## The Sophia FOUNDATION

Raising consciousness for the good of the whole



Issue 12 | Dec 2024 | End of Year Letter

# The Sophia Foundation enters its next chapter!

"Man is not a being who stands still, he is a being in the process of becoming. The more he enables himself to become, the more he fulfils his true mission."

Rudolf Steiner



Succession planning workshop, Cecilia, Lorraine, Nick and Bryony

### **Dear Friends of The Sophia Foundation**

The Sophia Foundation is not standing still, it too is in the process of becoming. At the end of last year, The Sophia Foundation held an exploratory Succession Planning gathering with a few trusted friends and associates. It had been twelve years since its inauguration, and I felt that the foundation had been grounded in the values that had come to inform my life and which I saw as my destiny task. How could the conditions be created that would enable The Sophia Foundation to continue becoming towards fulfilling its true mission?

Up until that time I had led the foundation with the support of my fellow trustee Koos Rossouw. My concern was to ensure that the purpose and ethos that underpin all that the foundation stands for would act as guard rails to guide those involved in the foundation in perpetuity. I believed this would give it the greatest possibility of fulfilling its true mission, that of becoming a positive force for the development of the human being into the future – a future where we can all live in greater harmony with each other and the natural world. The Sophia Foundation is more than a conduit for the disbursal of

funds. It has a purpose aimed at adding value and meaning to all of its activities by seeking to bring greater consciousness to every interaction.

At the gathering a Succession Planning Team was formed consisting of Cecilia Solis Peralta who leads our research, Nick Winearls who heads our fiduciary review and myself. Koos Rossouw acts as a consultant to the team.

# The succession planning team share feedback from our journey so far:

We have been on a steep learning curve and have made good progress working well as a team with complementary skills. Our task was to ensure that The Sophia Foundation is enabled to continue its journey of becoming – in perpetuity – by remaining true to its Vision, Mission, Ethos, and to Lorraine Forbes' Donor Intent.

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We started by reviewing the current documents. Nick's focus was to ensure all fiduciary requirements were met. Cecilia's main concern was to preserve the Donor Intent and to research the successes and failures of other perpetuity foundations. This led her to an invaluable resource, the guide issued by Roundtable (a nonprofit organization that advises philanthropists on how to protect their Donor Intent).

A shocking revelation from the research was, that in many cases the vision, mission and ethos, together with the vast endowments left by some very wealthy philanthropists such as John Rockefeller and Henry Ford, had with the passing of time, been hijacked with complete disregard for their Donor Intent. In contrast, the Duke Endowment has preserved the Donor Intent for one hundred years with grants falling into the same categories he originally envisioned.

This has emphasised, that if the people driving The Sophia Foundation do not have similar core values and if the legal vehicle and constitutional documents are not the appropriate ones, Lorraine's vision, mission and ethos may not stand the test of time.

"Most deviations from Donor Intent are not the result of malice, but the consequence of preventable issues." PhilanthropyRoundtable – Protecting your Legacy

These are the issues which we seek to pre-empt and prevent. This prompted us to start studying, with great care, the current Sophia Foundation deed, constitutional documents, governance and grant making policies and their ability and strengths or weaknesses to protect Lorraine's Donor Intent.

However, protecting the ethos has been just one part of the journey. We have spent many hours researching and discussing the procedures for the appointment of suitable trustees in the future – one of the greatest challenges of a perpetuity foundation. In 1977, Henry Ford II, the grandson of the founder of the motor business, resigned as a trustee of the Ford Foundation as he was not comfortable that his co-trustees were willing to follow the ethos of his grandfather. This left no family representative on the board – a situation which was not reinstated until 40 years later

With the aid of Stonehage Fleming, the investment managers of the Foundation, we are working on a





financial model that will protect capital and create a healthy ratio between operational costs and project funding.

All this happened whilst we were surrounded by the beauty of Driftwood Cottage and the Muse, the latter which is intended to remain the home of The Sophia Foundation into the future (Nick at times Zooming in from the warmth of his holiday home in France). These much-loved homes welcomed us with their beautiful gardens, views, and inner spaces that open the mind and soul to the work we needed – and still need – to do

"The people you select to shepherd your giving —particularly after your death—will make or break your Donor Intent."

PhilanthropyRoundtable – Protecting your Legacy

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#### OUR UPDATED VISION, MISSION AND ETHOS

1

#### **VISION**

Our destination, what we want to achieve.

