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# Teen Philanthropy café

SNACKABLE BITES ON GIVING, FOR TEENS

ON TODAY'S MENU: **THOUGHTFUL SITE VISITS**



# Welcome to the Café



**WHAT COULD I LEARN FROM VISITING A NONPROFIT ORGANIZATION? WHAT KINDS OF QUESTIONS CAN I ASK? HOW MIGHT IT HELP US DECIDE WHETHER IT'S AN ORGANIZATION WE WANT TO SUPPORT?**



**These are big questions, and you've come to the right place for answers. In this issue, we'll explore the value of visiting a nonprofit—often called a *site visit*. So pull up a seat, order your pumpkin soy latte or cinnamon chai, and we'll get you thinking and talking about site visits and what you can learn from them. Would you like nutmeg on that?**

## WHEN ARE SITE VISITS APPROPRIATE?

Some funders only do site visits for those organizations they are nearly sure they'll fund or those who are applying for grants of a particular size; others only visit current grantees. It's important to note that site visits aren't always necessary as a part of due diligence, or appropriate if it will be burdensome to the grantee.

## On Today's Menu **SITE VISITS**

### OBJECTIVE:

**Discuss the benefits of site visits. Learn how to meet with a nonprofit in a way that is respectful of its time. Discover whether site visits are valuable for you.**

The term *site visit* simply means meeting with one or more staff, board members, or clients of a nonprofit organization, at their office or location, with the intention to understand more about what they do and how well they do it. Usually a funder will go on a site visit as a part of the vetting or decision-making process for a grant, or to monitor a current grantee midway or at the end of a grant cycle (the period a funder supports an organization).

Much like a school field trip, site visits can give you insights that simply reading about an organization cannot. For funders, these meetings are an opportunity to look beyond what's in a written grant application, and gain a clear picture of what the inside of an organization really looks like.

Many philanthropists say that site visits are the most informative, interesting, and fun part of funding! It's a chance to connect with the people who are doing great work and learn more about their needs and successes. It's also a chance to see firsthand the staff and board's enthusiasm for their mission, their commitment to it, and their hopes for the future.

### ABOUT THIS GUIDE:

This series introduces young people to strategic, thoughtful philanthropy, and inspires them toward giving with impact. Families and adults who work with youth can use these guides to facilitate peer discussion and fun activities around giving. This project is a partnership of Exponent Philanthropy and Youth Philanthropy Connect, with funding by the Frieda C. Fox Family Foundation.



**SO DIG IN AND BEGIN.**

## GETTING THOUGHTFUL ABOUT SITE VISITS

There are several reasons to visit a nonprofit. Here are some:

- 🗨️ **YOU ARE PASSIONATE ABOUT AN ISSUE, CAUSE, OR ORGANIZATION, AND WANT TO LEARN MORE.**
- 🗨️ **YOU WANT TO GET TO KNOW THE STAFF AND WORK OF AN ORGANIZATION FIRSTHAND, AND OBSERVE ITS PROGRAMS IN ACTION.**
- 🗨️ **YOU WANT TO BETTER UNDERSTAND HOW YOU CAN SUPPORT AN ORGANIZATION (EITHER THROUGH FUNDING, VOLUNTEERING, AN INTERNSHIP, OR POSSIBLE FUTURE JOB), AND ASSESS WHETHER THE ORGANIZATION IS A GOOD MATCH FOR YOUR MONEY AND/OR TIME.**
- 🗨️ **YOU WANT INFORMATION BEYOND WHAT A WRITTEN GRANT APPLICATION CAN TELL YOU.**
- 🗨️ **YOU WANT TO BUILD RELATIONSHIPS AND CONTACTS WITH THE PEOPLE THERE.**
- 🗨️ **YOU ALREADY FUND AN ORGANIZATION, AND YOU WANT TO HELP MONITOR THE GRANTEE'S PROGRESS MIDWAY, OR ASSESS HOW WELL IT DID DURING THE GRANT PERIOD.**



**HERE'S A TIP:** Site visits *do* take up an applicant's time. If you are going on a site visit as part of a funding process, be sure that you align the visit with the size and purpose of the grant. And, before you make your request, consider how your visit may affect the organization's day-to-day duties. Nonprofits will nearly always gladly open their doors to potential funders, so the responsibility rests on us to be extra-conscientious and thoughtful visitors.

