

Worksheet 10.2
Preparing for Site Visits

Step 1. Preparation

- Define the goal of your site visit, such as to learn about the organization and its work or to determine the appropriateness of a future or further gift.
- If the organization has sent you a funding proposal or background information, read it.
- Review the organization's Web site and e-newsletters if available.

Step 2. Questions to Ask

Consider the questions you want to ask from among the following subject areas and possibilities.

I. Program and Leadership

- A. What is the organization's mission or primary purpose?
- B. What are you trying to accomplish?
- C. What are the organization's primary programs or activities and its immediate and long-range purposes?
- D. What is the organization's primary strategy to achieve those goals?
- E. What is the most exciting thing the group is doing now?
- F. How does your community perceive the organization's work?

II. History

- A. How long has the organization been doing what it does? Why was it formed? Has its mission or purpose changed during the past three to five years?
- B. What is the organization's vision for its work over the next year? Over the next three years? Do you have a written and board-approved strategic plan? If so, may I have a copy? How and why do you see the work changing? What impact do you think your project has had on the issue the organization is addressing?
- C. Who does your organization serve? Who are your constituencies?
- D. Who is your leadership body? What kind of people and talent have been involved? How do you support your staff and board to develop their skills and awareness?

III. Organizational Functioning

- A. How many people work with and for the organization, in what capacities? Do board members, senior staff, and volunteers reflect your clients and other constituents?
- B. Who decides what? Are constituents involved in staff, board, and volunteer leadership?
- C. How does your organization define success? How do you decide when to alter strategy or direction?
- D. Is there anything else you'd like me to know?

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Preparing for Site Visits, Cont'd

IV. Fundraising

- A. What is your budget?
- B. How much of your income is earned, how much is contributed?
- C. How would you describe your business model?
- D. What are the organization's sources of earned and contributed income?
- E. What are your fundraising goals? Do you have a fundraising plan? Who is involved in fundraising? How many board members and how many staff members are trained to ask for money from donors or funders?
- F. Does the organization have a cash reserve? How big is it as a proportion of the budget? How much of a cash reserve do you think is essential in order to preserve your work through hard times?
- G. Does the organization have an endowment? How large is it? What is its purpose?
- H. If I am unable to fund this project, or I can fund only a percentage of your request, how will this affect its going forward?
- I. What is the most useful gift a donor or foundation could give you now?
- J. What other fundraising support do you need now?

V. Impact

- A. What results are you seeking in your work?
- B. How will you know when you have been successful?
- C. How do you evaluate your work, your staff, and your board's effectiveness?
- D. How do those you serve help you measure your impact?
- E. Do you quantify your impact or demonstrate results for funders?
- F. If I am a donor or funder giving \$_____, will I receive your annual report or other reports of your success?
- G. What has been a failure or a challenge in the past two years?
- H. What have you learned from that challenge and how are you addressing it?
- I. What can you realistically achieve with the budget you currently have?
- J. How do you allocate your resources?
- K. When you are not successful in a strategy, what do you do?
- L. On a scale of 1 to 10, with 10 being excellent, rate your agency on its achievement of results and tell me why you chose that rating.
- M. Do you hire an outside evaluator, do you do your own evaluations, or do you use some combination?
- N. Do you share your audited financial statements and most recent 990s with donors upon their request?
- O. If we give to you, what opportunities for engagement or donor education might there be? Do you have a formal program for donors or a way to steward our leadership?