



Giving 2.0™ Guide: Conducting a Site Visit

Why Conduct Site Visits?

- Grant proposals can be very thoughtful and persuasive, but they are only a small part of a thorough organizational assessment.
- In-person communication helps to create a platform for a stronger partnership, if and when you fund the organization. It builds trust, gives you cultural insights and demonstrates an investment on the funder's part.
- Every site visit is a learning opportunity for how we assess and partner with nonprofits in the future as well as how we make future giving decisions.
- Site visits provide a forum for deeper conversations than you can have in written, electronic or telephone correspondence.
- Site visits can sometimes be an opportunity to see a program in action, though often the services are offered away from the nonprofit's offices.

Setting Up the Visit:

- Manage expectations of the visit upfront. Lay out a brief agenda: explain why you are making the visit, who you would like to meet and how long the visit might take. Depending on the size of the gift, requesting up to a one-hour visit may be appropriate (and is the maximum amount of time you should request).
- Please note: Typically, a \$5,000 grant or less would not warrant a site visit as it requires a significant amount of time from the nonprofit, relative to the gift size.
- Try to **schedule your site visit at least one week in advance** to give the applicant time to contact appropriate agency representatives who will attend the meeting. The organization may want to include a program participant, board member and/or staff member running the relevant program so do not be intimidated by these additional stakeholders and be prepared to ask thoughtful questions of all site visit participants. If appropriate, time your visit so that you see the program in action.
- Confirm your appointment 24 hours prior to the scheduled visit. Give the applicant your email and cell phone number in case an emergency occurs

and the meeting has to be rescheduled.

Before the Visit:

- Review the organization's past annual reports, grant proposal, website, 990 form and any other key documents that have been provided.
- Decide what key questions you will ask or which topic areas you want to discuss and designate someone who will be responsible for each set of questions (financial, program, organizational, etc.). Everybody in the group should ask at least one question.
 - Specifically, you will want to follow up with any unanswered questions that were generated after your review of the proposal and additional organizational research.
- ***Let applicants know that a site visit is not a guarantee of funding. Explain that it is a competitive process and more applications have been submitted than can be funded.*** The visit in and of itself is great exposure to giving circle participants and some may get involved regardless of the grant decision.

The Visit:

- Arrive 10 minutes prior to the starting time of your site visit. Nonprofit leaders' time is exceptionally valuable. Manage the meeting so that you end on time – the organization may not feel comfortable ending the visit if it runs over the scheduled time and it is important to respect their time and expertise.
- Set a non-threatening atmosphere. Site visits impact funding decisions significantly, so they generate considerable anxiety for the nonprofit. Manage this power imbalance thoughtfully and respectfully. Doing so will enable you to learn far more.
- Work as a team on the site visit. Make sure everyone in your giving circle has an opportunity to ask follow-up questions before moving on to a new topic.

Opening the Site Visit:

- Introduce yourself: your name, what you do, and why you are motivated to give. Ask everyone in the room to introduce themselves in a similar manner. Make sure each introduction does not exceed 60 seconds.
- Explain the purpose of the site visit. Let the agency representatives know that

the site visit is to gather more information about the organization and the proposed grant project as you proceed in the decision-making process. ***Be clear that the site visit is a step in the evaluation process and is not a guarantee of funding.***

- Bring copies of the agenda that you sent along to the agency prior to the meeting. You may want to start by providing a brief overview of your giving circle's purpose. You may observe a program in action for five minutes (if you arranged to do so in advance), followed by a question and answer period to learn more about their organization and grant proposal. You might also want to allocate time for them to ask you any questions they have about the grant-making process, etc.

General Questions to consider for the Site Visit: Please focus on asking questions that cannot be answered by reviewing the nonprofit's website or grant proposal. You may consider some of the following:

- Would you briefly summarize your organization's goals and how you work to achieve those goals?
- What is the specific population that you are serving and what is the scale of the issue you are trying to address?
- How do you know that your strategy to address this issue is working?
- What significant accomplishments, if any, has your organization achieved thus far?
- How is your organization different from others that are working to address the same or similar problems?
- Does your organization have the capacity (financial and human resources, realistic work plan, leadership, institutional knowledge, etc.) to meet its proposed goals and objectives?
- What are your greatest challenges in meeting your goals?
- Do you have collaborations with other entities and what is the nature of this collaboration?

Things You Do Not Do During the Site Visit:

- ***Do not argue with applicants***, no matter how strongly you feel about certain issues. They are the experts on what they do. Instead, try to learn what lies behind their thinking, approach or philosophy. Your responsibility is to learn

as much as possible about the organization.

- **Do not gush.** It is often difficult to hide one's enthusiasm for the wonderful work that grant applicants do, but past experience has taught us that one's enthusiasm can be easily misinterpreted as a guarantee of funding. Instead, express your interest and appreciation by asking thoughtful questions about the organization's vision, the challenges they face and how they hope to overcome these challenges.
- **Do not make recommendations** about how they should change their program, organization, or collaborations.

Closing the Site Visit:

- After you have asked all of your questions, begin to wind down the interview. Thank the agency representatives for taking time out of their day to meet with you.
- Explain the remaining steps in the grantmaking process and the approximate timeline. Let them know when they will receive notification on the status of their proposal. Remind them that the process is competitive and you have specific limits on how much funding you will distribute to the organizations you select. Allow the agency representatives to ask any questions they have.
- If the agency representatives do not have any more questions, then thank them again for their time.

After the Site Visit:

- Discuss the site visit with the others who attended it, preferably immediately following the visit or on a short phone call.
- You may want to write up your summary learnings from the site visit to solidify your thoughts and impressions while they are fresh.