

Effective Site Visits

A Discussion with Grantmakers in Eugene

October 5, 2007

I. Pondering the Site Visit

A. *Why do it:*

- It offers us a deeper understanding of the request and its sponsor.
- It gives us the opportunity to compare the written word with reality.
- It humanizes the grantmaking process.
- It enables us to take calculated risks.
- It is an opportunity for learning.

B. *Why not do it (the excuses):*

- It will be more difficult to say “no.”
- It will build expectations. “They’re coming for a visit!”
- The people we’re visiting will be on their best behavior.
- We won’t ask the right questions and we’ll miss the obvious.
- We don’t want to intrude.

C. *When to do it:*

- You have questions about the proposal or the sponsoring organization.
- You know very little about the organization.
- You’ve heard something about the organization that concerns you— leadership changes, financial setbacks, program cuts, program growth.
- The request is large.
- The request is slick but the organization is small--something isn’t right.
- You’re intrigued.

D. *How to incorporate it:*

- Start simply and adjust it to your current practices. This does not have to be a complex operation.
- Start with a manageable number of visits—prioritize according to your areas of highest concern.

II. Getting Ready for the Visit

A. *Establish the parameters when you set up the appointment:*

- Share the purpose of your visit—your priorities and processes.
- Establish the length of time you can dedicate to the visit.
- Work with your contact to determine who should be involved, but always include board members, administration, and program staff, when appropriate. Limit the numbers.

- Ensure that the agency has a place to hold the meeting.
- Decline opportunities to combine the visit with an event, luncheon, or social gathering.
- Express your gratitude for the opportunity to learn.

B. Be prepared:

- Read the proposal thoroughly and record your preliminary questions about the agency, its work, and the request.
- Review the financial statements and formulate any questions pertaining to finances and project budgets.
- Review the agency's website and/or published material and write down any questions that arise from this review.
- Develop a short set of universal questions that address your highest priorities.

III. Making the Visit

A. Re-establish the parameters with the full group when everyone has convened:

- Start by expressing your gratitude for the opportunity to visit
- Inform people of the purpose of your visit within the context of your grantmaking practices.
- Let people know how much time you can spend—usually requires up to 1.5 hours, depending on the size of the group and whether there is a tour.

B. Adjust your style to fit the situation:

- Take care not to dominate the conversation.
- Frame questions in a way that allows others to do the talking.
- Ask questions one at a time.
- If you find discrepancies, ask for clarification. If you continue to find them, do some follow-up investigation after the visit.
- If you're asking tough questions, avoid making anyone feel personally responsible for the matter you are pursuing.
- Be a sympathetic listener, and take notes.
- Make an effort to engage all of the people present in the room by directing questions to each.

C. Focus on questions that will help you understand the needs being addressed, the agency's approach to problem-solving, the organization itself, and the overall financing:

- Ask for help in understanding the problem they are addressing.
- Ask for more details on what they are proposing to do and how/when they will do it.
- Ask who else is working on the problem and how their approach differs from, or complements, another.
- Ask how they will know if their work is successful.

- Ask what will be different as a result of this work and what will be different if the agency receives a grant.
- Ask for an update on the fund-raising, and inquire whether they've had any great surprises or disappointments along the way.
- Ask what they've learned from this experience.
- Ask about governance—how often does the board meet and what are the board's responsibilities. Who is responsible for ensuring the financial health of the organization.
- Ask what they will do if their fundraising plans fall short.
- Ask what their highest priorities are.

D. Conclude the visit much like you started it:

- Thank everyone for taking the time to meet with you.
- Let them know how much you appreciated the opportunity to learn more about their work.
- Inform them of what happens next—your process.

IV. Assessing the Visit

- Take time after the meeting to discuss with a colleague what you've learned, or what questions remain.
- Review your notes from the meeting and interpret what you heard.
- Investigate whatever is necessary to ensure that you have your facts straight.
- Weigh what you have learned and reach some kind of conclusion. Are you uncertain or willing to take a risk?

V. Following up with the Agency

- Get back in touch by telephone to let them know the outcome of your trustee meeting.
- Express your gratitude for the opportunity to learn more about the agency.
- Send a letter of confirmation.