## HOW TO BE A GRACIOUS GUEST

BEFORE, DURING,  
AND AFTER

Here are some ways to conduct site visits thoughtfully and respectfully.

### ★ BEFORE THE VISIT

**SCHEDULE THE VISIT WELL IN ADVANCE.** Contact the nonprofit and ask respectfully if you can set up a site visit. To start, email the development director, who's in charge of fundraising. If the organization is very small and doesn't have a development director, email the executive director. Explain your purpose (whether it's part of a funding process, or that you are interested in an "informational interview," for example, to learn more.) Ask if the organization is willing to host you, and, if so, who would be the best person (or people) to meet with, and when would be the best time for a visit. Give the organization plenty of time to prepare (at least a few weeks).

**SHARE WHAT YOU WANT TO LEARN.** Think about what you really want to learn from your visit. Prepare a checklist of questions and people you would like to meet, and share the list with your host before the visit.

**EXPLAIN THE PROCESS.** If you are going on a site visit as part of the process to vet (i.e., assess) an organization for possible funding, be up front about that and explain the grant process. Let the organization know, as applicable, if the process is competitive—meaning a site visit doesn't automatically mean the organization is getting a grant.



# HOW TO BE A GRACIOUS GUEST

BEFORE, DURING,  
AND AFTER



**DO YOUR HOMEWORK.** Read the organization's website, brochures, or any other materials you may have. If the organization applied for a grant, read its proposal or application, and note the areas where you have questions or want to know more. Also—it may seem silly to say, get directions and make sure you have a phone number in case you get lost or are running late! You want to arrive relaxed, calm, and open-minded, not stressed out after driving in circles.

Be mindful of how you dress for a site visit. Although a suit isn't necessary (or appropriate if you're visiting an after-school center!), a tidy and professional outfit is one way of showing your respect for the organization's work—and the time they're spending with you.

## ★ DURING THE VISIT

**USE THE TIME WELL.** Set an agenda for the meeting, including time for introductions, a tour (if appropriate), a brief presentation about the organization's programs and work, and questions and answers. Set a time frame in advance (30, 60, or 90 minutes, for example), and arrive and end on time.

**SITE VISITS ARE CONVERSATIONS, NOT INSPECTIONS.** Nonprofits take visits from funders seriously. If you are representing a

foundation, it may make some nonprofits nervous. As soon as you arrive, create a non-threatening tone. Keep the conversation warm, friendly, and supportive.

**ASK QUESTIONS.** This is your chance to see how well this organization matches your own interests, or your giving mission and goals. Whereas you want to be respectful, don't be afraid to ask tough questions. Allow time for the organization to ask you questions as well.

**EXPRESS YOUR THANKS.** Let the organization know that you truly appreciate the time. If part of a funding process, let the organization know any next steps and when it can expect to hear back. Be as honest as you can about your grant process.

## ★ AFTER THE VISIT

**WRITE NOTES ABOUT YOUR VISIT.** This will help you remember the names of people you met, and what you talked about. Include your overall impressions about the organization, any stories you heard, and a summary of strengths and any challenges/concerns.

**TALK IT OVER WITH OTHERS.** If you went on the site visit with a friend or peer, take some time to discuss your impressions from the visit. If doing the site visit as

part of a funding process, you may want to report back to your family or the board what you learned.

Follow up as needed. If you have additional questions about the organization, call or email to clarify; again, however, be respectful of the organization's time.

“NONPROFITS  
REPORT THAT TEENS  
ARE SOME OF THE BEST  
QUESTION-ASKERS!  
SO BE THOUGHTFUL,  
BE INQUISITIVE, BE  
RESPECTFUL—AND ENJOY  
LEARNING THROUGH TRUE  
DIALOGUE WITH YOUR  
NONPROFIT PARTNERS!”



USE THESE QUESTIONS TO REFLECT OR DISCUSS WITH YOUR FAMILY OR PEERS.

