

جمعية دعم التعليم - تعلّم

High-Level Operating Model Report
December 2021

Ministry of Human Resources and
Social Development






Table of Content

#	Sections:	Page
1	Executive Summary	3
2	Introduction & Approach	17
3	Organizational Structure	23
4	Governance Model	27
5	Service Offering	39
6	Appendix	43



Executive Summary



The focus of this report is the high-level operating model for Ta'alum, this executive summary is broken out into four topics



Recap on the **strategic direction**, showcase the **target operating model framework** and key **benchmark insights** that will help shape the way of working for Ta'alum



Examine the **key functions** relevant to achieve Ta'alum's ambition and present the **organizational structure (N-1)** along with **roles & responsibilities**



Showcase the **proposed governance model** and its **committees** that are developed in **alignment** with **MHRSD's requirements** for Saudi based NGOs funded by the government



Conclude with the **high-level service offering** of Ta'alum that is deliberately designed to match the **NGO's transformation** along with an **outline** of the **framework** to select the **desired delivery model**



Recap: Many documents have been reviewed, stakeholders engaged and working team sessions conducted to shape the outputs of this project

01

Non-exhaustive

Ministry & Ecosystem Documents

15+ documents

Analyze **relevant documents** related to Ta'alum, MHRSD and the ecosystem, such as:

- *Strategies*
- *Social beneficiary studies*
- *Operating model inputs*
- *Royal decrees and legislation relevant to NGOs*

Internal & External Stakeholder Interviews

10 interviews

Gather insights through **interviews** with **representatives**:

- *His Excellency the Minister of HRSD*
- *Senior government officials within MHRSD*
- *Local NGOs in KSA*
- *Other govt. ecosystem stakeholders (e.g. TVTC)*
- *Universities in KSA*

Beneficiary Interviews²

50 interviews

Gather insights across **pre-enrollment, enrollment** and **employment** journey:

- *50 individual phone calls requested with social beneficiaries – 17 of which were conducted*
- *Broken into different stages (e.g. currently enrolled, dropped out, did not enroll, etc.)*

Ta'alum, MHRSD & EY Working Sessions

6 sessions

Leveraging on **knowledge within the client team** through various forms:

- *Project sponsorship working sessions*
- *Steering committees*
- *One-on-one consultation sessions*

EY Ripples, Research & Proprietary Database

6 NGOs

Extensive use of **EY Ripples and experience** to capitalize on leading practices in:

- *Strategic direction of education focused NGOs*
- *Operating model and third sector funding lessons learned*

Source: EY analysis, 2) unfortunately facilitation of social beneficiary interviews with EY team was not possible due to various client constraints



Recap: Ta'alum's strategic direction over the coming five years has been translated into a set of strategic objectives organized with cause-and-effect, displayed on the strategy map below

01

"شباب قادر بتعليم مُمَكِّن وعمل كريم"



الرؤية
أين نريد أن نصل؟

القيم
ماذا نريد أن نحقق؟

أصحاب المصلحة
ما هي التجربة التي نريد أصحاب المصلحة أن يعيشوها؟

العمليات/الإجراءات الداخلية
ما هي الأنشطة والعمليات المختلفة التي نريد أن نتفوق بها؟

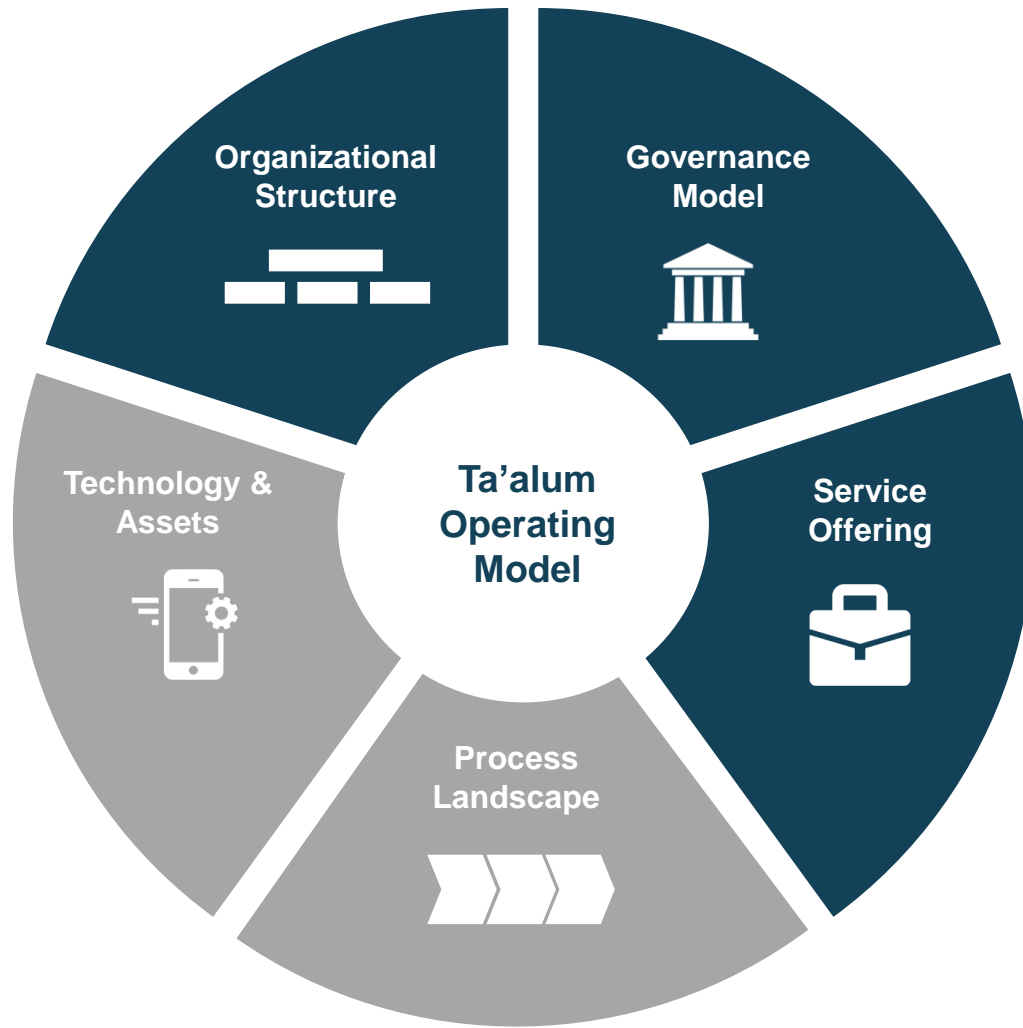
الممكنات
ما هو الأساس المطلوب لتحقيق استراتيجيتنا؟

Source: EY analysis

Source: EY analysis



A bespoke operating model framework has been crafted for Ta'alum – of which the primary elements have been detailed as part of this project engagement



Operating Model Overview



Organizational Structure

The high level organization **structure** for Ta'alum and the **roles & responsibilities** of the **key functions** of the organization up to **N-1**



Governance Model

The **governance** model and **committees**, defined in **alignment** with **MHRSD's requirements** for KSA govt. funded NGOs



Service Offering

The **service offering overview** that consists of the service **landscape** and **activation** by Ta'alum over the coming **five years**



Process Landscape

The **process landscape** related to the **value chain** that encapsulates Ta'alum's operations



Technology & Assets

The **technological & asset requirements** that are relevant to ensure Ta'alum operates in the most effective manner



not part of project engagement scope



Our extensive benchmark exercise of two regional and four global NGOs led to a set of considerations for shaping the way of working of Ta'alum



Benchmarked NGOs



Youth Off
The Streets



Shaw Trust
Group

shaw trust



United Negro
College Fund



North South
Foundation



Crown
Prince
Foundation



Alnahda
Society



Key Insights

Alternative Financing



Investment strategies can provide viable alternative funding sources and investment committees will ensure money is spent wisely

Financial Partnerships



Carefully selected partnerships can add direct financial value

Organizational Size



When you are large in size you may require subsidiaries to offer your services effectively

Donations



Do not underestimate the willingness to participate and invest by locals that are not based there

Advocacy



Lobbying actively and being the true voice of your target segment (e.g. dedicated Advocacy function)

Geographical Representation



If the target segment is highly geographically spread – there may be a need for regional offices

Governance



The regulatory environment and size of the organization tend to dictate the need for complex governance

Research Center



Perform extensive research to understand the target segment and create awareness

Growth



Organic is not the only viable option for growing the organization

Functions



Based on strategic priorities consider creating dedicated functions to push the right agenda

Operational Control



Some NGOs wish to exercise more operational control by e.g. owning schools / universities

Resourcing



Volunteers are a key asset to your organization



The landscape of functions that can be considered for an NGO is vast...



1. Core NGO Functions

1a. Fundraising	1b. Major Gifts & Individual Giving	1c. Advocacy
1d. Research	1e. Beneficiary Engagement	1f. Partnerships Network
1g. Technical Expertise	1h. Program Orchestration	1i. Program Delivery

Source: EY analysis, common functions of NGOs based on leading practice

... a set of questions should be examined to select the optimal configuration for Ta'alum



02



2. Enabling NGO Functions

2a. Finance
2b. Human Resources
2c. Marketing, Communications & Public Relations
2d. Legal Affairs
2e. Information Technology
2f. Strategy
2g. Business Excellence, Risk & Compliance



Key Questions

1

Is the **area a key focus** in Ta'alum's strategic **direction**?

2

Is the function **highly complex** and require **key capabilities**?

