



SEMI-ANNUAL CONFERENCE
SAN FRANCISCO
JANUARY 26-27, 2010

International Site Visits: The Good, The Bad And The Ugly

Tuesday, January 27, 2009, 4:00 – 5:30 pm

Facilitators:

Jennifer Anderson-Bähr, Senior Program Officer, The Firelight Foundation

John Harvey, Executive Director, Grantmakers Without Borders

Session Organizer: **Sexual Rights Working Group**

Panelists:

Andrew Park, Program Director, Wellspring Advisors

Sponsors:

Grantmakers Without Borders

The session began with a survey to understand attendees' objectives for session. Responses included:

- Efficiently using time when visiting many groups
- Discrimination towards program officers based on gender, race, age, sexual orientation, etc
- Best time during the cycle of the grants process to visit
- How to set expectations to avoid "dog and pony" show
- How to evaluate project success given the potential for a "dog and pony" show
- Common mistakes and how to avoid or ameliorate them.

Several attendees acted out a role play that emphasized how grantees are frequently focused on offering food, drinks, and small talk to further develop relationships. Grantees often prepare a full-blown presentation that may or may not link with the donor's interests. On the other hand, funders often end up making grantees wait due to poor schedule planning and then tend to be overly focused on getting right down to "questions," as opposed to relationship building.

Jennifer shared lessons learned by Firelight in three phases of site visits: before you go, when you're there, and when you get back. These are summarized in the attachments referred to above and there was discussion throughout.

Before you go

- Discuss your expectations with a set of questions and ask the grantees what they want to discuss. Ask the grantee to develop the agenda.
- Be sure to send key questions in advance.
- If traveling with multiple staff, assign clear roles for the trip.
- Be sure to understand the travel distances to better plan your time and be respectful of grantees' time.

When you are there

- Organize team meetings in the morning and evening debriefs
- Understand the personal needs of others

When you get back

- Complete a trip report; otherwise the experience lives only in the head of the person who experienced it.

The participants discussed many issues, which are summarized below.

Gifts: Accepting the gifts given by grantees can sometimes be overwhelming, but it's important to always be respectful. Jennifer shared a story how on one trip she received four huge wooden statues, regifted three and brought one home. Another attendee asked about potential conflict of interest if a grantee offered free accommodations for a convening organized by the grantor. Attendee's responses were mixed, but their answers were generally based on why the grantee had access to such a discount.

Value of site visits: One attendee questioned the overall value of site visits given their cost, explaining that so many questions can be answered over email and the resources spent on the site visit could be spent on additional grants. Jennifer answered that site visits help you understand the viewpoint of grantees and that it's also about how you approach the site visit. It's not just about questions, but about both parties getting to know one another better, making the process more personable - not about policing, but relationship building.

Visiting potential grantees: The group agreed that visiting potential grantees raises expectations and may require significant resource expenditure (time, staff preparation etc). Some suggested that potential grantees could visit the grantmaker (should pay for expenses) particularly if they can combine a trip with other business. One advantage of meeting with potential grantee is that they often assume grantmaking priorities that we may or may not have.

Expectations:

- One donor noted that it's important to be clear if the visit is more about educating the grantmaker as opposed to considering potential funding or building on the current relationship.

- Another, who spent some time on the NGO side, noted that if you visit a potential grantee and then do not fund, more than a standard decline letter is needed. Provide helpful feedback so the group understands why they were not funded.
- All agreed that setting out expectations in advance is the first step to a successful meeting.

Staffing/cultural norms/personal identity: There was some discussion about hiring grantmaking staff with cultural competency and/or who are from the region you are funding.

Several attendees discussed how gender, race, nationality, sexual orientation etc, can impact the way grantees interact with staff. Sometimes someone from the country may (or may not be) more respected than others. One attendee noted that it's important for bosses to be clear about the responsibilities of their staff - that is, gender, race or some other personal characteristic, does not determine who is in charge or responsible for a grantmaking relationship. It's also important to not take things too personally and understand the cultural norms of the place you are visiting (i.e., it may be normal, though nonetheless disrespectful), for the male ED of an organization to address his male counterpart not realizing that the female counterpart is an equal or superior). The group also agreed that it's acceptable to lie about marital status, sexual orientation or other personal identities if doing so helps you do your job as a program officer and does not offend anyone (including yourself).

Difficult days: the group discussed how to manage site visits when we experience the harsh realities in the field. Some suggestions included keeping a journal, site seeing or otherwise decompressing. One participant raised caution about the use of alcohol, admitting that the day after not sleeping well and drinking, she fell asleep during a site visit. All agreed that staff should receive comp time for travel.

Photography: Photography should always be guided by those you are asking to allow their picture to be taken and sensational photos should be avoided. Jennifer noted that we should be respectful and not single out one person over another, perhaps taking many more photos than would be needed. Firelight maintains a strict policy that to use photos, they must obtain written consent from every party in the photograph. Sensitivity should also be paid to cultural norms around photography.

Support staff and expenses: Firelight's policy is that all support staff stay at the same hotel as the staff and eat with the staff. In addition, they pay for translators and any costs to the grantee for the site visit.

Individual donors: The group discussed how to handle third parties (i.e., donors to your public charity) that may want to join site visits. Many cautioned against it, noting the high costs for grantees, the lack of travel experience of most donors and the fact that it's difficult to control their interaction.

One attendee asked how we can get over being the “donor” and the inevitable hierarchical relationship this implies during a site visit. The group concurred that we must always acknowledge our role as a donor, but remember that mutual respect and grantmaking philosophy can help breakdown some of the barriers between donor and grantee.