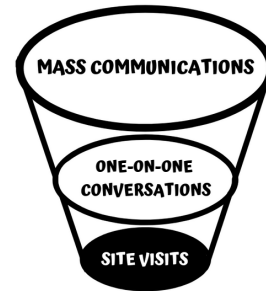


# CHECKLIST: EMPATHY IN SITE VISITS

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## INTERNAL PREPARATION

- I am aware of the biases I hold and of how my background and identities influence my interactions
- I am aware of how my personal background and identity may be perceived by others and may influence their assumptions about me
- I am aware of my preferred communication style, that other styles exist, and that one style is not better than another
- I am prepared to adapt my behavior and preferred communication style to what is effective on site

## EXTERNAL PREPARATION

- I have read up on the culture, customs, norms, values, and beliefs of the communities on site
- Both the grantee's and my role in the site visit have been discussed and are clear to both parties
- I have researched the grantee and their work extensively, so time doesn't need to be spent on introductory questions
- The evaluation criteria and objective of the site visit have been discussed and are clear to both parties

## COLLABORATIVE IMPLEMENTATION AND ENGAGEMENT

- The site visit aims to educate and engage, not merely report and reveal
- The site visit provides opportunities for challenging dialogues and complex discussions - not merely fact-based Q&A
- The timing and duration of the site visit have been mutually agreed upon
- The site visit provides opportunities for the grantee to learn more about my organization and theory of change - not merely ask questions about the application process and award timeline
- The agenda for the site visit was co-created by myself and the grantee
- Client engagement is client-focused and client-led, not determined solely by my needs and interests
- The site visit includes engagement opportunities that necessitate my physical presence, not merely a meeting which could have been conducted remotely

## REFLECTION AND FOLLOW UP

- Provide the grantee feedback on the site visit - not just on their application and award decision
- Leave time in the site-visit debrief meeting to share your own learnings and feelings, not just recap the events
- Evaluate yourself after the visit: How did you show up in this engagement and what did you learn about yourself as a result?
- Share your most valuable learnings from the site visit with your networks, including the grantee
- Even if you decline funding for this grantee, reflect on how can you leverage your experience on the site visit to continue advancing the cause
- Evaluate your theory of change and assumptions about the issue: Did they hold up in this site visit, or did something you learned open up new possibilities?

 For more resources on **Site Visits** go to: [www.philanthropywithoutborders.com/sitevisits](http://www.philanthropywithoutborders.com/sitevisits)

