

OLDMUTUAL

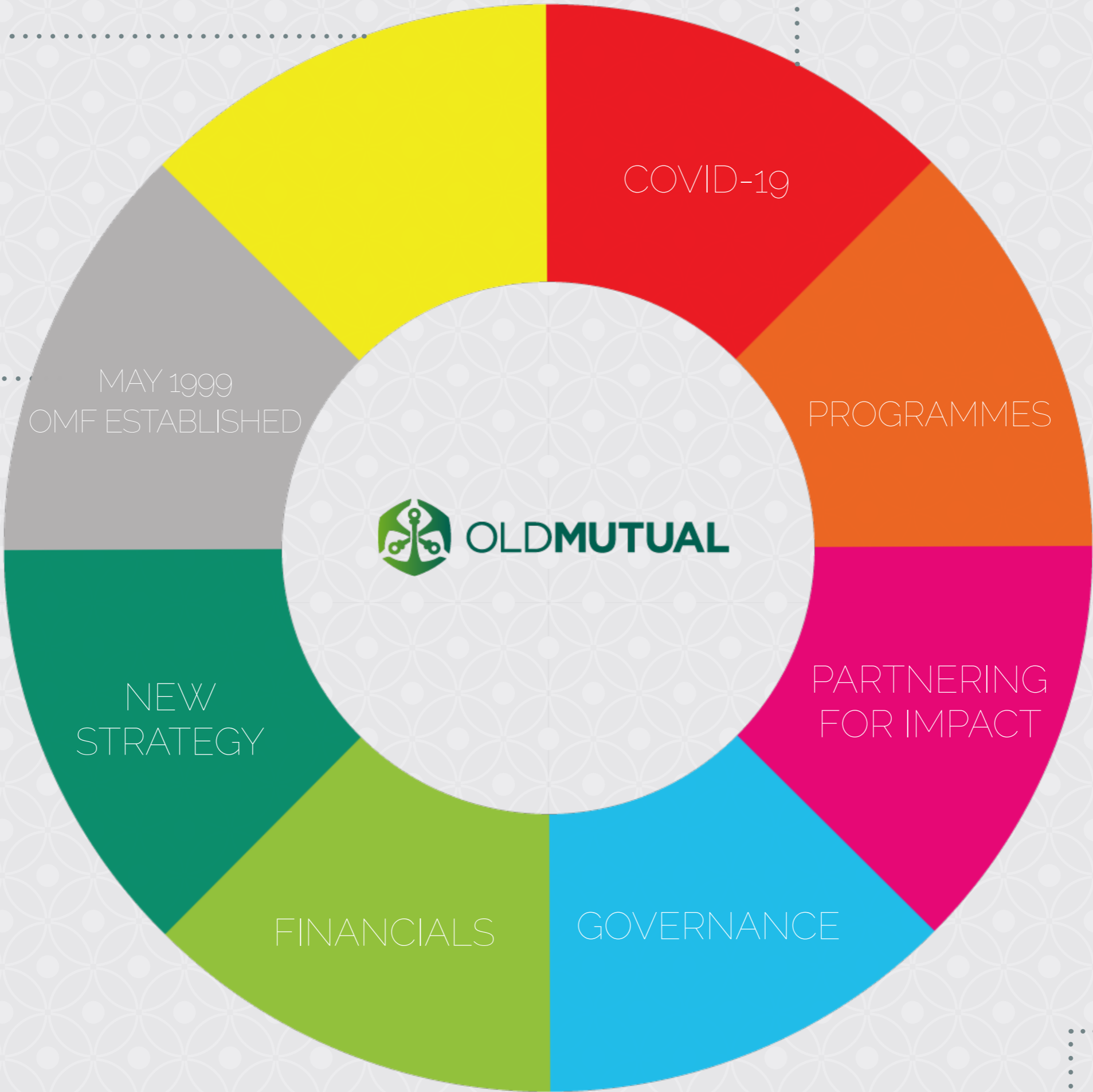
# OLD MUTUAL FOUNDATION

2020 ANNUAL REPORT

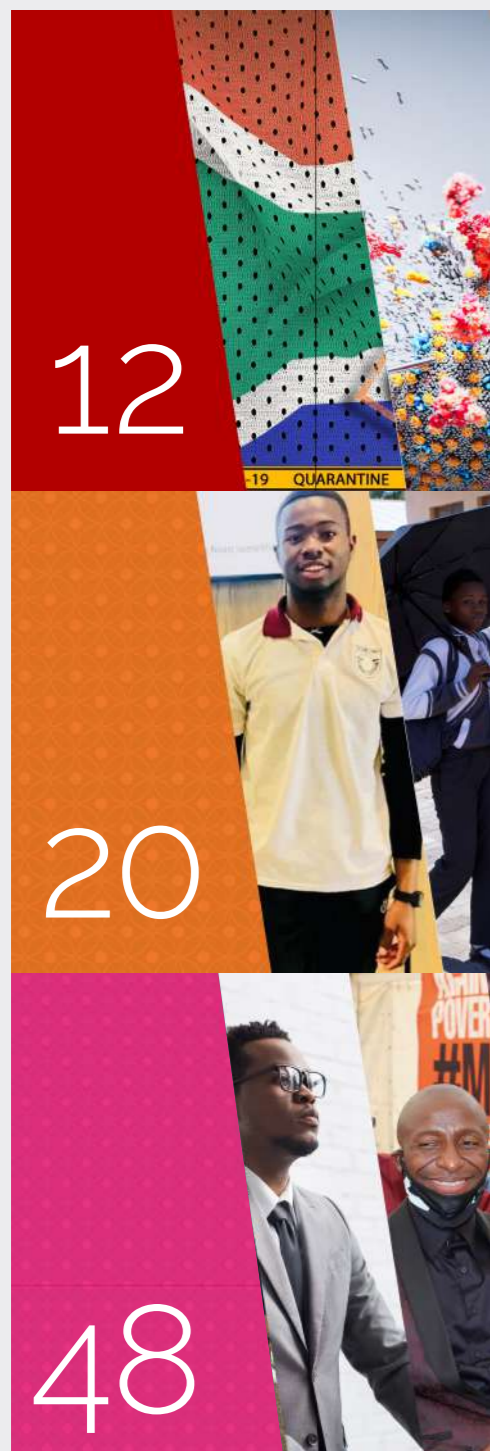


DO GREAT THINGS EVERY DAY

FOUNDATION  
AT A GLANCE



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## Nature of this Report

The Old Mutual Foundation (OMF) South Africa is about inclusive, transformative and sustainable socio-economic development. It is the social investment arm of Old Mutual.

This inaugural annual report integrates reporting on Old Mutual Foundation's financial, administrative, governance, managerial and operational activities within the contexts in which the Foundation operates. It is an annual report aimed at all audiences who have an interest in the work that Old Mutual does for the greater good.

This report reflects the financial year ended December 2020, with some reported activities extending into 2021 to accommodate publication purposes and timing.

**Fikile Kuhlase**  
**Head of Old Mutual Foundation**  
**and Social Investment**

May/June 2021



### About Old Mutual Limited

Old Mutual is a premium African financial services group that offers a broad spectrum of financial solutions to retail and corporate customers across key market segments in 13 countries across the continent. With 176 years of heritage, we are a crucial part of the communities we serve and broader society on the continent. For further information on Old Mutual Limited and its underlying businesses, please visit the corporate website at [www.oldmutual.com](http://www.oldmutual.com)

# WELCOME.....

The year was a show of agility, responsiveness and collaboration.”

I would like to start off by thanking the Old Mutual Foundation Board of Trustees for steering the Foundation through a turbulent and unscripted 2020. We ended the year, with a farewell to our two long-serving Trustees, the Chairman, Mr. Crispin Sonn and Ms Rose Keanly, the Chairperson of the Donations Committee.

We appreciate their diligence and service to the OM Foundation, its partners, stakeholders and community beneficiaries. The OM Foundation Team is thanked for sailing through the rough seas of 2020.

What a year it has been! From an enthusiastic beginning, filled with energy and ideas for the year, to hastily having to clear our offices and stay home. South Africans have weathered over a year of high stress, anxiety and uncertainty.

Covid-19 changed so much,

but solidarity and humanity were the biggest winners. Old Mutual Foundation, is privileged to be mandated to express purpose to positively champion and impact the lives of the most-needy. The lockdowns were not a time to withdraw, but a time to leap into action with repurposed plans and to extend our organisational commitments to save lives and livelihoods.

The year was a show of agility, responsiveness and collaboration. We were acutely aware that for the vast majority of people, sudden restrictions on movement and work, brought anxiety, financial stress and food insecurity. We responded the best way we could, informed by the most pressing needs of the country.

The needs were vast, and poverty and inequalities were exacerbated. We packaged relief efforts to ensure a continuation of education,

and supported e-learning, addressed food insecurity, health and hygiene needs, awareness campaigns and our employees responded by contributing through payroll giving. We also extended support to our MSMEs and skills development beneficiaries.

We got accustomed to the “family meetings” called by President Ramaphosa to update the nation on alert levels and other matters related to the Covid-19 pandemic. Our vocabulary extended to masks, social distancing, sanitising, quarantine, self-isolation, hygiene protocols, comorbidities etc. Listening to the scientists unravel the dynamics of the pandemic became second nature.

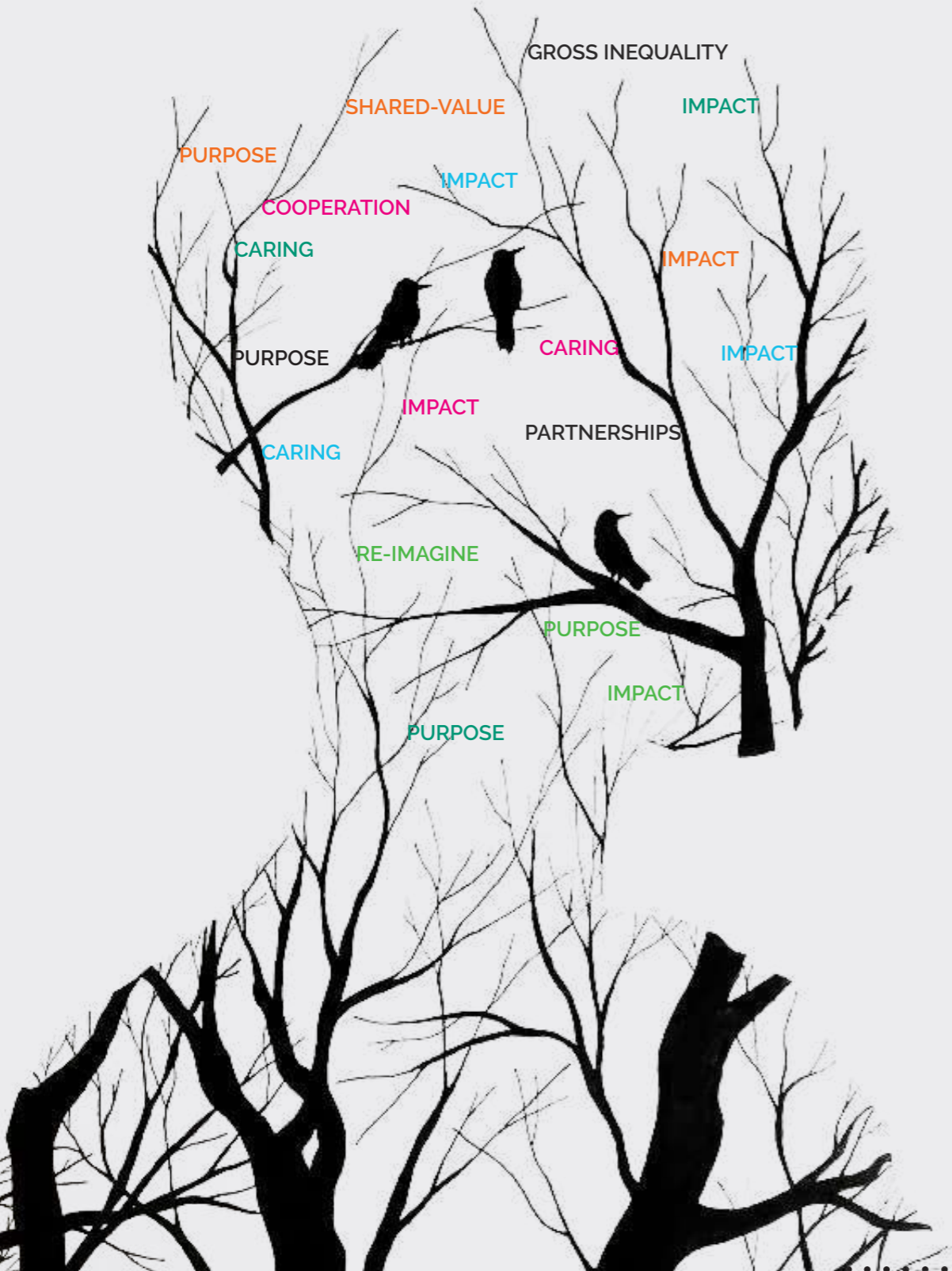
OM Cares!