To support the awakening of consciousness (increasing awareness) by fostering Wisdom, Beauty, Truth, Love, and Compassion, in order to live more harmoniously with each other and the natural world.

2

#### **MISSION**

How to achieve our Vision.

We do this by promoting: the inner-development and self-knowledge of people; the stewardship of natural resources and the environment; animal anti-cruelty and animal welfare; and the arts as a means of inner transformation.

it is the belief of the founder that it is only by raising human consciousness to the level where we assume responsibility for our actions and for the effect of our actions on all that surrounds us and choose to act in freedom and love for the good of the whole, that we make a positive contribution to life."

### **ETHOS**

Our core values on how we operate & behave.

- The Sophia Foundation understands that the Universe is not just material, but that Sophia (Wisdom) underlies all of Creation.
- It is essential for all involved in The Sophia Foundation and the initiatives that it supports to strive for, and commit to self-development, trustworthiness, integrity, congruence, and an impulse to contribute something positive to humanity and the natural world. We endeavour to support initiatives that give concrete reality to the great ideals of Truth, Beauty, and Goodness.
- In addition to giving money, we strive to add value to every interaction and project by seeking opportunities to facilitate greater consciousness and to expand possibilities in terms of our mission, without imposing on personal freedoms.
- We aspire to remain present to the possibilities of the moment and the latest findings in spirituality, science and philosophy that open new possibilities, new perspectives, and new solutions towards meaningful change in the world.
- We aim to accomplish our mission without being constrained, limited or influenced by any ideology, prejudice or political correctness that may divide humanity based on race, gender, nationality, economic class or religion, or that may hold back the evolution of human consciousness through human technologies such as the negative impacts of Artificial Intelligence.

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# OUR FOUR PARTNER ORGANISATIONS

**ACTIVITIES AND ACHIEVEMENTS DURING 2024** 

#### - PEACE PARKS

The Sophia Foundation Rangers Support Programme.

#### SUGARBIRD TRUST

Rope Access Team eradicating alien vegetation on high-angle slopes of Table Mountain.

#### - WATERSHED

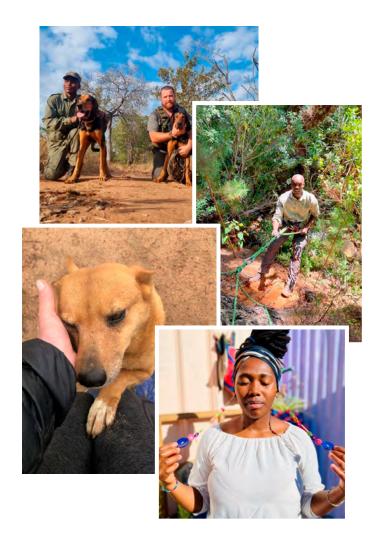
Animal Rescue, Rehabilitation and Outreach.

#### - EARTHCHILD - TAKE 5

National Campaign - a moment for peace, a movement for change.

The Sophia Foundation has four pillars of focus: promoting the inner development and self-knowledge of people; the stewardship of natural resources and the environment; animal anti-cruelty and animal welfare; and the arts as a means of inner transformation. Much has been learnt from the different partnerships and projects we have engaged with in the last years. Our approach has been exploratory and we are in the process of formalising our grant-making strategy. In thinking about the long-term future of The Sophia Foundation, we remain committed to adding value in addition to giving funds. However, we are questioning whether we would have greater impact by focusing on distinctive geographical areas and seeking gaps and opportunities where we can make a more sustainable difference.

When we initiated The Sophia Foundation Ranger Incentive Scheme with Peace Parks as a 3-year pilot project in 2021, it was intended to include ranger incentives, top ranger awards for leadership and annual inner leadership and development workshops for selected rangers. Unfortunately, the leadership aspects fell away and without these the programme no longer falls within the ethos and principles of The



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.... ACTIVITIES AND ACHIEVEMENTS DURING 2024

Sophia Foundation. Whilst we will therefore not renew our sponsorship, we very much appreciate the work that Ken Maggs has done in dealing with the difficult practicalities of implementing the programme and the daily hardships of the rangers.

There is so much sadness and cruelty in the world, but what is also true is that the opposite of cruelty – kindness – is always flowing too. We have great respect and admiration for Stephne Jackson the founder of Watershed for her absolute commitment to the heart-breaking and emotionally demanding sterilization and educational work she does in some of our worst areas of animal suffering. There has been some light at the end of the tunnel, as having the security of the on-going funding and commitment to her outreach from The Sophia Foundation over the years, has enabled her to plan return visits to areas where she has reported a small improvement in the welfare of animals as a result.