3

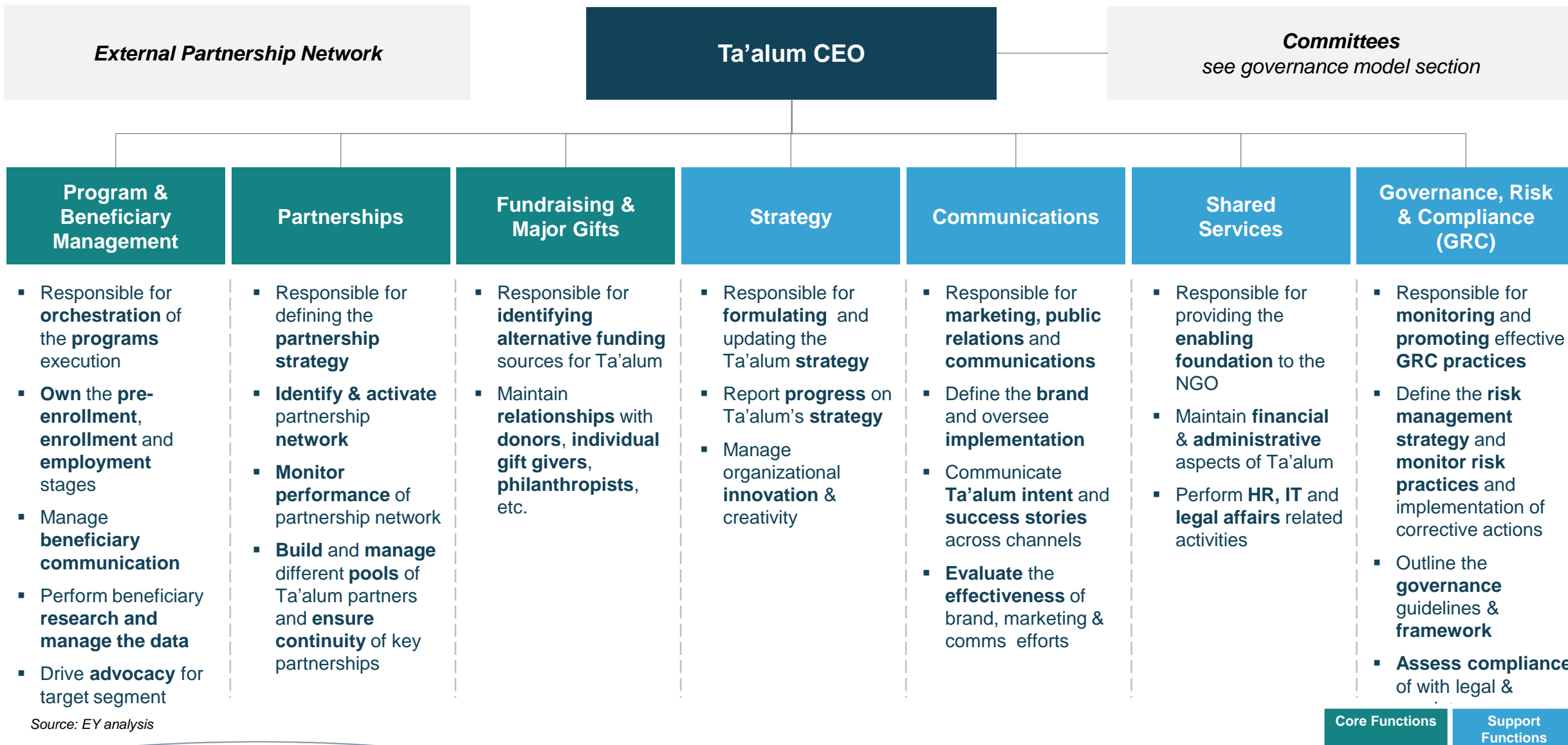
Does the **workload warrant** the **need** for a **dedicated function**?

4

Is **direct access** to the CEO **key** in driving the agenda?



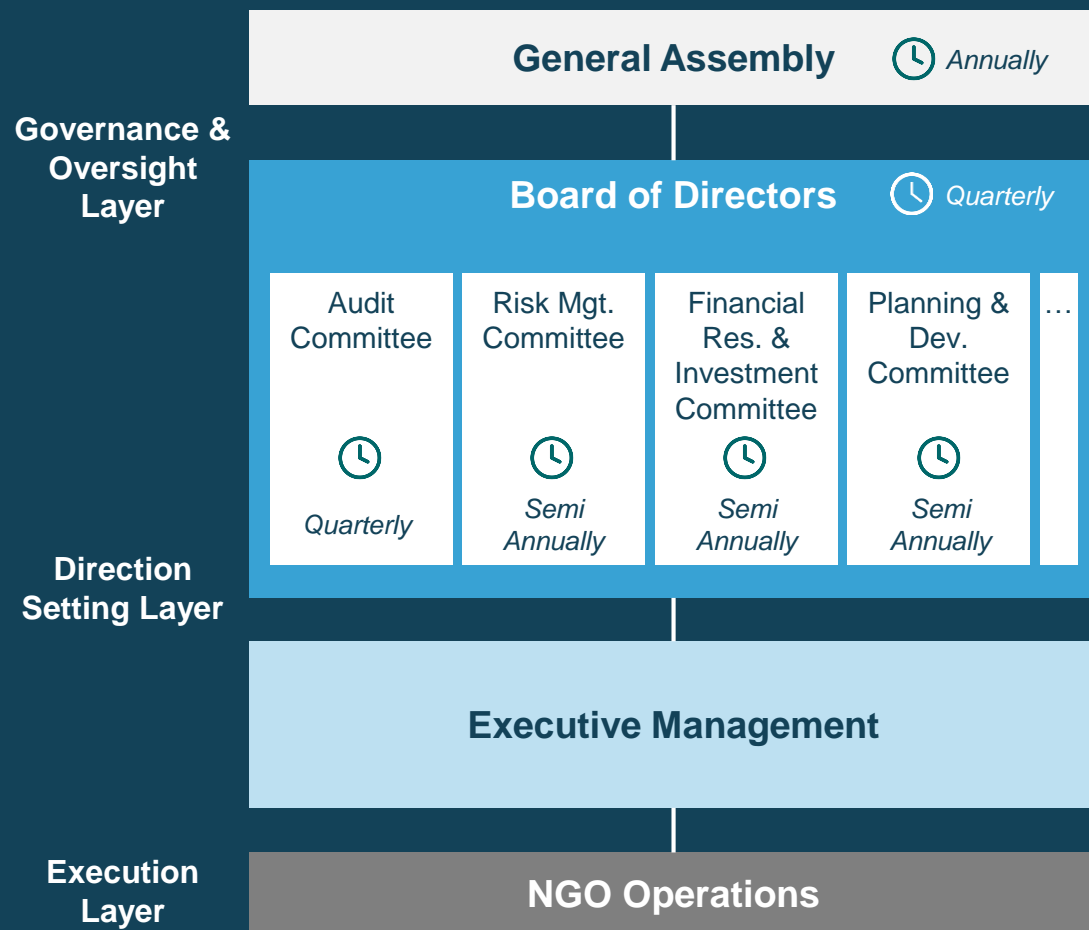
Considering Ta'alum's intent and the scarcity of resources in not-for-profit organizations, we believe it is key to be agile, more focused and combine multiple functions





MHRSD has defined requirements for the governance of NGOs...

NGO Governance Model Requirements



Source: EY analysis, MHRSD civil associations governance rules document



MHRSD proposed frequency

... with considerations to be adhered to by all NGOs that receive funding by the KSA govt.



03

Key Responsibilities

- General Assembly (GA)**
 - **Appoint** the **Board** and **oversee** the **NGO** and **BoD's** performance
 - **Approve foundational decisions** such as amendments in bylaws, mergers & acquisitions, etc.
- Board of Directors (BoD)**
 - **Review NGO performance**, social impact and realization of the strategy
 - **Manage NGO assets, financials** and develop **investment plans** for GA approval
 - **Shares** required data, **information** and financial statements with **MHRSD**
- Committee**

See next slide for proposed Ta'alum committees and roles

 - The audit, financial resources & investment, planning & development and risk mgt. committee are **required establishments for KSA based NGOs**
 - Each of the above **committees** has to be **chaired by a BoD member**
 - Any **additional committees** can be created as the NGO sees fit
- Executive Mgt.**
 - **Chaired** by the NGO's **CEO**
 - **Oversee implementation** of the **NGO strategy**
 - **Report progress** to the **Board** and respective committees
 - **Escalate key issues** that require higher levels of approval
- NGO Operations**
 - The documentation of MHRSD **does not provide any design implications** for the **way of working** of an **NGO** (e.g. functions, reporting lines, etc.)



In line with the requirements we recommend three committees to govern Ta'alum with unique responsibilities that work complementary and safeguard Ta'alum's success!



03



Strategy Council

مجلس الاستراتيجية

- The committee represents the Board in **overseeing** Ta'alum's **strategy outcome, budget and investment approach**
- Approve **the investment direction, policies and strategy** in line with the appropriate risk appetite of Ta'alum
- **Approve** Ta'alum **strategy and investment direction** in line with the appropriate risk appetite of Ta'alum
- Define the **eligibility criteria** and **examine the segments of social beneficiaries** to be targeted for participation
- **Monitor** Ta'alum's executive team **implementation and performance** of the **strategy & investment approach**
- **Approve** the **investment direction, policies and strategy** in line with the appropriate risk appetite of Ta'alum



Ta'alum Eligibility Council

مجلس اعتماد القبول والمتابعة

- The committee represents the Board to **shape Ta'alum core program foundation** and ensuring appropriate practices are followed to **accept social beneficiaries**
- **Work** closely with the **executive management** to ensure **implementation** of the **eligibly criteria and pplying the criteria's** related for **eligibility / acceptance**
- **Report** the **final list of admissions** to the **BoD** for final accreditation
- Involve **key stakeholders part of the ecosystem** throughout the design and implementation phases where deemed critical
- **Ensure fair** screening, **selection and acceptance** process for Ta'alum participants



Risk Management & Audit Committee

لجنة المراجعة والمخاطر

- The committee represents the Board in **overseeing** Ta'alum's **risk management practices**, and all material aspects of the Ta'alum's financial reporting, accounting policies and internal controls
- **Approve** the **risk management strategy** that entails the organization's **risk appetite & risk tolerances**
- Responsible for **overseeing risk exposures** and risk strategy for **broadly defined risks**
- **Oversee** the Ta'alum **organization's** audit both **internally and externally** and **compliance functions**
- **Examination** of reports of the **External Auditor** and on the **financial statements and follow-up** thereto

Key committees to be activated as soon as possible

Committee to be activated at a later stage

approach



Bi-monthly Meetings



Monthly Meetings



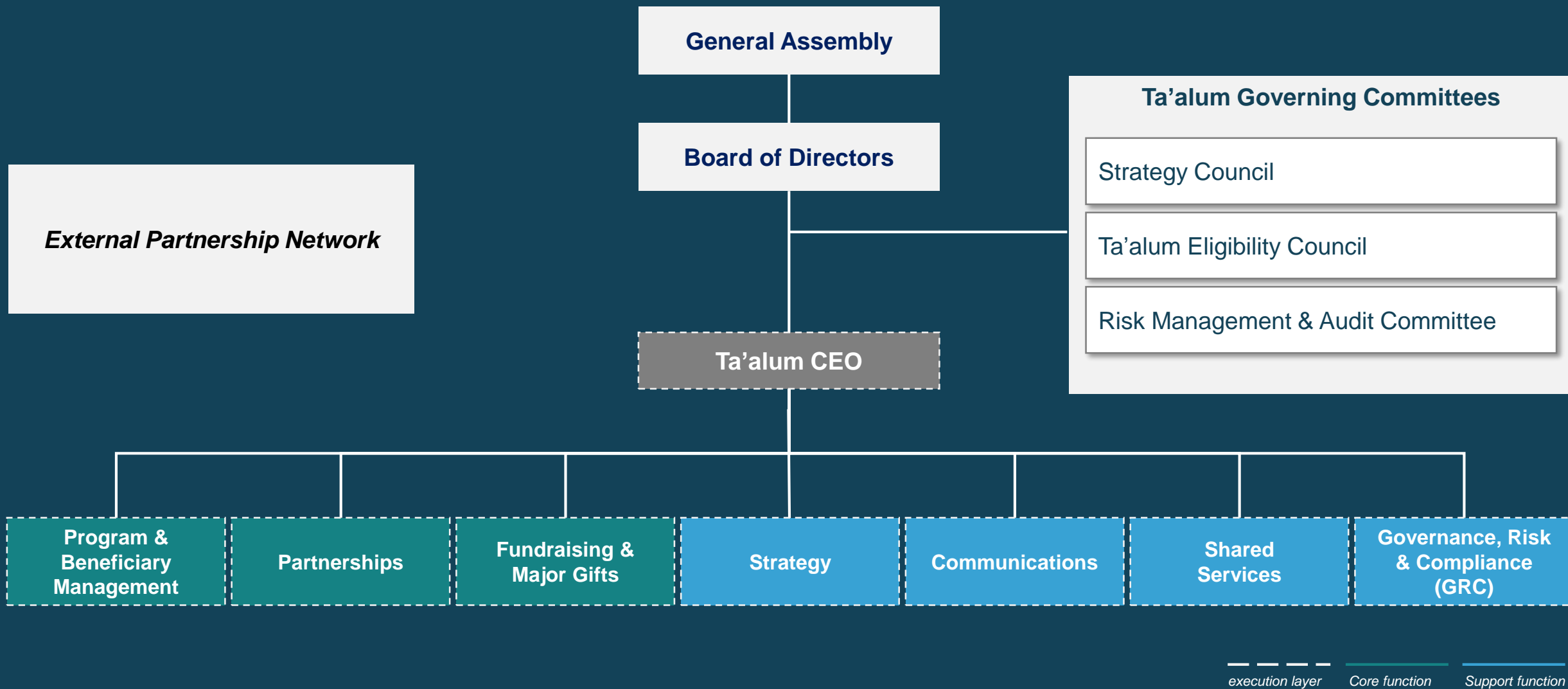
Quarterly Meetings



The proposed governance model and functions have been combined to create the “Ta’alum Organizational Structure”



