The Funders are Coming!
Preparing for a Grant Site Visit

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Presented by:

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Site Visit Overview

Definition

- When funder representatives come to requester for a fact-finding meeting
- Scheduled in response to proposal (pre-award)
- Can also be post-award; frequently called an "audit" when done by government agencies as part of grants management process

Purpose

- Meet representatives of the requesting organization (employees, board, volunteers, clients)
- Establish or strengthen the relationship between funder and requester
- Gain or increase understanding of the requesting organization's mission, programs, and role in the community and sector
- See or tour the site/location of proposed project
- Verify the facts of the proposal
- Ask follow up/clarifying questions about the proposal/project
- Assess project's fit with the requesting organization's mission and strategic plan/ priorities
- Assess the requesting organization's readiness to implement the project
- Consider the project/organization's fit with funder's mission and priorities
- Review the status of the funds secured to date, prospects to complete funding, and reasonableness of plan to sustain the project beyond a possible grant
- Consider qualifications of leadership (Board and staff) and their commitment to the project
- Requester: explain aspects of the project that don't come through on paper
- Requester: identify ways to improve presentation of project (via questions asked)
- Funder: gain knowledge of the sector, e.g. emerging trends or practices
- Funder: share insights or best practices of similar organizations/projects, and provide observations or feedback on the proposal/project
- For smaller family foundations, opportunity to get the younger generation involved

"A site visit is successful if we've learned things about the organization and the project that weren't required or presented or apparent in the [written] proposal."

"I want to walk away [from a site visit] knowing that the group is a good steward of its current resources (human resources, revenue including prior grants). A red flag could be if there doesn't appear to be enough staff, or if there is lots of turnover in the organization. Plans for sustainability are key, as well as strong relationships with other funders."

\- Gloria Kemp, Community Benefit Manager for Kaiser Permanente of Georgia Corporate Giving

quoted in "Strategies for Successful Site Visits: Tips and Techniques for Grant Professionals and Managers" by Danny Blitch, Eden Freeman, Kimberly Hays de Muga, and Margit Brazda Poirer in *Journal of the Grant Professionals Association*, Volume 8 Number 1/Fall 2010

Tips for a Successful and Productive Site Visit

Before the Visit - Preparation is key!!!

Understand the Funder

- Research past applications/grants, visits, and other points of connection with the funder
- Be familiar with other organizations within the sector or community that the funder has supported/currently supports
- Learn about the funder's tendencies/practices from others
- Ask the funder what expectation s/he has for the site visit
    - Length of time to allocate for the visit?
    - What organizational representatives should attend?
    - What is the agenda or format?
    - Are there specific questions/topics to be prepared to address?
    - Should the requester prepare anything in advance: an update, presentation, etc.?
    - What funder representatives will be coming?

Identify the Team

- Select the staff, board, volunteer, and client/service members who are best suited for the conversation
    - Articulate and passionate about the mission of the organization
    - Knowledgeable about the details of the project and its potential impact
    - Disciplined with their answers (e.g. concise, succinct)
- Recommend keeping team around four to six people
- Suggested members/areas to include on your team:

Position	Area of Knowledge/Experience
Executive Director/CEO	Organization, e.g. strategic plan, position/niche in sector
Project Director	Details about specific project to be supported
Finance Personnel	Budgets and funding for organization and project
Grant Writer / Development staff	Preparation of application (where information in proposal came from), fundraising plan for project, grants administration
Board Member	Role of and commitment to this project by Board members
Client	Impact of project on service recipient
Partner Representative (if collaborative proposal)	Nature and depth of partnership, how organizations will work together on this project

Review the Proposal

- Be familiar with all the details as presented in the proposal
- Be prepared to provide a progress report on changes to the project, budget, staffing, and/or funding plan

Prepare the Team

- Provide background information on the funder and their history with the organization
- Explain to them what to expect, how and when to respond, etc.
- Be sure all those involved have a copy of the proposal and related material, especially the organization’s financials and the project budget, funding plan, etc.
- Provide possible questions and key talking points to the team members
- Practice answering questions, especially with volunteers, clients/service members

