



# SITE VISIT

# GUIDELINES

## Goals of a Site Visit:

- To build trust and strengthen relationships.
- To explore shared interest areas, share knowledge and identify possible new ways of working together to serve common goals.
- To gain information beyond what is obtained from a written report.

## Our Promise to You:

- Be guided by mutual respect, appreciation, and trust.
- Approach each interaction as a partnership rather than a top-down relationship.
- Be aware of the power imbalance regardless of the equity we seek – and think about how what we say and do can be interpreted because of this power.



- Be a partner and ally.
- Assist from a place of trust and support, not suspicion.
- Accountability will be a two-way relationship.
- Learn about and respect norms.
- Ask to take photos (or if there are limits to doing so) during the visit and if you can use them in your written materials, social media, etc.
- Make clear the purpose and anticipated length of visit and respectfully stick to it.



*Writing a check to a nonprofit is not in and of itself a particularly satisfying activity and it is only one step in getting the job done. There is no greater satisfaction than having some involvement with the organization you are helping to fund. Site visits accomplish this. Nothing beats getting to know the people and their work up close and having the chance to work in partnership with an organization to get a critical job done.*

—Sybil Hite, Vice President  
Hite Foundation



### Guidelines:

- Be humble, patient, respectful, and flexible.
- Discuss with community partners what is helpful and appropriate when it comes to site visits.
  - Frequency
  - Nature/approach
  - Objectives
  - Cultural norms





- Consider these questions before you plan a site visit.
  - Is this visit necessary?
  - Is this visit more about the foundation than about the partners and the communities?
  - What disruption will it cause? Is that disruption worth it? How can the disruption be minimized?
  - Could you get the same information without a site visit?
  - Is it necessary to visit communities?
- Thoughtfully and collaboratively plan all site visits with partner agencies.
  - Let them know well in advance and check if the proposed dates/times work.
  - Communicate your purpose, objectives, and expectations with partners, and ask partners about their objectives and expectations of your visit as well.
- Discuss any issues or questions on either side that should be addressed during the visit. Both parties should discuss and agree upon mutual objectives for the visit and how to achieve them.



### What we'll be looking for:

**Leadership:** Is there adequate leadership (board and staff) to support your mission and carry out programming effectively? Do the Board and staff agree on priorities? Are the mission, vision, and values clear and is your programming within the mission?

**Infrastructure:** Do you appear to have the necessary space and equipment to support your mission and carry out programming effectively?

**Collaboration:** Who else in the community is dealing with similar problems or client groups? How is this organization working effectively with other orgs to develop mutually beneficial activities and to share data?

**Evaluation:** Are you able to measure and explain community impact?



### Things we may ask on visit:

- “Tell us more about how we can provide additional support through capacity building.”
- “How can we better serve the mission of your organization through financial, informational and/or relational support?”
- “If we wrote an e-newsletter article about this program, what would you like us to educate our audiences about?”
- “Tell us about the programs you administer?”
- “What challenges do you foresee in carrying out your work? For your organization? Concerning your clients/constituents?”
- “Who else is doing good work in your field? Describe your collaboration of efforts.”
- “What else would you like us to know?”
- “Do you have any questions for us?”

### After the Site Visit:

- Ask for a brief evaluation of visit from host agency.
- Consider writing a short article with photos for the next e-newsletter.
- Set up a plan to follow up on action items.