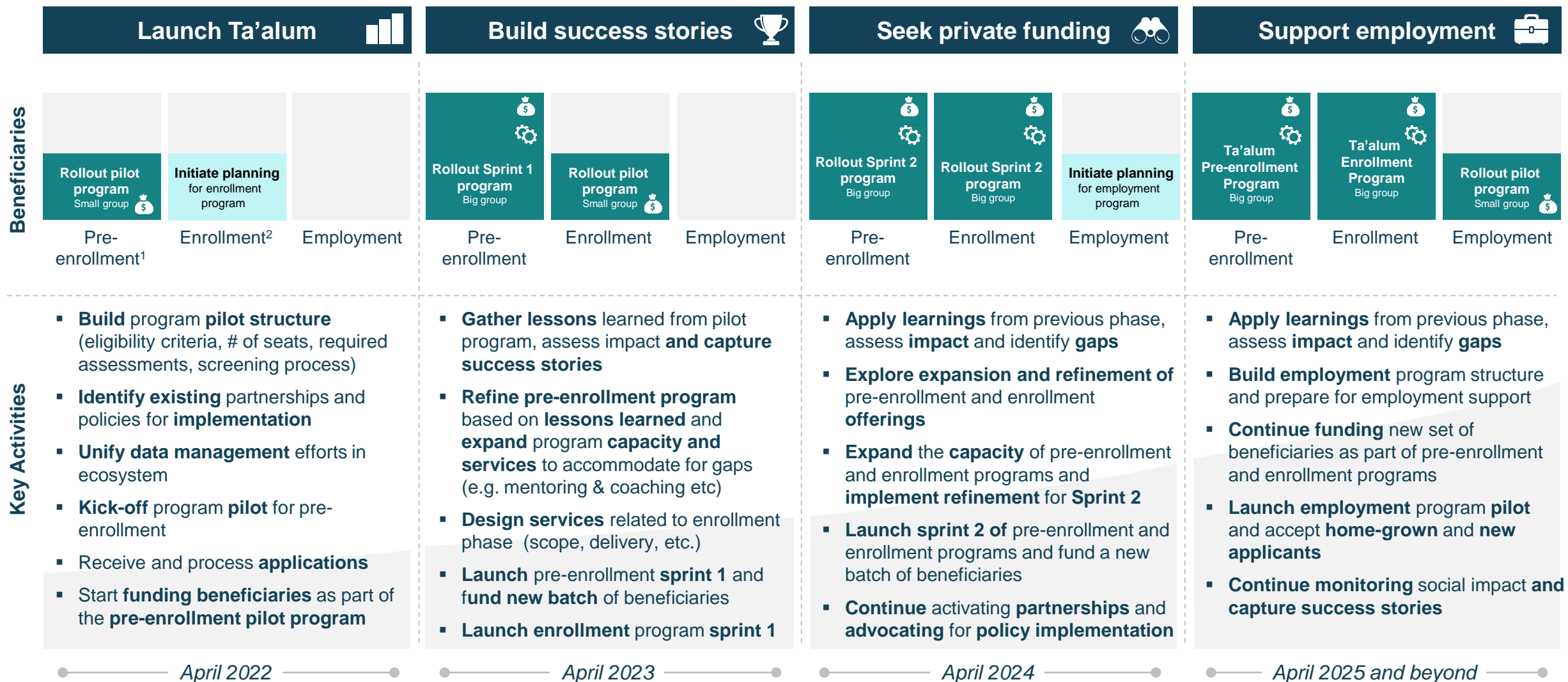
03



Source: EY analysis



Recap: Over the coming years, Ta'alum will gradually need to expand its beneficiary base, while activating supporting service offering, capabilities and ecosystem partnerships...



Source: EY analysis, 1) pre-enrollment stage looks at social beneficiaries that have obtained a high-school diploma for now, 2) enrollment stage is meant for social beneficiaries enrolling into vocational colleges or universities



Funding related service








Other services



..with the first year's focus on funding related services, while moving towards other services for pre-enrollment, enrollment and employment in line with the NGO's transformation



Services	Details (non-exhaustive)	Pre-enrollment	Enrollment	Employment
 A. Funding	A1. Schooling & Tuition Fees	Support to be offered at year 1	Support to be offered at year 2	Support to be explored and determined after year 3
	A2. Housing			
	A3. Transportation			
	A4. Food & Nutrition			
	A5. Supplies (Books, Clothing, Devices, Other)			
 B. Learning	B1. Virtual Learning	Support to be determined during year 2		
	B2. In Person Learning			
 C. Mentoring	C1. Academic Guidance	Support to be determined during year 2		
	C2. Social Counselling			
	C3. Career Mentoring			
 D. Training	D1. Workshops and Seminars	Support to be determined during year 2		
	D2. Delivery Of Training Courses			
	D3. Internships Job Shadowing			
 E. Matching	E1. Education Application Support	Support to be offered at year 2		
	E2. Job Application Support	Support to be explored and determined after year 3		
	E3. Opportunity Matching			

Source: EY analysis – the portfolio of services will need to be refined as part of the respective 3 design support initiatives for pre-enrollment, enrolment and employment (including the mode of delivery, whether in-house or vs. partnerships, etc.)



The initiatives for pre-enrollment, enrollment and employment will enable Ta'alum to take appropriate decisions on the desired delivery model by service offering



Illustrative

Ta'alum Strategic Initiatives

The strategic direction has a set of initiatives that will be key in shaping the delivery model by service for Ta'alum

1

E5.I1. Define the Ta'alum supporting partnerships strategy – Year 1 Q3

the partnership strategy is outlined in year 1, however re-iterations will be made according to the initiatives below and BAU execution will need to be aligned to the desired service offering delivery model

2

P2.I1. Create the Ta'alum education pre-enrollment support program – Year 1 Q3

3

P3.I1. Design the Ta'alum students in education support program – Year 2 Q1

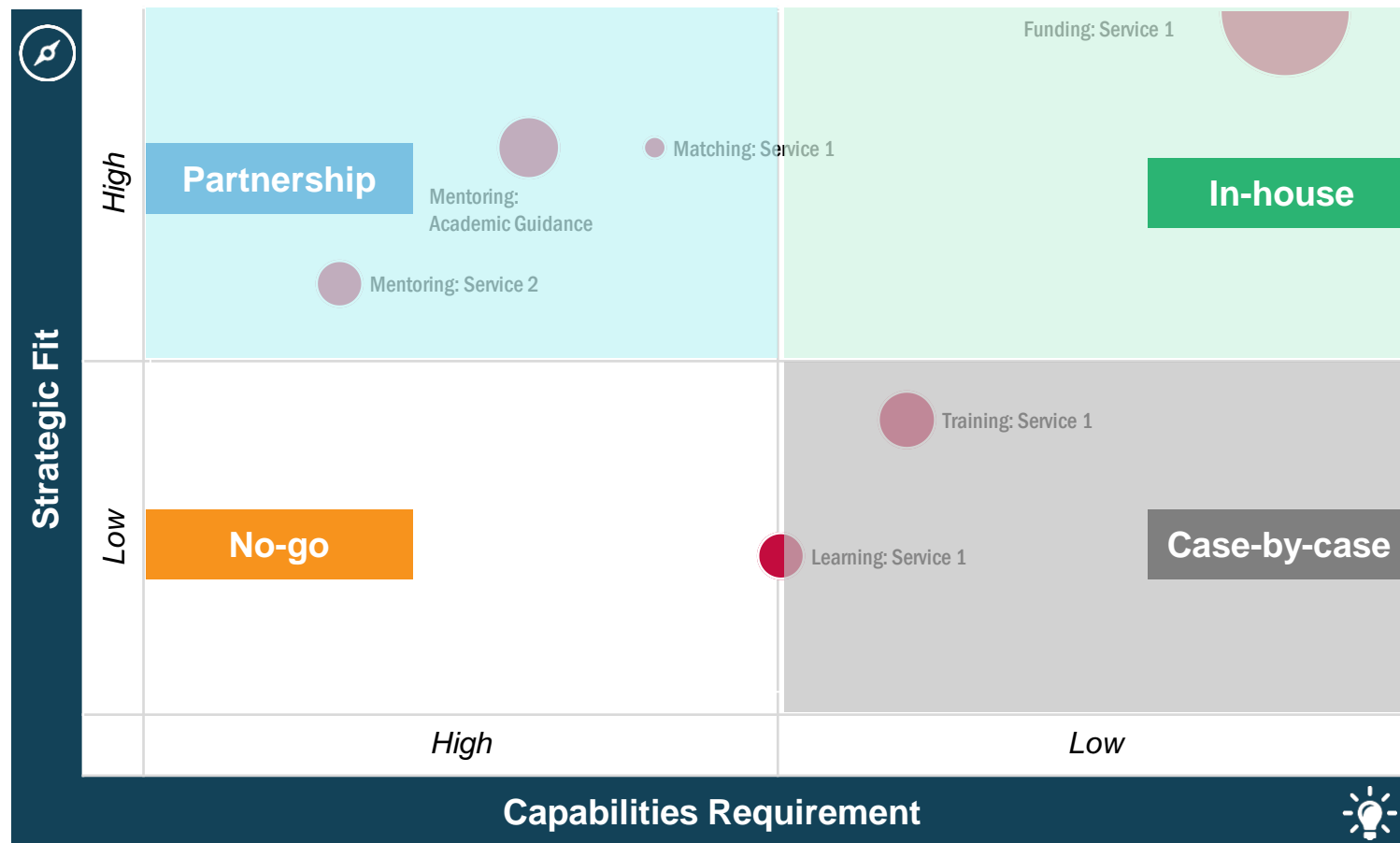
4

P5.I1. Develop pre- and employment support plan for Ta'alum students – Year 3 Q3

Source: EY analysis

Ta'alum Delivery Model By Service Rationalization Framework

 Bubble size represents the volume of Ta'alum participants / beneficiaries anticipated to be supported through the respective service offering