You will read about the great work Sugarbird Trust continues to do to protect the indigenous fynbos and Afromontane forests of Table Mountain National Park. Our funding supports the Sugarbird Rope Access team consisting of a group of four men who are trained and equipped to eradicate invasive alien vegetation growing on high-angle slopes mostly in the upper reaches of Newlands Forest and on the steeper slopes of Devil's Peak.

When Janna Kretzmar, the director of Earthchild Project approached us after a long-standing relationship with their Alumni Programme, to co-fund their groundbreaking national Take 5 meditation campaign, we agreed. Scientific research has shown that large-scale meditations for peace have a measurable influence on peace in society. All South Africans experience the impact of violence daily – could this initiative make even a small difference? We were initially unsure as to whether this ambitious project would come together in the time available. It clearly exceeded all expectations and had a very broad positive outreach even into some of our most rural areas, creating "a moment for peace, a movement for change".



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THE SOPHIA FOUNDATION RANGERS SUPPORT PROGRAMME 2024

"Rangers are fundamental if we are to meet our global conservation targets for 2030 and prevent the dangerous tipping points that threaten our planet. These people do far more than protect wildlife, they are educators, they are community supporters and they help regulate the sustainable use of natural resources. Yet, far too often, they lack sufficient support, with rangers in particular facing inadequate pay and protection."

Prince William, Cape Town 2024







### Ken Maggs, Counter Poaching Unit Manager, writes:

In 2021, The Sophia Foundation initiated a three-year commitment to support Rangers in transboundary conservation landscapes where Peace Parks Foundation operates. This included a combination of funding for incentives; providing access to expertise in inner leadership emphasising personal development and leadership training; and establishing annual awards for top-performing Rangers showing leadership.

This Success-based Ranger Incentive Scheme has successfully motivated Rangers to apprehend poachers and recover illegal wildlife products, leading to numerous arrests and the removal of poaching equipment from protected areas. In the past three years, the Ranger Support Programme facilitated close to 35 000 patrols and the removal of more than 11 300 wire snares as well as the arrest of 515 poachers, indicating effective biodiversity conservation efforts. The provision of incentives, made possible by The Sophia Foundation, to Rangers in support of their commitment and dedication, is a valuable support mechanism alongside a multi-faceted approach to counter-poaching and fostering human-wildlife coexistence in the transboundary conservation areas where Peace Parks and partners operate.

In 2023, award ceremonies were held in the eight participating parks to recognise outstanding Ranger performance. Rangers play a vital role in conservation, often working in perilous conditions with limited compensation. The Sophia Foundation's support has been crucial in empowering these guardians of wildlife.

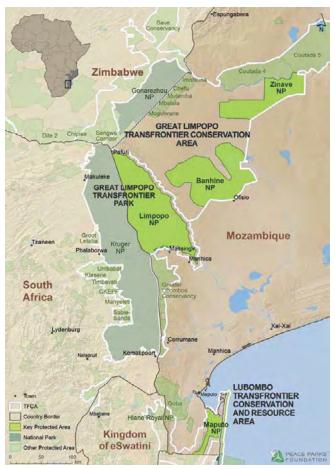
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THE SOPHIA FOUNDATION RANGERS SUPPORT PROGRAMME 2024



The inclusion of an Inner Development training component of The Sophia Foundation Ranger Support Programme was an essential requirement of the grant agreement for The Sophia Foundation founder, Lorraine Forbes. She recognised the toll taken on the mental wellbeing of Rangers as they tackle the complexities and dangers inherent in their work and knew the value that developing inner leadership can play in strengthening resilience and creating positive mental and emotional wellbeing outcomes. This groundbreaking concept, supported in principle by Peace Parks, resulted in a pilot training programme delivered in late 2022. The curricular was developed by The Sophia Foundation alongside the Southern Africa Wildlife College, a key training provider of Peace Parks. The focus of the training was the development of inner leadership competencies including enabling participants to effectively manage self in all situations; to build meaningful relationships through effective communication; to effectively inspire, lead and collaborate; to be meaningfully involved in the community; to integrate self-care; to initiate, manage and sustain change; and to be driven by an ethical compass in all situations. Seven Rangers with outstanding leadership qualities from across the participating protected areas were selected to attend this unique pilot training course. The inner leadership training opportunities



Key protected areas supported by Peace Parks

provided during the duration of the grant have laid a foundation for further Ranger wellness initiatives in the future.

