

6 Questions to Ask Before Planning a Philanthropic Trip

A White Paper by Maryann Fernandez, Founder & President, Philanthropy Indaba (February, 2010)



Going on a trip where there is an opportunity to give back is gaining popularity. A variety of organizations are putting together “philanthropic travel” opportunities, including tour companies that were previously focused on just the travel experience. As most of the press on this topic has come from the travel industry, I was surprised that the interviews and articles often failed to ask some critical questions important to many philanthropists. This is an opportunity to pose some thoughtful questions from the philanthropy side to help people make the most of their journey.

Defining a philanthropic journey. While all gestures of generosity such as the giving of time and skills as well as money are of great value, for the purpose of this article, we will be defining a philanthropic journey as one that involves a donation or intention to donate money.

I am also defining a philanthropic journey as one that starts with the intent to visit a project(s) and explore critical issues on the ground, and devotes part of a longer holiday or the entire trip towards that goal. A philanthropic journey is an intensive, focused learning experience on all dimensions of giving. It stimulates a participants needs for uniting the needs of the heart, the head and the hands.

After discussing this with a variety of industry colleagues and philanthropists, I have consolidated these thoughts in six substantive questions. This is not meant to be a be-all, end-all list but rather a place to start a more substantive conversation – raise the bar, so to speak - about what can and should be provided to individuals who are interested in making a positive impact with their philanthropy.

Question 1: How complex is my philanthropy and what level of commitment am I looking to make?

- **Look inward first.** Before planning this type of journey, people should look inward first – to their values, philanthropy and the type of commitment they are looking to make. Whether you are giving serious thought to expanding your philanthropy to a different region of the world or area of interest, looking to engage and train other members of your family in the grant-making process, or interested in identifying and evaluating a variety of organizations within a specific interest area, these are all examples of scenarios where a philanthropic trip planned with a knowledgeable consultant can be of tremendous benefit.

This is especially true of individuals and families who have a greater level of complexity in their philanthropy because of the significant assets they have either set aside or intend to commit to their philanthropy throughout their lives. Typically, this means that there is a stronger focus on due diligence and sometimes more personal engagement.

In talking with Timothy Karsten, who is active in his family’s foundation, he comments that along with the “bigger checks,” he invests more of himself because it is a long-term relationship. He adds that

"Giving family members the opportunity to travel and see organizations in-the-field, not only enriches them, but fuels their giving because of the opportunity to select partners to walk through life with." I think he put that beautifully, and I believe it speaks to philanthropists' desire to find projects and organizations that they are truly passionate about and can be part of their legacy.

- ***Do you have a guiding philosophy or mission statement that directs or influences your philanthropy?*** Steve Toben, Executive Director of the Flora Family Foundation, where the family has taken nine trips in the last ten years, shares that "the design [of the trip] grows out of our strategy," meaning that their mission for funding best-in-class, innovative social service models drives the kind of programs/organizations they want to visit.

Whether or not you know the amount of resources (time, knowledge, networks and finance) you are willing to contribute, given the right organization, of course, there should be a seriousness of intent, especially because of the time invested not only by the donor but for the organizations and other experts you'll meet on the ground. Not-for-profits invest in such visits resources that they often need to run their day to day activities. And to be respectful of that, individuals/families should look upon a trip like this, as an expression of their serious concern of the critical issues on the ground.

Question 2: What do I want out of this trip?

What are your reasons for exploring a philanthropic trip now? Are you looking to augment what you are doing in your philanthropy? Are you interested in gaining exposure to new projects or have a deeper learning experience about a specific issue? Here are two main reasons why people choose to go out into the field:

- ***Better understand the dynamics on the ground.*** In geographic areas where you may not be as familiar with things like local politics and culture, it's tremendously helpful to visit the field and gain an understanding of the variables that may impact the effectiveness of a program. This is especially so with international grant-making.
- ***Opportunity to identify and vet organizations.*** Many are striving for that "perfect fit" or as Michael Alberg-Seberich from Active Philanthropy put it, donors are looking for "an organization that serves the cause that they are committed to in a highly efficient way but whose leadership also relates to them on a personal, emotional side."

Steve Toben, Executive Director, Flora Family Foundation, adds that because the family is interested in making grants to different regions of the world and the foundation does not have a field presence, these trips serve as essential site visits for potential grantees.



Question 3: Who should come along?

A few thoughts to consider:

- Who is involved in your philanthropic decision-making? Are other family members involved?
- If you are thinking of bringing children, are the location(s), content and activities planned age-appropriate?
- Do you have a foundation executive or advisor who can bring expertise to your on the ground discussions?

Question 4: How do I choose the kind of trip I want to take?