Introduction & Approach



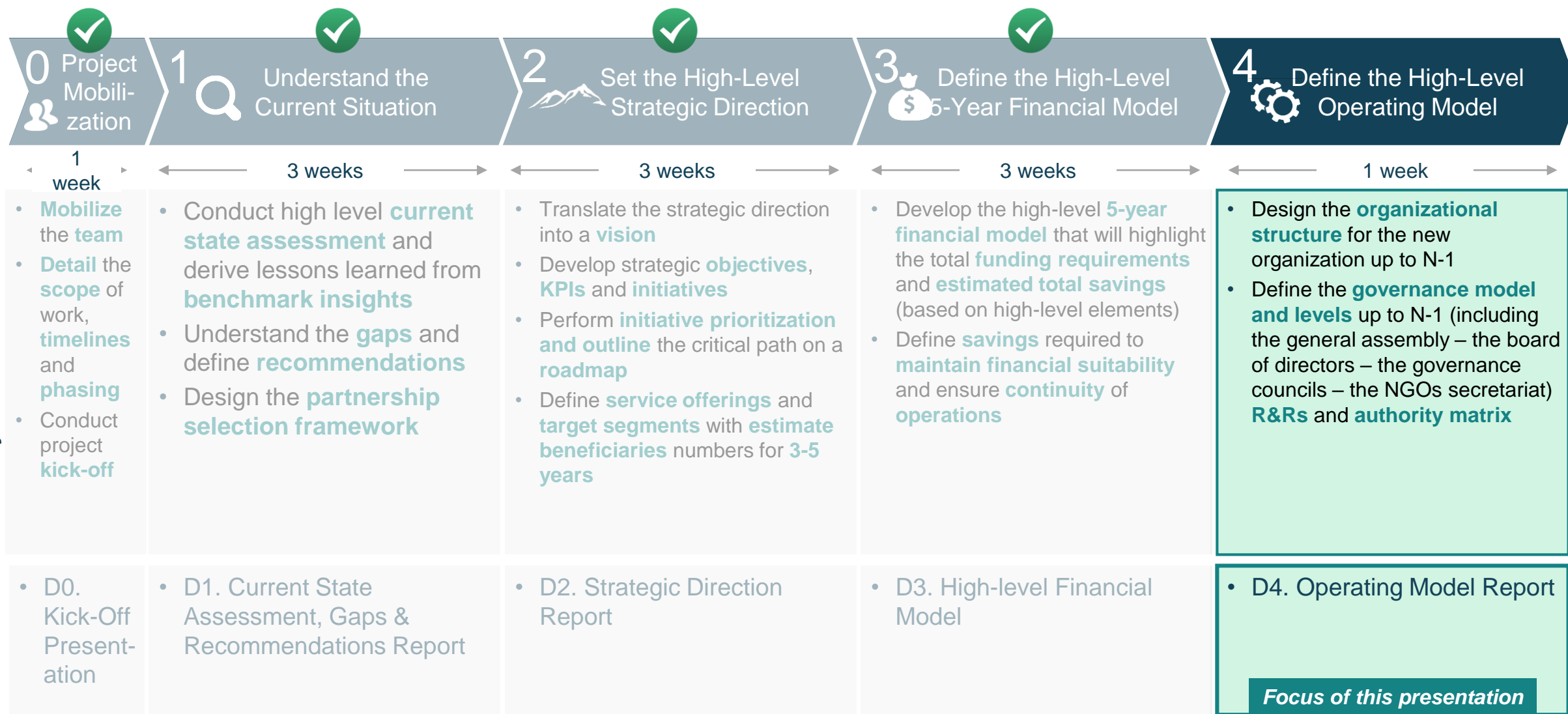
This project aims to set the foundation for the Social Security NGO “Ta’alum”...



Source: EY analysis



... with this document covering “Deliverable D4. Operating Model Report”

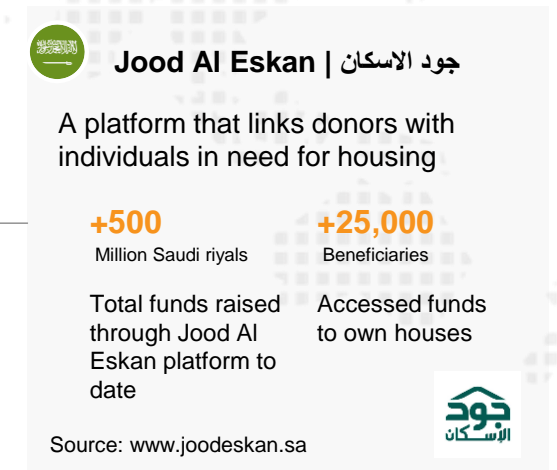
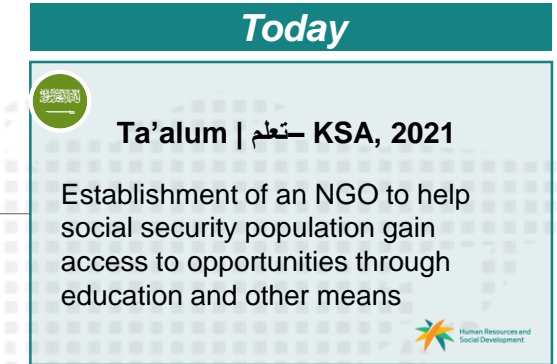
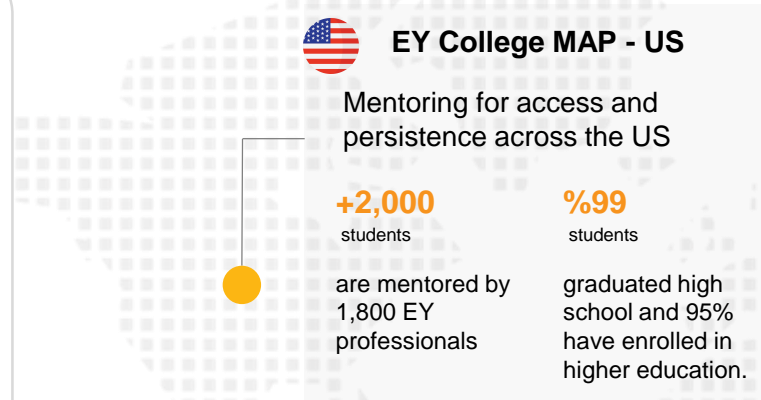
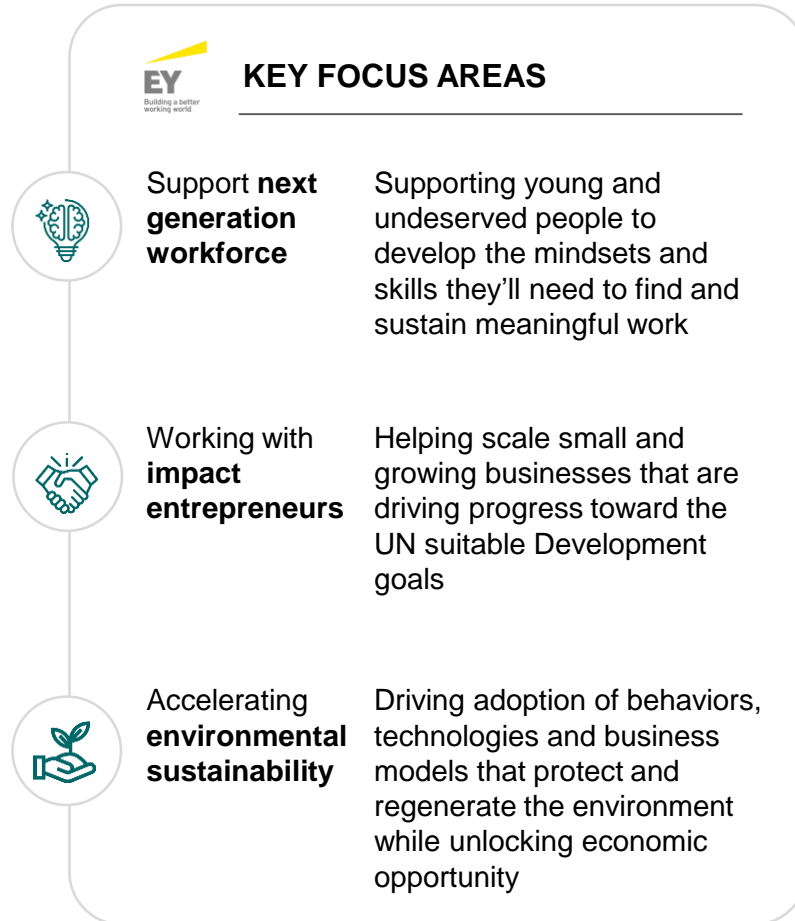


Source: EY analysis



The engagement has been funded through EY Ripples – EY’s Landmark Global Corporate Social Responsibility program, wherein we create impact in the social development domain across the globe!

Selection of examples of EY Ripples projects implemented from across the globe



Source: EY analysis



Many documents have been reviewed, stakeholders engaged and working team sessions conducted to shape the outputs of this project

Non-exhaustive

Ministry & Ecosystem Documents

15+ documents

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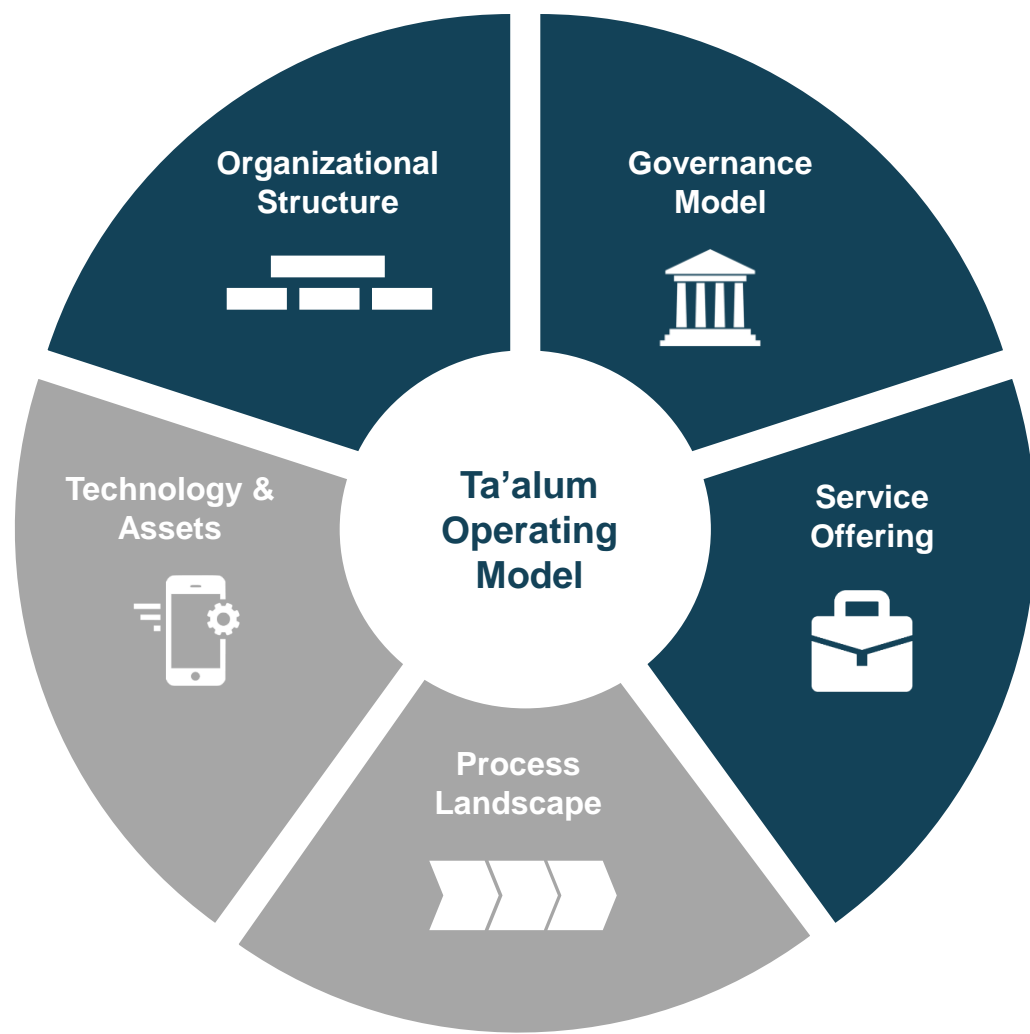
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The **technological & asset requirements** that are relevant to ensure Ta'alum operates in the most effective manner



not part of project engagement scope

Source: EY analysis



Organizational Structure



The landscape of functions that can be considered is vast...



