Conducting Site Visits

Information provided by 30 years of Baltimore Area Grantmakers member experience and published resources from the Association of Small Foundations, Grantmakers for Effective Organizations, and Bridgespan GiveSmart.

Site Visits Benefit Grantmakers and Grantseekers Both

Due Diligence: As part of a pre-grant inquiry, the primary goal of site visits is often to assess if a nonprofit organization can accomplish the program goals described in its grant proposal. Grantmakers literally see the program in action, fill information gaps from proposals, and provide context for deciding the type and amount ($) of support needed.

Trustee Engagement: Site visits are a tool to engage other stakeholders in the work of a foundation or corporate giving program. Trustees and decision-makers have the opportunity to deepen their understanding of issue areas and nonprofit operations. New generations of grantmakers gain skills and knowledge of foundation work. Foundation and giving staff build champions for new program areas or grantees.

Stewardship: Grantmakers benefit from visits post-grant awards to monitor outcomes, complete grant reviews, and support the service delivery of the nonprofit organization.

Challenges the grantseeker: During a site visit, the organization is asked the tough questions, which forces critical thinking about a proposed project and its relevance. The visit also presses an organization to review its mission, long range plans, strengths, and weaknesses.

Offers an opportunity to spotlight the organization: Even the best proposal can’t explain people on paper. A site visit brings the organization to life.

Personalizes the process: A site visit creates a partnership, grantmaker and grantseeker working toward a common goal.

Increases opportunity for networking: Grantmakers link staff with others in the field, offering opportunities for exchanging information, problem solving, and collaboration.

Is a forum for idea sharing: Grantmakers may have the benefit of knowledge about related organizations and model projects to share with the organization. Because project planners can be too close to a project, grantmakers offer a different point of view.

Is a morale boost for staff, board members, and clientele: Recognition in the form of a site visit reinforces the work of the organization. A foundation visit is seen as a “special day” and viewed with a sense of pride.
Effective Site Visits

First -- establish a purpose. A site visit should:

- Provide valuable information that cannot be obtained from a written proposal.
- Deepen the understanding of the community, the need, and the project.
- Provide person-to-person contact with nonprofit’s leadership.
- Permit non-paper comparison of similar projects giving smaller nonprofits more of a chance to showcase their organization.
- Indicate the seriousness with which you make decisions.

Second -- respect and discuss the applicants’ expectations.

- Site visits raise the applicants’ expectations.
- Clearly and honestly communicate to those applying that the site visit does not automatically signal a forthcoming grant.
- Communicate transparently about your grant decision process.

Third -- prepare.

- Arrange a mutually convenient time to visit; be specific about what you want to see and consider co-creating a written agenda.
- Record date of visit, contact name, site name, address and phone number.
- Obtain the names and positions of those with whom you are meeting. Likewise share the names and relationships of the people coming to visit.
- Re-read the application. Provide visitors with summary of the application (amount and purpose of request), prior giving if any, and relationships (such as employees on the nonprofit board).
- Develop a list of questions in advance or use a standard checklist.
- Get basic information such as directions, parking information and safety of the location.
- Plan a minimum of one hour and 15 minutes. The length of the visit may depend on several variables including size of the potential grant or operating versus project support.
- Note: Can you arrange a visit with other grantmakers? Grantmakers report two main benefits to visiting in small groups.
  1. Efficient use of nonprofit time – less interruption of service delivery.
  2. Benefit from peers’ questions and impressions.

Fourth -- consider the structure of the site visit.

- Go when it is meaningful. If you want to observe a program, speak to specific staff members or clients, or tour the facility, discuss this when you set up the appointment.
- Right size your visit to the grant. If the potential grant is small consider reducing the time spent and number of people who conduct the visit.
- Take notes. It’s better to take too many notes rather than too few. Many grantmakers allow 15 minutes post-visit to record notes and impressions…sometimes inside the car before departing the parking lot.
Fifth -- know what to expect when you arrive/plan the visit.

- Call if you will be late. If you have limited time, be up front with your time constraints.
- Protect your time. Remind the nonprofit organization at what time you need to depart.
- Prepare to be emotionally involved with the programs and clients and keep to your prepared agenda to stay objective.
- Grantmakers report discomfort at the “fish-bowl” effect, arriving in a suit with an imagined bag of money. While somewhat unavoidable…be down to earth; be yourself; find common ground with staff and clients (how about them Ravens). You are not likely the first to conduct a site visit to the organization.
- Vary the type of questions – specific (how many …), opened ended (tell me about…), and reflective (what moments have told you…).
- Ask questions in a logical order; do not jump around from staff to budget to goals.
- Make less pleasant issues more universal, “Many organizations have issues with XYZ, what are the points of conflict in your organization?”
- Good open ended questions are, “Tell me about the program and how it fits into your overall mission,” or “Tell me about your various programs.”
- Do not play “gotcha”. Your questions do not need to be a criminal investigation (antagonistic) to get the information you need to make good decisions.
- Final questions to consider, “What should I know that I have not asked?” “What are you worried that we may have misunderstood?” “Is there anything we have left out?”

Finally -- saying goodbye.

- Be sure to explain the decision making process and what happens from this point on.
- Ask yourself if there are resources, best practices, or other organizations to whom you can connect the organization you are visiting for the purpose of improving their program.
- Plan 20-30 minutes of uninterrupted time and ask yourself:

  What did I learn?

  What do I still need to know in order to make a sound decision?

  If I were to do this again, what would I change?

  What new questions would I ask?

  Did I leave out any important information?

  What are your perceptions of the organization’s:
  Personnel management effectiveness
  staff knowledge of the program priority needs
  ability to survive/grow other

- You should note how you feel intuitively and compare this site visits to others and consider how tough questions were handled. Use common sense.