**Maserame Mouyeme,  
Group Marketing,  
Public Affairs and  
Sustainability Director.**



Maserame Mouyeme, Group Marketing,  
Public Affairs and Sustainability Director.

The Board defined 2020 as...



# MEET THE BOARD

The Trustees that steered the OM Foundation through the unscripted and unprecedented 2020



Crispin Sonn  
Chairperson of OM Foundation  
Member of the Investments Committee  
and Donations Committee (DonCom)



Rose Keanly  
Chairperson of DonCom  
Trustee of the OM Foundation



Adrian Burke  
Chairperson of the Investment Committee  
Trustee of the OM Foundation



Dot Field  
Trustee of the OM Foundation  
Member of the DonCom and  
Investment Committee



Prudence Thiye  
Trustee of the OM Foundation  
Member of the DonCom



Andisa Ntsubane  
Trustee of the OM Foundation  
Member of the DonCom

The Old Mutual Foundation is governed by a Board of Trustees whose responsibility is to ensure that the Foundation is managed in accordance with the prescripts of its Trust Deed and in a responsible manner.

- In discharging its mandate, the Board was supported by two Committees:
1. Investment Committee - to monitor all investment activities of the Foundation and management of its financial assets
  2. Donations Committee - to review and approve projects for funding and where required, recommend projects to the Board for approval

One of the Board of Trustees' primary responsibilities is to uphold the fiduciary duty to protect all of the organisation's assets and funds in trust. The Board of Trustees acts in the best interest of the Foundation.



By Fikile Kuhlase  
Head | Old Mutual Foundation  
and Social Investment

“Old Mutual Foundation was established in May 1999, through the process of demutualisation. Its five focus areas approved in 2010 have been reviewed.

## OVERVIEW

The 2020 Annual Report of the Old Mutual Foundation is a 1st for the Foundation. Reporting on the year 2020 that was of such volatility and turmoil, is of significance.

”

• This has been a year that has stretched us all, and made us reimagine South Africa and the world as a whole. This document allows us to reflect, pause and reset. We look to better wisdom, honed by the most recent global pandemic crisis of Covid-19. Our focus is to be on inclusion, purpose

and long-term sustainability. This annual report will give an overview of the Foundation's activities, some that had to be repurposed to address the pressing needs of the country, exacerbated by the novel pandemic and its role in leading Old Mutual's Covid-19 community response, relief and

recovery efforts. Old Mutual Foundation was established in May 1999, through the process of demutualisation. Its five focus areas approved in 2010 have been reviewed. The Foundation aligns with Old Mutual Limited's (OML's) CARES Strategy, GMPAS

Brand Love Strategy, and OML's Responsible Business Framework and Social Responsibility Frameworks.

We have crafted a 5-year Strategy (2021 – 2025) of the Old Mutual Foundation, ratified by the OM Foundation Board of Trustees on 18 March 2021. The futuristic outlook is that society is looking to the corporate sector to deliver more, as the state simply does not have the capacity to deliver on its own. Otherwise, we shall witness growing social unrest arising from poverty, inequality and high unemployment rates.

The corporate sector has two choices: to give more or have it taken. The priorities OM Foundation addresses in the new strategic direction is contributing to improving the quality education outcomes in the continuum of the education reform and

education recovery agenda.

We also proposed a more targeted and meaningful role in Humanitarian and Disaster Support/Humanitarian 3R's (Response, Relief and Recovery), by positioning ourselves at the bottom of the hierarchy of needs, to address food insecurity and lack of shelter, Gender-Based Violence and Femicide (GBVF) and affordable / social housing, Showing that we are with the heartbeat of the national priorities, and have drawn on lessons learnt over the 22 years of existence of the Foundation and the experiences of Covid-19 to facilitate greater social impact.

We are aware that the 2021 State of the Nation Address of 11 February by President Cyril Ramaphosa, stated that the priorities of 2021 in South Africa are 1st to defeat the

coronavirus pandemic, 2nd to accelerate economic recovery, 3rd to implement economic reforms to create sustainable jobs and drive inclusive growth, and 4th to fight corruption and strengthen the state.

The OM Foundation is counted amongst those that were in the frontlines in 2020. We thank the Team of nine of dedicated Foundation staff, the Board of Trustees and the Director of Group Marketing, Public Affairs and Sustainability (GMPAS) for leadership and guidance. We look forward to the finalization of the GMPAS Operating Model Review and Simplification of Trusts and Foundations processes that are underway and playing our part in contributing to the stitching of the societal fabric of South Africa.

**Fikile Kuhlase**  
Head of Old Mutual Foundation  
and Social Investment

# COVID-19



# COVID-19

# TIMELINE

2020

2021



**On 5 March 2020,** the first case of Covid-19 was announced by the Minister of Health, Dr. Zweli Mkhize



**The SIU PPE probe** is investigating 189 corruption allegations, citing flagrant disregard for applicable law, policies and procedures – both the public and private sectors are implicated



**On 15 March 2020,** President Cyril Ramaphosa declared Covid-19 a national disaster



In 2020, government announced its R500 billion Covid-19 Relief Package



**On 23 March 2020,** President Ramaphosa announced a nationwide lockdown



**On 11 March 2020,** the World Health Organization (WHO) declared Covid-19 a pandemic of international concern



**WHO** designated 2020 the “International Year of the Nurse and Midwife”



**Minister of Health,** in March 2021 commemorating the 1st year since the unwelcome arrival of Covid-19, says SA has emerged as a world leader in health emergency response because of the expertise, courage and care of the frontline health workers



**4 March 2021** – at the opening of the National House of Traditional Leaders (NHTL) at Parliament, President Ramaphosa went to great lengths to acknowledge the role that the traditional leaders had played in the 882 traditional councils across the rural areas of the country, and he referred to just two initiatives: the elaborate food distribution initiatives that were rolled out nationwide (OMF did so through the Department of Social Development, community nutrition development centres (CNDC), NHTL and Each One Feed One with support of the Provincial Management board.). Secondly, he mentioned the OMF-funded support of child-friendly masks, alcohol free sanitisers and mattresses donated to 23 rural ECD centres through the NHTL.



**Doctors Without Borders/ Médecins Sans Frontières (MSF)** a health emergency response organisation, identified as the new partner of OM Foundation [www.msf.org.za](http://www.msf.org.za)



**“War talk”** approach of the past year was how the Government was forced to take aggressive action against an invisible enemy that threatened lives and livelihoods. This was the approach of many other governments including international agencies. Even the UN Secretary General labelled the pandemic “the fight of a generation”, but also said “our world is facing a pandemic of human rights abuses”. The world was plunged into war against a common invisible enemy. How this will manifest in the psyche of the nation is yet to be seen.



**At 5 March 2021,** South Africa remains under a national state of disaster, there have been over 50 000 deaths from the virus, over 1.5million Covid-cases recorded to date, recovery rate stands at 94% and over 100 000 vaccines have been administered to health workers



**The Department of Social Development** administers the R350 Covid-19 distress relief grants, and has paid out R17 billion, and with the extended period in 2021, it is estimated that R22 billion will have been paid



# OUR COVID-19 RESPONSE...

Old Mutual's Covid-19 relief efforts focused on health, education and food relief throughout South Africa and the rest of Africa.

R52 million was spent on community health, education and food relief programmes, with a further R5 million covering personal protective equipment (PPE) – in addition to the more substantial amounts spent on SME support and reduced or free insurance and interest-free loans.

Along with many in the private sector, OMF was swift and comprehensive in its response to the unprecedented global crisis.

It was an announcement made on 7 January 2020 that first informed us that a new virus, the 2019 novel coronavirus (Covid-19), had been identified. The first case in Africa was confirmed in South Africa on 5 March 2020; ten days later,

President Cyril Ramaphosa announced a national state of disaster following the World Health Organization's declaration of the Covid-19 outbreak as a pandemic.

On the same day, 15 March 2020, South Africa confirmed 61 cases in the country; it was this spike in cases that precipitated stringent measures to flatten the curve. These included the closure of all schools two days

early for the school holidays, international travel bans from 18 March, a prohibition on gatherings of more than 100 people, and restrictions on the sale of alcohol.

A national Covid-19 relief effort sprang into action, with Old Mutual Foundation taking a leading role.

On 23 March, national lockdown was announced. During his announcement speech, President Ramaphosa confirmed that the number of Covid-19 cases in South Africa had increased six-fold in just eight days, jumping from 61 to 402 cases. He warned that the rapid rise in infections could place great strain on the country's healthcare services.

We now live in a world where we operate within various alert levels. It is likely that new waves will cause these levels to fluctuate – at the time of publication South Africa was at level 3 with the third wave of Covid-19.

Covid-19 has starkly revealed poverty levels and vast inequalities in all countries. Of the 13 countries in which Old Mutual operates, only South Africa and Uganda focused on all three areas of health, education and food relief during 2020.

Ten countries made health their key focus. Thus the biggest investment for most went to health support.

## CONSOLIDATED COVID-19 SPEND: R35 million by OMF



- R20.8 million towards Education



- R11 million towards Food Security



- R3.2 million towards Health and Hygiene



# HOW WE HELPED

## Education

In South Africa, e-learning resources and free radio and television lessons were rolled out for learners in Grades 1 to 12.

The Dial-a-Tutor initiative gave learners access to the best teachers in South Africa via interactive virtual classrooms and is still operating. High-quality digital e-learning was delivered to a large number of South Africa's 12 million learners and 440 000 teachers.

Old Mutual Foundation was invited to be a member of the Department of Basic Education's Covid-19 Steer Team convened by the Department and NECT.

