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Keeping in Touch, Building Trust *A Funder's Report from the Virtual Front Lines*

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NINE YEARS AGO, when I was on the grantee side of the table, I always looked forward to site visits from The Pinkerton Foundation. I felt I had a special relationship with Pinkerton, and I enjoyed hosting the visits because I knew that if something went wrong, they would understand. I remember feeling I could have honest conversations about what was working and what was not, and that if there were problems, I would be connected to the people or resources that could support me. Today, I am a program officer with Pinkerton, and I've come to learn that my grantee experience was not an exception. We take pride in building relationships with the people and organizations we help fund. We do this by listening carefully to our grantees –

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by taking the time to learn their stories, to explore the passions that drive their work, and most importantly, by talking to their participants to get a nuanced, first-hand perspective from the people who count the most.

When the pandemic hit and stay-at-home orders went into effect, the entire process became much more complicated. Most of the programs we supported were sadly, but necessarily, turned on their heads. We immediately assured our grantees that we understood the need for all the changes

and that we would work with them as they reinvented their programs. Internally, we knew we had to change, too, but we struggled with how to stay close to our grantees when we could no longer see them face-to-face. What would a virtual “site visit” look like? How could we continue to build those all-important personal relationships that lead to positive outcomes? We certainly don't claim to have all the answers, but what follows are a few strategies we have implemented to allow us to keep in touch with our grantees and build the meaningful relationships that inform our work.

Visit Before the Visit

A “SITE VISIT” IS not a single event—especially for first-time grantees. Setting up a virtual meeting with the Executive Director and/or Program Team well before a formal visit is a helpful way to start building those relationships. When meeting someone new, we often start by asking them to share their life stories – in two minutes or so. These conversations reveal so much about the people who do the work and the path and the passion that brought them to it. It's also a great way to break down barriers and start building trust. Invariably, we find common histories or interests. We ask how they have been doing during the pandemic. From there we move on to an overview of the organization and program, how they have adapted to the pandemic, and how we can support them through these changes. These meetings are not interrogations. They are real conversations, with digressions and more than a little laughter. Above all, they are a way of building a trusting relationship. Here are some typical questions:

• About the Organization:

- ▶ What is your financial situation?
- ▶ How is the board reacting in support of the organization during this time?
- ▶ Has the pandemic affected your annual fundraising events? Have you shifted your focus on fundraising as a result of the pandemic? (At a [Legal Outreach](#) gala, for example, there was a special effort to raise funds for college students whose parents had lost jobs.)
- ▶ Have you received any emergency relief funds? PPP, NYCT or Robinhood grants, etc.
- ▶ Have there been staff changes? Layoffs, Furloughs, deferred pay, or percentage-base pay cuts? Until when?
- ▶ Have you been finding time for healing for yourself? For your team?

• About the Program:

- ▶ What changes have you made to goals and outcomes?

- ▶ How are your participants responding to the changes?
- ▶ What is working well? What are your challenges?
- ▶ What has been the feedback from the students?
- ▶ What have you adopted that you will continue after the pandemic?

Virtual Doesn't Mean Shallow

GOING ON A SITE visit has always been my favorite part of working as a program officer. Getting to know the participants, seeing them grow from one visit to the next, and listening to their stories and ideas is so inspiring. I truly gain valuable insights into the program and organization. One thing I always keep in mind is that these young people are inviting me into their safe space, and I need to respect that. When it comes to virtual site visits, it is even more important. Creating a safe and supportive environment is a daunting challenge in the midst of responding to the upheaval caused by the pandemic. The programs are testing as they go, and it is often messy. The young people — and often the staff as well — are coming from the communities that are the hardest hit by the pandemic. They are struggling with so many issues, yet still choose to participate because the programs are a genuine lifeline for them. A program officer coming into this environment can be overwhelming for participants and the staff, and it is essential for the visitor to tread with some sensitivity. We understand that this pandemic will not last forever, and so we need to make the best of what we have now. If this means we are only able to speak with staff and must forgo youth voices — which in normal times is an absolute must for us — so be it. Here is a rough schedule for a virtual site visit:

- Conversation with leadership and program team to get overview of organization and an introduction to what the “visit” will look like and what to expect. (15 to 30 minutes)
- Sit in on a virtual session in action; and/or meet with a few participants to hear about the program (At least 30 minutes.)
- Sample questions:
 - ▶ How did you hear about the program?
 - ▶ What are some highlights of your experience in the program?
 - ▶ How have you benefitted from participating in the program?
 - ▶ For those who have been involved pre-COVID – How has the program changed?
- If appropriate, ask participants to give a tour of the space. ([Green Teens](#) at the Campaign Against Hunger gave a tour of their community garden in Far Rockaway.)
- Conversation with the program team to discuss ob-

servations, ask follow-up questions and talk about next steps. (15 to 30 minutes.)

