



# Making the Most of a Site Visit: The Firelight Foundation's Approach

## ROLES AND RESPONSIBILITIES - OVERALL TRIP

### TRIP LEADER

Drafts objectives for the trip  
Travel plans (local and non-local)  
Ensuring follow-through on above - facilitation and/or doing  
Confirming/making adjustments  
Oversight for all functions  
Holds trip binder  
Planning itinerary (w/wiggle room)  
securing finances  
Recruiting in-country support  
Responsible for safety, health and security of team  
Communication with ff office  
Gets approval from director on finances, itinerary, travel plans, objectives  
Facilitates and schedules checkins  
Know whereabouts of all team members  
Donor relations  
\* Doesn't try to do it alone  
\* Facilitates group problem solving

### LOGISTICS AND GRANTEE COORDINATOR

Hotel  
Transport  
Airfare  
Taxis  
Translation  
Appointments (resource people/grantees)  
Scheduling and the unexpected (reconciling plan to reality)  
Internet access  
Phone cards  
Printing/photocopying  
Reservations for space and dinners  
Provisions  
AV responsibility  
Take care of transport person  
Sim cards/cell phones  
\* Delegation is part of the role  
\* Good to negotiate/stay flexible

### FINANCE COORDINATOR

Monitoring money - cash and TC's  
Make sure everyone has a bit of money  
Getting correct amount of bills  
Exchanging enough money  
Tips, fares, food, refreshments  
Coordinate money when leaving country  
Receipts for group activities  
Grantee reimbursements (review for reasonableness)  
Honoraria  
Transition to grantee accountant at meetings  
With TC, deals with unexpected large expenses  
Coordinates with Logistics person to ensure bases are covered

**DEBRIEF FACILITATOR/TEAM  
MONITOR**

Make sure team is healthy  
Convene morning/evening debrief  
Facilitates debrief  
Make sure all are cared for, comfortable  
Food and water monitor  
Emotional, physical, health

**DIRECTOR OF FUN/JESTER**

Shopping  
Exercise - yoga  
Refreshments (adult beverages)  
Home check-ins  
Leisure time - days off  
Levity, laughter, mirth  
Karaoke  
Dancing  
Music  
Appreciations, bless and release  
Thank you's/chatcki's

# ROLES AND RESPONSIBILITIES – SITE VISIT

## SITE VISIT LEADER

- Logistics
- Overall plan/schedule (big picture)
- Timeline
- Refreshments
- Local purchases
- Speech, gift giving, introductions
- Note taking
- Agenda framing/negotiating
- Pulling people out of visit when time to leave
- Trouble shooting when multiple groups are waiting
- Identifying whom to get stories from (talking to management)

## GRANTEE COMMUNICATION

- Leading discussions
- Viewing 'evidence', review books
- Ensuring participation of different management people, facilitating, managing the discussion, keeping to agenda
- Probing discussions, asking tough questions
- Managing balance between Firelight vs grantee concerns
- Relationship building
- Framing/explaining Firelight
- Gather feedback on Firelight procedures

## WANDERER/AV GURU

- Tape recorder
- Camera/video
- Story gathering
- How are caregivers responding
- What is community's relationship to grantee
- Basic fact finding on context, triangulation

## YOUTH/ENTERTAINMENT

- Energizers, icebreakers
- Build rapport-finding points of entry
- Watching how caregivers and youth are relating
- Balance between engagement with and observation of youth
- Explaining Firelight to youth and children

# TEAM MEETINGS

## MORNING CHECK-IN (short huddle over breakfast)

- Quick personal check in
  - How is everyone doing? (healthy, rested, anxious, any concerns that need be addressed today?)
  - What do you need from the team today?
  - Is everyone clear on their responsibilities for the day?

**General:** A well-functioning team is a key factor in a trip being successful. No matter what happens on the trip, we can handle it if we approach problems as a team. If the team breaks down, negative external factors will affect us quickly, and decisively. Be aware: in times of high stress, individuals tend to go it alone. This only makes the situation worse, and it leads other team members to question that first person's commitment to the team.

We should be intentional about how we begin a trip together. Is there an awareness, willingness, and faith that working with the team is the better way to work than by ourselves? Make sure to plan a team meeting at the beginning of the trip to help us

## EVENING DEBRIEF (45min-1hour)

Note: Times can vary depending on the issues of the day. A facilitator is chosen for each meeting, with responsibility for facilitating the conversation, managing time, etc. The same facilitator can run the check in the next morning. If there is a need for more time, help the team contract for how much time and how it is managed around other priorities such as eating, resting, etc. Agree to how much time for check in next morning, and whether or not a check in is needed in the morning.

- Appreciations for the day (10min)
- Check in on the specific activities of the day (20min)
  - Each person reports on their perspective on the day. Important successes and challenges are discussed. Items discussed are chosen by their relevance for the whole team. Check in on how this relates to the overall objectives.
  - Any concerns which relate to the overall trip?
- Team talk (10min)
  - How are we doing as a team? Any concerns we need to address?
  - Check in on personal objectives and feedback from the team
- Quick run through of tomorrow's schedule and check-in on assigned roles (10min)
  - What do team members need for tomorrow? Any set up or logistics changes? Additional items that need to be communicated? Other changes that need to be dealt with?
- Closing thoughts (5min)

be intentional about teamwork. Reiterate that "team cohesion" is one of our goals.

