

Conducting Effective Site Visits – Boston University MG455

A site visit can be one of the most important tools you use, as a grant maker, in determining your ultimate funding decisions. For example, an in-person look at a potential grantee's activities can complement a grantee's written proposal and give you a clearer picture of their request. In fact, site visits can be one of the most interesting parts of the grant-making process.

Bear in mind that few organizations turn down a funder's request for a meeting.

They may be in the midst of their busiest season, rushing to prepare a proposal for another funder, or simply overwhelmed with work — they'll probably still set aside two hours for you. As valuable as site visits can be, therefore, it's important to make sure you're not imposing on the organization's time or distracting its staff. Remember: the organization is not likely to tell you — at least at first — that your request for a meeting comes at a bad time. You need to be alert and sensitive, and hope that at some point the group feels free to be more candid with you about its schedule.

Be aware that a site visit is a very important event to potential grantees. They will quite likely put a lot of energy into planning it and will hope to have your full attention. Difficulties in scheduling can create a misleading impression, as one grant maker learned: "I remember a time when one of our team had to leave after half an hour. It wasn't disrespectful; it was just someone juggling a tough working schedule. But it seemed as though perhaps we weren't really that interested."

How to Plan an Effective Visit:

1. Do your homework before visiting the organization.

- Read the proposal
- Review the organization's website
- Review the most recent Form 990 and any other information on Guidestar or Charity Navigator.
- Make a note of any questions that arise when reading this information.
- Meet with your team to develop preliminary questions; narrow it down to five top questions

2. Schedule your visit.

- Call the organization's main telephone number and ask to speak with the Director of Development. Explain that you're considering making a grant to the organization and would like to conduct a site visit to get a better sense of the work the organization is doing.
- Schedule the visit during a time when activity is happening (i.e. if it's an after school program, visit when the children are there).

- Let them know how much time you have, and whether there are particular people or activities you would like to see.
- Notify the host of any questions you have prior to the visit; let them know what you are interested in learning more about

3. **During the Visit:**

- Begin by reminding people of the reason for your visit and about your role. You may have explained these points already, but nonprofits often play host to visitors, and may not remember what you told them.
- Be sure they understand that you're there not only as an interested individual, but as your fund's representative.
- Since everyone's time is scarce, you may want to focus on what you most need to know to make a good grant.
- The site visit is not usually the best time to bring up small, detailed matters that may require the applicant to do research or analysis.
- It is an opportunity to get to know the organization in a more personal way than is possible on paper.
- Refer to your predetermined questions — but be careful of coming up with a long list. Narrow it down to the five most important ones, so as not to overwhelm your host.
- When you visit the organization, be sure to ask your questions and observe the environment.

Sample Questions

Mission

- What is the mission of the organization? (this is kind of a trick question because ostensibly you know the mission having read the website and proposal)
- When was it last revised?
- Is the mission current? Do you wish you could change it? Why?

Board of Directors

- What role does the board play?
- How often do they meet?
- What role do they play in fundraising?
- Are there term limits?
- How are board members recruited?

Program

- Talk about the philosophy of the program; why did you choose this program design?
- What would you change about the program if you could change one thing?
- What challenges do you face in running this program?
- How many participants are there? How often do they attend?
- How do you know when you have been successful?

General

- What are the greatest challenges faced by your organization?
- What is your vision for this program/organization?
- Where do you recruit your staff from? Has recruiting staff been a problem? How?
- What are the greatest hopes you have for your program/program participants, etc.?
- (if they have an international component), What led you to have a domestic program and also an international program? How has that influenced the organization or its participants?

Financial

- I noticed that the last 990 you have on file is from 2004, why is that?
- I noticed that your organization relies heavily on (one source of funding); does that worry you? Will that funding source be at risk in the future?
- How will our funds be used?
- You are a large organization with a big budget, how will our small grant help you?

Volunteers

- What type of volunteer program do you have?
- Do you have a volunteer coordinator?
- Have you ever worked with undergrads? Why or why not?
- What was that experience like?