- **Single NGO or Non-profit:** There are a variety of non-profits who regularly bring donors out to visit their projects. This works well if you have already identified the organization as one you might like to support. You will get an in-depth view on their particular theory of change. The downside is there is a very good chance that you will only be experiencing that one particular theory of change for the entire trip.

A requirement on whether you must be an existing donor to join the trip varies, so inquire before making any further plans.

- **Group Trip:** A group trip has several main benefits. First, it's an easy alternative to having something crafted especially for you/your family. You benefit from the organizer's expertise and their connections, and you will probably gain exposure to a variety of organizations focused on a certain issue or geographic area.

Second, you will be able to exchange thoughts and ideas with other people in the group. Different individuals/families have different ways of evaluating organizations and pick up on different details, and you'll have access to these varying perspectives during your trip to enhance, and maybe even challenge, your thinking.

Third, a group trip is a good choice if you are just beginning to explore a certain issue area or geographic region.

- **Customized Trip:** A customized trip for an individual/family is a deep dive learning opportunity which focuses on their specific interests and the guidelines/philosophy of their philanthropy. With a customized trip, depending on how specific you want to be, you can direct the focus, the geographic location, and the length of the trip. You can decide whether to incorporate a vacation as part of the journey, or not.

Additionally, if you are working with a service provider to craft this trip, they should be able to make appropriate recommendations as to projects to visit and activities that will help to enhance the journey...again customized to you/your family's interests and guidelines.

Question 5: How do I find the right service provider or consultant to develop my trip?



Your answers to the questions in Part 1 will likely be a good guide and offer you clarity on the needs that should be fulfilled when planning your trip with a consultant or other service provider.

There are many types of organizations promoting "philanthropic trips" or "travellers philanthropy" including companies whose main focus is on travel planning. Whenever exotic locations are involved, websites and brochures feature beautiful photos and touching stories, but some of the philanthropists I interviewed suggested that you look beyond the marketing and ask some deeper questions.

Philanthropist, Karen Ansara, has taken several philanthropic trips with her family and comments on the time and effort they put into their trips: there is a "direct correlation between how much you put in and how much you get out of it."

- ***What is the background of the person planning the trip and suggesting projects?***

Interestingly enough, this was one of the first, if not the first question a variety of friends in the philanthropy arena would ask when I mentioned various service providers. Inquire about the background of the person working directly with you in identifying projects and coordinating the site visits. Who are they and what kind of experience do they have?

- ***How will the service provider match me with organizations on the ground?***

If the trip is being customized for you and the service provider will be identifying organizations for you to visit on the ground, this is an important question.

The key here is the consultation process in advance of planning the journey. Identifying appropriate projects/organizations on the ground requires the service provider to know the client fairly well, so be clear on what that process will be. As Executive Director of the Flora Family Foundation, Steve Toben quarterbacks this process for the family and reaches out to contacts in their network to identify projects because people in their network, "...know what business we're in." In other words, when customizing a trip, your service provider needs to know you and your philanthropic objectives well in order to steer you towards organizations that could be a good fit.

Some service providers partner with a certain number of non-profits which streamlines their process, and the client is most likely matched with partner organizations. Others use their trusted networks to research and access a wide variety of projects and organizations in order to better customize connections for clients. Again, this is about what serves you and your philanthropy best.

- ***Who has vetted the projects?***

When I mentioned the words "vetted projects" to philanthropists, they were in unanimous agreement that this was important to them, even though they intend to ask rigorous questions themselves. Whether your preference is big multi-national organizations or small grassroots programs, if this is important to you, ask the questions: Who has evaluated the organization? What is their process? How is impact measured?

As stated in the previous question, some service providers partner with a certain number of non-profit organizations, while others may receive referrals from a network of trusted contacts in the industry. Either way, since "vetting" takes many different forms, you should ask about the vetting process and if there is any additional fee associated with it.

- ***How does the service provider ensure that the interaction you have with the various organizations and their beneficiaries is respectful and appropriate?***

Every part of the process should be developed to ensure respectful interaction for all concerned. It starts with evaluating a client's interests and intent then successfully identifying projects that match a client's values, interest areas and objectives. In other words, make sure that your site visits are focused and aligned with the issue areas, goals and guidelines of your philanthropy.

From there, it's about how you are prepared for the trip: background on country and culture, context of the visit, people you will be meeting, and cues on things like protocol and photography. We find that other philanthropy-focused groups like Active Philanthropy in Berlin who have run a variety of group expeditions, also find that providing a strong context for the journey from the outset is key: "The purpose of the visit is about the NGO and the target community and how they can be supported." In other words, your service provider should guide its clients towards purposeful observation so that they can make informed decisions about grants.

