

## Task 6: Site Visits

### **The big Idea of this task:**

Choosing an organization requires us to do background research that includes getting to know an organization personally before we commit to fund it. Part of this is making sure that the organization's mission and values are in alignment with the values of our foundation. Making responsible choices means knowing the organization.

### **By the end of this task, campers will be able to:**

- Evaluate how the organization aligns with their foundation's mission.
- Understand the workings of the organization.
- Feel confident making a final decision about the organization they choose.

### **During this task, campers will grapple with:**

- How does this organization align with our mission and values?
- How can I show respect and honor towards the representatives of the organization?

### **You know you have been successful with this task when:**

Campers can feel confident about talking about the organizations and know where they would like to fund.

### **Additional Resources**

- Contact organizations in advance of your visit and have them send you promotional materials.
- Visit websites of the individual organizations you are visiting.

### **To have on your "radar screen":**

- It is important to have adult leadership make contact with organizations well in advance to schedule site visits. Be sure that they understand that campers are visiting as funders, not as volunteers. This concept may be a new one for the non-profit, and it is important to prepare the organization so neither the campers nor the organization are disappointed.
- The goal of this visit is not to volunteer, but to learn about the mission and structure of the organization. A true site visit is very different than taking campers to an organization for hands-on service or volunteerism. We encourage to spend time helping campers understand the difference between the two purposes.
- You may want to encourage teens to ask the organization if it would be still be helpful to receive a grant for less than the requested amount. This is useful information, and a consideration that often arises in the final decision making session.

- Be aware that participants tend to become attached to the organizations they visit. If you will be reviewing five proposals, but only visiting two of the organizations, it may be difficult for campers to feel as excited about the places they have not visited. It may also be difficult for them to be objective about those they did visit.
- Site visits are a great place to take photos, or to communicate with the media. They are also a great time for campers to write blog postings for your camp's blog as they process the experience.

### **Sample Activity**

- Sample 1: Site Visits (Adaptable program for one facilitator/ multiple facilitators)
  - Sample 2: Site Visit Guide
- \*From Rose Youth Foundation, Rose Community Foundation

## Sample 1: Site Visits

### Adaptable program for one facilitator/ multiple facilitators

#### Overview

Making a site visit is a critical component of the grant making process. Being able to see and experience what goes on inside a nonprofit organization can have a significant impact on the camper's ability to make a thoughtful decision about the grant making pool. During this program campers will have the opportunity to perform site visits.

#### Group Type

Adaptable program for one facilitator/ multiple facilitators

#### Space Needed

- Site location
- Quiet location for teen foundation members to sit in a circle and have a conversation following visit (you may choose to do this back at camp, or to ask the organization to use their space following the visit)

#### Supplies Needed

- Campers should have a pen and their Mission Driven Grant Proposal Evaluation sheets
- Appropriate documentation for off camp trips
- Contact information for organization
- Completed Mission Driven Grant Proposal Evaluation sheets (from Task 5)

#### Prior to the Program

- Arrange for transportation to the site
- Contact organization a few days prior to the visit to reconfirm day and time
- Make sure to schedule time to debrief after returning from the site or you will run the risk of your campers forgetting what they have seen.
- If you have multiple groups within one teen foundation that are visiting different organizations, see Appendix 1- Teen Foundation Visits to Multiple Sites. This will help guide your discussion and evaluation towards the end of the program.
- You may want to ask campers to dress more professionally than they usually do at camp- as is appropriate for visiting a professional setting.

#### Timetable- 115 minutes

15 minutes- Preparation

60 minutes- Site Visit (not including travel time)

    20 minutes- presentation by organization

    20 minutes- camper's questions

    20 minute- tour of site/meeting with service recipients

15 minutes- Reflection

20 minutes- Discussion about the organization

5 minutes- Evaluation

### **Preparation (15 minutes)**

Before leaving for your site visit, review the questions and roles discussed at the end of the previous task. Make sure campers are clear on what will happen on the site visit (from your conversation with the organization), and on what is expected of them. Review which campers will be introducing the group to the organizations (we recommend sharing their mission statement) and which questions they will each ask. Be clear that they are welcome to ask additional questions that come up during the visit.

### **Site Visit (60 minutes)**

During or directly following the site visit, encourage campers to use the “Observation during site visits” on the Mission Driven Grant Proposal Evaluation sheets to record their personal impressions and observations. (It is important that teens have the opportunity to reflect individually before reflecting as a group.)

