

5. Two Topics: How do you scale up successful projects? And How do you keep your spirits up with sometimes exhausting travel and exposure to extreme levels of poverty? Nov 16, 2012

Present: Bill Ryerson, Nina Meyerhof, Fran Stoddard, Carolyn Meub, George Hamilton, Curtis Koren, Megan Camp. **Facilitator:** Rick Peyser. **Coordinator:** Jackie McMakin

Welcome from Rick: Thanks to everyone on the call and to Jackie for coordinating. Previous calls brought value to me: met George; our organizations are collaborating in China. Purpose of this call: use members as advisory board. Grateful for your time.

Agenda Item # 1: How do you scale up successful projects? Background: GMCR's funding has been dedicated to coffee supply chain. Last year opened to non-coffee supply chain – new territory, working hard to get things moving. Company has grown rapidly. A year and half ago Rick was doing everything – investigating n/p's, meeting with farmers, due diligence visits when projects were running, putting together check requests – one man band. Now 5 on team: coffee community outreach person; non-coffee outreach, project manager, admin assistant, Rick.

Questions: How can our team be most effectively organized? How can we be most effective and efficient in grantmaking? We could decide to support only large NGO's, limit time we review grants (now quarterly). Now we're funding 40 different n/p orgs, ranging from Planting Hope (work in one village) based in Montpelier to Save the Children (work on 3 continents).

George: We work with a number of grant programs focused in Russia and Eastern Europe (country-wide, \$25 million). Thinking a lot about this point. Appreciate you, Rick, as a funder. As a manager of grants, I find the balance between flexibility and accountability is important, who can get the biggest impact, the way you structure the grant, the more flexibility you can give to achieve results and be accountable for them. Not so prescriptive on strategies and work plans. Be sure to communicate regularly. Being clear on results and flexible on strategy – these are critical.

Fran: What input on grants do farmers and community members have?

Rick: Grants are targeted to supply chain. Focused on communities providing certain products. Within communities, we are totally open to what farmers are looking for or need. If the NGO or coop is involved, we look for a participatory approach, eg., a community diagnostic. We ask what are greatest needs and challenges? Help them find resources to meet those needs. We don't have time to design projects. Dependent on NGO and coop partners to design them. Agree on goals and objectives – what will be different as project ends – this is crucial. We try not to be prescriptive.

Planting Hope is small but innovative, do good work that can be replicated by larger groups. Reluctant to part ways with smaller organizations. But the reality is it takes just as much time to manage smaller grants as larger ones. That's the dilemma.

George: Have you thought of organizing a coalition of small organizations to work in partnership? This is a good thing – learnings can be shared. At the beginning they may be reluctant to work together but are grateful to be encouraged. When they do work together, they see the benefit.

Megan Camp: What geographic area are you working in?

Rick: 80% of coffee projects are in this hemisphere from S. Mexico to Bolivia and some in Africa and Indonesia. Non-coffee projects are global: Far east, Washington State migrants growing apples, Columbia, W. Africa.

Carolyn: The shorter the chain is to where funders are the greater the impact. After the earthquake in Haiti, we were boots on ground providing water. Sometimes large is not always better.

Bill Ryerson: What is average size of grants?

Rick: Smallest \$100,000 to \$2 million (multi- year regional Central American countries). Numbers of grants – 25 – 35 a year. We appreciate multi-year grants for impact and easier to manage.

George: Reducing number of orgs depends on effectiveness.

Rick: We're reluctant to let go of smaller orgs, eg. local groups in Nicaragua.

George: One thought – a win/win. Bring grantees together – have evaluation sessions together. Oversight interventions – reduce management. Powerful for NGO's to be in the same room together.

Rick: Developed a monitoring and evaluation guide for all of them – designed with groups jointly. Did field trials. Now refining them. We do food security summits – grantors plus other groups to share best practices. The coalition idea to work with regional coalitions is good. I like this.

Bill: Have you tried to be members of Association of Small Foundations or Council on Foundations?

Rick: Council on Foundations. Yes, we are.

Bill: The Association of Small Foundations was founded by a Vermonter. Works with a lot of small foundations with limited staff, come together to talk about procedures with limited staff, handle paperwork, good assessments. Their meetings are beneficial.

George: Second this point. Has good guides, practical. Great resource.

Bill: At the other end of the spectrum, I know something about the Gates Foundation. They are huge. It's hard for them to manage grants under \$20 million. If they are giving 20 m, you have to work with larger ngo's to handle their grants. A country or regional umbrella may be a way to get around that.