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... a set of questions should be examined to select the right configuration for Ta'alum



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2a. Finance
2b. Human Resources
2c. Marketing, Communications & Public Relations
2d. Legal Affairs
2e. Information Technology
2f. Strategy
2g. Business Excellence, Risk & Compliance



Key Questions

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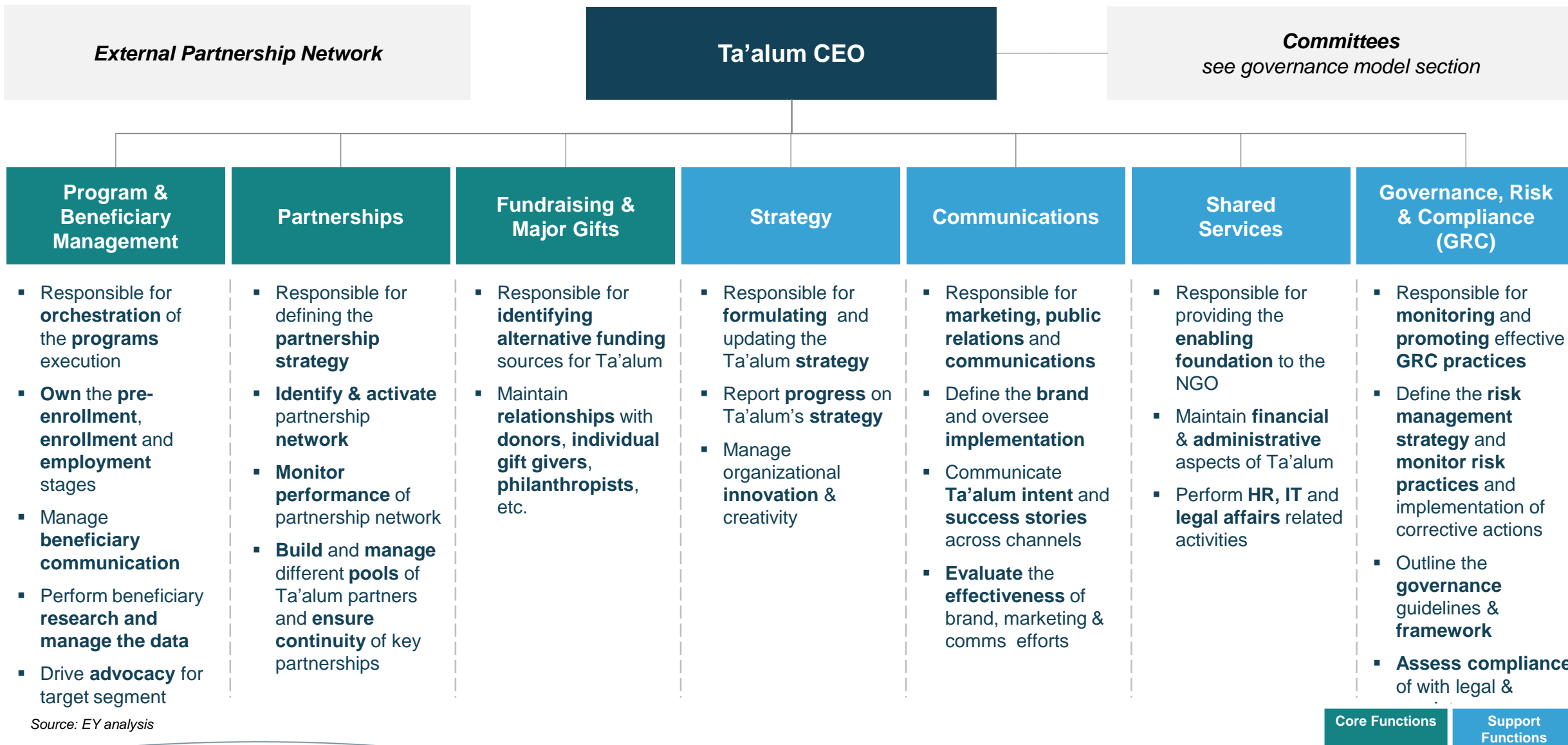
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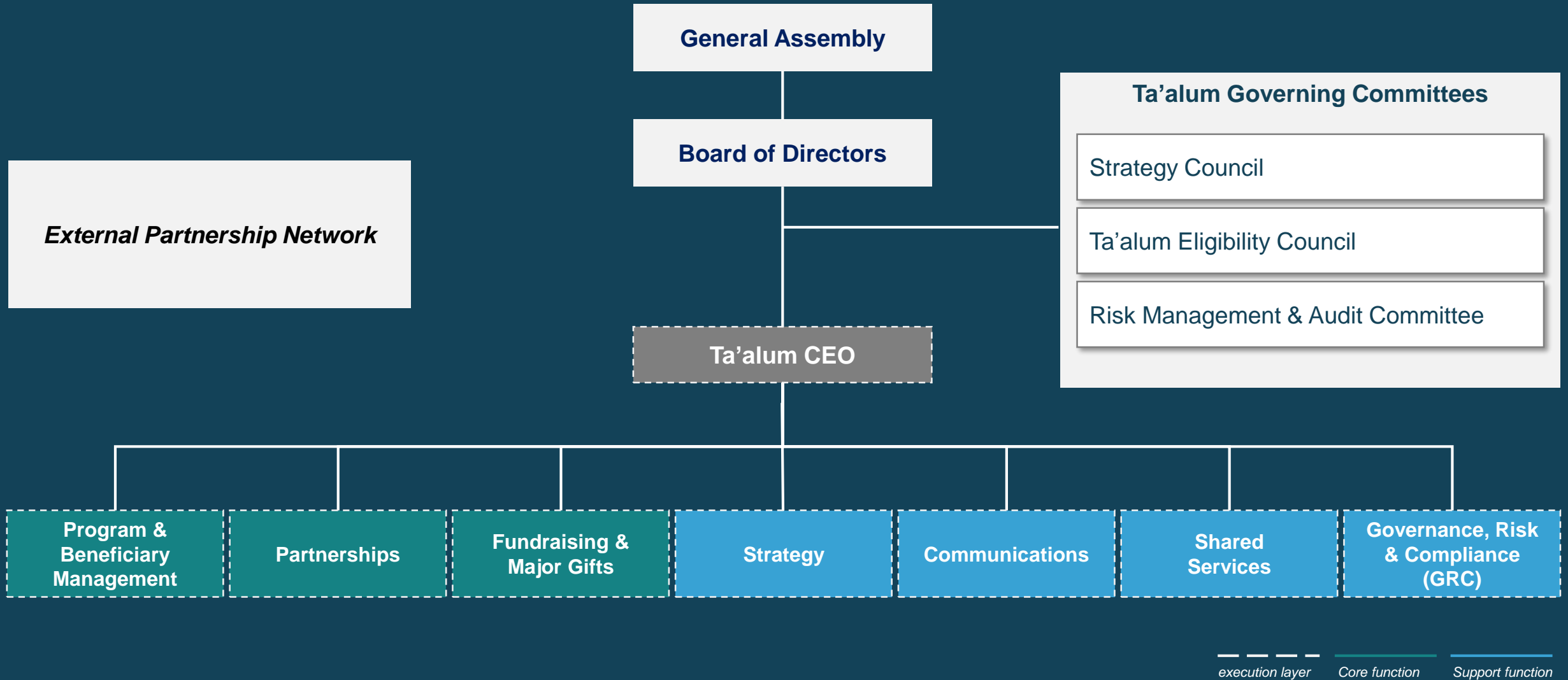
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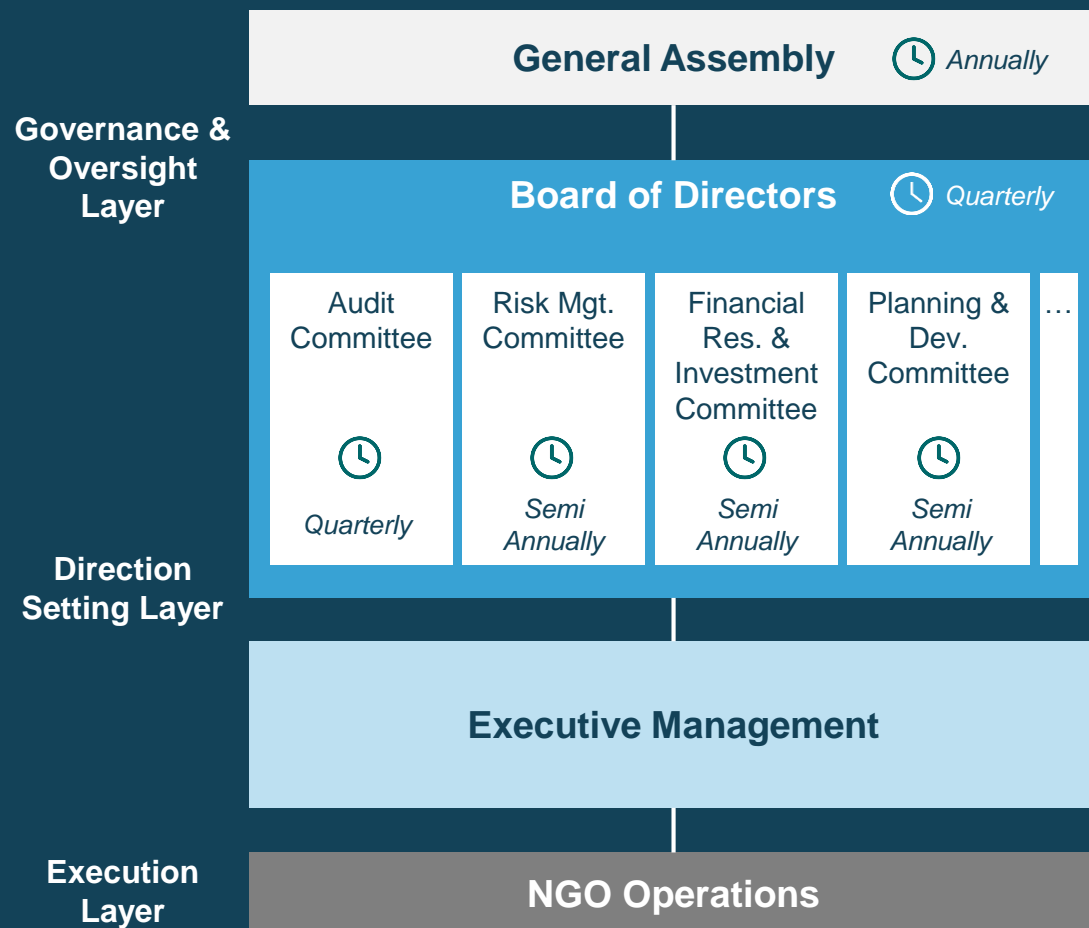


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Key Responsibilities

- | | |
|--|--|
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<i>See next slide for proposed Ta'alum committees and roles</i> | <ul style="list-style-type: none"> ▪ The audit, financial resources & investment, planning & development and risk mgt. committee are required establishments for KSA based NGOs ▪ Each of the above committees has to be chaired by a BoD member ▪ Any additional committees can be created as the NGO sees fit |
| Executive Mgt. | <ul style="list-style-type: none"> ▪ Chaired by the NGO's CEO ▪ Oversee implementation of the NGO strategy ▪ Report progress to the Board and respective committees ▪ Escalate key issues that require higher levels of approval |
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Based on the considerations we recommend three committees to govern Ta'alum with each unique responsibilities that work in harmony and safeguard Ta'alum's success!



