

WORKSHEET 12.1

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.
- Read the proposal or background information.
- Think about your expectations, questions, and concerns in advance.

Step 2. Consider the questions you want to ask from among the following subject areas and possibilities:

Program and Leadership

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

History

- 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?
- What is the organization's vision for its work over the next year? Three years? Do you have a written and 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?
- Who does your organization serve? Who are your constituencies?
- 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?

WORKSHEET 12.1 continued

Organizational Functioning

- 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?
- Who decides what? Are constituents involved in staff, board and volunteer leadership?
- How does your organization define success? How do you decide when to alter strategy or direction?
- Is there anything else you'd like me to know?

Fundraising

- What is your budget?
- How much is earned, how much is contributed?
- What are the organization's sources of earned and contributed income?
- What are your fundraising goals? Do you have a fundraising plan? Who is involved in fundraising?
- Does the organization have a cash reserve? How big is it as a proportion of the budget?
- Does the organization have an endowment? How large is it? What is its purpose?
- If I am unable to fund this project, or can only fund a percentage of your request, how will this affect its going forward?
- What is the most useful gift a donor or foundation could give you now?