### **Reflection (15 minutes)**

Begin by congratulating your teen foundation on their site visit. (Point out specific examples of things they did very well while visiting the organization such as showing respect to the employees or clients, asking thoughtful questions, etc.)

1. Ask the campers using a round robin style so everyone gets to share:

- Can you share one experience that stood out for you during the visit?
- What is something that you learned about the organization that you did not know prior to the trip?

### **Discussion about the organization (20 minutes)**

2. Share with the campers:

- Now that we have shared some of the highlights of our visit, we would like to give you an opportunity to discuss the notes that you wrote on the Mission Driven Grant Proposal Evaluation sheets.

3. Remind the campers:

- Before our site visit we broke down the mission statement and request for proposal for (organization’s name). Now that we have visited, share how you saw the values identified by the organization carried out through the conversation with their staff and your observations? (Encourage all of the campers to share examples.)
- Were there areas where you feel the mission was not aligned with the work the organization was doing? (You may find here that participants disagree about what they heard during the presentation at the organization. This is productive as it will encourage conversation and give them an opportunity to teach each other.)

- What other observations did you make?
- What questions do you still have? (You will need to decide as a group how you might get the answers to any lingering critical questions. This might involve a quick phone call to the person you met with, or a written request if time allows.)

### **Evaluation (5 minutes)**

#### 1. Share with the campers

- Thank you for taking the time to give feedback about the organizations. We hope that this discussion will help you in evaluating the organization(s).
- Now we are going to ask you to spend a few minutes thinking about everything you learned about the organization from the visit and discussion.
- Then evaluate the organization using the scoring on the right hand side of the Mission Driven Grant Proposal Evaluation sheet. (Remind the campers that they are evaluating the organization on its own, not compared to other organizations they may have visited.)
- Once the campers complete their rating, collect the sheets to be used in the next task.

**Sample 2: Site Visit Guide**  
**Adaptable program for one facilitator/multiple facilitators**  
**Rose Youth Foundation**

**Site Visit Guide**

Definition of the site visit: Speaking in person with grant applicants, surveying their program and operations, gathering information and expanding your knowledge.

Before scheduling a site visit ask yourself two basic questions:

1. Do you have any important questions about the project that are not answered in the proposal?
2. Is this proposal so off base, out of priority or substandard that it does not warrant taking up the grantee's time (or your time) and raising their expectations to go on a site visit?

**Benefits of the Site Visit:**

- Meet key staff and board members
- Learn more about the organization and the project
- See beyond the proposal
- Gain a sense of place
- Learn and advance your personal development
- Determine actual need
- Provide helpful advice

**The Choreography of the Site Visit:**

1. Prepare in advance. Read the proposal carefully. Write down questions in logical order. Learn a little about the field. Bring your copy of the proposal and list of questions together with a pad of paper and pencil or pen on the site visit.
2. Create an agenda with goals.
3. Dress appropriately out of respect. Remember that some Jewish day schools require that students dress modestly.
4. Know where you are going and be on time.
5. Introduce yourself. Look people in the eye, shake their hand and thank them for their time. Tell them your name, what grade you are in, where you go to school.
6. Review the agenda, how much time you have together and your goals for the site visit.
7. Tour the facilities. Keep your eyes open. Notice how staff interacts with clients. Take notice of the site itself (is it clean, in good repair). If no facility, proceed to the next step.
8. Brief presentation of the proposal by the grantee: let them tell you about why they applied and why their program is important.
9. Ask your questions and discuss the project together.
10. Tell them about the review and approval process and when they will be notified.

11. All important last questions:
  - What should I know that I have not asked you?
  - Is there anything we have left out?
  - Any questions?
12. Thank them for their time.
13. Debrief with your colleagues for a few minutes after you leave.

## Appendix 1

### Teen Foundation Visits to Multiple Sites

1. If you have multiple groups visiting different organizations have each group share what their group learned at their site so that every teen is able to evaluate each site that was visited.

- During the discussion about the organization, have one camper serve as a note taker.
- Once the camper is done recording all of the feedback and the rest of the groups have finished their discussions, have them gather together to share the feedback of each group.
- Have a camper from each group share the feedback about the organization with the entire foundation. (The presentation should be about 2 minutes or less, and the campers may need a counselor to help guide the conversation.)