



GiveSmart

Donor Decision Tool

Quick Guide to Conducting a Nonprofit Site Visit

Collaborating to accelerate social impact

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Requesting a site visit often raises expectations on the part of the nonprofit and can be time-consuming and even disruptive, so it is wise to visit only if you are serious about funding the organization. Be aware of the unavoidable dynamics of being a potential funder—the organization will be putting its best foot forward.

Still, actions speak louder than words: Little can rival actually visiting a nonprofit to get a feel for the work that it does and the people or causes it supports. The activities you observe during your visit—whether of scientists hard at work on the next big vaccine, eager students with their arms raised, or a bevy of job seekers receiving training in needed skills—will likely inform your thinking long after you have left the grounds.

Site visits offer opportunities not only to get excited about the work the organization does, but also to inform questions that can be hard to answer otherwise: How do the programs operate on the ground? Does the staff seem committed and talented? Does the physical space appear up to the task of delivering the results promised? Your visit will allow you to flesh out your understanding, confirm your assumptions, and answer many specific questions about the organization.

Of course, such visits don't make sense for all organizations. Generally, nonprofits that provide observable programs or services like the examples above lend themselves better to site visits. A site visit to a nonprofit that does indirect work, like an environmental advocacy organization, may not offer the same level of inspiration and insight.

For organizations that have multiple sites (say, a network of charter schools or afterschool programs), it may be worthwhile to visit at least two sites to get a sense of how they compare. How similar are they one to the next? If they are different, are the differences intentional or the result of a model that is not being “replicated” with fidelity?

To make the most of your time—and the organization's—here are some rules of thumb:

- **Share your goals in advance:** If you know there are certain people you'd like to meet (say, the director of the program you are most passionate about), or

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programs you would like to see in action (like the youth poetry class you read about in the paper), make sure this will be possible at the time of your visit.

- **Bring other decision makers:** If there are people whose opinions you are counting on to make your decision, bring them. Recognize, though, that the more people you bring, the more formal the conversations, so resist the urge to bring an entourage.
- **Be prepared:** Bring any remaining questions you have and be ready to ask them if the situation arises (or try to answer them through observation).
- **Know how close you are to a decision:** You may be asked specifics about your decision-making process. Because site visits do raise expectations, be ready to share where you are and the likely timing of your decision.

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Example agenda items for a site visit:

- Meeting with the program director or directors. You may find that certain questions from the [Guide to Interviewing the Leader of an Organization](#) are useful to ask.
- Tour of the office and/or facilities.
- Tour of the site where the organization works with beneficiaries and, if relevant, speak with beneficiaries to hear their perspectives.
- Meeting with frontline staff, ask:
 - How did you come to work here?
 - What is it that you find rewarding or challenging about working here?
 - Is there anything you need to do your job better or to be more effective?
 - Can you share an example of how you have changed the way you work over the last six months to be better at your job?