## Health and Hygiene

OM partnered with Higher Health and the post-school education and training (PSET) sector, responding swiftly in the area of student health and wellness. Higher Health delivers health, wellness and psychological services to 420 campus sites and rural, informal and urban settings, focussing on the health of students. With the support of OMF, they were able to run an effective awareness and education campaign, and to train education healthcare workers on Covid-19 protocols for the benefit of South Africa's students.

Through our partnership with the Imbumba Foundation and its Soap4Hope campaign, soap and other hygiene

products were distributed to vulnerable communities across South Africa. An estimated 7 784 families were reached in eight provinces. The campaign also spread safe hygiene protocols and the message of physical distancing, so that nobody was left behind in our effort to help flatten the Covid-19 curve.

The Western Cape government received a fully refurbished 300-bed quarantine and self-isolation facility from Old Mutual. The Group invested R4.5 million in the Mupine facility to enable the province to effectively strengthen its fight against the Covid-19 pandemic. In addition, the Minister of Health received a donation of PPE worth R5 million from Old Mutual.

## Food Security

We partnered with UNHCR, the Nelson Mandela Foundation's Each One Feed One Campaign, the Department of Social Development, and various NGOs to provide nutrition to thousands of children who are not able to access school feeding schemes during lockdown.

Current reports show that we have reached just over 7700 families across South Africa. Through our partnership with the United Nations High Commissioner for Refugees (UNHCR), we also reached out to vulnerable refugees in South Africa. The exact number of refugee families reached through this initiative was 294 individuals and 580

families (persons of concern or refugees). Beneficiaries were predominantly from DRC, Burundi, Ethiopia, Eritrea, Somalia and Rwanda.

## Staff Volunteer Programme

The Old Mutual Staff Volunteer Fund contributed R2 million towards food relief efforts. This arm of Old Mutual staff partnered with Food Forward SA to distribute food parcels to homes for the aged, shelters for women and youth, child-headed households and early childhood development centres.

The Provincial Management Boards (PMBs) have been active in each of the provinces, partnering with respective government departments and NGOs to

address local and regional needs. Through the PMBs, in conjunction with an array of regional and provincial partners, around R2 million has been donated to community relief efforts, including the provision of personal protective equipment, tents, hospital beds and food parcels.





# PROGRAMMES

# NEW NORMAL AND BUSINESS UNUSUAL

At the Board of Trustees Meeting of 16 April 2020, Management requested strategic guidance on how to deal with the Covid-19 pandemic and “new normal”. The status update report of Q1 in 2020, tabled by the Head of Foundation was drafted and tabled during the unprecedented 21-day Lockdown from 26

March – 16 April 2020 as declared by President Cyril Ramaphosa. The Country and the World had gone into disaster relief mode. As Covid-19 is not just a health pandemic, but has resulted in abrupt social disruption, economic downturn and financial meltdown. Levels of anxiety were at an all time high. The high inequality in

SA showed up in sad ways e.g. the pandemic calls for physical/social distancing, but how can that happen in an overcrowded shack? Management requested a repurposed Board session to give Management guidance on how to ensure business continuity, under these trying times where the Foundation model is not fit-

for-purpose, and was called upon to adopt a Business-Unusual Approach.

We launched into Crisis Management mode and asked ourselves if Covid was an “exploding” or “unfolding” crisis? Do we have a crisis-ready culture? fight or flight; how do we ensure we are LEADING, not managing

in a crisis; how do we resist the urge to do things immediately and work with a high-performing team and partners, get the facts, ask questions, listen and make a plan. The leaders had to stay calm and above the fray, and keep an eye on the long game. In the age of Twitter, is even more important for organisations to act swiftly

and adeptly in response to a crisis. Covid-19 is a Novel Crisis – simply too big and unusual to have imagined.

Ours was to manage the crisis lifecycle and not just the event and have empathy. OMF was at the forefront of the crisis response and its capabilities tested heavily.



## Education Portfolio

Invested in initiatives intended to improve the maths and science Grade 12 results in a set of South African public schools. As well as focused on improving leadership at the same schools through the development and coaching of school management teams School Governing Bodies and provided support to educators teaching maths and science.

Since 2013, through a seven-year partnership with the Department of Basic Education. In 2019, the project came to an end. We have impacted 253 000 learners, 3 353 Teachers in 327 schools throughout Eastern Cape, Free State, KwaZulu- Natal and Limpopo. In 2020, we were closing-out this seven-year Old Mutual Education Flagship Programme (OMEFP) and preparing for the new education strategy in Literacy and Numeracy using mother tongue bi/lingual teaching methods.

Education was a key focus of Old Mutual South Africa's Response, Relief and Recovery Covid-19 efforts.



## Enterprise Development Portfolio

In April 2020, the Board of Trustees of the Old Mutual Foundation approved a new Enterprise Development Strategy to develop small, micro, and medium enterprises (SMMEs) with a new focus on social enterprises. Along with this strategy was approval to hire a new Senior Manager: Enterprise Development.

However, with Covid-19, there was a moratorium on all new appointments at Old Mutual. The Foundation funds enterprises that will create permanent sustainable jobs, benefit a broad group of beneficiaries as opposed to individuals, and develop rural, peri-urban and township communities to ensure they participate in the mainstream economy of South Africa.



## Skills Development Portfolio

Through developing critical skills, we aim to positively impact on economic empowerment and address youth unemployment through accredited skills interventions leading to job placements and sustainable livelihoods.

We support scarce skills in demand-led sectors such as trade and artisan skills; hospitality, tourism and ICT skills. All development initiatives engage whole-person development including professional work readiness and personal resilience.



## Employee Volunteerism Portfolio

Old Mutual is proud to have one of the most extensive Corporate Employee Volunteerism programmes in South Africa.

Our four structured programmes:

1. Staff Community Builder: Staff volunteer at community projects of their choice and receive Foundation-funded support for these projects.
2. Staff Payroll Giving: Enables employees to make monthly voluntary donations from their salaries to social causes they care about.
3. Care and Share: Coordinated group volunteer activities such as Mandela Day and Habitat for Humanity.
4. Staff Volunteerism Awards – 2020, marked 10 years of the annual Staff Volunteerism Awards that were held as a virtual event to recognise and award the Mutualites that promote the #OldMutualCares values.



## Vulnerable Members of the Community Portfolio

Through this portfolio, we extend general social support, welfare and resources to improve the lives of vulnerable children, youth, women, the disabled and the elderly, mainly in rural and peri-urban communities.



Silas Tlaile Moraila  
Principal of Ngwanamatlang Secondary School - Limpopo



# A TRIBUTE TO UNSUNG HEROES

Schools have had to grapple with a lot of complexity during the Covid19 pandemic. According to UNESCO, education is faced with a significant dropout of learners which will have consequences for our nation for generations to come. Effective and agile leadership in schools is critical and school leaders need support so that they have the right agency and are implementing

appropriate actions to deal with the complexities COVID-19 presents. District officials are also the frontline of support to schools.

Old Mutual has been using SEED Educational Trust to implement leadership interventions with Principals and District Officials. SEED's focus is on strengthening

the ecosystems around school so that they support teaching and learning, their offering is one of complementary collaboration. They do this through leadership development programmes but also through the facilitation of learning processes that enable greater collaboration, integration and cohesion within the ecosystems that support teaching and learning in schools.

## Outline of the School Management Programme:

- The connection of policy to practice
- Leadership theory; planning; supervision; personal mastery
- Organisational change
- Data use; action research
- It includes a "toolbox" that contains technical and adaptive tools that can facilitate the work of the principal
- Each participant completes an Insights Personality Type Evaluator, and this is used as a learning tool for personal and professional growth

The school leadership development programme is supplemented by mentoring of principals by experienced

former principals who walk alongside principals and support them in the technical areas of school management. Mentors also work with School Management Teams and help them strategize using objective data generated through the Data Driven Districts tools (DDD).

According to the Department of Education's National Senior Certificate 2020 Examination Report, the matric overall pass rate for the 2020 cohort declined by 5.1 percentage points from 81.3% in 2019. The Class of 2020 had an overall pass rate of 76,2% and a 36,4% bachelor rate, a decline by 0.5% from the 2019 Bachelor rate achievement which was 36,9%. Mathematics registered a pass rate of 53,8% in 2020, a decline by 0.8% from 2019, and Physical

Science 65,8% in 2020, a decline by 9,7% compared to 2019 .

The decrease in performance is said to have been sharper in provinces that have a significant rural population and effect is partly attributed to the COVID-19 pandemic conditions having a greater impact on schooling in rural areas and their constrained ability to re-organise and regain lost learning time due to school closures, learner absenteeism, teacher well-being, and access to resources .

We would like to shine the spotlight to some schools which have gone through the leadership programme mentioned above, by looking at how they have performed under the most difficult conditions in 2020.



Name of School	District	Province	2019 Pass Rate	2020 Pass Rate	2019 B. Rate	2020 B. Rate	2019 Mathematics	2020 Mathematics	2019 Physical Science	2020 Physical Science
Ebenezer Majombozi	Buffalo City	Eastern Cape	83.2%	95.3%	35%	63%	43.8%	92.1%	76.5%	65%
Lumko	Buffalo City	Eastern Cape	90.9%	85%	52%		73.1%	85.4%	94.4%	69.7%
Mzontsundu	Buffalo City	Eastern Cape	75%	88.4%	22%		55.6%	90%	83%	83%
Ngwanamatlang	Sekhukhune East	Limpopo	58.1%	72.6%	20.6%	34.1%	45.1%	51.1%	54.7%	52.9%

Their performance has either surpassed national averages or they have improved in comparison to 2019 regardless of the COVID-19 circumstances in 2020.

All the schools except for Ngwanamatlang, had increased numbers in terms of the number of learners who wrote in 2020, compared to 2019.

- For **Ebenezer Majozi**, out of the 35 learners who passed Mathematics, 4 learners passed with Marks that ranged between 70% - 79%, 5 passed between 60-69%, 9 between 50 – 59%, which means 51% of their learners passed Maths with grades 50% and above, which speaks to the quality of the passes, over and above that, they have also improved significantly on their

bachelor pass rates.

- Lumko** also had an impressive pass rate for Mathematics, which increased from 73,1% to 85,4%, out of the 35 learners who passed Mathematics, 3 learners passed with Marks that ranged between 70% - 79%, 6 passed between 60-69%, 9 between 50 – 59%, which means 43% of their learners passed Mathematics with

grades 50% and above, over and above that; they increased their enrolment rates for Mathematics, the school also boasts an impressive improvement in their bachelor rate compared to 2019.

- Mzontsundu** also achieved outstanding results in Mathematics from 55,6% in 2019 to 90% in 2020 as well as an improved bachelor pass rate from 22% in 2019, to 51% in 2020.
- Ngwanamatlang**, as well, improved their pass rate, their bachelor pass rate as well as well as their Mathematics pass rate.
- In summary, in some of the key indicators, these schools have seen improvements in their performance rather than a decline in performance

and given that they are quintile 3 schools, their performance needs to be celebrated and there are many rural schools with very little resources to go by, but continue to perform regardless of their circumstances and we do not hear enough about them.

- When asked what they did to assist their learners during the COVID-19 difficult period, some of the schools relied very much on extra classes in the afternoons and on weekends. Daily motivations so that learners can believe in themselves, increasing parental engagements, greater cohesion between the school management team. Other schools

formed partnerships with some of the schools in their areas, and worked together, supported, and learned from each other. The Principal from Ebenezer Majozi, ends his message by saying “**I work very, very, very, hard for my school**”.