HOW DOES YOUR FAMILY OR FOUNDATION APPROACH SITE VISITS? WHAT KINDS OF SITE VISITS HAVE THEY GONE ON, AND FOR WHAT PURPOSE?

WHAT ARE THE TOP THREE QUESTIONS YOU WOULD WANT TO ASK THESE NONPROFITS:

- 1.
- 2.
- 3.

WHAT PERSONAL REASONS MIGHT YOU HAVE FOR VISITING A NONPROFIT?

IS THERE ANYTHING THAT FEELS UNCOMFORTABLE TO YOU ABOUT GOING ON A SITE VISIT?

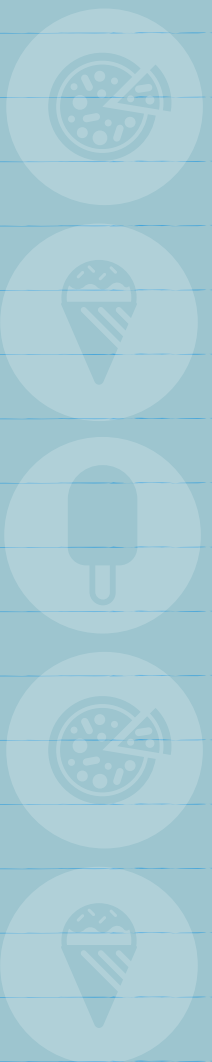
WHAT SKILLS OR NEW LEARNING DO YOU THINK YOU COULD GAIN FROM A SITE VISIT?

IF YES, WHAT DO YOU THINK YOU COULD DO TO FEEL MORE COMFORTABLE (E.G., PREPARE IN ADVANCE, ASK FOR SUPPORT, GO WITH SOMEONE ELSE)?

NAME AT LEAST TWO NONPROFITS THAT YOU WOULD BE INTERESTED IN VISITING, AND WHY:

- 1.
- 2.

WHAT ARE YOU MOST EXCITED ABOUT WHEN IT COMES TO THE PROSPECT OF SITE VISITS?



# SAMPLE QUESTIONS FOR SITE VISITS

The questions you ask a nonprofit organization depend on two things: your purpose for going there, and what you want to learn during your time together. For example, you would ask very different questions if there to assess the organization for a possible grant versus just wanting to learn more about it, out of your own curiosity.

Here are some sample questions to get you started on a site visit to a potential grantee—an organization your family or foundation might fund:

What are you working on now that you're really excited about or proud of?

Do you involve youth/teens in your organization, either as participants or volunteers?

If we were to give a grant to your organization, what do you think the best use of our dollars would be?

What are some of the greatest opportunities and challenges you have as an organization?

What success story can you share about this program or your organization?

Tell us about your budget: How does it reflect your organization's model, mission, and priorities?

Possible closing questions: What else should we know that I have not asked you? Is there anything we left out? Do you have any questions for us?

## FIELD EXAMPLE: QUESTIONS GO BOTH WAYS

Just as your hosts will share their stories, be sure to share your story too. According to Harriet Dennison of The Ralph L. Smith Foundation in Portland, Oregon, "On a site visit, I always ask, 'What questions do you have of me?' It's an opportunity for me to demystify the grantmaking process. There's nothing I wouldn't tell them if they asked." She adds another helpful question at the end: "What did I forget to ask you that you want me to know?"

## ACTIVITY ONE

### INTERVIEW A PHILANTHROPIST

Here's a way to learn from others who have been on site visits. Find a staff or board member from a foundation or giving program (maybe it's even your own family foundation), and ask if you can interview them by phone or in person. Ask them these questions and any others that you're curious about.

