NAPA VALLEY
COMMUNITY FOUNDATION

What NVCF Wants to Learn From a Site Visit

What: Site visits are our preferred way to learn about a nonprofit or charitable project working in Napa Valley. This in-person visit allows us to get a feel for the group, how it's run, and see its 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. Our site visits typically last between 60-90 minutes.

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

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

Why: We want to learn as much as possible in an interview format, see the nonprofit in action and begin to develop a relationship with staff. We also want to give the nonprofit a chance to learn about NVCF and our grantmaking. Transparency on both sides is our ultimate goal.

What to Expect

- We'll ask a lot of detailed questions. We do this so we can have a thorough feel for your project or organization. We need to have this level of understanding so we can re-tell your stories to our donors.
- We'll ask questions about your operating budget, program budgets, sources of funding and grant applications pending.
- We may ask to take photographs with our digital camera

to post on our website or publish in our *Community Link* newsletter. We only take photographs with your permission, and we ask any photographed individuals to sign a release form.

. • We often do some research before a site visit. We review IRS Form 990s, annual reports or audited financials, as well as material on your website. We also look at NVCF's prior grantmaking and relationships to your organization.

. • We won'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, changes to service delivery in the near, short and long term, rough patches and how the agency has pulled/not pulled through)

. • Why does your group do what it does? What is the problem/need the agency is trying to address—numbers and comparisons that put your work in context locally, regionally, etc. How does your nonprofit define success and how do you measure it?

. • Tell us about your board—weaknesses, transitions, priorities.

. • How long have you been with the group and why are you doing this work?

. • How is your group funded—what does the funding pie chart look like?

. • What is the overall operating budget and how is it carved among admin and programs? What are the financial challenges?

. • What are the operating or program challenges? What is the plan to address them?

. • What are your top needs currently or in the next nine months?