Rick: The tipping piece we've thought about related to smaller groups we work with.

Agenda Item # 3: How do you keep your spirits up with sometimes exhausting travel and exposure to extreme levels of poverty?

Bill: I do a huge amount of travel (Bill mentioned all the trips made this year). Totally relate. Getting sleep is essential. All the exhaustion is worth it. Key to that – measuring what you're accomplishing – measure short and long term effects critically important to justifying your existence. What is the measure of change per dollar spent? Tough to get at but can be gotten at.

Rick: Your travel schedule makes me feel like I've been on vacation! I have to take a long flight to the country, another flight in-country, drive along awful roads 6 or 8 hours. Two days of hard travel to work. Language differences. I'm fluent in Spanish but it takes a day to get warmed up. Mental fatigue as well. Going along in remote areas, I begin to focus on mental snapshots (kid in rags, farmer's home) make me wonder, are we getting anywhere? In Guatemala used the Most Significant Change technique, what is most significant change in your diet this year? We were blown away by results – extremely positive. The half empty glass suddenly overflowed. Hard to get balance. Other suggestions?

Bill: Take a day in the capital and get a day of sleep before the second day of travel.

Carolyn: Find time for yourself every day just for ½ hour. Drink a lot of good water.

George: Make time for exercise.

Bill: Are you consulting with World Food Program. They have a focus area on food security. They are a UN bureaucracy and are full of interesting information.

Rick: It's on our radar screen; have not contacted. Developed good relationship with USAID missions, areas to collaborate on. We should also approach WFP.

Bill: You might leverage support from them. For example, tell them, “We’re putting in \$2 M, can you put in some?” They may be a useful partner. Donors often don’t want to donate first. They are more willing to follow a significant donation.

George: Be more intentional with partners to develop pilot projects that can be taken to scale.

Rick: have you worked with them?

George: We know them. The first dollars are the riskiest. They want to support a scale of success.

Nina: I feel peripheral since I work with young people. They look at their environment, identify and work for changes. To keep your spirit up is to know your spirit. When you know ... (Nina, I lost what you said. Could you write a quick email to clarify for the group?) I wrote a book called *Pioneering Spiritual Activism*. It is a handbook for youth to empower them to seize opportunity. Will order some for the group.

Bill: Merlot always works well.

Carolyn: Eat as well as you can, get as much sleep, take care of self.

Fran: Bill’s assessment idea is very good.

Bill: We hire out our assessment. Harvard School of Public Health

Fran: Not only is it good to measure, see progress, but it’s good to celebrate progress.

Bill: Convene grantees interregionally. Have sharing sessions what’s working where they can gain from each other. Hard to be the interpreter in the middle. They really benefit from interaction.

Fran: Orton creates peer relationships to give support through regional gatherings.

Bill: Packard Foundation discussions lead to collaborations; offers grants for capacity building for grantees, eg. board development.

Agenda Item #4: Do you want these phone calls to continue?

Carolyn: Yes, very helpful.

Bill: It’s interesting to focus on one organization and get input as opposed to going all over map.

Rick: This has been incredibly helpful. Generated some helpful ideas. If others want to do this I hope to play an advisory role.

George: Would it be better to leave another phone call open?. It's better when they are demand driven. Right now I don't have issues in mind to propose as an agenda but will keep it in mind for when I do.

Jackie: My experience tells me that if we keep it open, it won't happen. Also if someone volunteers now to facilitate it and we set a date, adrenalin will flow, the person will get clarity about agenda items, and it will happen and be productive.

Carolyn: I'll be a guinea pig. We are at a stage of exciting growth. How do we get where we want to be – it's scary and exciting. I'd like to do it in January.

Bill: Consider connecting by Skype if out of the country.

Fran: I could do this for one person. Also if someone has a burning question to discuss next time, call Carolyn to see if she's willing to share the time.

Carolyn: Yes.

Closing Evaluative Comments:

Bill: 90% of life is showing up. No substitute for meeting in person from time to time perhaps once a year.

Carolyn, Rick, Fran: We'd like that.

George: Bill, if you're willing to host, I'd like to learn about your evaluation, assessment and measuring techniques.

Bill: I'm happy to host it. March/April easier. Past heavy snows.

Fran: We could set time and date for it on January call.

Agenda Item #2: If you want to benefit and invest in people at the “bottom” of your supply chain, ie. the workers, how do you get their input on the skills they need plus management buy-in to support the skills development needed? (No time for this.)