SITE VISIT REPORT

Date of Visit: _____   Visited by: _____

Name and Address of Site: _____   Amount Requested: _____

_____

Feasibility of Project:
- Is there adequate talent in the leadership (board and staff) to make the program/organization a success? Who will staff the project? What is their experience in this area? Who will supervise the project staff? Will the staff seek training or consultants, if needed?
- How is the organization governed? What kind of involvement is expected of the board?
- Is there a probability of sustained change from our involvement — either within the organization or in the social problem being addressed?
- Will our involvement (financial or other) help the organization succeed in gathering additional commitments from others?
- Is there a better way to help, apart from the request as it stands?
- Does this further the foundation's mission and goals?
- Is the organization clear about the problem they are trying to solve or impact?
- If applicable, is the organization proposing to help those who are most seriously affected by the problem? If not, why not?
- Can they be specific about what they propose to do? How? When?
- Is their approach feasible? Innovative? Cost-effective?
- Does their approach foster self-reliance?
- Is this project complementary or duplicative? Why?
- How will the organization know if the project is succeeding before all the money is spent? What kind of interim reports will we receive?

Strengths: _____

Weaknesses: _____

Perceptions of Interview and Summary of Findings:

■ Personnel	■ Management efficiency and effectiveness	■ Sense of mission
■ Were they knowledgeable about program	■ Priority needs	■ Ability to survive/grow
■ Other		

Recommendations:

❑ Full Funding, Partial, None, More	❑ Suggest organization submit formal proposal
❑ Activities fall outside donor's interest areas	❑ Contact outside consultant for assessment
❑ Check community for alternative services available	

Other comments: _____

This and other samples can be found at www.smallfoundations.org.