Site Visit Tip Sheet

Sometimes a grantmaker will visit the project site to get a first-hand view of activities, meet the personnel, and ask questions. Site visits can be brief (half hour) or long (several days), informal or formal. The GIFT Center can advise you on upcoming visits. If you are contacted by a charitable grantmaker wishing to visit your program, please e-mail GIFTCenter@uafoundation.org to discuss how we may be able to help. Additionally, if you have a program that already receives private grant support, it is sometimes appropriate for you to initiate a site visit yourself, extending a personal campus (or other program related event) or location invitation to the grantmaker. A few general tips:

1. Ask Questions
   - Prior to the visit, try to determine the grantmaker’s expectations.
   - Designate one person in your group as the contact with the funder.
   - The contact should ask basic who, what, and how questions. Do the visitors want a tour? A chance to go over a proposal? Do they expect an advisory board member, department head, or students to attend?

2. Choose Participants with Care
   - Depending on the grantmaker’s expectations, select participants who can clearly articulate why the project is important and what it will accomplish.
   - Participants might include a representative of the unit’s leadership (to address questions of vision and resources), a hands-on program person or researcher (to address specific project questions), a student, a community participant, and a member of the development staff.

3. Prepare an Agenda
   - The agenda can be for internal use, to help you keep track of the key points you’d like to cover within the specified time frame. Or it can be shared with the grantmaker.
   - Map out a realistic timeline allowing for questions, breaks, set up, and transitions.
   - Consider scheduling the denser material in the morning. Break up a long visit with different kinds of activities.
   - Be flexible; the visitors may want to spend more time on a topic than you planned. Follow their lead.

4. Anticipate Questions
   - Put yourself in the visitors’ shoes and anticipate questions they may ask. Is there an odd expense in your budget that requires explanation? As you reviewed your proposal, did you notice a gap that may lead to a query?
   - There may also have been news items in the media recently about the University that have nothing to do with your program or department; however, the funder may raise this topic. Be prepared with a short response and/or a referral for additional information.
5. Prepare Participants

- Make sure all participants are aware of who is coming, why, and the role each participant is to play.

- Provide participants with a fact sheet on the visiting grantmaker and on the program that is the focus of the visit.

- Hold a pre-visit Q & A session with participants.

- Provide specific instructions about who should be where at what time.

- Let people know how to dress (Business casual? Usual lab wear?) and supply name tags if the group is large.

- Emphasize to students that they are representing the University and that grantmakers are curious about why students choose a particular institution or program.

6. Remember Your Role as Host

- Be professional and cordial, even while being questioned. It’s the grantmaker’s job to evaluate programs and proposals, sometimes on behalf of a group of decision makers who aren’t present.

- Provide refreshments appropriate to the length and location of the visit (and the limits of your budget). Always have water available.