

## **Philanthropy 101**

### **How to Conduct a Site Visit**

A visit from a potential funder sometimes makes organization staff and board members uneasy. It is your job to try to put the organization at ease by being friendly and communicating clearly. Yet that does not mean you should be afraid to ask tough questions. These questions provide the information you need to make a good decision. Just explain why you need the information.

Both for your and their benefit arrive on time, and stick to the time estimate you established. Give the organization an opportunity to share what they want to, but also make sure you have time to ask your questions. Above all, enjoy learning about the work the organization is doing, because site visits are the best way to see the work first-hand.

The issues you cover in a site visit depend in part on what you have **learned before the visit**, and specific questions your prior knowledge generates. However, the general questions below are a good starting point.

1. Describe how the organization started and important milestones in its history.
2. What is its mission?
3. What programs does it currently provide?
4. Does the organization have a strategic plan? If so, please describe.
5. What is the need the organization is addressing?
6. What is the organization's strategy for addressing the issue?
7. What are the specific program goals?
8. What evidence can the organization provide that its programs have an impact with the people it serves?
9. Does the organization evaluate its work?
10. What are the qualifications of staff?
11. What is the role of the board, and how often does it meet?
12. How does the board's membership reflect diversity of skills and demographics, and how does it reflect the population/issue it addresses?
13. What are the organization's major funding sources?
14. Does the organization have a deficit?
15. Has the organization ended the past three years bringing in more income than expenses? If not, how was that addressed?
16. What growth does the organization anticipate in the next year, and how will the organization support that growth?
17. What is the organization's greatest achievement in the past year?
18. What are the organization's greatest challenges?
19. What are the organization's most critical funding needs?
20. What does the organization want you to consider funding?