# SITE VISIT QUESTIONS

## **PROGRAM:**

- Describe how the community is involved in your program?
- How do you include input from the community in your decision-making?
- How do you include input from children/youth in your decision-making?
- How do you know that your approach/program is working? What are some indicators? (increased awareness, more healthy children, more children in school, # of home visits, etc.)
- What are your biggest challenges?
- How are you currently documenting the work that you do?
- Who do you share this information with?
- How could you improve the documentation of your work?
- What, if anything, is your organization doing to raise awareness about the situation of vulnerable children among policy makers and the public?
- What are you doing to advocate for their rights and the fulfillment of their needs?

## **ADMINISTRATIVE:**

- How do you choose your leaders and/or board?
- What role does your board play?
- How is the relationship between your board and the staff?
- If you did not have Firelight funding how would you sustain this program?
- Besides Firelight, what other external sources of support do you rely on?
- Describe the kinds of local support you receive (in kind donations, volunteer time, etc).
- How are you working with other organizations and local/national government agencies?
- What are the challenges that you think you will face in the future?
- What steps have you taken to address them?
- How do you address the issues of confidentiality and privacy?

## **FINANCE:**

- Who keeps your books?
- How do you keep them?
- Who keeps the receipts and where are they stored?
- How would you assess your current financial situation?
- What are you worried about with regards to finances?
- How do financial concerns affect your daily decision-making?
- What items in your budget/financial reports do you want to draw our attention to?

**RELATIONSHIP BUILDING QUESTIONS FOR INDIVIDUALS:**

- What is the best part of your job?
- How did you get involved in this work?
- What motivates you do this work?
- What is the most challenging part of your job?

**VISION:**

- What recent accomplishments are you most proud of?
- If all your wishes/plans could come true, what would \_\_\_\_\_ look like in 5 years? What would you change? What would you keep the same?
- If you could give one message to US donors or decision makers, what would it be?
- What do you think is the greatest challenge facing children in your community?
- What is being funded in your area and what is not being funded that should be?

**TALKING TO CHILDREN/YOUTH**

- Describe your life before and after your involvement with \_\_\_\_\_. How has your life changed?
- What is your biggest worry?
- What gives you hope?
- What is your dream?

### **TA PROVIDER QUESTIONS:**

We would like to convene a capacity-building workshop for representatives of our grantee organizations that will provide a forum to discuss and engage some of their highest priority organizational development needs. Included among these may be: financial accounting and management of donor funds; human resource/personnel issues; program administration; reporting; proposal development; preparing for program development; and/or other topics related to organizational administration and growth.

What is your organization's experience with providing technical assistance to grassroots groups? Specifically, we would appreciate your feedback on the following few questions:

- Has your organization led technical assistance workshops before? If so, please briefly describe:
- The types of groups that participated in these workshops
- (If applicable) The pre-workshop needs assessment process conducted
- The curriculum covered during the workshop
- What qualifications does your organization have that make it uniquely qualified to deliver effective capacity-building training? Please provide at least one example of a capacity-building program you have delivered and feedback you received.
- Based upon your experience with community-based organizations, what would you identify to be among the highest-priority technical assistance needs?
- How do you evaluate the effectiveness of your training efforts?
- What type of follow up assistance have you provided to organizations that participate in trainings facilitated by your organization?
- Finally, please provide an estimated cost for a 5-day workshop aimed at responding to some of the technical assistance issues cited above. For purposes of calculation, you can assume the workshop will take place in Lusaka or Livingstone, and require in-country travel for approximately 15 individuals.
- Please provide the names and contact information for two individuals who know of your work. Please indicate their first and last name, organizational affiliation, position, and relevant contact details (email, phone/fax, mailing and physical address).

### **IGA - NEW GROUPS:**

- Who will manage the IGA part of your program?
- What, if any, training will you offer participants? Who will conduct the training, and what experience or qualifications do they have?
- How many participants will be involved?
- In carrying out their IGA, will they work in groups or individually?
- What are the projected costs (inputs) per participant/IGA?
- What, if anything, will the participants contribute (e.g., money, skills, materials)?
- Is there an existing market for the products or services?
- How much profit do you expect the businesses to make (please specify over which time period, e.g., weekly, monthly, etc.)?
- How will participants use profits? (E.g., Share? Reinvest? Support children? Return a portion to your organization?)
- If loans are provided, describe your repayment expectations—are participants expected to repay loans in full or in part? Over what time period?
- How will children benefit from this IGA? How many children will benefit? How will caregiver(s) benefit from this IGA? How many caregivers will benefit?
- How will you judge that an IGA activity is successful?
- What sort of support, if any, does your organization offer to participants who run into difficulties with their businesses?

