Four Steps for a Successful Site Visit

1. **Establish a purpose.** (One or several of the following)
   - Look for information that cannot be obtained from the written proposal.
   - Deepen your understanding of the community, the need, and the project.
   - Establish a person-to-person relationship with the nonprofit’s leadership.
   - Allow the organization to showcase their project.
   - Form a stronger basis for comparison with other projects.
   - Indicate the seriousness with which you make decisions.

2. **Prepare an agenda.**
   - Review the application and compose questions. Determine your agenda for the visit.
   - If you want to observe a specific program or activity during your visit, or meet with certain staff members, stipulate such in setting up your appointment. Plan a minimum visit of 60 to 90 minutes.
   - The length of the visit may depend on several variables, such as the size of the grant, the scope of the project, the number of people on the tour, geographic spread, etc.

3. **Plan a visit and communicate the purpose.**
   - Call to arrange a mutually convenient time. Give them sufficient time to prepare for the visit.
   - Site visits raise the applicant’s expectations. *Clearly and honestly communicate with the applicant that this visit does not automatically signal a forthcoming grant.*
   - Obtain in advance the names and positions of the people you will be meeting during the tour. Ask yourself if this site visit is a priority with them.
   - Get basic information as to directions, parking (or cab availability), and the safety of the location (hard hats, footgear, etc.).
   - Call if you will be late in arriving, or need to reschedule.

4. **Implement on-site basics.**
   - Be honest and up front about your time limitations. Treat everyone with respect. Understand scheduled visits may change, due to project responsibility.
   - Start discussions with “Tell me about the program and how it fits into your overall mission,” or “Tell me about your various programs.”
   - Listen – even for the things they don’t say.
   - Take notes. It’s better to take too many notes than to take too few.

A response to a site visit should be both subjective and objective. You should note how you felt intuitively about the organization and the program. You should also compare this site visit with others and compare how tough questions were handled.