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- **Report** the **final list** of **admissions** to the **BoD** for final accreditation
- Involve **key stakeholders part of the ecosystem** throughout the design and implementation phases where deemed critical
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Risk Management & Audit Committee

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- Responsible for **overseeing** risk **exposures** and risk strategy for **broadly defined risks**
- **Oversee** the Ta'alum **organization's** audit both **internally** and **externally** and **compliance functions**
- **Examination** of reports of the **External Auditor** and on the **financial statements** and **follow-up** thereto

Key committees to be activated as soon as possible

Committee to be activated at a later stage

approach



Bi-monthly Meetings



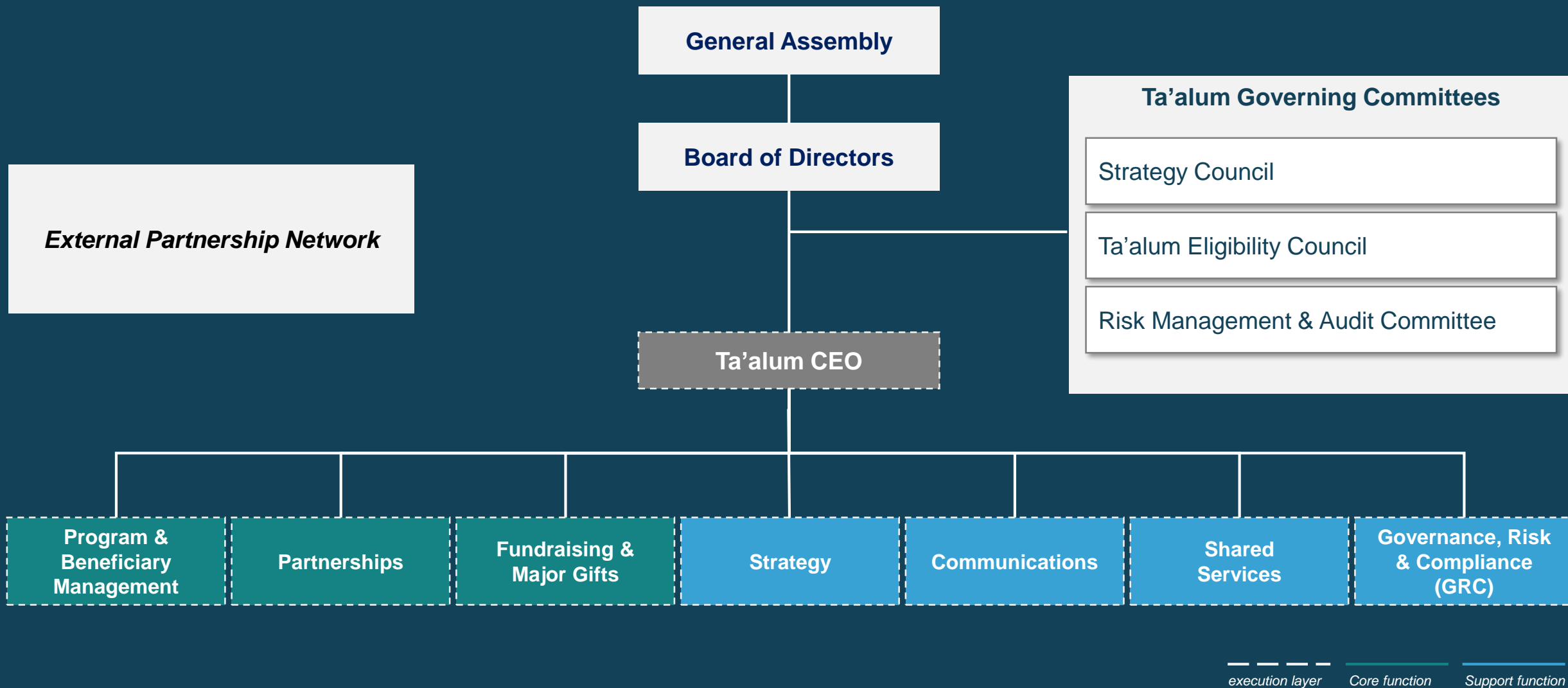
Monthly Meetings



Quarterly Meetings










The proposed governance model and functions have been combined to create the “Ta’alum Organizational Structure”



Source: EY analysis










The General Assembly is key in appointing the Board of Directors and approving foundational decisions that will impact Ta'alum

<div></div> <div>General Assembly</div>	Description <div></div>	Governance Layer <div></div>	Members <div></div>
	<p>The General Assembly appoints the Board of Directors and approves any decisions that are foundational to Ta'alum as an organization (e.g. bylaws, mergers & acquisitions, etc.)</p> <p>As per MHRSD requirement the General Assembly should meet a minimum of once a year.</p>	Governance & Oversight	<ul style="list-style-type: none">▪ His Excellency The Minister of Human Resources & Social Development▪ Other participants of the General Assembly are to be determined
		Direction Setting	
		Execution	
Main Responsibilities <div></div>			Key Outputs <div></div>
<ul style="list-style-type: none">▪ Hold accountability for the appropriate appointment of the Board of Directors and the right skillsets are present within the Board to govern and steer the organization▪ Approve foundational decisions such as amendments in bylaws, mergers & acquisitions, etc.▪ Evaluate the annual performance of the Board of Directors of Ta'alum▪ Oversee the organizational of Ta'alum against the ambitions and respective targets that were outlined in the strategic direction▪ Lobby on behalf of Ta'alum on any key changes that are necessary to the regulatory environment to enable the target segment▪ Examination and adoption of the auditor's report on the financial statements for the fiscal year ended after discussion			<ul style="list-style-type: none">▪ Appoint Board of Directors▪ Approve amendments in bylaws, mergers & acquisitions, etc.
			Frequency <div></div>
			Annually

Source: EY analysis









The Board of Directors holds fiduciary responsibility to represent and protect the interests of the company and wider stakeholder network – and is key in governing, overseeing and setting the direction of Ta'alum

<div></div> <div>Board of Directors</div>	Description 	Governance Layer 	Members 
	<p>The Board of Directors represents and protect the interests of the company and its stakeholders and is nominated by the General Assembly.</p> <p>The Board should at a minimum meet four times a year and have presence across key committees to govern Ta'alum</p>	Governance & Oversight	<ul style="list-style-type: none">▪ His Excellency The Minister of Human Resources & Social Development▪ Ta'alum CEO▪ Ta'alum Strategy and Partnerships departments Representative▪ Key external public and private sector stakeholder(s)▪ Additional participants invited upon request
		Direction Setting	
		Execution	
Main Responsibilities 			Key Outputs 
<ul style="list-style-type: none">▪ Hold a fiduciary responsibility to represent and protect the interests of the company▪ Provide direction for the organization by supporting the creation of long-term value on behalf of all involved stakeholders▪ Promote a strong resilience system is in place across the business (governance, compliance, audit, risk management, etc.)▪ Drive the effective use of financial resources through embedding sustainable practices▪ Lead on diversity, equity and inclusion and ensuring the right workforce practices are in place to enable the organization (incl. remuneration of senior stakeholders)			<ul style="list-style-type: none">▪ Approve the governance, compliance and risk management approach of Ta'alum▪ Approve the strategic direction and investment approach of Ta'alum▪ External reporting of achievements
			Frequency 
			Semi-annually

Source: EY analysis










The Ta'alum Participant Eligibility Council plays a key role in shaping the Ta'alum core program and overseeing the social beneficiary screening, selection and acceptance process is done right

<div></div> <div>Ta'alum Participant Eligibility Committee</div>	<div>Description<i>i</i></div> <div>The council represents the Board to shape Ta'alum core program foundation and ensures eligibility criteria is properly implemented.</div> <div>the council shall meet on a monthly basis to review the progress of beneficiaries admission and oversee the process of screening</div>	<div>Governance Layer</div> <div>Governance & Oversight</div> <div>Direction Setting</div> <div>Execution</div>	<div>Members</div> <div><ul style="list-style-type: none">Minimum of one representative from the Board of DirectorsTa'alum CEORepresentative from the departments Strategy, Partnerships and Program & Beneficiary ManagementAdditional internal and external participants invited upon request</div>
	<div>Main Responsibilities</div> <div><ul style="list-style-type: none">Work closely with the executive management to ensure implementation of the eligibly criteria and pplying the criteria's related for eligibility / acceptanceReport the final list of admissions to the BoD for final accreditationApprove the total number of seats for social beneficiaries in the Kingdom targeted across pre-enrollment, enrollment and employment stagesInvolve key stakeholders part of the ecosystem throughout the design and implementation phases where deemed criticalEnsure fair screening, selection and acceptance process for Ta'alum participants</div>	<div>Key Outputs</div> <div><ul style="list-style-type: none">Ensure fair screening, selection and acceptance process for Ta'alum participantsApproved allocated number of seats</div>	
	<div>Frequency</div> <div>Monthly</div>		

Source: EY analysis










The Strategy Council plays a key role in setting the high level strategic direction for the investment, policies and strategy in line with the appropriate risk appetite of Ta'alum

<div></div> <div>Ta'alum Participant Eligibility Committee</div>	Description <div></div>	Governance Layer <div></div>	Members <div></div>
	<p>The council represents the Board to shape Ta'alum strategic direction and ensuring appropriate practices are followed to accept social beneficiaries.</p> <p>There is no requirement on how frequent the council should meet. Two times a year is in line with the school entry system in the Kingdom</p>	Governance & Oversight	<ul style="list-style-type: none">Minimum of one representative from the Board of DirectorsTa'alum CEORepresentative from the departments Strategy, Partnerships and Program & Beneficiary ManagementAdditional internal and external participants invited upon request
		Direction Setting	
		Execution	
Main Responsibilities <div></div>			Key Outputs <div></div>
<ul style="list-style-type: none">Approve the direction for strategy, policy and investment in line with the appropriate risk appetite of Ta'alum (including the budgets)Monitor Ta'alum's executive team implementation and performance of the strategy & investment approachIndependently define the eligibility criteria and examine the segments of social beneficiaries to be targeted for participationApprove the total number of seats for social beneficiaries in the Kingdom targeted across pre-enrollment, enrollment and employment stagesSeek approval by the General Assembly for significant changes to the direction			<ul style="list-style-type: none">Approved eligibility criteria and target segment of social beneficiariesApproved screening, selection and acceptance process
			Frequency <div></div>
			Bi-monthly

