PENSACOLA BAY AREA IMPACT 100

Arts & Culture · Education · Environment · Family · Health & Wellness

OUR MISSION STATEMENT:

IMPACT 100 Pensacola Bay Area is a group of women whose commitment is to know and serve the community, to collectively fund significant grants to charitable initiatives, and to set an example of effective philanthropy.

PURPOSE OF SITE VISITS

1. To help us better understand the work of the applying organization and specifics of their grant application.
2. To give the organization an opportunity to talk directly with **IMPACT 100** and explain how they would use the **IMPACT 100** grant.
3. To provide us with feedback regarding their needs.
4. To give us the opportunity to acknowledge and encourage the work they are doing for the community. Remember, we want all the nonprofits to know they have been heard, and benefit from the "impact of IMPACT".

CONDUCTING SITE VISITS

1. Notify your Chair and Co-Chair if you volunteer for the organization, or if your spouse or significant other, or family member serves as a board member for an organization in your focus area. If this is the case, you should not go on the site visit and should avoid participating in the discussion afterwards. Voting in committee is acceptable, but you may abstain at your discretion.

2. If possible, the site visit leader should be someone who has gone on a site visit previously. A site visit of three to five (3-5) IMPACT members is ideal. Nonprofits compare notes, so we wish to avoid small attendance at some and large attendance at others. Coordinate with site visit members about each person's available dates and times. The leader should try to have 2-3 possible dates and times to offer the nonprofit. Encourage site visit members to carpool if possible. An online meeting scheduler such as Doodle.com can be very helpful.

3. The leader will call the Executive Director and schedule an appointment that will satisfy most members. Ask about parking and room size particularly if you have a large group visiting. Allot 1 hour and do not exceed 1.5 hours. Please ask that they have their financial person present. Remind them that there should be no press at this meeting. Notify the committee chair or co-chair and the remaining site visit team of the date and time of the site visit. Inform the committee chair or co-chair if a minimum of 3 committee members cannot attend the site visit.

4. If multiple organizations have collaborated for the request, make sure that all Executive Directors will be present at the site visit.

5. **Read and reread the grant application** and all materials sent to **IMPACT 100** from the organization and make note of questions.

6. The site visit leader should check with the Chair/Co-Chair to see if there are 1) questions raised during the financial and/or construction reviews and 2) major issues that may require some lead time for the Executive Director to resolve prior to the visit. Review all questions with the other site visit members.

7. Suggestions for additional discussion items during the site visit are:

   Tell us about your organization's key strengths; and the current challenges you face.

   Tell us how your Board of Directors function; and what they bring to your organization.

   What other organizations provide similar services in our community and why are you different?

   Are you aware of similar projects that have been successful in other communities?

8. Meet ahead of time and discuss with your site visit partners the areas that need to be explored. Agree who will lead, take notes, etc. You may print a copy of the grant and bring it with you, as well as notes and your personal evaluation sheet (which you have already completed) and a blank evaluation to fill out as a group. *Do not let the nonprofit see your evaluation.*

9. Dress appropriately, conservative casual to business dress is fine and wear your IMPACT name badge

10. Be prompt, be patient and listen. Remain neutral in comments about **IMPACT 100**. You are part of the process, not the decision maker for the grant requested. Do not give them false hope, nor tell them that they don't qualify. You are the reporter only. DO enjoy the visit and show them that you are glad to be there! Thank them for applying.

11. If the nonprofit attempts to give you gifts of any kind, politely decline them. The only exceptions are brochures, pamphlets, and newsletters for you to share with the committee. When you leave, let the Executive Director know that they will hear back from IMPACT 100 by the 3rd week of September. If the organization offers you a wish list, please accept it and remind them that they will get an opportunity in late September to complete a wish list that will be posted on our website. If they ask, "do you think we have a good chance?" gently remind them that your role is to spend time getting to know their project and their organization and to share your findings with the rest of the committee.

12. The site visit group should meet again immediately after the visit at a different location to note thoughts and specific observations. Allow enough time for each member to share her impressions and concerns of the project and the organization, taking care to be respectful of all input as not everyone may agree. Then complete the Grant Evaluation and Site Visit Evaluation Form as a team remembering that all members will have an opportunity to express their thoughts after the site report is given to the committee. Remember it doesn't have to be a unanimous opinion, it's okay to have a difference of opinion!

13. The person who will give the report to the committee can be someone other than the leader. She should write her notes of the visit as soon as possible. There is a Site Visit Recap Report Form available both in your folder and electronically to use as a guide for the report. The report should incorporate information from the group's Grant Evaluation and Site Visit Evaluation Form and the group's observations, including differences of opinion. Please be prepared to give the site visit report at the next meeting.

If you have questions prior to, or while on a site visit, please call your committee chair or co-chair.