Take Care of the Details

- Provide the funder with clear travel directions and parking info
- Provide funder with a (mobile) number to contact for assistance on the day of the visit
- A few days prior to the meeting, send the funder a list of those persons who will be attending with titles or their relationship to the organization
- Confirm the time and place by email a day or two prior to the meeting
- Confirm the on-site meeting room reservation and any equipment/technology needs (e.g. projector) – and make sure you are comfortable using the technology!
- Make sure the office/building/conference room is neat and will comfortably accommodate those in attendance
- Assemble plenty of copies of handouts and gather supporting materials
- Provide water or light refreshments but not an extravagant meal

During the Visit

- Be on time (early in fact!)
- Provide a tour/visuals – this is your chance to show your program/organization in action!
- Be ready to provide an overview and update of the project
- Beware of “death by powerpoint” – focus on facilitating a conversation
- Engage in honest communication, especially about challenges
- No surprises!
- Be prepared to differentiate your organization/project and approach from others – show how your organization is uniquely positioned and fully capable of implementing this project
- Have relevant supporting material on hand for reference or if questions come up, but don’t give funders lengthy materials
- Don’t make stuff up! It’s okay to say “We’re still working on that” or “I’ll get back to you”
- Focus on the fundamentals; make sure long-winded answers don’t get in the way of the funders getting all their questions answered
- Allow time for questions and conversation; you can learn a lot by listening to the funder!
- Ask about next steps, timeline, and/or if the funder has any suggestions
- Be flexible! Focus on getting across those key messages when your carefully prepared agenda gets thrown out the window
- RELAX!

After the Visit

- Send a quick thank-you email – to funder as well as your team
- Follow up with the answers to questions/request for additional information - before or by the funder’s deadline and in the appropriate format

Special Tips for Virtual Site Visits (on-line meetings, conference calls)

- Add an IT expert to your team with the specific role of managing technical issues
- Test your software/on-line meeting solution beforehand
    - Are you able to share a powerpoint or any materials on the screen? If so (and this is an important part of the visit), make sure you know how to do this.
- Make sure your location is conducive to this kind of conversation
    - Minimal background noise
    - Set up so funder can easily see/hear from all team members
- Schedule extra time just before site visit starts for set-up and any last-minute technical issues
- If any team member is new to or uncomfortable with virtual meetings, practice ahead of time
- Ask funder best way to get them any materials/handouts (email the day before?)

Sample Site Visit Questions

Organization

- What makes your organization uniquely qualified to carry out the proposed project?
- How does this proposal fit within your current strategic plan or operational plan?
- What impact will the project have upon the organization's business model or funding sources?
- How will this project make the organization stronger or better able to fulfill its mission?

Project

- How did this project come about?
- Why is this the right time to implement this project?
- Does this project reflect best practices in the field?
- Who is the target population for this project? What is your plan for reaching/involving/ recruiting them? How do you know they need this project?
- What will change as a result of this project, e.g. the lives of those served, the community, the organization?
- What challenges might you face in implementing this project? How will you overcome them?
- What will success look like and how will you know if you have achieved it?
- What will you do if we grant you half of your requested amount? If we deny the request entirely?

"The dialogue that occurs in the approximate 90 minute visit between the O'Neill Family member, Foundation staff and the grantee is just as valuable as any of the materials in the final proposal."

- Timothy McCue, Program Officer for William J. and Dorothy K. O'Neill Foundation

quoted in National Center for Family Philanthropy's *Family Giving News*, September 2011

Site Visit Preparation Template

Funder:

Date/Time of Visit:

Location:

Logistics:
Room set-up?
Refreshments?
Equipment needed?

Participants:
Organization

Funder

Background:
How was this arranged? Who arranged it?