Source: EY analysis










The Risk Management & Audit committee plays a key role in overseeing Ta'alum has applied a risk strategy & approach across the organization and to ensure transparency and good financial management practices

 Risk Management & Audit Committee	Description 	Governance Layer 	Members 
	The Committee represents the Board in overseeing Ta'alum's risk management practices and all material aspects of the Ta'alum's financial reporting, accounting policies, internal controls that promote good financial management practice to ensure that a clear strategy and approach is taken built on the right levels of risk appetite and tolerance for	Governance & Oversight	<ul style="list-style-type: none">Minimum of one representative from the Board of DirectorsTa'alum CEORepresentative from the departments Strategy, Partnerships and GCRAdditional internal and external participants invited upon request
		Direction Setting	
		Execution	
Main Responsibilities 			Key Outputs 
<ul style="list-style-type: none">Approve the risk management strategy that entails the organization's risk appetite, risk tolerances and utilization of risk appetiteEnsure compliance with the accounting standards issued by the Saudi Authority of Chartered Accountants and with the accounting forms and reports issued by the MinistryEnsure that risk management is embedded in the business and all decision making processesMonitor the integrity of the financial statements and periodic financial reportsEvaluate the internal controls of the organization to ensure robust practices are embedded in the NGOExamine internal audits and follow-up on the implementation of corrective actionsOversight on the implementation of the risk management strategy & approach by Ta'alum's executive management team			<ul style="list-style-type: none">Approved risk approach ,guidelines and to generate risk report with corrective actions that need to be implemented across Ta'alumApproved financial statements ,reports and to Recommendations on internal
			Frequency 
			Quarterly

Source: EY analysis





The Executive Management of Ta'alum is responsible for overseeing the day-to-day operations of the organization and ensure the strategy and operations are effectively implemented in line with the direction (1/3)

 Executive Management	Description 	Governance Layer 	Members 
	<p>The Executive Management represents the Board in delivering on the promises that Ta’alum aims to achieve (e.g. strategy, investment approach, talent management and resilient way of working)</p> <p>Should meet monthly / bi-weekly to steer the organization</p>	Governance & Oversight	<ul style="list-style-type: none">▪ Ta’alum CEO▪ Ta’alum representative from each of the functions that report directly to the CEO▪ Additional internal and external participants invited upon request
		Direction Setting	
		Execution	
Main Responsibilities 		Key Outputs 	
<ul style="list-style-type: none">▪ Hold the responsibility for driving Ta’alum’s success through building and executing the strategy, investment approach, talent management, and stakeholder engagement▪ Build the organization as deemed necessary to deliver on the promises that were made▪ Safeguard the anticipated results of Ta’alum’s operations and the strategic course▪ Ensure that the organization is abiding by respective laws and regulations and has a resilient system of governance, risk and compliance in place▪ Take key strategic decisions and escalate where higher levels of approval are necessary to drive the way forward (e.g. Board of Directors or respective committees)		<ul style="list-style-type: none">▪ Quarterly strategy reports that outline the progress and performance of Ta’alum▪ Escalation of key decisions for approval to relevant committees & Board of Directors	
		Frequency 	
		Monthly / Bi-weekly	





The Executive Management of Ta'alum is responsible for overseeing the day-to-day operations of the organization and ensure the strategy and operations are effectively implemented in line with the direction (2/3)

<div></div> <div>Executive Management</div>	<div>Description</div> <div>The Executive Management represents the Board in delivering on the promises that Ta’alum aims to achieve (e.g. strategy, investment approach, talent management and resilient way of working)</div> <div>Should meet monthly / bi-weekly to steer the organization</div>	<div>Governance Layer </div> <div>Governance & Oversight</div> <div>Direction Setting</div> <div>Execution</div>
Function	Main Responsibilities	
Program & Beneficiary Management	<ul style="list-style-type: none">▪ Responsible for orchestration of the programs execution▪ Own the pre-enrollment, enrollment and employment stages▪ Manage beneficiary communication▪ Perform beneficiary research and manage the data▪ Drive advocacy for target segment	Core Function
Partnerships	<ul style="list-style-type: none">▪ Responsible for defining the partnership strategy▪ Identify & activate partnership network▪ Monitor performance of partnership network▪ Build and manage different pools of Ta’alum partners and ensure continuity of key partnerships	Core Function
Fundraising & Major Gifts	<ul style="list-style-type: none">▪ Responsible for identifying alternative funding sources for Ta’alum▪ Maintain relationships with donors, individual gift givers, philanthropists, etc.	Core Function



The Executive Management of Ta'alum is responsible for overseeing the day-to-day operations of the organization and ensure the strategy and operations are effectively implemented in line with the direction (3/3)

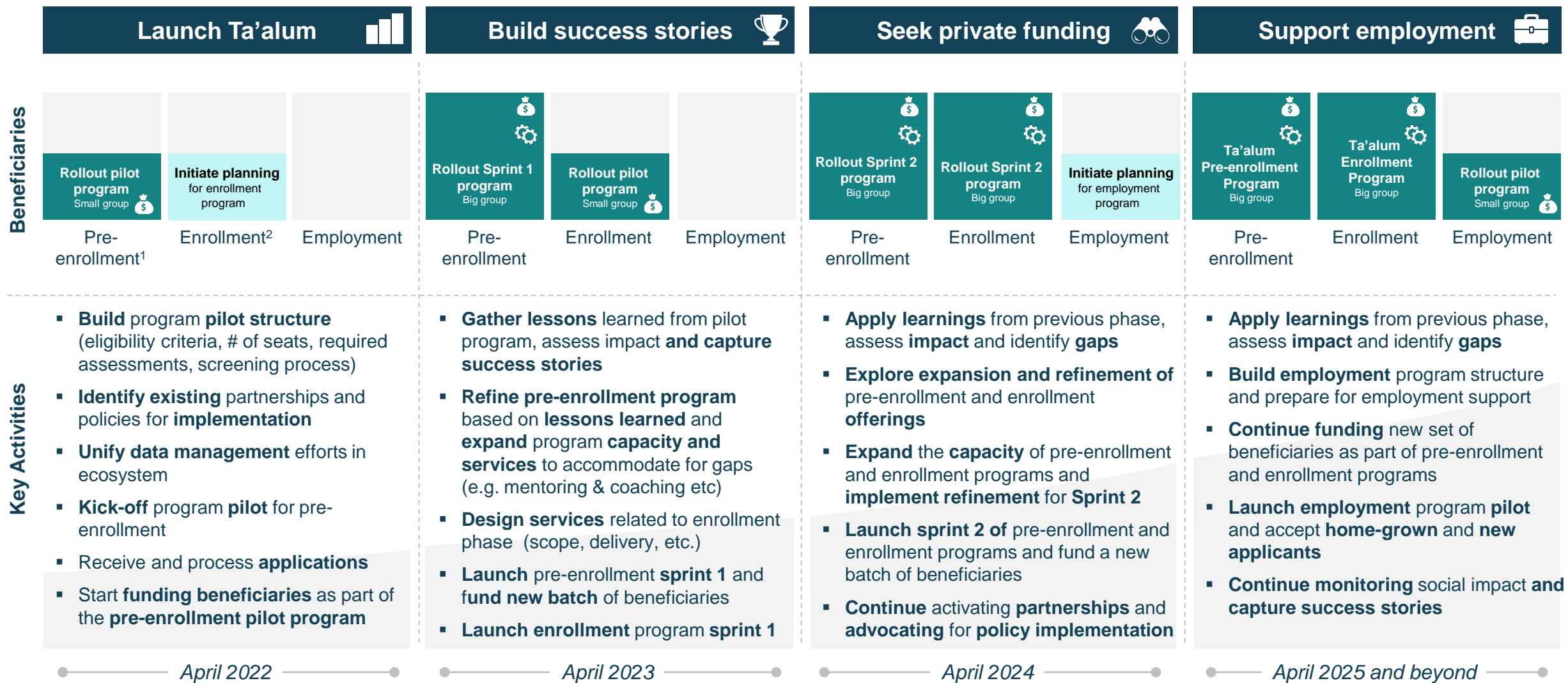
 Executive Management	Description	Governance Layer 
	<p>The Executive Management represents the Board in delivering on the promises that Ta'alum aims to achieve (e.g. strategy, investment approach, talent management and resilient way of working)</p> <p>Should meet monthly / bi-weekly to steer the organization</p>	<p>Governance & Oversight</p> <p>Direction Setting</p> <p>Execution</p>
Function	Main Responsibilities	
Strategy	<ul style="list-style-type: none"> Responsible for formulating and updating the Ta'alum strategy Report progress on Ta'alum's strategy Manage organizational innovation & creativity 	Support Function
Communications	<ul style="list-style-type: none"> Responsible for marketing, public relations and communications Define the brand and oversee implementation Communicate Ta'alum intent and success stories across channels Evaluate the effectiveness of brand, marketing & comms efforts 	Support Function
Shared Services	<ul style="list-style-type: none"> Responsible for providing the enabling foundation to the NGO Maintain financial & administrative aspects of Ta'alum Perform HR, IT and legal affairs related activities 	Support Function
Governance, Risk & Compliance (GRC)	<ul style="list-style-type: none"> monitoring and promoting effective GRC practices Define the risk management strategy and monitor risk practices and implementation of corrective actions Outline the governance guidelines & framework Assess compliance of with legal & regulatory requirements 	Support Function



Service Offering



Over the coming years, Ta'alum will gradually need to expand its beneficiary base, while activating supporting service offering, capabilities and ecosystem partnerships...



Source: EY analysis, 1) pre-enrollment stage looks at social beneficiaries that have obtained a high-school diploma for now, 2) enrollment stage is meant for social beneficiaries enrolling into vocational colleges or universities








Funding related service



Other services



... with the first year's focus on funding related services, while moving towards other services spread across pre-enrollment, enrollment and employment in line with the NGO's transformation

Services	Details (non-exhaustive)	Pre-enrollment	Enrollment	Employment
 A. Funding	A1. Schooling & Tuition Fees	Support to be offered at year 1	Support to be offered at year 2	Support to be explored and determined after year 3
	A2. Housing			
	A3. Transportation			
	A4. Food & Nutrition			
	A5. Supplies (Books, Clothing, Devices, Other)			
 B. Learning	B1. Virtual Learning	Support to be determined during year 2		
	B2. In Person Learning			
 C. Mentoring	C1. Academic Guidance	Support to be determined during year 2		
	C2. Social Counselling			
	C3. Career Mentoring			
 D. Training	D1. Workshops and Seminars	Support to be determined during year 2		
	D2. Delivery Of Training Courses			
	D3. Internships Job Shadowing			
 E. Matching	E1. Education Application Support	Support to be offered at year 2		
	E2. Job Application Support	Support to be explored and determined after year 3		
	E3. Opportunity Matching			

Source: EY analysis – the portfolio of services will need to be refined as part of the respective 3 design support initiatives for pre-enrollment, enrolment and employment (including the mode of delivery, whether in-house or vs. partnerships, etc.)