Embedded in Peace Parks' Combatting Wildlife Crime Strategy is a multi-faceted approach to counter-poaching. At the heart of wildlife protection and counter-poaching is a Ranger Corps that is well-selected, well-trained, well-equipped, and well-motivated with integrity. Around this Ranger Corps are the external aspects that empower them to do their work - communications, mobility, access and movement controls, specialised technical support, training and

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community. The Sophia Foundation Ranger Support Programme has been a vital support mechanism that focuses on the heart of the matter – the internal aspects of the individual people that make up a well-motivated Ranger Corps.

"What inspires me most about our Rangers is their selfless commitment to the cause of conservation. They are relentless in never giving up and are often prepared to put their lives on the line. I am convinced that they, once provided with adequate incentives, will continue to carry themselves with great pride and integrity, set an example for the next generation of rangers, and continue to strive to keep our wild spaces safe. For me personally, it is a great honour and privilege to be a part of this worthy family of warriors."

Ken Maggs





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ROPE ACCESS TEAM ERADICATING ALIEN **VEGETATION ON HIGH-ANGLE SLOPES** 

"The greatest threat to our planet is the belief that someone else will save it."

Robert Swan, Explorer

#### Koos Rossouw, Trustee of The Sophia Foundation, reports:

This year, the Sophia Foundation has continued to support the Sugarbird Project in its mission to protect the indigenous fynbos and Afromontane forests of Table Mountain National Park.

Specifically, we have funded the Sugarbird Rope Access team consisting of a group of four men who are trained and equipped to eradicate invasive alien vegetation growing on high-angle slopes. Most of their work this year has been in the upper reaches of Newlands Forest and on the steeper slopes of Devil's Peak, dealing with heavy infestations of such species as black wattle, longifolia, gum and blackwood that if left unchecked completely overrun the indigenous flora.

In addition, the Rope Access team has this year also completed the Newlands Forest bark-painting project, painting all the remaining vulnerable old trees of Table Mountain's largest and most beloved forest. This critical intervention has been undertaken in collaboration with the Newlands Forest Conservation Group to protect the forest's ancient indigenous trees that are targeted by bark-strippers for medicinal purposes.

Painting indigenous trees is harmless to the trees and the hope was that it would render their bark valueless as a health remedy. This experimental approach, which SANParks was initially reluctant to permit us to undertake, has indeed proved to be enormously effective as a deterrent to bark-stripping. After a couple of initial incidents, literally no more stripping has occurred among the thousands of trees painted for protection. So, the project's success rate is very close to 100%. This fantastic outcome suggests that bark-painting as a deterrent to bark-stripping should be rolled out at a greater scale in other vulnerable areas.

Why do we support the mission of the Sugarbird Trust? Fynbos and Afromontane forest make up the bulk of the Cape Floral Kingdom, which is by far







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ROPE ACCESS TEAM ERADICATING ALIEN **VEGETATION ON HIGH-ANGLE SLOPES** 

the smallest, richest and most threatened of the world's six floral kingdoms. At the same time, Table Mountain is considered Africa's leading tourist attraction and has been named one of the New Seven Wonders of Nature.

And if protecting these two priceless treasures is not enough, then there is the added benefit of giving four men the dignity of a well-paying job so that they can support themselves and their families while building their skillsets. These men are aware of the immense contribution they are making to protect our natural heritage, and they take great pride in their work.

It is a privilege for all of us to live in this beautiful city, the most biodiverse in the world, and to have the opportunity to preserve its wonders for future generations.



Training on rope access



Bark painted tree

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#### WATERSHED

ANIMAL RESCUE, REHABILITATION AND OUTREACH

"The very nature of God is to seek out the deepest possible communion and friendship with every last creature on this earth."

Catherine LaCugna, Theologian

#### Stephne Jackson, Founder of Watershed, writes:

After 24 years in animal rescue living with the pain of animal cruelty, abuse and the unnecessary spreading of painful diseases, I cannot stress enough that mandatory sterilization is key to the humane control of pet overpopulation in areas where animals are neglected or abandoned. While Watershed continues to focus on sterilization and when doing mass sterilisations can sterilise up to 200 animals in 3 days, it has become evident that working long-term and throughout the year is essential if we are to make a sustainable difference. Our work has evolved to include the support of sympathetic local vets who assist us throughout the year with sterilising, educating, vaccinating, deworming and treating animals medically for mange and other diseases. This has the added advantage of uplifting people in these poorer areas by encouraging them to engage in animal rescue work such as helping local animal welfare organisations and participating in dipping days.

