

# NAPA VALLEY

## COMMUNITY FOUNDATION

### Marla's Site Visit Primer

**What:** Site visits are my preferred way to learn about a nonprofit or charitable project, at least initially. This in-person visit allows you to get a feel for the group, how it's run, and see their work in action.

**When:** We nearly always meet with a Napa County nonprofit/project at least once before we recommend a grant, or include them in the *Community Link* newsletter. My site visits typically last between 60-90 minutes.

**Who:** I typically meet with the Executive Director. If the group has a Development Director, they often join in. If it's an all-volunteer group, I meet with a few of the board members.

**Where:** I meet at the nonprofit's site, if they have one, so I can get an in-person feel for the agency and their work. If they don't have an office, but run a program or event, I try to attend that program or event and schedule the conversation around that.

**Why:** Learn as much as possible in an interview format; see the nonprofit in action and begin to develop relationship with staff; hear their story, in context, without "insider" lingo, at a pace that allows me to ask questions and absorb.

**What to Bring:** I always bring a notebook (my style is to take copious notes, if possible), and I have started bringing a digital camera, so I can take photographs to post on our website or use in *Community Link*. If I take photos of people, I have the subjects sign a photo release form. I also often do a bit of research beforehand, by looking at their website and reviewing their IRS Form 990.

**Setting Expectations:** You may hear many heartbreaking/heartwarming stories during site visits, which can be distracting. I try to remain as objective as possible, and listen compassionately while staying on track with the questions I have. I often tell the group I want to get to know them to see if their work is a fit for any of our donors—I don't make any promises about funding.

#### Sample Questions:

- What does your nonprofit do? (programs, context in which the agency works, partners, crossover with other nonprofits, how will service delivery change in the near, short and long term, rough patches and how the agency has pulled/not pulled through)
- Why does it do what it does? (what is the problem/need the agency is trying to address—numbers and comparisons that can help me put this in context locally, regionally, nationally, internationally)
- How does your nonprofit define success and how do you measure it?
- How long have you been with the group and why are you doing this work? (ED's history, why he/she is working with this particular group, tenure in current role, challenges)
- Tell me about your board—weaknesses, transitions, priorities

- How is the group funded—what does your funding pie chart look like (including grants, private donations, etc)?
- What is the overall operating budget and how is it carved among admin and programs?
- What are the financial challenges?
- What are the program or operating challenges?
- What is the plan to address these challenges?
- What are your top needs currently or in the next nine months?