- 1 **How many site visits do you do per year?**
- 2 **What is the primary purpose of most of your site visits (e.g., to help you make grant decisions, to monitor a grantee's progress)?**
- 3 **How do you determine which organizations to visit?**
- 4 **Who typically goes on site visits—board or staff, or both?**
- 5 **How do you prepare for site visits?**
- 6 **How do you help the nonprofit prepare for the visit?**
- 7 **What is a typical agenda? Do you share the agenda (or other information) with the nonprofit in advance?**
- 8 **What do you look for most while on a site visit?**
- 9 **How do you capture what you learn on a site visit? Do you take notes? Photos? Do you have a template you use? How do you share this information with your board or others involved in your philanthropic efforts?**
- 10 **What advice would you give to other people (like me!) who are new to site visits?**

## ACTIVITY TWO

### PLAN, GO ON, AND DEBRIEF A SITE VISIT!

Even unrelated to a grant, it's fair game to call a nonprofit and ask if you can do a practice site visit with them! Let them know you're just learning about the process. More times than not, they're happy for the opportunity for a low-stakes practice run for their team as well—it's a terrific chance for dialogue and learning for all involved. Site visits are also a terrific opportunity to involve your friends and family!

### WHAT DO FUNDERS LOOK FOR ON SITE VISITS?

On a site visit, philanthropists keep their eyes and ears open to assess the health and success of the organization and the people it serves. Here are some specifics funders say they look for:

**"I look for clients. Believe it or not, I did a site visit to an emergency shelter and no one was there."**

**"We look for competence and professionalism among staff. I always ask about strategic planning efforts, and expect both staff and directors to be able to articulate what the organization does, why and how it meets community needs, and outline a basic road map for the future."**

**"I always think of myself as a gracious dinner guest – I show up on time, ask thoughtful questions of my hosts, listen attentively, and don't overstay my welcome."**

## IN SUMMARY:

# To-Go BOX

- Site visits are a smart, interesting, and fun way to learn about a nonprofit and see if it is a good match for your (or your family's) time and/or money.
- It's important to be respectful of the nonprofit you are visiting. The best way to do that is to plan for the visit together (well in advance), be up front and honest about your purpose and (if applicable) grant process, honor the organization's time and energy, and treat its staff and board as if they are the experts.
- When it comes to site visits, trust your gut. Don't be afraid to ask hard questions, and take note of any red flags or "weird feelings" you get about the answers. These could be areas you want to follow up on or ask more questions about.



## UH-OH: RED FLAGS

**WATCH OUT.** These are things you don't want to see on a site visit—and, if you do, ding-ding-ding! They could mean there's trouble brewing at the nonprofit (but be sure you don't make assumptions without asking more). If you notice any of these red flags, you might simply want to ask specific questions to learn more.

THE LOCATION OR OFFICE SEEMS HIGHLY DISORGANIZED OR PHYSICALLY UNSAFE.

THE ORGANIZATION HAS NO PLANS OR WAY OF MEASURING ITS SUCCESS.

CLIENTS (IF APPLICABLE) ARE SPARSE OR NONEXISTENT.

THERE IS FREQUENT STAFF OR BOARD TURNOVER.

THEY SEEM TO NOT KNOW WHAT THEY'RE TALKING ABOUT.

THE BOARD IS INACTIVE OR DISENGAGED.

THE ORGANIZATION DOESN'T "PLAY NICELY" WITH OTHER COMPARABLE ORGANIZATIONS IN ITS ISSUE AREA.

THE BUDGET IS UNREALISTIC OR UNCLEAR.

When in doubt, trust your gut. Are you leaving the site visit feeling great about the organization, or with more questions than when you came? Use your instincts to discern whether the organization is sound and stable, if it is struggling, or otherwise. Remember, you don't have to fund an organization if you go on a site visit.



## WANT MORE?

If you're curious to learn more, check out these resources:



**Youth Philanthropy Connect:** [youthphilanthropyconnect.org](http://youthphilanthropyconnect.org)

**Exponent Philanthropy:** [exponentphilanthropy.org](http://exponentphilanthropy.org)

**Jewish Teen Funders Network:** [JTFN.org](http://JTFN.org)

**The Truth About Site Visits:** [mcf.org/nonprofits/site-visits](http://mcf.org/nonprofits/site-visits)

**National Center for Family Philanthropy:** [ncfp.org](http://ncfp.org)

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### QUESTIONS?

Contact  
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Thanks for coming by!  
See you next time at  
Teen Philanthropy Café.

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