#### Is there a correlation between school performance and effective leadership?

In some of the reviews conducted in the programme, one of the Principals of these schools mentioned that: “At the time of my appointment, some people saw it as a school which deserved to be closed down due to the conditions at the school. The situation ranged from very poorly maintained school grounds, poor infrastructure, poor



human relations, poor learner and teacher discipline and poor learner performance in all grades”.

The school achieved a matric pass rate of just 16% in 2016. He described the situation as needing a skilled leader but felt that he lacked these skills. He shared some of the skills he gained after going through the leadership programme:

- “I learned that it is not about how energetic I am, but rather about how I can **motivate and mentor my team to perform their roles**.”
- “I learned that whilst being too ambitious energises me, it can drain my staff. It is **more important to get staff to initiate changes themselves** and to allow

them to develop their own energy”.

- “I learned that I need to **model what I want to see taking place at the school**”.
- “I learned the **benefit of consultation** to make informed decisions. This also helped the **staff to feel valuable to the institution**”.
- “I learned that it is **not necessary to wait until 100% of the staff are behind a change** before it can be implemented.
- “Once I had at least 70% on board I was able to move and once the negative staff saw the signs of success, they became supportive of the change”.
- “I **strengthened the authority and responsibility level of all staff throughout the school** and this impacted upon the

discipline of learners who became more responsible in terms of completion of assignments and tasks”.

This school continues to progress well from strength to strength and it is one of the schools indicated above. Unfortunately, this Principal has been moved and we hope that he will be able to turn around the new school he has not been assigned.

Another feedback from a District official described increases in principals’ interpersonal understanding; knowledge and understanding of the management requirements of their jobs; as well as an improved attitude and set of tools for problem solving. “The culture of commitment I think that will

be lasting. In the schools they are working with, I think they are bringing back that culture of commitment. Our teachers get into this culture of being hopeless with everything. They are bringing to our teachers, “let us do with what we have”.

The sector through various research pieces has come to agree that, schools that are well managed and are with a functional school management team, do perform differently from schools that display poor leadership. Weak Institutional functionality has also been identified as one of the binding constraints in the sector. Leadership development for Old Mutual, is an important piece that is coupled with all our interventions in education.

Old Mutual has now scaled the

leadership programme to expand beyond schools by working with Eastern Cape Circuit Managers (CM’S) in School Coaching and Mentoring.

This programme is an accredited 10 MONTHS programme by the University of Stellenbosch Business School Executive Development (USB-ED) at NQF 7 and SEED Educational Trust. The benefit of training Circuit Managers as Coaches and Mentors is intended to improve their practice in how they support school. The competencies gained by Circuit Managers in turn will impact the entire education system throughout the Province. Secondly training Circuit managers means that, the resource is resident

within, for all the years that the CMs are still in the employment of the Department they will continue to support schools effectively and ultimately, very little support will be required from outside organisation.

#### Objectives of the Circuit Manager development programme:

1. To develop District officials who continuously reflect on self and others in order to improve their practice and deepen their professional identities.
2. To develop the skills, competencies, and dispositions of District officials so that they can provide meaningful support to principals and schools.

Over and above the programmes



Mr Lugodla, a former principal of Qaqamba Secondary School, achieved the highest marks in the SLP intake and is pictured here receiving his award from a Managing Trustee of SEED Educational Trust. We wish Mr Lugodlo all the best as he embarks on turning around the performance of yet another school for the next few years.

above, in response to the nationwide Covid-19 lockdown, Old Mutual focused its activities in supporting the Department of Basic Education to provide remote learning to millions of South African learners as physical classroom learning was not possible during the lockdown.

We committed R20.8 million towards remote learning support, teacher support, and strategic operations support from the National Education Collaboration Trust offered at a national level.

Radio and television broadcasts have been crucial to providing curriculum support, especially to learners in rural areas who have limited access to online learning platforms. Since the 1st of April 2020 as reported by the National Education Collaboration Trust.

- SABC availed 12 regional and national radio stations to broadcast lesson for 30 minutes every day.
- SABC 2 and SABC 3 television channels broadcast educational content for 2.5 hours, 5 days a week.
- Lessons were also broadcasted on Channels 317 and 319 on DSTV, and Channel 122 on OpenView HD (OVHD). With an estimated reach of 2 million households, content was broadcasted for 24 hours on OVHD.
- 2Enable Enterprises was contracted to provide broadcast services and manage the broadcasting on SABC and OVHD. The latest report indicated that, between 26 June 2020 and 25 July 2020, a total of 69 learning episodes were

broadcast on SABC 2 and SABC 3; and 104 episodes on Incremental Introduction of African Languages (IIAL) and 799 episodes were aired on OVHD for Grades 10-12. The IIAL lessons were for isiXhosa, isiZulu, Setswana, Sepedi, Sesotho, Tshivenda, Ndebele, siSwati and Xitsonga.

Up to the end of September 2020, 124 learning episodes were aired on Channel 122 and a further 99 episodes on SABC 3 and DSTV Catch-Up. Average weekly viewership was highest for people aged 15-19 years old, with 34,396 weekly viewers in this age group. The most popular broadcasts amongst the learners were Life Sciences, Mathematics, and Geography.

# 21 ACTS OF GOODNESS FOR THE MATRIC CLASS OF 2020

## IMPORTANT INFO :

### Yethu Scholars

Assisting Matriculants with NSFAS and University applications.

Send WhatsApp to 067 036 2635  
www.facebook.com/YethuScholars/

### FoondaMate

A WhatsApp Chatbot for learners to get past papers, word definitions, wikipedia search results and the solutions to basic mathematics equations.

Send WhatsApp Text "Hi" to 060 055 8055

### VELLE

Online revisions and home based learning support:

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### Bokamoso Life Centre

1. Scholarships - High School & Tertiary  
2. Life Skills & Life Orientation  
3. Basic Computer Literacy  
4. Arts and Culture

SMS LEFA to 43366

### loveLife

1. Space for Study Groups at Y-centers  
2. Peer to peer support  
3. Plz Call Me: 083 323 1023  
4. For Psycho-social support call:

Vodacom: \*140\*0833231023#  
MTN: \*121\*0833231023#  
or Cell C: \*111\*0833231023#

### Phakamani Young Minds

Services:

- Online and Offline Supplementary Tutoring
- Homework Supervision
- Exam Preparation and Revision
- Online and Offline Psycho-social support.

WhatsApp on 067 794 3925

### National School of the Arts

Through 4 disciplines of creative arts education:

1. Stories: Affirmations, Expressions & Advice to the Matric Class of 2020.  
2. A Memory Book For The Class Of 2020 - Of COVID And Creativity.

### Caring4Girls

Caring4Girls is a sanitary towels distribution programme which strives to help keep adolescent girls in school during their monthly cycles.

## " Believe you can & You will - You got this!! "

Thanks to the 21 Acts of Goodness Partners. Best of luck to the Matric Class of 2020.

### For Urgent Contacts :

Visit: [www.21acts.co.za](http://www.21acts.co.za)

Matrics: to download past papers WhatsApp: 060 055 8055

To partner email: [info@21acts.co.za](mailto:info@21acts.co.za)

For general enquiries: WhatsApp - 081 240 0674



# 21 ACTS OF GOODNESS TO..... ENABLE THE MATRIC CLASS OF 2020

The Old Mutual Foundation repurposed plans of 2020, identified Matric support as one of the key areas of need in the Education sector. The redefined Care and Share Programme gave birth to the 21 Acts of Goodness initiative at the peak of Covid-19 in April 2020 during level 5 of Lockdown. The initiative led by the Old Mutual Foundation partnered with Old Mutual Insure that committed R2 million, and 21 other organisations. Our key partners were

BrandSA, the Nelson Mandela Foundation (NMF) and loveLife.

It was heartening to be part of the organisations who stepped up to support the biggest cohort of Matriculants ever - 1.1 million who wrote the National Secondary Certificate (NSC) exams. 21 Acts of Goodness reached over a tenth of these Matriculants across the country. 2021 thus provides

an opportunity for us to build on the lessons learnt from the 2020 pilot and to roll the programme out on a bigger scale, including to the Second Chance Matric Programme learners.



The National School of the Arts (NSA) partnered with 21 Acts of Goodness to support the Matric Class of 2020 project. The NSA put together a digital Memory Book for the Matric Class of 2020 and released a feel-good anthem to kick off the exam period.

Two National School of the Arts (NSA) matriculants, dedicated the song to the Matric Class called New Day (Gotta Get Up)

it was released on 4 November 2020, just in time for the start of the 2020 National Senior Certificate (NSC) exams. "We want this song to give matrics energy and encouragement, because there is so much we have to deal with right now" said Liebah Masango (18), the lead vocalist and songwriter.

"Just breathe" is one refrain in the song and encourages matrics to stay calm and relax through all the stress and loss which has shaped their milestone year. They also wanted to encourage matrics to seize the day and get pumped up for their exams. It is their gift to the Matric Class of 2020. The song launch got some media coverage.

Liebah Masango (18), co-wrote the song with fellow matriculant Ayanda Yumba (18), who produced it. The feel good



anthem is a response to what the pair say is the need to encourage matriculants to persevere despite the challenges this year has presented. They came up with the lyrics in the practice room at the NSA while hanging out and reflecting on the year.

Liebah recalls feeling excited about starting her matric year, receiving her matric jacket and all the plans she had. Then everything came to a screeching halt in March with the lockdown. Dreams deferred, matric balls cancelled. A whole range of feelings engulfed them,



# COMPLETING..... SCHOOL IN 2020: TWO LEARNERS WHO EXCEEDED EXPECTATIONS

as they had to reimagine their matric year, the steppingstone to the rest of their lives. Lockdown separated them at least temporarily, from their teachers and from each other. Ayanda said that being cut-off from the support of his peers was one of the greatest challenges he faced as a matriculant.

As the premier school of specialising in performing and creative arts the National School of Arts attracts creatively gifted teenagers from across South Africa. Their academic curriculum offers four disciplines: art, drama, dance, and music.

Both Liebah and Ayanda

are Music learners at the NSA and both play the piano, saxophone, drums and bass guitar. We are very pleased to share that both Liebah and Ayanda have done well in their Matric year and received distinctions!

Shine on Liebah and Ayanda and thank you for spreading the message of hope to fellow matriculants! New Day was released online through Facebook Live and YouTube on 4 November 2020.

Check it out the NSA Instagram page @nsaartschool.

The very successful 21 Acts of Goodness to Enable the Matric Class of 2020 will be rolled out again in 2021 - watch the space!



When you really want something and work hard for it, nothing can stop you – not even a virus that shuts down the most important year of your school career. That is the testimony of two learners who, despite Covid-19, made great sacrifices to pass their matric year with distinctions.

Both learners were assisted by Old Mutual Foundation's 21 Acts of Goodness to Enable the Matric Class of 2020 project. The project made sure that Grade 12s in vulnerable and underprivileged areas received access to study materials to help them prepare for their final exams. Through sheer hard

work and determination, and by utilising every resource available to them including materials provided by the 21 Acts of Goodness project, they were both offered bursaries to pursue further studies.

Usenathi Maxwell Mrubatha matriculated at Bopasenatla Secondary School in Diepkloof, Gauteng.

'It wasn't easy,' says Usenathi, explaining that he was aiming for six distinctions in his final year of school. 'But then Covid-19 hit and I was sure that I was going to fail matric and that all my hard work would be for nothing.'

