

Site Visits

Site visits can help with grantmaking decisions, observe the progress of a grant during the grant period, or evaluate results at the end of the grant.

Site visits help increase understanding of the community, the need, the nonprofit, its leadership, and the project. They offer an opportunity to look for information that cannot be obtained from the written proposal and to build a relationship with grantees.

Site visits to new applicants are recommended only if the organization has a good chance of funding. They are time consuming for grantseekers and tend to raise the applicant's expectations of a favorable decision. Communicate with the applicant that this visit does not automatically signal an impending grant.

In preparation for a site visit:

- Re-read the proposal and develop a list of thoughtful questions and determine your agenda for the visit.
- Call in advance to arrange a mutually convenient time. If you want to observe a specific program or activity during your visit, or meet with certain staff members, be sure to request it while setting up your appointment.
- Plan a minimum visit of 1 to 2 hours. The length of time may depend on several factors, such as the size of the grant and the number of people you are meeting with.

Factors to consider during site visit

Proposal: Is the organization clear about what they propose to do and how and when they propose to do it? Is their proposal feasible, innovative, and cost-effective?

Leadership: Is there adequate leadership (board and staff) to make the program or organization succeed?

Infrastructure: Do they appear to have the necessary space and equipment to accomplish what they propose in their request?

Impact: Is there a probability of sustained change from our grant, either within the organization or in the problem being addressed? Does their approach foster self-reliance? Will our contribution help the organization succeed in gathering additional support from others?

Urgency: Does the community see this as a priority problem?

Collaboration: Who else in the community is dealing with similar problems or client groups? Is this project complementary or duplicative? Why?

Evaluation: Is the organization able to measure and explain its impact? What kind of interim reports will we receive?

Other: Did any new issues or opportunities arise from this visit? Is there a better way to help, apart from the request as it is proposed?

General questions/prompts:

- “Tell me about the program and how it fits into your overall mission,” or “Tell me about your various programs.”
- What challenges do you foresee in carrying out this project? For your organization? Concerning your clients/constituents?
- Who else is doing good work in your field? Is there collaboration of efforts?
- How will the organization know if the project is succeeding, or if your work is succeeding?
- What else would you like me to know?
- Do you have any questions for me?

Remember: Be sure to...

- Ask questions that reveal whether a grant to the organization will further the foundations mission.
- Listen even to what they don't say.
- Take notes and write down your thoughts immediately following the site visit.
- Explain the review and approval process.
- Confirm next steps. (What will they do? What will you do?)
- Establish a timeline for review and decision.

Site Visit Report

Organization: _____

Date & Time of visit: _____ Visited by: _____

Contact Name: _____ Phone: _____

Purpose of visit: _____

Site Address: _____

Amount Requested: \$ _____ Type of Grant: _____

Purpose of grant request: _____

Preliminary analysis of proposal: _____

Strengths/Weaknesses: _____

Field Notes

Persons interviewed (name(s) /title(s)): _____

Impressions or Observations: _____

Organization's or programs strengths or weakness: _____

Recommendations: (Full or partial funding, no funding or other)

Follow up required: _____