PHILANTHROPY MASSACHUSETTS

SUCCESSFUL SITE VISITS

GUIDANCE, STRATEGIES, AND TIPS FOR FUNDERS AND NONPROFITS

This site visit* guide was borne out of a series of meetings with funders and nonprofits and a survey of nonprofit organizations that took place in late 2023 and early 2024. Initiated by funders who participate in the Philanthropy Massachusetts Program Staff Learning Network, the site visit project was expanded to include other philanthropic and nonprofit leaders in the planning and implementation of this work. The process included:

1. A survey of nonprofits conducted by Philanthropy MA to collect feedback on the site visit experience. You can view the survey results here.
2. A meeting of the Program Staff Learning Network titled *Site Visits to Deepen Knowledge & Relationships* at which three nonprofit leaders served as panelists. The results of the nonprofit survey fueled the discussion.
3. A program titled *Site Visits: Let's Improve Them!* at which more than 150 staff and volunteers from philanthropic and nonprofit organizations shared perspectives on the pros and cons of site visits and how to improve them.
4. A planning group of funder and nonprofit practitioners compiled and synthesized learnings from the above work to prepare this guide. It is intended to be a living document that can be refined with use and feedback.

Thank You

The Philanthropy MA team is grateful to Amy Hampe, of the Richard and Susan Smith Family Foundation, and Melanie Torres, of the Klarman Family Foundation, for initiating and facilitating this project with the Program Staff Learning Network and to planning group members — Tania Buck of the Somerville YMCA, Lisa Crane of HopeWell Inc., and Kristina Dakos of Women4Progress — for their contributions to the creation and presentation of this guide.

*There was much discussion around appropriate terminology to adequately reflect intentions for these types of meetings and to set the tone for trust-based and collaborative conversations among equals rather than one-way, check-list assessments. Suggested terms in place of 'site visits' were 'check ins' or 'field visits.'

Successful Site Visits

Guidance, Strategies, and Tips for Funders and Nonprofits

Please Note

If you participated in any of the meetings or working groups to date, you witnessed and perhaps contributed to the discourse acknowledging the imbalance of power inherent to grantor/grantee relationships. A common theme we heard throughout the process was the importance of building strong, respectful relationships and empowering nonprofits to feel comfortable communicating honestly with funders.

A Working Document

This guide is housed on the Philanthropy MA website along with additional site visit resources. These documents and links will be refreshed as dictated by the field.

You are welcome to provide your feedback at info@philanthropyma.org with the subject line "Site Visits."

"Funders need to consider that a nonprofit might not make their needs known. Nonprofits need to feel empowered to set clear boundaries."

Speech bubbles indicate direct quotations from the funder/nonprofit working groups.

Tips for Requesting and Conducting a Successful Visit

Four key themes emerged from the working groups. They are outlined below.

Work on cultivating and deepening the relationship between the funder and nonprofit at every opportunity including, but not only, at visits.

- Visits are not always about assessing the work. A visit can be driven by wanting to understand the work, learn, and find ways to deepen support and partnership.

Set clear expectations.

- Clarify the purpose of the visit. Is it part of the application? Just checking in? Something else?
- Confirm the visit and guest list 24 to 48 hours in advance.
- Send an agenda and any questions and/or points for clarification in advance. Co-create the agenda with the nonprofit if possible.
- If you will be asking questions that have already been answered in a report or proposal, please explain why you are asking again or following up on previous answers.
- Establish clear next steps/follow-up action items post visit.

Be flexible with the logistics.

- Ask the nonprofit if there are certain/busy times to avoid or particularly valuable/informative times for your visit.
- If possible and appropriate, offer to visit in person or by Zoom/virtually. Virtual visits may be simpler and easier for organizations that are not able to visibly showcase their work or that operate from multiple locations.

"If it is just a 'getting to know you' visit, be explicit about that ('I don't have an agenda' or 'don't prepare a PowerPoint')."

"If it's the case, communicate that the purpose is relationship building rather than seeing all programming."

"Do you need a tour? Who should be in the room? Does the visit replace a written report?"

"Should visits occur before or after funding? Before funding requires the organization to do a lot of work and adds a lot of pressure with no financial commitment."

"Participant privacy is important. Respect who is at your visit and why."

"We like site visits in lieu of written reports. Conversation allows us to get into the true impact of an award while deepening connections."

Tips for Requesting and Conducting a Successful Visit

(Continued)

- Recognize that some programs cannot provide access to clients for legal or other reasons (asylum seekers, victims of domestic violence, etc.).
- Share accommodations that can be made available: language translation or mobility/accessibility assistance for people with sight, hearing, or other disabilities.
- Consider offering a visit to replace a written report.