He resolved to study till late every night, and also helped his classmates to prepare for

their final exams. 'That's when I realised what I wanted to do with my life,' he says. 'I want to be a teacher or a lawyer. Nothing is more rewarding than helping others.'

Usenathi was surprised when he achieved distinctions in three subjects in his final exams: Life Orientation, History and isiXhosa. Unfortunately, he could not use his bursary this year as no space was available at any of the universities to which he applied. However, he is undeterred and plans to pursue a degree in 2022.

'I am the first one in my family who will go to university. My family was very discouraged by the



Usenathi Mrubatha  
21Acts Distinction Recipient



Nkosinamandla Jeju  
21Acts Distinction Recipient



Mr Bonakele Majuba  
MEC for Education - Mpumalanga



Ms. Antonio Oakes  
Old Mutual Insure

pandemic and believed that it was going to hinder my goals. They couldn't believe it when I achieved three distinctions. They were so proud of me.'

While waiting to go to university next year Usenathi is continuing to learn in other ways. 'I enrolled for a course in computer studies as I want to learn how to use a computer. I'm also tutoring learners in my community – it gives me a taste of the future!'

The second learner, Nkosinamandla Jeju of Silver Oaks Secondary School in Soweto, got distinctions in Life Orientation and Tourism,

together with an overall bachelor pass. He is currently studying a BCom Business Management at the University of Johannesburg, thanks to an Orange Carpet Award that pays for his first year of studies.

'One day I want to be the CEO of a big company, like MTN's CEO, Ralph Mupita,' he explains.

Nkosinamandla, who lives in a single-room house with his mother, realises that it is up to him to achieve great things in life. During the hard lockdown in 2020, he started a campaign with the help of his mentor Sam Persaud, a retired partner at Deloitte in Canada. 'The campaign's aim was to raise funds for data for Grade

12 learners, which helped us to stay connected and to continue our studies online.'

Nkosinamandla also received a scholarship to continue his studies at Wabash College in the United States of America next year. However, it covers only \$31 000 of the \$58 000 tuition fee.

This is often part of the frustration for learners who receive offers of help; the help is tantalising, but so often, just not enough to really make a difference.

'Without this scholarship I will not be able to attend school. My mother is currently unemployed, but she has saved just enough to pay for necessities.'

Nkosinamandla is appealing to individuals and businesses to assist him with the shortfall in his scholarship.

'Education is my number one priority. I have come this far I will not give up now.'

#### **A closing word from Fikile Kuhlase, Head of the Old Mutual Foundation:**

As the pilot 21 Acts of Goodness campaign was such a success, the 2021 plan is to support learners who were assisted by the project in 2020 and passed matric, but who subsequently 'fell through the cracks', through no fault of their own.

Old Mutual Foundation encourages other corporate sponsors and partners to get

involved to ensure that the dreams of these hard workers who made it through an unprecedented year are not dimmed.

We appreciate Nkosimandla's wish to study abroad, but urge him to also consider local tertiary institutions as a start, as it is then often easier to secure funding for post-graduate studies abroad.

Education is a societal matter. The Old Mutual Foundation sends a call to action to all South African corporates to increase their support of education, in whatever form, and to support our many deserving yet struggling

tertiary education students.

loveLife gave the matriculants psycho-social support and access to their y-centers across the country.

The Old Mutual Foundation wants to extend its gratitude to BrandSA and NMF for amplifying the message of support to the matric class of 2020.





# SKILLS DEVELOPMENT

History continues to remind us that during great periods of uncertainty, there are certain anchors we can always rely on to help provide hope and security.

Education and Skills Development are among the most valuable and useful of these anchors, providing stakeholders with great opportunities to channel resources and energy into making a significant difference.

The Old Mutual Foundation has collaborated with the skills development project of the Raymond Mhlaba Skills Development Centre in Gqeberha (Port

Elizabeth), Eastern Cape and awarded grant funding of R1 058 000. This was used for skills development of 40 unemployed, underprivileged youth between age 18 and 25 during 2020.

The Raymond Mhlaba Skills Development Centre is a place of learning that cares about its students. Three core values direct their outlook: to LOVE all their students, to CARE for them through all the challenges they face and to give them HOPE for the future they deserve.

The partnership is a very fitting one for Old Mutual, with its intensified focus on the Old Mutual Cares Strategy,

created to help solve society's most pressing problems.

Through the Cares Strategy Old Mutual strives to live out its purpose of championing mutually positive futures every day, in a way that is authentic and aligned with the long-term goals of its core business operations.

Old Mutual's vision is to be our communities' first choice to sustain, grow and protect their prosperity. We believe that a company that conducts its business in a way that benefits our society and our environment is a company that is built for success.

## Programme objectives:

- Identify 40 unemployed youth aged 18-25 living in underprivileged and deprived circumstances and enrol them on the 2020 Hospitality Professional Cookery programme
- Increase skills of students from Matric or Grade 11 level to an NQF Level 4 qualification
- Provide exposure and experience to programme specific Industry sectors
- Provide a structured interactive initiative to actively increase and measure the personal development of each individual
- Maintain and develop partnerships to increase the quality of training and employment opportunities
- Monitor student employment rates and progress

- Reduce poverty and improve livelihoods

## Programme impact:

- Eight students have already gained full-time employment at leading companies in the retail and hospitality sectors
- Most students have had the opportunity for interviews and are currently in selection processes

The official unemployment rate in South Africa climbed to 32.5% as the number of jobless grew 7.2 million in the fourth quarter of 2020.

The need for skills and employment opportunities is huge, but through sustained investment, innovation and collaboration, we believe that dedicated institutions such as the Old Mutual Foundation can play their part in creating opportunities for sustainable change in the Skills Development space.

"We would like to thank Old Mutual Foundation once again for your valuable partnership in the upskilling of our underprivileged youth and for the positive intervention made in the lives of those in such great need," said The Ray Mhlaba Centre Management Team.





Nathaniel Petersen  
World Changer Champion



Thato Mohapa  
Chairperson, Limpopo Provincial Management Board  
The 2020 Winning PMB and Collaboration Champion

# ENTERPRISE DEVELOPMENT

- Of OMF R9 million budget for Enterprise Development R2 927 418 has been approved to date. Project funding to the value of R3 425 000 in the pipeline for Q4, including project reviewed at the Q3 meeting.

We are reviewing additional projects in our pipeline for Q4 to see how much of the unallocated funds of R2 647 582 we can still potentially in 2020. Anticipated accruals from the 2020 budget at this point amount to R375 000 for the FSP Incubator and Accelerator Programme.

These are two tranche payments scheduled for February and July 2021 respectively.

In addition, in August 2020 OMF launched an Accelerator and Incubator project with the Mass and Foundation Cluster (MFC). This is co-funded project is a unique business enterprise providing development support to entrepreneurs who own funeral parlours.

The Accelerator and Incubator is a unique business enterprise to provide

development support to entrepreneurs that are funeral parlour owners to grow and sustain their businesses.



# STAFF VOLUNTEERISM

- Volunteering is not a once-off event, which is why the Old Mutual Foundation offers employees multiple platforms where they are able to serve others. These include Staff Community Builder, Staff Payroll Giving, and Care and Share initiatives.

The Staff Community Builder Programme encourages employees to volunteer their time and skills to organisations they are passionate about. The Old Mutual Foundation then partners with them to increase their impact by

providing seed capital of up to R40 000 to support the chosen organisations.

The Staff Payroll Giving Programme allows employees to contribute a small portion of their salary on a monthly basis to causes of their choice. The Old Mutual Foundation then matches their donations rand for rand. The Care and Share Programme allows every employee to take a full day of paid leave to participate in one of the registered community building activities in November or for Mandela Day in July.





# OM STAFF VOLUNTEER FUND TRUST AND AWARDS .....

The Old Mutual Staff Payroll Giving Programme has been in existence since 2002. Through this programme, Old Mutual employees can make a monthly donation from their salaries towards causes they care about, such as abused children, the elderly, youth development, early childhood development, women

empowerment and animal welfare. Every contribution made by employees is matched rand for rand by the Old Mutual Foundation.

The Old Mutual Staff Volunteer Fund Trust (OMSVFT) was also established in 2002 with the fiduciary responsibility of executing on the Trust deed

of the Fund. The role of the trustees is to ensure that the donor's funding (Staff Payroll Giving contributions and OM Foundation matching) is used appropriately and to the optimum benefit of the beneficiaries.

In September 2020, the OMSVFT Annual Report was distributed to all our

contributing employees in both digital booklet and downloadable PDF format. The report was a hit. Many complimented the look and feel of the report, the photographs and how beautifully the stories were written. Employees clearly valued the feedback about the organisations and projects they were supporting through their giving.

The report received similar comments from Old Mutual's Human Capital Director, Celiwe Ross, and Director of Group Marketing, Public Affairs & Sustainability, Maserame Mouyeme.

The OM Staff Volunteerism

Awards is a popular annual event, usually hosted at Mutualpark, Cape Town. In 2020 Covid-19 challenged us to find more creative ways to manage and host this important event on the Old Mutual calendar.

Rising to the challenge The Old Mutual Foundation launched its first-ever virtual Staff Volunteerism Awards on 30 September 2020. Hosted on Old Mutual's very own internal TV show, The Now Network (TNN).

The virtual awards were a huge success, with improved digital communications providing more platforms to communicate the event than in previous years. The TNN

broadcast exposed more than 1 200 employees to the Staff Volunteerism Awards, and to volunteering overall, which we trust may have motivated and encouraged others to get involved.

Since the event was not face-to-face and therefore cost The Old Mutual Foundation less than in previous years, the prize-giving allocation for each of the award categories.

The finalists each chose a charity to receive their winnings and R445 000 was ploughed back into the community to support 14 Non-profit organisations and over 5 100 beneficiaries.



Carmen Govender  
All for One and One for All Champion



Miskha Samodren  
All for One and One for All Champion



# STAFF COMMUNITY BUILDER PROGRAMME

The Staff Community Builder Programme (SCB) is an initiative of the Old Mutual Foundation that encourages and supports our employees who are actively involved in volunteer work in their local communities. This volunteer programme offers eligible volunteers the opportunity to apply for funding for resources for the organisation at which they volunteer. Unfortunately, given the unprecedented

circumstances brought about by the Covid-19 pandemic and subsequent lockdowns, our employees could not volunteer at their organisations in 2021.

However, 66% of the SCB budget was repurposed to provide relief and recovery measures to various sectors that were hardest hit by the pandemic. These sectors

included small and medium enterprises (SMMEs) and cooperatives, artists and creatives, early childhood development (ECD), practitioners and centres, and education.

## Repurposed plans

Seven projects were funded, totalling over R3 million. The Old Mutual Foundation was proactive, reaching out to organisations and offering assistance at a very difficult time, especially to the most vulnerable members of our society.

## PPE and food

Funding went to personal protective equipment (PPE) and mattresses for rural ECD centres, food and dignity packs for creatives and artists, housing for vulnerable

orphaned children, leadership mentoring for principals of under-resourced schools, sewing equipment for small sewing groups and hydroponic infrastructure for a food security project.

Our partnership with the Department of Social Development has been strengthened and for the first time we were able to work with the National House of Traditional Leaders. This is a valuable connection as much of our work is in rural areas.