We work where help is most needed. Our predominant focus is in areas up the West Coast, Villiersdorp and the surrounding farming communities, Stellenbosch farming communities on Bottelery Road, Caledon and Tesselaarsdal.

The demand for our food programmes has become so large that we can no longer afford to buy the quantities needed for our feeds and rely heavily on food donations. The increase in unemployment has caused further grief and hardship resulting in more abandoned animals and more animals being left without food. Our biggest food needs come from farming communities where we assist in addition with deworming, vaccinating and sterilizing. Sadly, there is no commitment from local farmers to help with funding and our









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#### WATERSHED

Helping those without a voice, one animal at the time....

on-going requests to them to introduce laws to stop new animals coming into their farming communities have been ignored. When able, we in addition assist other worthy organisations struggling to keep up with their food needs.

Raising awareness of the importance of adopting rather than supporting breeders has become a necessity. Every breed of dog has a breed-specific rescue organisation, brought about because people are not properly educated in the nature of the breed they adopt (mostly Labradors, Border Collies, Jack Russels and Cocker Spaniels). These animals then land in welfare organisations. Breed-specific rescue organisations have strict regulations, and people are vetted to make sure their lifestyles will blend with the breed at hand.

Through a contract we have had with Bidair Petlounge for the past 8 years, we have a sponsorship to fly rescue animals to new homes or rehabilitation centres throughout the country. By working closely with all welfare organisations, including breed specific welfares and certain SPCAs, we have flown thousands of animals to a better future.

Watershed's work has only been made possible in the past few years due to the generous and consistent help we receive from The Sophia Foundation. Since Covid fundraising has become more and more difficult. We are deeply grateful to The Sophia Foundation and also to our smaller donors, through whose support we have been able to continue to meet our mission of making a meaningful and significant change to an animal's life through increased Pet Care Education, spreading the need to Adopt not Shop and focusing on the importance of Mandatory Sterilisation.







"Our local feeding programmes have become vital. We rely heavily on food donations for cats and dogs as the demand has become so large that we can no longer afford to buy the quantities needed for our feeds. Unemployment has caused much grief and hardship resulting in more abandoned animals and an increasing number of animals left without food."

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#### WATERSHED

Helping those without a voice, one animal at the time....

## From dump to diva - OLIVE

On our Villiersdorp outreach at the beginning of the year, we came across the central "dumping area" in the local township that was disgusting. Goats, pigs, dogs were everywhere scavenging on whatever they could find to eat. This is when we spotted Olive. She was so hungry and looked the worst and was very weak. I knew that we had to catch her and help her, but she ran away. We couldn't find her anywhere while there for our outreach, but I was determined I would go back the following week and find her. I prayed "Oh, live!" "Oh, live!" (Olive) over and over again and luck was on my side as when I returned to the dump, she was there. This time I came prepared with "Kentucky Fried Chicken". She immediately ran up to me and ate out of my hand. I could loop the lead over her neck and take her to the vet.

She had full blown ehrlichia as well as sarcoptic mange and was in the beginning stages of pregnancy (not her first for sure as her body and teats showed multiple prior pregnancies). She stayed at the vet for two weeks where she was treated, sterilised, vaccinated and dewormed and when her condition had improved sufficiently, she was moved to boarding kennels in Stellenbosch. What joy when in March she flew on our Bidair Petlounge sponsored flights to her amazing new home in Johannesburg and where she is living the highlife with her new mom and dog and cat siblings. She has even gone for training and was told she is one of the cleverest dogs they have ever had at the training school.

Olive is just one example of many animals that have survived and shown resilience in these harsh areas of neglect and have made it and we are so proud of her. We were able to uplift this beautiful girl from a life of hell, hunger and never having been loved to a home full of love and full tummies. In all the extremely sad and traumatic moments of our work it is stories such as these that keep us going.







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### EARTHCHILD PROJECT - TAKE 5

A moment for peace, a movement for change

"Though we do not wholly believe it yet, the interior life is a real life and the intangible dreams of people have a tangible effect on the world."

James Baldwin, Writer









### Janna Kretzmar, Founding director of Earthchild, writes:

This year the Earthchild Project realized a long-standing dream by launching Take 5 - our first ever national campaign, which aimed to bring together South Africans of all ages and backgrounds in a collective effort to create peace and well-being through a simple daily guided meditation. For 30 days in September, we invited participants to take just five minutes each day to listen to a guided meditation, cultivating calm, resilience, and a sense of community. What started as a vision for a simple daily practice grew into a powerful movement that reached millions of people, with significant positive impact.