- ***Transparency regarding how the service provider makes their money.***

This recommendation came directly from the philanthropists themselves and confirmed by other consultants in the industry. The bottom line is this: while exact numbers don't always need to be revealed, it should be clear to you exactly how your service provider makes their money. Whether it is

a consulting fee, a premium added on to the trip cost or some compensation from the organizations being visited, the client should understand, what's in it for the service provider.

- ***What broad considerations should you make with regard to security?***

When considering places to visit, research the stability of the government and any recent violence or crime. While bodyguards are often not necessary in visiting most places, your service provider should be taking cues from the ground as far as appropriate security measures, especially from individuals who are very familiar with the communities you will be visiting. Some projects are not located in well-trafficked places or tourist areas, so you really need people familiar with the area to weigh in here.

With regard to managing information, let's simply say consider limiting the number of people who have access to your itinerary, especially your full itinerary, and other information. Ask the service provider as well. Also, keeping a fairly low profile while on the ground; your service provider should be able to walk you through all of this.

These are not tremendously difficult things, but simple steps can go a long way in ensuring your safety on a trip.

Question 6: What kind of activities will help make my trip more meaningful and help guide philanthropic decision-making?

- ***Guided discussions on the ground:*** Philanthropist, Karen Ansara, shares that these in-the-field experiences “inspire as many questions as there are answers.” Often people leave for their trip with preconceived ideas, only to find that once in-the-field, the game has changed and they need to shift their thinking to incorporate new information.

That's why guided discussions on the ground can be invaluable: it allows you to process the information and emotions from these in-the-field experiences and connect it to your philanthropic initiatives. It's not just about going to see a project and being moved, but also thinking creatively about your role in the solution. Guided informal discussions during a trip can be an effective way to launch a thought process during the trip and bridge it to actions to be taken after the trip.

The key is finding the right person to facilitate that discussion in a more objective way. More often than not, it will not be a representative from the organization you are visiting on the ground, but rather a trusted advisor, a trustee, or someone else who can help balance the needs of your philanthropy vs. the needs and capacity of the organization.

- ***Bringing and/or distributing supplies:*** “Fantastic yet misplaced generosity can be so dangerous. I am reminded of the huge influx of donated clothing from abroad to Zambia in the 1980's had the unforeseen impact of totally crippling the local textile industry. We must never forget that for every action there is a reaction.” --Julian Page, Livingstone Tanzania Trust.

While the quote above references a fairly large amount of donated clothing, it reminds us that before committing to bringing supplies from abroad, ask: “Can this be purchased locally?” So in addition to supporting the program with needed items, you can also support the local economy.

It's also a great idea to get an *updated priority list of needed items* from the organization to ensure that you will be providing things *they* need vs. what *you* think they need. (i.e. does the school *really* need another book donation or more notebooks, or would they rather have some new desks for a classroom) Many organizations are happy to take whatever you are willing to offer – you are the one donating so you have the power. But getting information from the field and including them in the decision-making process is a *smart* way to ensure that your efforts are truly useful to the organization because they are the ones who have the capacity to best assess needs and priorities.

- **Service opportunities:** Service opportunities are a great addition if you are open to rolling up your sleeves and work elbow to elbow in the community. It also enables philanthropists to experience a different level of personal contribution that goes beyond money.

On the flip side, I've heard anecdotes about service opportunities that have more volunteers than work to be done or have been "manufactured" for the donor but gave didn't really deliver in providing real interaction or insight into the project.

So how do you find a meaningful opportunity to contribute time, skills and energy *and* does not overburden the organization's staff? Here are considerations:

- Months in advance, work with the person planning your trip to identify a possible service opportunity with one of the organizations you are interested in visiting. The goal is to find out what work is currently being done by the organizations and their current needs for outside help vis-à-vis your (or your group's) skills?
- What amount of time are you willing to commit - half a day, several days, more?
- How many people from your group will be involved?
- Be realistic about your comfort level for doing work on the ground – i.e. will you be working outside, do you mind getting dirty, do you have any limitations doing physical labor, is your contribution more administrative – *but* allow yourself a little room to stretch your boundaries.
- Sometimes *NO* is a reasonable answer. For some organizations that require technical knowledge or are not set up to incorporate outside volunteers, your request may not be possible. Think about other organizations in a similar field or geographic region, or perhaps considering a longer service opportunity which will allow for some training and give you the chance to see the real day-to-day successes and challenges of the organization.



Information

Philanthropy Indaba

P.O. Box 1545, New York, NY 10028, USA

Tel: +1 646 684 3228

Email: maryann@philanthropyindaba.com

Website: www.philanthropyindaba.com

Blog: <http://philanthropyindaba.wordpress.com>

(Photos taken by Maryann Fernandez while visiting projects around the world.)