Seek Alternative Vantage Points

WHILE THESE TUMULTUOUS times might not allow opportunities to sit down with young participants—or even gather them for a Zoom session—there are several alternative ways to assess participant outcomes and elevate youth voices.

- Live virtual events: Most programs host events to honor and celebrate the accomplishments of their participants—recognition ceremonies, end-of-the-semester graduations, etc. (In [STEM from Dance's](#) “Girls Rise Up” summer showcase, the young women danced in unison from their own homes and interviewed a special guest, the famed African American ballet dancer Misty Copeland.)
- Competitions, Hackathons, Symposiums or other events that gather participants from a variety of programs. (For example, Emoti-Con is an annual competition for young people who believe in digital innovation as a tool for positive social change. During this year’s online-only project fair, I was able to see creative work produced all year by several Pinkerton grantees who are part of the Hive NYC learning network. The projects were even memorialized on [Emoti-Con's website](#).)
- Virtual Galas: At Pinkerton, we typically shy away from attending annual galas and fundraising events. During the pandemic, however, we have found that these events—which usually last an hour or so—can offer valuable insights. The virtual celebrations almost always emphasize the substance of the programs and often find unique ways to highlight youth voices in a respectful manner. ([Girl Be Heard's](#) virtual gala was inspirational)
- Media that show off what participants are doing, such as:
 - ▶ Videos created by participants - YouTube, Vimeo, TikTok, etc. (The Possibility Project’s Youth Justice Program participants produced an original music video, “[I Need Hope](#).” The Sherman Scholars, a biomedical science enrichment program hosted by the Icahn School of Medicine, created a [TikTok](#) video to recruit students for the following semester.)
 - ▶ Podcasts: The Bell’s youth-led [Miseducation Podcast](#) reports on inequities in schools and participants from Genspace’s Biorocket program created [science-based podcasts](#).
 - ▶ Online journals or stories: Many programs have created websites that link to projects their participants have created. (For example, Youth Communication has an online teen magazine that shares stories written by its participants. <https://www.ycteenmag.org/>)

- ▶ Pictures, presentations, artwork, poetry, etc. There are a variety of artifacts that can reflect participants' work. (Apollo [Teen Takeover's](#) digital presentation celebrates youth voice and vision through art, song and dance.)

The Wisdom of Networks

AT THE PINKERTON FOUNDATION we value creating opportunities for organizations to connect with each other, share strategies, and collaborate on projects. Over the years we have helped to foster these relationships by supporting the Career Internship Network, the Youth Justice Reading Circle, and the New York City STEM Education Network, among others. By joining these meetings, I have been able to get a sense of how program staff are reimagining their work, what their concerns are, and how they have supported each other. As part of the Youth Justice Reading Circle, for example, a dozen organizations offered free, drop-in virtual programming for court involved youth over the summer. Facilitated by modest grants from Pinkerton nearly 1,000 young people participated in [weekly sessions](#) in drawing, theater, dance, cooking, yoga, and more.

A Little Help from Our Friends

WE ALWAYS ENJOY OUR conversations with our philanthropic colleagues and learn a lot from them. Keeping those lines of communication open and active is even more important during moments of crisis. Getting a thoughtful recommendation from trusted foundation sources, non-profits, or other leaders in the field is particularly valuable at a time when it might be difficult to establish a trusting relationship

with a potential new grantee.

Let Values Be Your Guide

IN CHAOTIC, STRESSFUL times it's especially important to keep an eye on the compass. At Pinkerton we are guided by an explicit set of core values that shape our work and our relationships with others. We learn from our grantees and from

each other. We take pride in encouraging equitable practices in our grantmaking, in good times and bad. We respect our grantees and honor the hard work that they do, especially in times of crisis. We listen to our grantees as best we can, with open minds and curiosity. Visiting our grantees by virtual means has certainly posed challenges, because we love meeting people in person.

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But the alternative approaches we have taken this year have been helpful in building the kind of trusting relationships that lead to positive outcomes. We keep learning every day—and in that spirit, we welcome hearing your ideas, insights and experiences.

Contact information:

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