The initiatives for pre-enrollment, enrollment and employment will enable Ta'alum to take appropriate decisions on the desired delivery model by service offering

Illustrative

Ta'alum Strategic Initiatives

The strategic direction has a set of initiatives that will be key in shaping the delivery model by service for Ta'alum

1

E5.I1. Define the Ta'alum supporting partnerships strategy – Year 1 Q3

the partnership strategy is outlined in year 1, however re-iterations will be made according to the initiatives below and BAU execution will need to be aligned to the desired service offering delivery model

2

P2.I1. Create the Ta'alum education pre-enrollment support program – Year 1 Q3

3

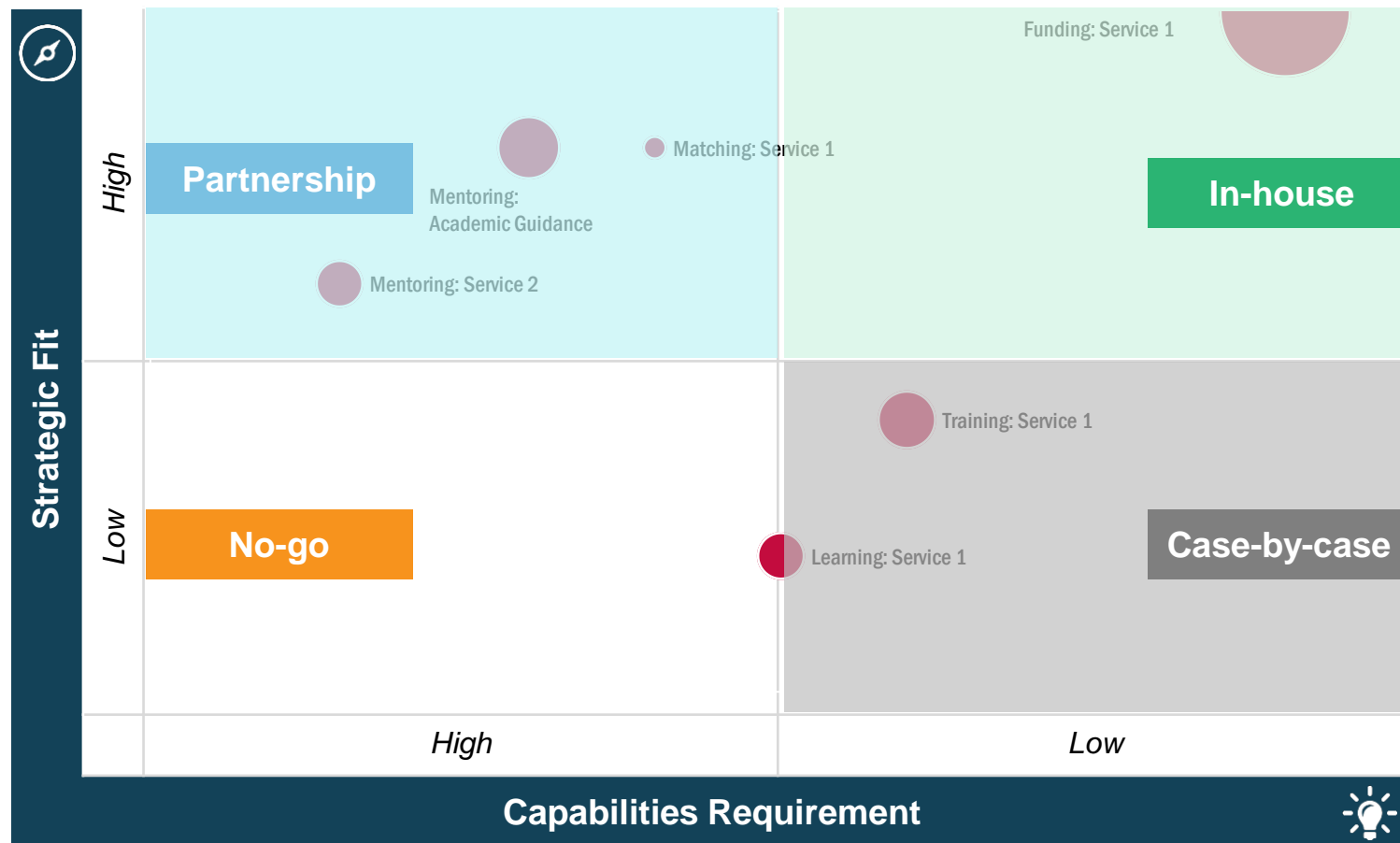
P3.I1. Design the Ta'alum students in education support program – Year 2 Q1

4

P5.I1. Develop pre- and employment support plan for Ta'alum students – Year 3 Q3

Ta'alum Delivery Model By Service Rationalization Framework

● Bubble size represents the volume of Ta'alum participants / beneficiaries anticipated to be supported through the respective service offering



Source: EY analysis



Appendix



With four key learnings from Shaw Trust's way of working identified for Ta'alum



Shaw Trust

shaw trust

Governance

Board of Trustees	Audit and Risk Committee	HR Committee	Investment Committee
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Org. Structure / Functions

Shaw Trust Group Functions

Group CEO	Chief Corporate Officer	Chief People Officer	Commercial Officer
Chief Financial Officer	Support Functions	Communications and PR	Strategic Partnerships

Subsidiaries

Employability	Ixion	Optimus Education	Justice, Community Health & Wellbeing, Charitable Services and Enterprise
Education & Skills	Homes2Inspire	Children, Young People & Family Services	

For detailed benchmark slides please refer to the Ta'alum CSA report as part of this project

Key Learnings

1

Organic is not the only option for growth:

- Shown by Shaw Trust Group as they acquired various companies over the years to compliment its service offering

2

When you are large in size you may require subsidiaries to offer your services effectively:

- Shaw Trust Group utilizes subsidiaries to service over 290k beneficiaries

3

Financial sustainability can be supported through innovation:

- Shaw owns social enterprises and retail shops run by volunteers with proceeds going to the group
- Dedicated commercial officer position

4

Organization size and regulatory environment dictates need for complex governance:

- Shaw Trust has more committees than the other five benchmarked NGOs



With four key learnings from UNCF's way of working identified for Ta'alum



United Negro College Fund



Governance

Board of Directors

Investment Committee

Leadership Team

Org. Structure / Functions

CEO

CFO

COO

Chief Development Officer

People & Culture

General Counsel

Programs & Student Services

Public Policy & Govt. Affairs

Research, Learning & Member Engagement

Advocacy & Student Prof. Dev program

Information Technology

Branding, Marketing & Communications

Development Vice Presidents

National Development Operations

Northeast Region

Southern Region

Mid-Atlantic and Midwest Region

Western Region

Major Gifts & Individual Giving

Source: EY analysis, annual reports, website

For detailed benchmark slides please refer to the Ta'alum CSA report as part of this project

Key Learnings

1

If target segment is geographically spread – there may be a need for regional offices:

- UNCF has over 23 offices overseen by 5 vice presidents – showing a clear priority

2

Board of Directors of Global NGOs tend not to have governmental presence:

- UNCF utilizes large private sector companies and has many university representatives

3

Investment committees can be key in ensuring sustainable financial practices are followed:

- UNCF invests and manages a wide spread portfolio (holding over \$100 million)

4

Based on strategic priorities consider creating dedicated functions to push agenda:

- Advocacy
- Public Policy & Govt. Affairs
- Fundraising: Gifts & Individual Gifting
- Research & Member Engagement

With three key learnings from YOTS' way of working identified for Ta'alum



Father Chris Riley's Youth Off The Streets



Governance

Board of Directors

Functions

Org. Structure / Functions

CEO

Youth Support
Services

Organization
Capability

Schools

Finance, Risk &
Compliance

Revenue &
Partnerships

Cultural
Development

Marketing &
Communications

Source: EY analysis, annual reports, website

For detailed benchmark slides please refer to the Ta'alum CSA report as part of this project

Key Learnings

1

Investment strategies can provide viable alternative funding sources:

- YOTS uses a deliberate investment strategy focused on safe, steady and secure return over the medium term
- \$190k USD in 2019 was obtained

2

Partnerships can drive financial value:

- Partnership with an investment company that does not charge fees for managing YOTS portfolio while also donating part of its proceeds to YOTS

3

Some NGOs wish to exercise more operational control and want to safeguard results:

- Evident from YOTS's management of six schools across Australia
- Having dedicated functions overseeing program delivery

With three key learnings from North South Foundation's way of working identified for Ta'alum



North South Foundation



Governance

Board of Directors

Advisory Board

Investment Advisory Council

Org. Structure / Functions

Functions

CEO

India Scholarships

Contest Administration

Contest Management

Fundraising

Human Resources

Public Relations

Information Technology

Finance

Regional Centers

16 centers spread across India

Source: EY analysis, annual reports, website

For detailed benchmark slides please refer to the Ta'alum CSA report as part of this project

Key Learnings

1

Volunteers are a key asset and can play several roles as part of the NGO or network:

- The 16 centers spread across India are solely operated by volunteers
- Over 300 volunteer teachers are providing training to more than 4,500 children

2

Donations can come from other parts of the world that resonate with the target group:

- Large portions of operations for NGOs are solely reliant on donations
- Creating connections with a country's natives regardless of their current location can be key

3

Stay connected with your Alumni – they may want to contribute in future!

- Run Alumni programs to stay connected and create a strong foundation for the future



With three key learnings from Crown Prince Foundation's way of working identified for Ta'alum



Crown Prince Foundation



Governance

Board of Trustees

Functions

Org. Structure / Functions

CEO

Program
Management &
Performance
Excellence

Strategy &
Partnerships

Communications

Finance &
Support Services

Source: EY analysis, annual reports, website

For detailed benchmark slides please refer to the Ta'alum CSA report as part of this project

Key Learnings

1

NGOs originated in the Middle East typically use a Board that has govt. representation:

- Large private sector companies
- Former politicians
- Activists and
- Other NGOs that operate in the region

2

Leverage the prestige of the Royal Family to create cross border Govt. partnerships:

- 1M Jordanian Coder Platform done together with Ministry of Digital Economy & Future in the UAE
- Providing tech certification in up and coming fields that are key for the job market

3

Owning an educational institute can be key in ensuring allocation of seats for beneficiaries:

- Crown Prince Foundation owns the Al-Hussein Tech University in Jordan



With three key learnings from Alnahda Society's way of working identified for Ta'alum



Alnahda Society



Governance

General Assembly

Board of Directors

Leadership Team

CEO

Chief Advocacy
Officer

Director of the Center
for Research and
Studies

Financial
Consultant

Other Departments

Capacity Building

Financial & Social
Support

Public Relations

Strategic Partnerships

Human Resources

Information
Technology

Source: EY analysis, annual reports, website

For detailed benchmark slides please refer to the Ta'alum CSA report as part of this project

Key Learnings

1

Being the advocate and true voice for women in the Kingdom:

- Having a focus on the target segment allows for more targeted programs while also being an advocate that truly understands the group to help drive the national regulatory environment

2

Extended network of the Board of Directors can be key in obtaining additional funding:

- Chaired today by HRH Princess Moudi Bint Khaled Bin Abdulaziz Al Saud
- The Board has a diverse set of experience in the private, public and third sector

3

Dedicated research center that focuses on providing insights on the target segment:

- Scientific research
- Surveys and data
- Knowledge sharing
- Help inform policy making

الموارد البشرية
والتنمية الاجتماعية



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