### **RESOURCE PEOPLE QUESTIONS**

- Tell us about your work.
- How long have you been doing this work?
- Describe your current job.
- What is your sense of the problem and how it is being addressed? What is currently being done and by whom?
- Who is funding in the field? What is being funded and what is NOT being funded that should be?
- What are the challenges of working in this country?
- Do you know other people who we should be talking to?
- What kind of relationship would you be willing to have with Firelight? Eyes? Resource person?
- Would there be any conflict of interest with your job?

### **IGA - REGRANTS**

- How many participants were involved in your IGA activities?
- What was the cost per IGA?
- How much profit was made?
- What did you do with the profit?
- Of all the loans you made, how many have been repaid? In the case of default (non-repayment), please provide a few examples of the challenges faced by participants that led to default.
- How many children benefited from your IGA activities? How did they benefit? How many caregivers benefited? How did they benefit?
- Based on your definition of success, how many IGAs are successful?
- What has been your biggest challenge?

# SITE VISIT PROTOCOL

## ADVANCE PREPARATION:

- Ask about the grantees expectations of the site visit
- Send them a list of our key questions
- Request at least 1 hour of discussion time with key management staff – clearly state Firelights expectations of site visit
- Find out who (full names) will be leading the site visit (exec dir, board, staff), who will be meeting/collecting the team, who are the key people the team will meet
- Try to ascertain travel times and distances from the location where the team will be prior to the visit. Build in lots of flexibility.

## SITE VISIT PRIORITIES:

- Visiting office, center, or the location of activities
- Meeting with the management or leadership team of the organization including, if possible, the chairperson or a representative from the board (at least one hour)
- Discussing concerns (for both grantee and Firelight) and collecting feedback on Firelight
- Reviewing accounts and talking with a knowledgeable person about how books are being kept
- Meeting with children and young people who participate in the activities or benefit from the services of the organization
- Meeting with caregivers who participate in the activities or benefit from the services of the organization
- Meeting with members of the community or volunteers who engage with the organization around program activities
- Gathering individual stories of people from the organization, or of people who are benefiting from the work

## FRAMING THE VISIT WHEN YOU FIRST ARRIVE:

- Take care of the driver
- Check for language/translation needs
- Find out what is the program or agenda for the visit – who is or has been waiting for the team?  
Make sure those people are seen first and released
- Introduce key people and find out who is in the room
- Introduce Firelight and give brief history/context

**OTHER THINGS TO KEEP IN MIND:**

- Make sure to get photo consents
- Make connections and ask questions
- Expect the unexpected
- Ask open-ended questions

# TRIP CHECKLISTS

## PRE - TRIP CHECKLIST

- Get relevant immunizations (6 weeks in advance)
- Arrange flights (6-8 weeks in advance, each person on their FF credit card if they have one)
- Arrange accommodation (4-6 weeks in advance)
- Arrange meeting rooms, as necessary (4-6 weeks in advance)
- Contact all partners and relevant "Resource People" (6 weeks in advance)
- Give admin a copy of flight info for scheduling travel insurance & airport transport (3-4 weeks in advance)
- Get malaria prophylaxis, if applicable (2 weeks in advance)
- Purchase/charge MCI calling card
- Reconfirm flights, hotels (48 hours in advance)
- Call Visa/Mastercard to notify out of country usage
- Check with Donor Outreach team about what gifts to purchase for donors/events

## JUST BEFORE YOU LEAVE THE OFFICE:

- Change voice mail message
- Delegate responsibility for checking voice mail.
- Activate vacation email messaging.
- Delegate responsibility for checking email 3x/week.
- Delegate responsibility for reviewing/responding to incoming mail.
- Discuss protocol for handling urgent mail/emails/voicemails
- Schedule potential phone check-in times (pre-departure, or at first site).
- Review outstanding issues in need of follow up with supervisor or ED.
- Make arrangements for co-signature of payments.
- Indicate that you are out of the office in MEETING MAKER & print/give copy of itinerary with contact information to Admin and ED.
- Copy of emergency contact information (personal) to Admin.
- Copy of FF Visa/Master card, driver's license, passport & immunization card to Admin.
- Make sure you have your tickets!

## PACKING LIST:

- passport/yellow health info card
- credit card
- travelers checks (& spare copy)
- Emergency contact info
- anti-diarrheals, pain relievers
- stapler
- charger for video camera
- tapes (microcassette AND videocassette)
- video card for computer
- microcassette recorder
- calculator
- 3-hole punch
- meeting sign-in sheets
- receipt book
- FF business cards
- pencils/pens
- post-it notes
- airline tickets (& spare copy)
- cash
- contact info, travel agent
- insect repellent
- guide books/maps
- digital camera
- charger for digital camera
- video camera/extension cords
- adapter plugs/Palm Pilot travel kit
- photo consent forms
- batteries (AAA and AA)
- nametags
- markers
- OH transparencies/markers
- highlighters
- masking & transparent tape
- FF note cards

## POST TRIP CHECKLIST

- Debrief with team
- Review lessons learned/things to do differently
- Get copies of photos and send to grantees
- Review trip report
- Complete necessary grantee follow-up
- Put new contacts in database
- Acknowledge any gifts or materials received