

FAB! SITE INTERVIEW GUIDELINES

Revised November 2012

Site visits are *extremely important*. They help to "complete the picture" provided by the applicant's grant request submission. The purpose of the visit is to gather subjective information as well as verifying, clarifying or expanding on information contained in the application.

Please call the contact person indicated on the grant application to make an appointment for your site visit. Inform the contact person that you would like to meet with individuals involved in the project/program. Ask that the Exec Director or Board Chair, Grants Writer, Development Officer or Financial Officer be available for the visit. Try to have three of these individuals at the meeting. **Plan to spend at least one hour during your site visit**

Guidelines:

- Be friendly and open minded. This is not intended to be a threatening inspection. Communicate that your purpose is to learn more about the organization and the proposed project/program.
- Be clear about your role. You are there to gather information. Based on the information provided, Screening Teams make recommendations to the entire Screening Committee, which in turn sends its recommendations to the membership for a final vote.
- Try to include open-ended Questions and avoid putting the applicants on the spot.
- Be prepared. Review the Grant Application, Screening Team Grant Evaluation Worksheet, and the Screening Team Summary Report before visiting to determine what additional information you need.

Sample Topics for Site Visits:

1. Project/Program: Does the application project/program "fit" with the goals and objectives of the organization? Is the project/program too ambitious for the organization? How will they monitor and assess the project/program internally? How does the organization judge its project/program performance and by what standards?

Sample Questions:

Tell me about the proposed project/program

How does the proposed project/program fit in with your goals and objectives?

How will you evaluate the project's/program's success?

What challenges do you anticipate?

What was your greatest success and/or challenge in presenting a program or a project similar to the one that you are proposing?

2. Project/Program facility: Is the facility for the project/program appropriate? What parking is available and at what cost? Will parking keep people away or encourage them to come?

Sample Questions:

Are you satisfied with the facility? Any challenges?

3. Staff: Try to get a sense of leadership and communication. Is the staff experienced? Who is responsible for meeting the budget? Is there a high turnover of staff? Is there dependence on volunteers?

Sample Questions:

Who is working on the proposed project/ program?

How is the responsibility divided?

What is the level of experience?

4. Financial evaluation: Try to assess the projected project/program income. Is it realistic? Are the other sources of funding for the project/program under consideration "real" or not? What are the other sources of funding?

IMPORTANT TO ASK: If the full funding requested does not materialize, will the project/ program, as presented, still be possible? What sorts of changes would be needed if the anticipated funding does not materialize?

Watch for overestimated expenses. Budgets may appear larger than they need be. Does the staff seem to understand the financial requirements? Ask for an explanation of the expenses included in the project/program budget items: for example, the expense for "artistic staff" - who is included and what is their remuneration; does the project/program budget contain remuneration for the project/program only or are they including additional expenses; what is included in project/program materials? If you have doubts or questions about any expenses, ask for an explanation.

Sample Questions:

What is the status of pending funding?

Can you go forward if funding does not materialize? (Very Important, be sure to ask!)

Please explain the expenses in the proposed Project/ Program budget.

What is included in each item and how is the number developed?

Summarize your impressions for your evaluation:

Do you think the proposed project/ program will be a valuable contribution?

Did you find the staff competent and motivated?

Do you think the proposal is realistic and achievable?

Please note: Any member of your screening team may accompany you and your site partner on your visit. No other person(s) outside your team should attend.

After your site visit, please include your comments at the end of the Screening Team Grant Evaluation Worksheet. Thank you!