Do your homework and lean into your role as an active observer.

- Ask the nonprofit what is the maximum number of guests they feel they can accommodate at one time.
- Make sure all guests (board/committee members, etc.) are well prepared, and determine in advance who will ask which questions.
- Give your hosts your full attention: no phone, photos without permission, or “wandering off on your own.”
- Do not expect food/beverages to be served at this working meeting as they add cost and can be a burden for the nonprofit.
- Instead of requesting a special visit, consider attending existing programs, events, or meetings of the nonprofit to see it in action.
- Consider combining a visit with other funders as it will save time and expense for the nonprofit and offer you a networking opportunity with other funders.
- If possible, allow for visits to be initiated/requested by a nonprofit on their own schedule.
- Understand that staff and other participants in the visit may have varying levels of comfort sharing their stories.

“Is the site visit an efficient use of time? Time spent during the site visit is time not working on the project or program.”

“Give kind and helpful feedback, especially when funds are not granted.”

“Site visits can be an efficient/effective way to talk about a program and be able to answer questions that a funder may have. Sometimes can be more efficient than hours spent on a grant report - and can actually see the work in action.”

“Make sure not to use visit time to offer unsolicited advice.”

“Trust is a two way street: Make sure grantee partners or potential applicants have an opportunity to ask questions of the funders, too.”

“Avoid any semblance of an inquisition.”

Tips for Hosting a Successful Visit

Funders visit for a variety of reasons including: to learn more about a new or unknown organization and a proposed project; to receive updates and see the impact of past grant awards; to better understand a program by seeing it in action; to meet new staff; and/or to become active partners in the work of the organization. Whatever the stated reason, you should feel encouraged to reach out to a funder and articulate your needs and prepare in the following ways.

Work on cultivating and deepening the relationship between the funder and nonprofit at every opportunity including, but not only, at visits. Make sure the expectations are clear and align with your needs.

- If not provided, ask the funder about the nature of the visit, what issues they would like to discuss, and how much time they would like to spend.
- Share best times and circumstances for visits and be clear on the ideal group size.
- Be clear with the funder about sensitivities/concerns around the involvement of program participants or other groups.
- Suggest appropriate attire (i.e. walking shoes, informal clothes) if conditions warrant.
- If programming can't be observed, consider providing alternate methods to show your work — videos, photos, written testimonials, signage, or other creative opportunities like a panel or vendor fair.
- Share logistical details with the funder including parking and/or arrival instructions, and provide day-of contact for any issues.

"Mutual expectation setting is important. Communicate your plans and allow the funder the opportunity to comment or edit."

"Create a one page guide on what to expect, especially in school or mental health settings. Set clear expectations for the funder."

"Sometimes funders get asked to attend big celebrations as the format for our visit. That can make it tough for a conversation or for getting an authentic feel for the program."

"Make tools for site visitors. Provide a way to get feedback from visitors if you want it."

Tips for Hosting a Successful Visit

(Continued)

- Confirm the visit and guest list 24 to 48 hours in advance if the funder hasn't done so.
- Ask for clear next steps or expectations post visit.

Be flexible and prepared.

- Arrange for a quiet area for conversation.
- Determine who is best positioned to share and meet with the funder. Select participants from your staff/ volunteers who feel comfortable speaking and connecting with groups of people.
- Prepare your participants with speaking points and be sure everyone is aligned on the project/grant request details so your team speaks with one voice.
- Have any relevant supporting materials on hand for easy reference, but avoid excessive paperwork. You can follow up or send additional resources later.
- Do not feel obligated to provide food or beverage, as this is a working meeting. Do what works best for your team, your constituents, and your organizational culture.
- Find out if any accommodations are needed during the visit (language translation, mobility/accessibility assistance for people with sight, hearing, or other disabilities) and do what you can to meet them.
- Consider hosting a day for multiple funders to visit at once.

Do your homework and lean into your role as the expert in your field.

- Learn about the funder's priorities and funding history with your organization.
- Be sure to get your questions answered.

"Determine what you want the funder to leave knowing."

"Use site visits as an opportunity to tap funder connections (e.g. 'we are looking for...'). Funders can support capacity by connectivity."

"Share impact in varied modalities (data, strategy, stories)."

"Be clear if not much is new/changed. It's okay to say if there's nothing new to observe. Just state it.
How you are sustaining success IS positive. You can explain how that's continuing to work well."