Guide to Site Visits & Site Visit Summary Form

Created by Slingshot
www.slingshotfund.org

Introduction

For many giving circle members, going on site visits is the most informative, interesting, and fun part of the funding cycle. Although some people find these site visits intimidating, it is a vital part of the grant-making experience. In order to ensure that you are able to make the most of this opportunity, Slingshot has created this short "guide to site visits," based on our own guide for Slingshot members, that will help to prepare you.

Why Go On Site Visits?

The site visit is an opportunity to look beyond an organization's grant application to develop a deeper understanding of a potential grant recipient. Many circles, Slingshot included, find gathering first-hand impressions of the organizations you're considering for grants to be an invaluable part of the process. Going on a site visit is an opportunity for members to get to know an applicant organization in person, to interact with its leaders, users and stakeholders, and to gather information and impressions that you simply can't get by reading applications or website.

Before the Visit

- Be in touch with anyone else going on the site visit with you right away. Discuss why you want to visit this particular organization.
- Ideally, you will be able to conduct this site visit in person, as the experience will be more accurate and rich with the in-person interaction. However, depending on the location of the offices, the timing of the visit, and the nature of the organization, phone visits are often necessary alternatives.
- Although there is no precise procedure, a typical in-person site visit will last from 60-90 minutes. You may also choose to meet with additional staff, funders, or participants in the organization's activities.
- Make your appointment with the organization at least two weeks in advance, and confirm with your contact during the week of the appointment. Be sure to verify the address, who you ask for when you arrive, etc.
- Though it goes without saying, your attitude during all communications and the site visit should be one of respect and support for the organization. Be aware of your power as a potential funder.
- Take an opportunity to re-read the organization's proposal and refresh yourself about the questions you want to address while visiting. While you want to be respectful, this is your opportunity to also ask tough questions.

What should I say when I call?

- Be as honest as you can be about the purpose of the visit. You should tell the organization that they are under consideration for a grant from your giving circle, that you have approximately 60-90 minutes for a visit, and that you would like to not only speak with the organization's leadership, but also get a sense of the organization's activities from its participants.
- Feel free to elaborate on how many organizations applied for funding and how many circle members are visiting, and that you will take back details of your experience to the larger committee for a decision-making meeting. (Unless your circle is also asking applicants to interview in person or by phone.)

What should I do to prepare?

- Read everything that has been sent to you previously, including the organization's proposal, budget, questions to address during the visit, and any additional materials like brochures.

- Take some time to peruse the organization's website before you visit, since seeing it might raise questions you want to clarify during your visit.

Figure out what you really want to learn from the visit.

- Think about your expectations, and figure out what you really want to learn from the visit. Remember that you will be representing not just yourself but your entire giving circle investors, and try to anticipate questions that your fellow members might have.

- If circle members have visited this organization in the past, talk to the member who conducted a past visit to get their impression of what you should look out for. Note the questions that arose in previous years that you want to follow up on.

During the Visit

Who should I meet with?

- If possible, meet with not only the Executive Director but also other staff and people who participate in the organization's activities. You want to go deeper than the usual "sales pitch" from the ED or the fundraising team.

What information should I leave behind?

- You should let the organization know about your circle's decision-making process and timeline.

After the Visit

- Take some time to debrief with any other members that went on the site visit to discuss your impressions. If necessary, call the organizational contact whom you visited with to answer any questions that still remain unclear.

- If you have different opinions about the organization, explore why you formed those opinions.

- Decide how you plan to convey the information you gathered on the site visit to the rest of the giving circle. Questions you could address in your update to fellow members include:

1. On a scale of 1-10, how comfortable would you be recommending this organization for a grant? *Please rank on a scale of 1 ("absolutely not") to 10 ("definitely yes") and explain your reasoning.*

2. What impact would this organization have on our portfolio of grants? (ie: why should our giving circle make this grant?)

3. Who did you speak with on your visit (e.g. executives, program staff, participants, board members, etc.)?

4. What was your experience during your site visit or phone evaluation (e.g. ease or difficulty of contact, response time, level of enthusiasm, where you met, overall confidence in leadership, etc.)?

5. As you see it, what are the strengths and weaknesses of the organization?

6. What have you learned that was not explained in the proposal? Have there been any changes since the proposal was written?

7. Does this organization appear financially viable for the foreseeable future?

8. In what ways does this organization resonate with our giving circle's mission?

9. How will this organization use the funds?

10. If this organization has gotten a site visit or grant from us in the past, what has changed at the organization since our last interaction with them?