Site Visits: Let's Improve Them!

You might recall the request a few months ago to share your opinions with funders about site visits. Your responses fueled a robust funder network meeting about site visits with more than 60 participants and a panel of three nonprofit executives. From setting clear expectations to being respectful of all involved, your recommendations were heard and have inspired further action.

You are invited to collaborate with funders to further discuss these findings and co-create resources to guide grant makers and grant seekers as they develop objectives and prepare for these visits. The resulting document(s) could include a best practices guide or a checklist of dos and don'ts. You can learn about the convening [here](#) and review the survey results and the network's key discussion points below.

SURVEY FINDINGS

Fifty nonprofit representatives participated in the September 2023 survey. When asked to rate their feelings about or reaction to funder site visits, 63% reported positive, 33% reported neutral, and 4% reported negative views. Across the board, four distinct themes arose when asked:

What would you like to tell funders to create more meaningful site visits that deepen their knowledge about your work and help you build stronger relationships?

1 **Be clear on why you are having the site visit and what you hope to accomplish.**

Communicate your expectations in advance for the format, what information should be shared, who you would like to meet, and ideally share an agenda and the questions you expect to ask so the nonprofit can be prepared.

> *"The best experience is typically when funders set clear expectations, either by submitting questions in advance or communicating that presentations and such are NOT required. When funders communicate that they want an authentic rather than a curated experience, non-profits leaders and staff feel like they are seen and understood."*

63%

"love them"
or
"wish we could host more"

33%

"they are fine"
or
"generally useful"

4%

"dread them"
or
"wish we didn't need to do them"

2 **Be respectful and flexible on scheduling and let the nonprofit lead on what times are best to visit.**

Right-size the amount of time you are there so it does not take staff members away from doing the work. Consider if the meeting could be virtual versus in-person based on your goals.

> *"We also enjoy a chance to show off, so planning time for a tour - but making sure the time is appropriate for clients being served and giving us time on the agenda to share more of the nitty gritty with you so you can get to know us better."*

3 **Don't be disruptive to the agency's work and don't make constituents feel they are on display.**

Come in with a sense of humility and a learning mindset. Prepare all visitors to dress appropriately for the meeting ("dress for meeting success, not to impress").

> *"Need funders to understand that not every org is able to have a site visit where program participants are observed... there are practical, ethical, and other considerations."*

4 **Be prepared and do your homework on the organization or grant request.**

Do your research and make sure everyone visiting is well prepared so you are not asking for information the organization has already shared with you. Listen, be engaged, have a dialogue. Offer updates on the funder and make connections to others.

> *"95% of the time, it seems the questions they ask are exactly what we put in our application...I also often get the feeling that there is a lack of trust being displayed by site visits. If they are asking the same questions as are in our application, are they coming to visit us because they don't believe what we wrote? Regardless if that is the intention, that is how it feels."*

FUNDER DISCUSSION AND NEXT STEPS

At the Program Staff Learning Network Meeting on *Site Visits to Deepen Knowledge & Relationships*, participants reviewed the survey findings and heard from a panel of nonprofit executives. They worked in small discussion groups to expand on the four themes, and then focused on how to create opportunities to deepen knowledge and build stronger relationships moving forward. Additional discussion points included:

- Framing the meetings as conversational, not transactional
- Reframing "site visits" as "check ins" or other terms that signal an eagerness to collaborate and learn
- Refraining from working through checklists or other activities that suggest compliance
- Making site visits optional or in lieu of written reporting

Funder network participants expressed overwhelming support for taking next steps along with nonprofit peers to improve site visits for the benefit of all involved. **We hope you will join us for the convening, a working session on March 12th from 10:00 to 11:30 am.** Please register here. You are also welcome to share your thoughts with us here.

THANKS

Many thanks to the 50 nonprofit representatives who shared their candid opinions in the survey back in September.

Special thanks to Celina Miranda, Ph.D. of Hyde Square Task Force, Usha Thakrar of Boston Area Gleaners, and Rosario Ubiera-Minaya of RAW Art Works for generously sharing their thoughts and expertise as panelist at the Program Staff Learning Network Meeting on September 26, 2023.

OTHER SURVEY HIGHLIGHTS

"We learn a lot about the funders' priorities and change in directions and have an opportunity to discuss our future directions as well. I appreciate it when it's a dialogue."

"I have found that funders come away with a significantly better understanding of our work, mission, and challenges during a site visit. I encourage impromptu questions and observations during the site visits to increase engagement."

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

"If a funder has detailed questions about budget line items, etc. they should provide those questions in advance rather than putting the org on the spot in a meeting."

Please contact Phyllis Corkum, Nonprofit Programs Manager, for further information.