At its heart, Take 5 was about creating accessible and inclusive tools for communities, especially those in under-resourced areas where mental health support is often limited. To ensure inclusivity, we produced the

guided audio meditations in five South African languages including English, isiXhosa, Afrikaans, isiZulu and seSotho. Participants could sign up for free and we ensured that Take 5 was available on multiple platforms so that more people could access the meditations.

We were overwhelmed by the positive response and by 1 September over 50 000 people had signed up, including individuals, schools, police stations, clinics, and community-based organizations. In addition, one of the most impactful achievements was our partnership with 52 community radio stations, who broadcast Take 5 throughout the month of September. Their collective listenership of over 6 million people allowed us to reach remote and

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underserved communities, ensuring Take 5 truly lived up to its goal of inclusivity.

We treated this first year of Take 5 as an experiment and therefore collecting data to measure the impact was a key component of the campaign. A post-campaign survey showed that over 90% of survey respondents reported improvements in their overall well-being, including reductions in stress and anxiety, and improved emotional resilience. Participants shared that Take 5 provided a valuable moment of calm and focus in their day, while teachers and caregivers observed notable emotional regulation improvements in children, especially those with ADHD or sensory needs.

The Take 5 experience also created a wonderful sense of connection. By gathering individuals in schools, workplaces, and homes around a shared daily practice, the campaign created pockets of calm that rippled across communities.

While our reach was impressive, this being our first year, we experienced many challenges and learnt many lessons along the way. Although we were amazed by the openness of schools and community-based groups to join the campaign, we saw that many needed more on the ground support to really implement Take 5 on a daily basis. In addition, finding ways to use digital platforms that are accessible for diverse audiences and then distributing the meditations in a way that enabled effective tracking, was a challenge and something we're excited to improve moving forward.

A core learning from this year was that there is an incredible openness and a need for tools like Take 5 - simple, accessible, positive and impactful. A practical tool that can support individuals and communities to connect to themselves, improve their well-being and to cultivate more peace and resilience. We are committed to continue growing Take 5, extending the reach and impact throughout South Africa. We are deeply grateful to The Sophia Foundation for taking a leap of faith and supporting us to create Take 5 - a moment for peace, a movement for change.

"The Take 5 experience also created a wonderful sense of connection. By gathering individuals in schools, workplaces, and homes around a shared daily practice, the campaign created pockets of calm that rippled across communities."

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As I reflect on the genesis of The Sophia Foundation I think of my parents without whose sacrifice and generous legacy the foundation would not exist. I think of my own journey and the mentors who helped me to grow into the vision of The Sophia Foundation those who inspired me to greater insights and those who challenged me. Then I remember Hayley Bagnall who supported me during the first three years of the foundation as I traversed unknown territory; Koos Rossouw, my fellow trustee who managed the fiduciary side with his team and also stood beside me in support; John Winship who leads our finance team and has generously volunteered his time from the beginning; Richard Minnaar, Bryn Hatty, and Thiam Marais of Stonehage Fleming, also from the finance team who are exploring models for managing our finances into the future to protect capital and balance operational costs with grant funding; the succession planning team who have worked with me throughout the year with complete commitment and dedication - Cecilia Solis Peralta whose penetrating research has highlighted the areas in our documentation that need further consideration to preserve Donor Intent, Nick Winearls who is leading our fiduciary review and Bryony De Stadler who will join our staff next year as my personal assistant but is already engaged in supporting the team; all of our partner organisations working for a kinder world and the riches gained and the lessons learnt from these contacts. Finally, I think of all the Friends of The Sophia Foundation who have given me so much support and believed in the vison of the foundation. A part of each one of you lives within The Sophia Foundation and without you it would not exist. I am deeply grateful.

The words from the ELIANT foundation seem very relevant to this time as The Sophia Foundation enters its next chapter and we do the groundwork that will

hopefully enable The Sophia Foundation to fulfil its vision of being a force for wisdom, beauty, truth and goodness well into the future.

"We need to sow the seeds of a Consciousness that is not discouraged by failure but trusts that a positive future-orientated thinking will sooner or later become a reality of life, even if we ourselves can only do this sowing and later generations reap the harvest."

With my warmest wishes and appreciation



Lorraine Forbes



The Sophia Foundation office at the Muse.