



Best Practices in Strategic Philanthropy

Exploring Series | Trust & Collaboration

Wednesday, 28th September 2022

18:00 to 19:45 Gulf Standard Time

Summary:

This interactive, virtual session was the third and final in the Circle's three-part Exploring Series. It featured international guest speakers Robyn Cader Halawi, Executive Director of the ELMAA Foundation, and Sapphira Goradia, Executive Director of the Vijay and Marie Goradia Foundation, and was moderated by expert facilitators from 21/64.

During the session, speakers discussed the need for embracing the practices of 'Trust-based Philanthropy', an approach that emphasises building collaborative relationships where funders are accountable to their grantees, not just the other way around. The session also explored the principles and methods of implementation for building trust and collaboration between donors and grantees, as a way of restoring a power balance and involving local community experts in decision-making processes. Participants on the call actively shared their own experiences of navigating funding and building trust-based relationships in countries other than in the ones in which they currently live, such as Lebanon, India, and Uganda. The session allowed for participants to tap into the expertise of the keynote speakers, as well as reflect on the learnings with their peers.

Key Takeaways:

- Adopting a model of 'participatory grant making' wherein grantee communities are given an equal voice in where and how funds are used. This model is exemplary of having a strong trust-based relationship in which collaboration can allow for greater insight into the issues being tackled and more community-centred solutions resulting in deeper impact.
- Grant-makers must make an effort to acknowledge that they are not the experts of the local, cultural context
 - It is important to build trust between donors and grantees through sustained communication and have many conversations so that both parties are aware of the others' expertise and skillset.
 - There should be no feelings of obligation for grantee organisations to accept grants unless there exists an alignment of values between them and the donor.
- Oftentimes grantees do not feel comfortable being vulnerable with and opening up to donors about their opinions on strategies and implementation. Therefore, it is important for grant-

makers to also build connections with locally operating NGO's and get on-ground guidance and support around where and how the capital can be best put to use.

- Sometimes a good way to offer support is to work collaboratively and partner with governments who have a very clear vision of how to help their country.
- It is vital to have a very rigorous due diligence process when selecting local partners to fund. The process, once complete, should result in a fully transparent, and trust-filled partnership.
 - Liaising with local, trusted resources on the ground, preferably sector leaders who know which other organisations are doing legitimate work is a strong way to vet potential partners. Oftentimes the best referrals come from other private funders who have already vetted local grantees.
- The best way to build trust is to put your money where your mouth is by investing in the next phase of a programme and sticking with partners through times of crises – to let them know you are in it for the long haul.
- Treat everything as an investment by bringing the same type of rigour to philanthropic activity as to any personal investments. This means employing various methods to get the most impact out of the investment – such as hiring advisors or performing site visits to verify information.
- When meeting with organisations and their leaders and deciding whether to fund or continue funding, is important to pay attention to intuition, and then perform due diligence as a way to test initial assumptions and biases. Trust comes from the “head, heart and gut” and all three are important elements to pay attention to when collaborating with grantees and others within and beyond the sector.
- In the past few years and due to COVID-19, it has been difficult to travel and be “on the ground” with grantee partners. Hence, relying on the knowledge of intermediary organizations and trusting their expertise can help to inform philanthropic, especially when the funder does not live in the same country as the grantee organisation.
- When setting up a grant, decide and communicate beforehand which necessary metrics grantees will need to report on. This can help ensure that the funding is being used for the work that the organisation is doing instead of being used to complete unnecessary work such as extra metrics to report upon that may not be required.
 - Important to note the stage of the organisation with which you are working – to determine what level of M&E they should be performing.
 - There exist many different ways to evaluate impact – it is important to trust grantees to choose how they can evaluate their work but also build into the grant budget an amount for monitoring and evaluation.
- Executing a grassroots level needs assessment to decide focus-areas for deploying capital to and then creating an investment model/funding strategy.
 - Funding strategy should take into account the work of local changemakers on the and should be updated every quarter through progress meetings.