

Preparing for a Site Visit

Site Visit Goals

- ✓ Meet key staff and/or board members
- ✓ Deepen your understanding of the organization and the project
- ✓ Gain a sense of place, leadership and capacity
- ✓ Determine actual need, possible role of philanthropy and alignment with your grant priority
- ✓ Gain perspective on organizational strengths and weaknesses

Prepare

- ✓ Determine who you want to meet with from the organization and where you would like to meet – is there an opportunity to see a program in action or tour a facility?
- ✓ Identify three times your group is available for a site visit and designate someone to be the scheduler
- ✓ Carefully review the proposal/material you have about the organization – print a copy to bring with you
- ✓ Meet with your site visit team to discuss site visit questions and to create an agenda that combines everyone's goals for the visit

Possible Site Visit Questions

1. What are your goals this year?
2. What does success look like? How do you measure whether or not you have achieved it?
3. What outcomes do you expect to result from your work? How do you evaluate outcomes?
4. What population do you serve? What is your history working with your intended target population? How do you reach them/how do they find you?
5. What impact will this one-time grant have on the program or organization?
6. What are the greatest opportunities currently facing your organization?
7. What are the greatest challenges currently facing your organization?
8. Tell us about the qualifications of the staff, volunteers and/or lay leadership.
9. Possible closing questions: What should we know that we have not asked you? Is there anything that we have left out? Do you have any questions for us?

Visit

- ✓ Introduce the group and review your agenda and goals for the meeting
- ✓ Tour the facilities if possible/relevant
- ✓ Questions and discussion – organize questions so you begin with easier, rapport-building questions and work your way to any more challenging questions you have, phrase them diplomatically
 - Open with a general, broad question
 - Ask open-ended questions
 - Ask one question at a time
 - Listen far more than you talk
- ✓ Outline the review and approval process for them and tell them the date by which they'll be notified of funding decisions

Debrief

- ✓ Meet with your group to discuss what you learned at the site visit
- ✓ Determine whether or not you recommend funding this organization, for what amount, what purpose and why