## Support for creatives

The pandemic hit creatives, artists and crafters particularly hard, with many unable to earn a living. Through the Imbumba and Malumbi Foundations, the Old Mutual Foundation reached out to

367 creatives and artists and 381 crafters in Mpumalanga, Free State, KwaZulu-Natal and Gauteng with food and dignity packs.

## Housing for orphans

Covid-19 brought the inequalities in our country into stark reality, including a dire shortage of housing. Many were unable to isolate in their homes because they simply had no home or had inadequate shelter.

The Old Mutual Foundation partnered with Habitat for Humanity South Africa, donating R500 000 to build three homes for vulnerable child-headed families in Umbumbulu, KwaZulu-Natal. These homes are due to be ready for occupation in May/June 2021.



# VULNERABLE MEMBERS OF THE COMMUNITY

Over the past five years this portfolio has ploughed over R11 million into a variety of community projects, funding over 150 organisations and affecting over 500 000 individuals. Funded organisations include old age homes, schools, orphanages, early childhood development centers, crèches, hospitals, youth development centers, community farming groups.

In 2020 we spent R2 410 100 supporting 52 projects and improving the lives of about 15 000 beneficiaries. The VMC programme

receives on average over 300 applications a year, with a budget of R2.2 million in 2020. Distributing this budget over such a large number of requests across all nine provinces continues to be challenge.

New requests continue to pour in and Covid-9 has created a whole new range of emergency needs.

Requests for food, health equipment and sanitising products dominated in 2020. In Q3, we approved requests to the value of R200 000 for

five NPOs severely impacted by Covid-19. A further R700 000 was put to the board for approval in Q4, bringing the total of YTD donations in the portfolio to R1 861 500.

Table 3 shows numbers of Covid-19 projects which had funding approved by the end of Q3 in 2020.

The support and relief offered through this ad-hoc discretionary funding of the VMC portfolio was critical to many NPOs struggling to survive the pandemic and was received with gratitude.

In addition, Old Mutual employees continue to give generously of their own hard-earned salaries to this programme. Since the programme's inception in 2002, the Staff Payroll Giving (SPG) programme has generated over R20 million and ploughed back almost 90% of that into projects in all nine provinces.

This abundant giving was made possible by the generosity of our own employees and their willingness to make a difference. In 2020, faced with the Covid-19 pandemic, OM employees rallied together and donated over R300 000 of their salaries to the relief effort.

Some employees and Exco members also contributed to the Solidarity Fund.

Table 3: Provincial distribution of VMC Covid-19 projects approved in 2020

Province	Number of Covid-19 projects
Eastern Cape	5
Free State	3
Gauteng	4
KwaZulu-Natal	7
Limpopo	6
Mpumalanga	10
Western Cape	10
Northern Cape	4
North West	3
<b>Total</b>	<b>52</b>

# PARTNERSHIPS



# PARTNERS..... FOR IMPACT -

## Old Mutual Partnership Awards (OMPA)

“Alone we can do so little,  
together we can do so much!”

In recognition of the importance of partnerships, Old Mutual hosted the second annual Partnership Awards on 8 December 2020. The ceremony was held virtually to comply with Covid-19 regulations.

The Old Mutual Partnership Awards (OMPA) were piloted in South Africa, first in 2019 to celebrate the impactful partnerships that Old Mutual has forged over the years with its stakeholders. Stakeholder Relations Unit of Group Marketing, Public Affairs and Sustainability coordinates OMPA.

In 2020, OMPA was extended across the Old Mutual Limited Group, to all the 13 countries in Africa where Old Mutual has a presence.

By building mutually beneficial relationships and partnerships, we are able to champion mutually, share value and contribute to making the world a better place.

Despite the disruptions brought about by Covid-19, we continue to forge ahead with our partnerships to make a positive difference in communities we serve.

We are very proud to announce that some of our Old Mutual Foundation partners were shortlisted for the Old Mutual Partnership Awards and scooped two top spots and awards!

The non-profit organisation Matla a Bana from South Africa, walked away with R275 000 and Imbumba Foundation, also based in South Africa, received R175 000. The National Department of Social Development (DSD) also made it onto the shortlist as a runner-up in the public sector partner category. The prizes will be used towards capacity building, enterprise development and contribute to the excellent work each of these organisations already do.

The Old Mutual Foundation partners competed against worthy organisations in the following categories:

1. CSI Category – Matla a Bana of South Africa, Water for People - Naotcha Project of Malawi, and CEO Staircase Challenge (Tower for Good)/Rafikistry TLC, a partnership of UAP Old Mutual.
2. Humanitarian Category – Imbumba Foundation of South Africa, Solidarity



2020 Provincial Management  
Board Conference



- Response Fund of South Africa and Gertrude's Children's Hospital Foundation of Kenya.
3. Public Sector Category – South Africa's National Department of Social Development, the Kenya Society of the Blind and Nigeria's Lagos State Ministry of Education.

Congratulations to the winners and runner-up Old Mutual Foundation partners who we greatly appreciate:

### Corporate Social Investment Partner of the Year Winner

**Matla a Bana:** A Voice Against Child Abuse: A collaboration between the Old Mutual Foundation and the Old Mutual Staff Volunteer Fund Trust that provides funding support for communities in need.



### Humanitarian Partner of the Year Winner

**Imbumba Trust:** Working together with the Old Mutual Foundation the Trust launched an extensive Covid-19 relief response programme, providing food relief, hygiene and sanitation products to underprivileged communities.

### Public Sector Partner of the Year Runner-up

**National Department of Social Development:** Old Mutual South Africa's partnership with the DSD has reached the most vulnerable communities affected by the Covid-19 pandemic. Led by Deputy Minister Bogopane-Zulu, it draws in Traditional Councils and various other partners.



# TRADITIONAL LEADERS, THE BEDROCK OF INCLUSIVE RURAL DEVELOPMENT

Often when we think of traditional leaders in South Africa, many of us do not think of them as central to development at grassroots level. Yet the Constitution of South Africa provides a national framework

for traditional leadership governance. Through the Deputy Minister of Social Development, Ms Hendrietta Bogopane-Zulu, the Old Mutual Foundation was introduced to the National House of Traditional Leaders

(NHTL) at the peak of Covid-19. This was an invaluable and strategic introduction that we appreciate. The traditional leaders in the various provinces became the main link to the rural communities and the relief efforts that were

being provided, and extended outreach was of essence. While in other areas of the country we were witnessing chaotic scenes at the food distribution points; that was not the case where we had the authoritative and respected voices and presence of the traditional leaders.

The National House of Traditional Leaders was established by a Parliamentary Act of 1997 to promote the role of traditional leadership in a democratic dispensation.

Perhaps our urban-lens made us pay little attention to this very influential sphere of governance in South Africa, but traditional leaders – and with them large swathes of

South African society – tap directly into the heart of CSI in our country.

They carry a lot of clout! A conservative estimate is that the 882 Traditional Councils oversee 20 million people in South Africa. One only has to look at the recent passing on of Zulu King Goodwill Zwelithini and the Queen Regent Mantfombi Dlamini-Zulu to realise the power and influence traditional leadership has in our societies. Issues of culture, heritage, identity are a source of pride for many.

Of the 60 million people in South Africa, 12 million speak isiZulu, 8 million isiXhosa, 4 million Setswana, 2.2 million

Xitsonga, and 1.2 million Siswati and Tshivenda, respectively.

We can safely say, traditional leaders command the attention of around 28 to 30 million people – at least half of the country's population with which CSI South Africa is trying to engage. Why then have we not interfaced more with traditional leadership?

The Old Mutual Foundation recognises the importance of partnering with traditional leaders to enable inclusive community upliftment in rural areas.

We greatly appreciate the various projects facilitated through the National House of Traditional Leaders.

## PARTNERSHIPS



The provincial traditional leadership was at the forefront, including Chief Matsila of Venda, Chief Ravele in Vhembe, Limpopo, Inkosi and Inkhosikati Ngomane of kaHhoyi, Mpumalanga, Inkosi Mandla Mandela in Qunu, Eastern Cape, Princess Gabo Moroka of Thaba'Nchu, Free State and Ikosi Mahlangu of Matshiding, kwaMhlanga in Mpumalanga, and many others.

It has been an enlightening and educational experience for us as CSI practitioners.

We are especially pleased at how working with and through traditional leaders enabled us to reach the broader community during and after Covid-19 lockdowns. These included forgotten

communities in the middle of nowhere across the length and breadth of South Africa.

We have now established a solid partnership with the National House of Traditional Leaders.

We would like to single out two young ladies in traditional leadership: Princess Gabo Moroka and Inkhosikati laMdluli of bakaNgomane, who went beyond the call of duty to ensure that the Matriculants in their areas got the required support.

This included camps, tutoring, extra lessons, internet access, nutritious meals, study venues etc. while also promoting food security and agricultural development in their communities.

They both also had major activations on Heritage Day, 24 September 2020. Both dedicated the day to the 21 Acts of Goodness campaign to Enable the Matric Class of 2020 project.

The Moroka High School of Thaba'Nchu, with the Princess Gabo Foundation, was broadcast on e-NCA TV doing the Jerusalema Dance Challenge on Heritage Day.

The Princess Gabo Foundation and the Royal BakaNgomane Foundation extend sincere gratitude to Old Mutual Foundation for providing a green light to a better future!





# INTERNATIONAL..... PARTNERS

Providing Shelter for Child-Headed Households in KwaZulu-Natal with **Habitat for Humanity South Africa.**

Habitat for Humanity is about building strength, stability and self-reliance through shelter. Old Mutual Limited through the Old Mutual Foundation's employee volunteerism programme; has partnered with Habitat for Humanity

South Africa for employee team builds events for well over a decade. This long-standing relationship of Old Mutual Foundation with Habitat for Humanity SA is since 2003!

We are very proud to say we have built 136 houses for our most needy in society in KwaZulu-Natal, Gauteng and the Western Cape. However, when Covid-19

struck in 2020, we could not have the employee volunteer built programme continued, however Habitat for Humanity, adopted a new housing delivery model, ensuring that planned projects went ahead.

The latest partnership of Old Mutual Foundation and Habitat for Humanity South Africa has added three more houses, bringing the total to 139 houses! The beneficiaries

are three child-headed households in Umbumbulu in KwaZulu-Natal.

The Umbumbulu project is the latest in a series of projects that have been supported by Old Mutual and reaffirms a relationship that in 2013, saw the Old Mutual Foundation and Habitat for Humanity Southern Africa (HFHSA) celebrating a partnership that had resulted in 100 homes being built – a milestone that no other HFHSA corporate partner has achieved.

Umbumbulu is about 40km from Durban on the South Coast; construction

is underway on these three houses that will become home to child-headed families identified as being amongst the most vulnerable in the area.

The homes quality structures adhere to the National Home Builders Registration Council (NHBC) requirements and are being constructed by an Umbumbulu builder who is using local labour to create employment in the area. All the homes are on land under KZN traditional council and the Permission to Occupy (PTO) certificates have been issued; giving the beneficiaries secure tenure of the land.

The homes, built of brick

with tile roofs, will offer the occupants access to electricity for the first time and have rainwater harvesting system/ jojo tanks to ensure a constant supply of water for the families.

To ensure that the beneficiaries understand the home-ownership process, they have attended information sessions about home maintenance, home-ownership rights and responsibilities, and been helped to develop appropriate financial management skills. In addition, they will receive the socio-economic support they need to sustain their improved lifestyles.

