Conducting Successful Site Visits

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INTRODUCTION

Nonprofit professionals and grant writers work diligently to perfect their craft in effectively conveying their needs and the impact they are making in the community. They invest hours preparing grant proposals, budgets and financial reports and building their case for support. These documents are a helpful way for funders to make informed decisions about their grants, but there are some things written correspondence cannot tell funders about an organization.

For example, it is difficult to understand a nonprofit's organizational culture without stepping into their facility. It is difficult to comprehend the need of the people the organization is serving without seeing them in person. It is difficult to fully appreciate and value the passion and expertise of nonprofit staff without meeting them. To experience these things first hand and truly get to know an organization, funders commonly conduct nonprofit site visits before, during or after grants are awarded.

This guide outlines several things to consider as you conduct your site visits or, perhaps, add site visits as part of your grantmaking process and strategy. You can use this guide as a reference for quick tips to utilize now or to help spark ideas for changes in your site visit process in the future.

PRE-SITE VISIT

There is no perfect time for a site visit as part of the grantmaking process; therefore, it is important for your foundation to determine the goals of your site visit and select the time of visit based on what you are hoping to accomplish. There are three distinct times when a funder may conduct a site visit:

- Pre-grant: this site visit can serve as a tool for your foundation to get to know an organization, to better understand their needs, or as a way to build upon the written proposal the nonprofit submits.
- Mid-grant: this site visit can serve as an opportunity for a funder to check-in on the progress toward grant objectives and outcomes, to course correct for the remainder of the grant period, and/or to see their dollars in action.
- Post-grant: this site visit can serve as a grant evaluation or reporting process at the end of the grant period to collect feedback from the grantee.

Once you have determined your goals and the timing of your visit, it is imperative that you communicate with the nonprofit you will be visiting about your goals for the visit and what they can do to be prepared. If there are any specific questions you would like them to answer, you might consider sending those questions in advance. If you plan to bring other staff members, grant review committee members or board members along with you on your site visit, be sure to communicate this as well, so you can manage expectations on the front end. Also indicate the amount of time you plan to spend at the organization so staff can help schedule your visit at a time that is convenient for them and will allow you to see programs in action and interact with staff members and clients.

Pitfalls and Possibilities

A potential pitfall of conducting a pre-grant site visit is that the nonprofit might assume the site visit guarantees funding. Be sure to articulate that the visit does not guarantee funding and what the site visit means as part of your overall grantmaking process.

Regardless of the timing and type of site visit you choose, you should also take time to consider if the site visit could replace a requirement of your applicants and grantees. For example, could a pre-grant site visit replace an LOI process or a post-grant site visit replace a written report? Using your site visit as a tool to gather information and, in turn, relieve a burden from a nonprofit, will help the process feel like a win-win for both parties.

Finally, a pre-grant site visit might allow new organizations that you have not funded in the past an entry point into your process. By beginning with a site visit, you are not placing as much importance on the nonprofit staff's abilities to prepare a compelling proposal. You get a chance to meet them before they start the process and can help coach their proposal on the front end. This has the potential to save both you and the applicant valuable time and energy.

Bite-Sized Action Steps:

- Determine your goals for your site visit program and the timing. Also determine if you will conduct site visits in the same way across all applicants/grantees.
- Determine what you want to learn while you are at your site visit and prepare any questions you will ask in advance.
- Communicate with the nonprofit well in advance of your visit so they can be prepared and know what to expect.
- Explore if there are other funders in your community who conduct site visits. You may be able to coordinate with them to do a joint visit that is productive for both of your organizations and saves the nonprofit time conducting visits.

DURING THE SITE VISIT

Your time visiting an organization should allow you the opportunity to learn something new about the organization, its programs, its staff, and its clients. Be sure to create space during the site visit for the staff to lead the conversation and to highlight the things they feel are important or that you may not yet know. This will give the staff an opportunity to show you their expertise and their passion for the organization's mission.

Pitfalls and Possibilities

One possibility on a site visit is that you will identify needs at an organization that have not been shared in a proposal. For example, you might see that the organization's technology is outdated, rooms need a fresh coat of paint, or there are young leaders in the organization who might benefit from professional or leadership development. Don't be afraid to ask the staff about other needs at their organization. Their responses could help you identify capacity building and technical assistance needs that you may be able to help support directly, through a connection to another funder, or in partnership with another community partner or sponsor.

Bite-Sized Action Steps:

- Prepare a list of questions you hope to have answered during the site visit. Try to keep the list as brief as possible and not duplicate questions you have asked or will ask in the proposal process.
- Build a loose agenda to help guide the visit but be sure to allow time for the staff to share with you what they feel is important. You should both have an opportunity to lead the conversation during the visit.
- Make a quick checklist of other needs you might be able to identify during your site visit.

AFTER THE SITE VISIT

Following the site visit it is important to share what you learned in two ways. First, a site visit recap should be sent to the organization you visited. Sharing this recap directly with the staff will allow them to add additional detail/ context if you missed something during the visit and will also be a clear indication to them that the site visit was productive and a good use of their time. The recap should indicate how you plan to use the information as part of your grantmaking process.

The next communication should be to your staff, grant reviewers and/or board of directors. This might be a site visit recap that accompanies the grant proposal they review or a separate communication during the grantmaking process. You may not need to share your full notes. A quick bulleted list of highlights and learnings is likely sufficient.

Pitfalls and Possibilities

One pitfall would be to conduct a site visit and then not use the information productively. Effectively sharing out the information you gained creates several possibilities for you as a funder and for the organization.

Another pitfall would be that your site visit uncovers problems at an organization or you learn that a nonprofit is not delivering on grant outcomes and objectives. If this is the case, it is best to address these items right away with both the applicant/grantee and your reviewers/board. Clearly communicating your concerns and the impacts it may have on current or future funding will benefit everyone in the long-run. The trust-building you do during the site visit will help to make these difficult conversations, if necessary, a bit easier.

Bite-Sized Action Steps

- When providing a recap to the nonprofit, consider any resources or connections you may be able to make for the organization. Share articles, connect them with peer organizations or other funders and think about ways you can support them beyond your grantmaking program.
- Create a tool to capture your site visit learning. It would be ideal if this is something you could share with staff, grant reviewers and/or board members when you get back to your office.

CONCLUSION

It is clear there are many benefits of site visits for both funders and nonprofits. Investing time and energy in building a comprehensive site visit program as part of your grantmaking process creates an opportunity for you to learn more about organizations and programs in your community and to make more informed decisions during your grantmaking process. At the same time, you learn about nonprofits in your community, you are also providing nonprofits an opportunity to learn more about your foundation, your priorities and your grantmaking process. This transparency helps build trust for more effective grant partnerships in the future.

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