Funder Expectations:

Agenda/Topics to Cover

Per Funder:

Per Organization:

Key Messages:

Handouts

Summary of Grant Request
Amount:
Purpose:
Date Submitted:
Decision Expected:
Include copy of grant, if appropriate

Thank you/Follow-up
Thank you sent to funder? Format? Sender?
Did the funder request any follow-up or additional information?

Post-visit Notes

Presenters

Darcie Spar
Darcie began her non-profit career as an AmeriCorps member, and has since worked and volunteered for non-profits of various sizes doing grant writing and management, marketing communications, e-philanthropy, event planning, database and volunteer management, and many other fundraising activities. She has more than fifteen years of experience with grants – her favorite area of development! - and has been a GPA (Grant Professionals Association) member since 2004. She currently coordinates the programming work of the GPA Oregon and Southwest Washington Chapter. As the Development, Marketing and Communications Network Liaison with the Oregon Food Bank, she provides development assessment, guidance, and training to a network of 19 regional food banks. Darcie has two greyhounds and is also active in another "GPA" organization – Greyhound Pet Adoption Northwest.

Contact Darcie at dspar@oregonfoodbank.org.

Dana Miller
Dana joined the M. J. Murdock Charitable Trust in August 2008. As Senior Program Director for Grant Programs he is responsible for providing leadership and oversight of the Trust's grant programs and associated processes. Dana has a bachelor's degree in business administration and a master's degree in higher education administration. Early in his career he served as an investment officer in a regional bank and earned credentials as a registered securities representative and a certified financial planner. Dana soon embarked on a twenty-one year journey as a senior administrator for three different private liberal arts colleges in Kansas, Ohio, and Oregon. The last eleven years were at George Fox University in Newberg, where he served as vice president for advancement. Dana has extensive experience in all aspects of external college relations including development, marketing and communications, admissions, and more. He has been privileged to serve on several local nonprofits boards and professional associations. Dana and his wife LaNeal live in Vancouver and are the proud parents of two adult sons.

Contact Dana at danam@murdock-trust.org.

Site Visit Resources

Are You Ready for a Foundation Site Visit?
Blog posting from Philanthropy Front and Center - Cleveland
http://clevelandblog.foundationcenter.org/cleveland/2010/12/are-you-ready-for-a-foundation-site-visit-1.html

How to Score a Site Visit Touchdown
Video of panel discussion with four foundation representatives from GrantSpace, a service of The Foundation Center
http://grantspace.org/Multimedia/Video/Site-Visit-Q-A-2010-12-10-Cleveland-OH

Prepping for Your First Foundation Site Visit
Blog from Pamela Grow
http://www.pamelasgrantwritingblog.com/123/prepping-for-your-first-foundation-site-visit/

The Truth About Site Visits
Article from Minnesota Council on Foundations
http://www.mcf.org/nonprofits/site-visits

How Charities Can Benefit From a Foundation's Visit
Transcript of live chat session from the Chronicle of Philanthropy
http://philanthropy.com/article/How-Charities-Can-Benefit-From/63370/

Developing Questions for Site Visits
List of suggested site visit questions from a Canadian community foundation
http://www.victoriafoundation.bc.ca/developing-questions-site-visits

What do you do on a foundation site visit?
List of questions to ask funder to prepare for a site visit from Wild Woman Fundraising
http://wildwomanfundraising.com/reader-questions-foundation-tour/

Grantmaking: Evaluation: Site Visits
Links to various funder site visit forms/questions compiled by the Iowa Council of Foundations
http://www.iowacounciloffoundations.org/site-visits.aspx

Strategies for Successful Site Visits: Tips and Techniques for Grant Professionals and Managers
by Danny Blitch, Eden Freeman, Kimberly Hays de Muga, and Margit Brazda Poirer
Article in Journal of the Grant Professionals Association, Volume 8 Number 1/Fall 2010
https://grantprofessionals.org/component/content/article/77-gpa/375-strategies-for-successful-site-visits (must be a GPA member to access)