As the Covid-19 pandemic continues to wreak havoc,



behind the statistics are survivors who are children already facing rural poverty, left orphaned and homeless and to fend for themselves.

The tragedy of South Africa is that, by 2018, it already had 2.7 million orphans. Of these, nearly 500 000 are found in KwaZulu-Natal's impoverished rural areas where the children have to rely on community goodwill for survival. The struggle continues, as there are thousands of child-headed homes carrying adult burdens. The three houses for the Orphaned and Vulnerable Children (OVCs) will be ready for occupation in H2 of 2021.

***"HOME is a shelter from storms – all sorts of storms".***  
William Bennett

**UNHCR** on Old Mutual's Contribution to Vulnerable Refugees and South Africans Affected by the Loss of Income Due to Covid-19 of 525 000.

"If ever we needed reminding that we live in an interconnected world, the coronavirus has brought that home."- United Nations High Commissioner for Refugees, Filippo Grandi

UNHCR SA implemented cash-based assistance utilising the contribution from Old Mutual for Covid-19 relief efforts. In UNHCR's report to Old Mutual, they started off with – 'Why your contribution matters?' UNHCR reported that the COVID-19 pandemic has demonstrated that the disease has no borders or language barriers.

The threat to every person on the planet includes refugees and forcibly displaced people and can only be tackled through working together and demonstrating solidarity amongst the global community.

People of concern to UNHCR belong to the most marginalised and vulnerable members of society, meaning that they are at higher risk during the outbreak because they often have limited access to water, sanitation and healthcare facilities.

Over 80% of the world's forcibly displaced people are hosted in low and middle-income countries, where they face specific challenges and vulnerabilities that need to be taken into consideration in COVID-19 readiness and

response operations. South Africa hosts some 274,000 refugees and asylum-seekers. The country continues to receive high numbers of asylum applications combined with a large backlog and complex protection problems faced by people of concern.

Together with partners, in many operations, UNHCR is realigning and reallocating resources to find flexible and pragmatic solutions that allow UNHCR and partners to stay and deliver together. In responding to this unprecedented challenge, the partnerships that UNHCR has with the private sector are proving critical.

Old Mutual's donation has helped fill the gap that UNHCR has been faced with

in helping forcibly displaced people in the fight against the coronavirus by scaling up our work to keep people of concern safe by responding to the pandemic with life-saving support, including water, medical care, hygiene materials and expanding cash-based assistance to help mitigate the negative socio-economic impact of the coronavirus outbreak.

Months of COVID-19 restrictions have had severe economic impacts on vulnerable populations, including refugees, asylum-seekers and internally displaced people (IDPs).

Lost income as a result of limitations on movement and economic activity has meant that the number of people requesting assistance

from UNHCR has increased significantly, notably among those who had previously been self-sufficient, as they now struggle to put food on the table, pay rent, or cover the cost of utilities.

### #WithRefugees



# MANAGEMENT AND GOVERNANCE





# MANAGEMENT..... AND GOVERNANCE

**Provincial Management Boards (PMBs)** of Old Mutual in the nine provinces in South Africa have made a significant difference in the lives of their local communities through their commitment to various community projects and activities. They also work hard to encourage employees to

participate in volunteerism and community upliftment. 2020 has seen amazing collaboration between the Old Mutual Foundation and the various PMBs. It was also the annual PMB Conference, was successfully hosted by the Stakeholder Relations team in March 2020.

The PMBs are the heartbeat of Old Mutual and play a key role in all our provinces. They were established to represent the microcosms of the broader business to our customers nationwide and they are made up of regional leaders across the business. The PMBs play a critical role in unifying the Old Mutual

brand and delivering our value proposition to our customers and stakeholders.

## MANAGEMENT AND GOVERNANCE OF OMF

The Old Mutual Foundation has a team of nine members and has a dual reporting mandate into:

- The Board of Trustees of the Old Mutual Foundation
- The Director of Group Marketing, Public Affairs and Sustainability (GMPAS)

The Old Mutual Foundation was established in 1999 following the demutualisation of the South African Mutual Life Assurance Society ("the Society") demutualised in terms of Section 25 of the Long-Term Insurance Act, 1998 (Act No. 52 of 1998).

The Old Mutual Foundation was set up primarily to support South Africa's economic transformation for the benefit of the vulnerable members of South Africa's communities.

It delivers on its objectives primarily through grant funding towards programmes in Education, Skills Capacity Building and Enterprise Development. The Old Mutual Foundation is governed by a Board of Trustees whose responsibility it is to ensure that the Foundation is managed in accordance with the prescripts of its Trust Deed and in a responsible manner. The Trust Deed in effect was amended in 2010.

The objects and purpose of the Foundation, as indicated in the Trust Deed, to play an active role in supporting South Africa's economic transformation; to benefit the most vulnerable members of South Africa's communities, by means of grant funding to support initiatives in Enterprise Development, Skills Capacity Building and Education.

- To support and enable employees of Old Mutual (South Africa) Limited, its partners and the general public to volunteer and support charitable initiatives that uplift vulnerable communities;
- to communicate, promote, benchmark, monitor and evaluate the effectiveness of its interventions;
- to research, promote and



support innovative socio-economic solutions in South Africa.

**The Board** meets on a quarterly basis and has two sub-committees: the Donations Committee (DonCom) that meets on a quarterly basis and an Investment Committee that meets three times a year. In discharging its mandate, the Board is supported by two Committees:

1. Investment committee - to monitor all investment activities of the Foundation and management of its financial assets
2. Donations committees - to review and approve projects for funding and where required,

recommend projects to the Board for approval

The Committees each have their own Terms of Reference to govern the functioning of the Committees.

The Trustees are expected to act in the best interest of the Foundation and avoid any conflict between personal and Foundation interests. They are guided at all times by the Trust Deed as the principal governing framework.

They ensure strategic alignment of the Foundation's strategy and plans with the broader OML strategy and assist in developing and maintaining strategic partnerships. The Trustees also ensure proper accounting records

are kept of all Foundation transactions, review and adjudicate over funding proposals and DonCom delegation in line with the mandate of the Foundation.

They monitor the performance of the endowment fund. They oversee the management of the endowment fund and monitor the performance of the fund and other assets of the Foundation.

They approve the annual business plan and oversee the implementation of the Foundation strategy and annual business plan. They approve budget expenditure and the annual financial statements and provide oversight of the tracking and monitoring impact and sustainability of the funded projects.

The Board shall at all times have no more than ten and no less than two Trustees and shall consist of independent and non-independent Trustees.

The Director/General Manager of Group Marketing, Public Affairs and Sustainability and the Head of the Foundation shall be permanent attendees of the Board.

At the end of 2020 we saw the departure of two long-serving Trustees of the Old Mutual Foundation, as per Old Mutual Group Governance Framework Board tenures.

We remain indebted to **Chairman of the Board of Trustees, Mr. Crispin Sonn** and the Chairperson of the

Donations Committee, Ms Rose Keanly. Thank you for your wisdom, counsel and your diligent service to the Foundation!

In 2021, two non-executive independent Trustees, will be recruited, to join the Old Mutual Foundation Board of Trustees.

**Other Trustees of the OMF Board are:**

- Ms. Dot Field
- Ms. Prudence Thipe
- Mr. Adrian Burke
- Mr. Andisa Ntsubane







# FINANCIAL REPORT





# 2020 BUDGET

The Old Mutual Foundation has two pots of funding for its annual drawdowns – the Endowment Fund of the Old Mutual Foundation and Net Profit After Tax (NPAT) of Old Mutual Limited:

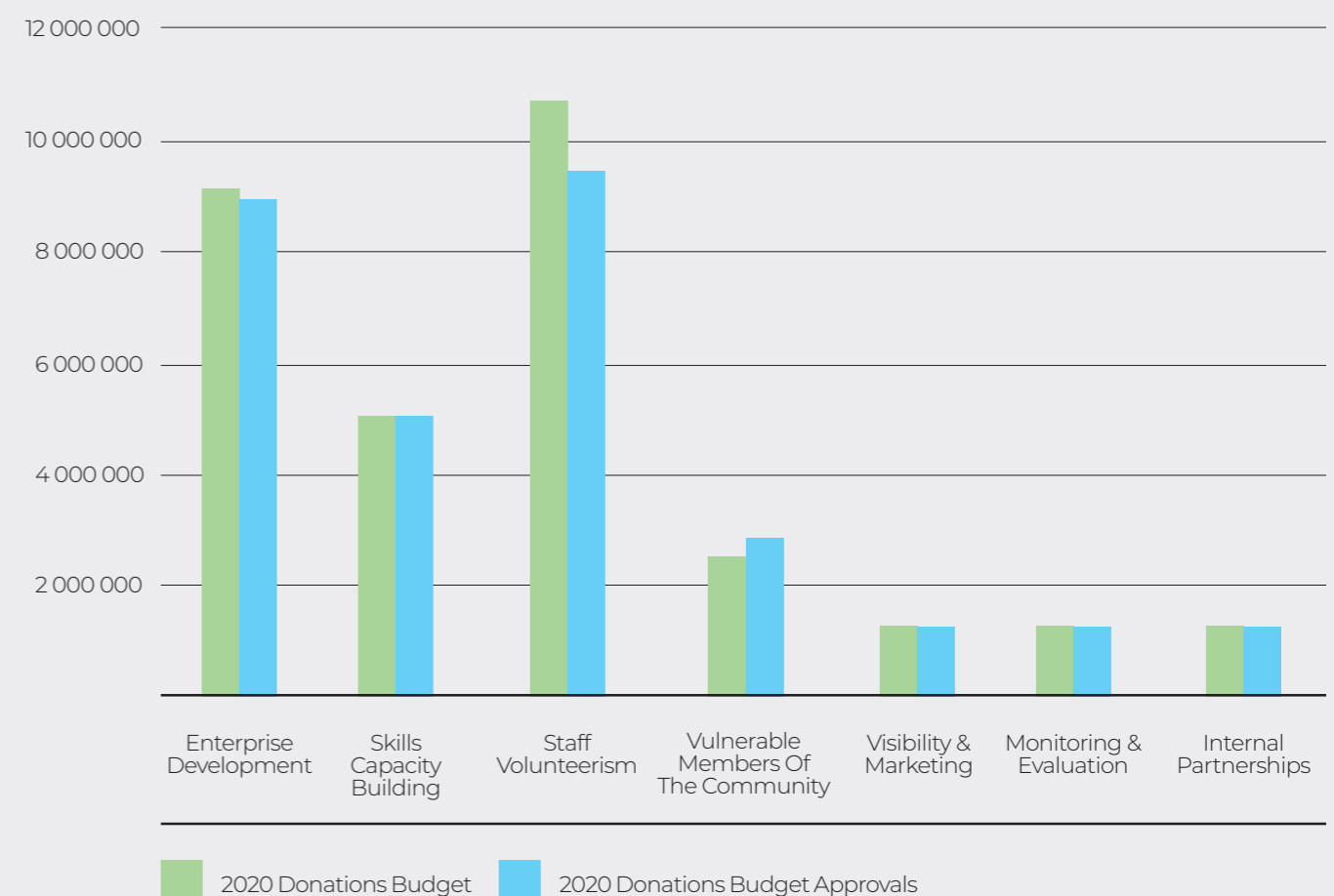
- 
**1. Donations:**  
Budget drawn from the Endowment Fund of the Foundation as recommended by the Investment Committee at **R30 million** for 2020
- 
**2. Net Profit After Tax (NPAT):**  
Funding from OML for Socio-Economic Development as per the Financial Sector Code's BBBEE Scorecard requirements – **R11.5 million** for 2020
- 
**3. The Old Mutual Foundation managed and administered **R35 million** for Covid-19 relief and recovery efforts in 2020**
- 
**4. Accruals from 2019 = R7 million**

TOTAL FUNDING

**R83.5 million**

## DONATIONS BUDGET

The graphs below show the budget vs approvals of the Donations Budget of R30 million for 2020.



# SUMMARY - 2020 DONATIONS AND EDUCATION BUDGET APPROVAL AND 2019 ACCRUAL DISBURSEMENTS

## EDUCATION BUDGET

Organisation	Funding	Payments Disbursed
National Education Collaboration Trust (NECT)	R3 000 000	Q4 2020
Programme to Improve Learning Outcomes (PILO) KZN	R4 000 000	Q4 2020
SEED Educational Trust	R1,3 000 000	Q4 2020
Entrepreneurship in Education	R1,5 000 000	Q4 2020
Africa's Biggest Classroom - Mainstreaming Financial Education	R500 000	Q4 2020
Planning for the New Literacy and Numeracy Strategy	R1 000 000	Q2 and Q3 2020
<b>TOTAL</b>	<b>R11 300 000</b>	

## DONATIONS BUDGET

Quarter	Approval per Quarter	% of Total Approvals
Q1	3 188 049	11
Q2	7 132 171	25
Q3	8 397 515	29
Q4	10 328 442	36
	<b>29 046 177</b>	<b>100</b>

Focus Area	2020 Donations Budget	2020 Donations Budget Approvals	2019 Accrual Spend	Total 2020 Approvals & 2019 Accrual Spend	Comments
Enterprise Development	9 000 000	8 919 626	5 252 560	14 172 186	ED Q4 approvals include R2,5m redeployed funds to Education Portfolio
Skills Capacity Building	5 000 000	4 992 720	500 000	5 492 720	
Staff Volunteerism	10 700 000	9 664 183	320 794	9 984 977	
Vulnerable Members of the Community	2 200 000	2 410 100	150 000	2 560 100	Additional R210k redeployed to this budget centre
Visibility & Marketing	1 100 000	1 099 643	718 000	1 817 643	
Monitoring & Evaluation	1 000 000	959 905	-	959 905	
Internal Partnerships	1 000 000	1 000 000	90 219	1 090 219	
	<b>30 000 000</b>	<b>29 046 177</b>	<b>7 031 573</b>	<b>36 077 750</b>	



# COVID-19 RELIEF FUNDING

Our efforts are ongoing, and will continue long after the scourge has passed its peak. This report gives just a glimpse of the efforts made by Old Mutual and the Old Mutual Foundation to combat the effects of the pandemic and to strengthen those most in need of assistance.



Over 20  
thousand families

Food parcels were distributed to various district poverty nodes, child headed households and vulnerable refugees.



12 million learners

Free lessons on radio and TV were rolled out for learners in Grades 1 to 12, reaching 12 million learners.



440 thousand  
teachers

Top quality digital e-learning was delivered to a high number of South Africa's 12 million learners and 440 000 teachers.



Total budget:  
R52 million

Towards community, health, education and food security.

# 2020 COVID-19 FOCUS AREAS



## 1. E-learning

Through the digital delivery of educational material we ensured continued learning and teaching through e-learning platforms for learners. Some of the learning material was made available in print, for users with no access to the internet or digital resources. We supported the Read to Lead campaign as well as other reading and literacy initiatives.



## 2. Hygiene Support

We partnered with organisations and NGOs to amplify the message of improved hygiene, cleanliness and physical distancing.

#SafeHands  
#FlattenTheCurve  
#StaySafe  
#Soap4Hope



## 3. Food Security

Food parcels were distributed to various district poverty nodes, child-headed households and vulnerable refugees.

We reached over 20 000 households, touching over 100 000 lives.



## 4. Employee Volunteerism

Old Mutual employees have always given generously of their time and energy to the needs of orphans, the elderly and others. During lockdown, employees answered the call to action by supporting homes for the elderly, shelters, orphaned and vulnerable children (OVCs) and Early Childhood (ECD) centres with the most basic necessity – food. This was purposeful employee engagement in action.



## 5. Health and Hygiene

Our Mupine facility was handed over to the Western Cape Government. This is a fully refurbished 300 bed quarantine and self-isolation facility from which is being used in the Province's fight against Covid-19.

We donated Personal Protective Equipment (PPE) worth R5million to the SA Minister of Health. All our RoA operations also donated PPE to various government and relief agencies.



**OLD MUTUAL  
FOUNDATION**

2021 - 2025

# STRATEGIC PLAN

WHAT'S  
NEXT?

stitching societal fabric

# LOOKING AHEAD: OUR NEW STRATEGIC DIRECTION 2021-2025

- The Old Mutual Foundation five-year strategy in South Africa crafts the Foundation's strategic intent for 2021 to 2025. We are repositioning the Foundation, to have a greater impact on society by leveraging strategic partnerships and deepening our focus on being a catalyst for change at a systemic level.

With this new approach, Ubuntu and our African heritage, are our cornerstones. Our aim is to partner with like-minded pan-African corporate foundations, government and other stakeholders.

We seek to provide thought leadership; promote professionalisation of the sector, amplify voices, change the narrative, collaborate for impact, and enable pathways for change through innovative social solutions.

As we move forward we are inspired to deliver cutting-edge Corporate Social Investment. We want to contribute to inclusive, transformative, impactful and sustainable socio-economic development in communities where we operate, through a deliberate partnership approach and by promoting social legitimacy and shared value.

## Our key focus areas are:



### 1. Education



### 2. Humanitarian and Disaster Support

Our guiding principles encompass our beliefs and values and guide the strategy through all circumstances, irrespective of changes in goals, scenarios or type of work.

## Our three key enablers:

- Partnerships
- Financial Wellbeing
- Employee Volunteerism

## The guiding principles are:

1. Partnering for impact
2. Evidence based interventions
3. A blended & co-funded approach
4. Systemic influence
5. Agile & responsive
6. Knowledge building
7. Hierarchy of needs
8. Invest rural
9. Non-commercial social benefit and social legitimacy
10. Inclusive, transformative, long-term and sustainable



Inga Hlatshwayo  
Senior Consultant: Communications  
Old Mutual



Wayde Van Niekerk, South African  
Athlete and Sello Hatang, CE of Nelson  
Mandela Foundation



Kaizer Motaung Jr.  
Kaizer Motaung Jr. Foundation

# COMMUNICATIONS HIGHLIGHTS

## Internal Communications

To drive awareness, appreciation and engagement with the countrywide efforts, Group Marketing and Communications distributed essential Old Mutual Foundation information and relief updates across all its communication channels, including all our communication TNN, Now Magazine, the News Hub and our Intranet. These were well received by Mutualites, generating pride and helping to keep colleagues connected to the company and its caring culture.

Please direct questions and requests to [csi@oldmutual.com](mailto:csi@oldmutual.com). Preference is given to the following provinces: North West, Northern Cape, Free State, Limpopo, Mpumalanga, Eastern Cape and KwaZulu-Natal. We regret that we are not able to fund the following: individuals, tours,

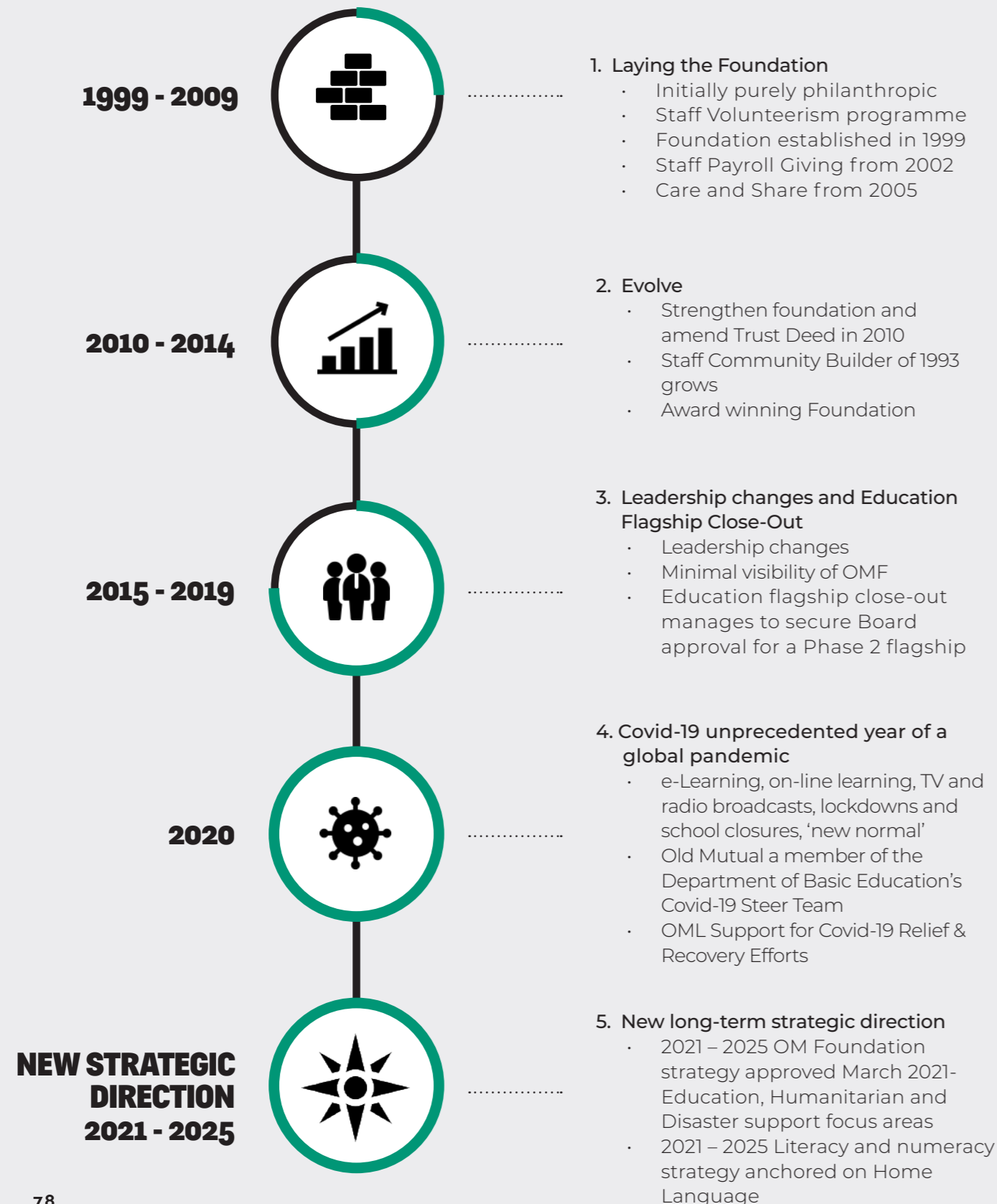
gala or charity events, seminars or conferences, vehicles or other transport, arts and culture events and land or building purchases.

Internal and external comms UNMUTED the foundation in 2020.

Thank you for your community involvement!



# 22 YEAR JOURNEY OF OLD MUTUAL FOUNDATION



## CONTACTS

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