

# FAMILY FOUNDATIONS

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## WHY WE'RE SOLD ON SITE VISITS

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I began making site visits for The Needmor Fund in the winter of 1981 when I was 15 years old. After reading 30 or so proposals, and with questions in hand, Needmor Director Karl Stauber and I traveled for two weeks across the country—from the deep South to the Appalachians, across the Badlands and into the frozen Dakotas. We met on hilltops, in shacks, church basements and homes. In Alabama I saw the realities of discrimination and powerlessness through one woman's story of how her land had been taken away. In Georgia I saw communities that had been dependent on the cotton industry devastated by brown lung. In a town called Brumley Gap I met people challenging a power company that threatened to wreak havoc on their environment. And in a small town near Bismarck, North Dakota, where farmers' livelihoods were being undermined by the interests of development, I believe the entire town came out for our site visit.

I begin with this rather personal testimony because I believe that the experience of doing those first site visits has so much to do with my relationship with The Needmor Fund today. I began to develop a consciousness of the world around me and the role of philanthropy in advancing the struggle for a more just society. Fourteen years later, I am chair of the board.

The Needmor Fund was established in 1956 in Toledo, Ohio by my grandparents, Duane and Virginia Stranahan. Site visits are essential, one grantmaker explains, because there's no substitute for seeing a project and its leaders firsthand. Here's her advice on making the best of them.

Its offices are currently in Boulder, Colorado. Duane's father was a founder of the Champion Spark Plug Company. Today our endowment is \$15 million, and we grant close to \$2 million annually. Needmor began granting nationally in the mid-1970s and started supporting grassroots community organizations in the early 1980s. We currently focus

on social justice and change through community organizing.

I am quite involved with our foundation, as is much of my family. Three generations are represented by the 20-plus family members active in the foundation. Maintaining this involvement can be problematic. People have jobs, begin their own families, go to school, and sometimes feel queasy just sitting in a room with ten other members of their family. Site visits are an important element in our attempt to address this reality. While we have several committees on which family members serve, site visits are open to all and remain an ongoing opportunity to be engaged in the essence of the foundation. All active family members have at some point made site visits, and most make several each year.

The Needmor Fund has two grant-making cycles per year. The grantmaking committee (which includes six family, three nonfamily and staff) reads over 100 proposals each year to determine which of these groups will move forward to the site-visit stage. Family members who are not on the committee are also invited to read proposals during this first round of screening. After the grantmaking committee has made its recommendations, we begin the site visit process. We make site visits to at least 40 of the 60 groups we fund annually. All new groups are visited, and current grantees undergoing change or about which there is some concern are visited as well.

We generally have two people on each visit, especially for new groups (there is a lot of information to retain and having two people increases the odds that all aspects of the visit will be fairly represented to the board). During our site-visit season, which lasts about six weeks, there are as many as ten people on the road at one time visiting groups across the country.

While there is generally a core group of eight to ten visitors (including the staff), making site visits

remains an option for all members of the family. After the site visits, the grantmaking committee gathers again to hear the reports. Questions and concerns, stories (and usually a lot of enthusiasm) are shared. And finally, our grant recommendations are made to the board.

What convinced my family that making site visits was so important? Our penchant for site visits grew out of a need to shape our funding priorities and to maintain the family's commitment to the foundation. As we explored different areas of funding, we frequently asked ourselves how our grants had made a difference. Additionally, there was concern that if we didn't understand where and how the money was being used, the foundation might not continue to exist. We decided to get to know the people behind the groups we were funding. These relationships became more important as we moved in the direction of supporting grassroots community organizations. We were in new territory, and many of the organizations we funded had never received foundation support before:

The only reason I can think of for not making site visits would be the expenses involved. Site visits do require time and money—especially if you grant nationally. We generally make 25 site visits per cycle, and average \$600 per visit for travel, lodging and food for two people. We spend a little more than 9 percent of our total operating budget on site visits.

This represents 2 percent of what we grant annually. I believe that this is ultimately a small amount to put towards the larger investment we may be making.



### **What We've Learned**

Site visits have become an integral step in our grantmaking process, and we are always looking for ways to make them more effective. We've learned a few lessons along the way. What follows are some of the questions we

find helpful to consider each time we embark on site visits.

**What is the purpose of the site visit?** This is the organization's moment to put its best foot forward. At the same time, you should be clear about your expectations for the site visit: Who do you want to meet? The board, the membership or just the staff? For example, we place a great deal of emphasis on the strength of the board and the participation of members, and we always ask to meet with them. I once visited a group whose proposal was very strong on paper. At the site visit, not one board member showed up. This gave me a pretty good sense of the board's commitment to the organization.

**How much time do you want to spend with the group?** Two hours may be enough for a group that you are familiar with. However, the purpose and the value of the organization is truly illuminated by taking the time to see the community. I once spent a whole day peering over one acequia after another in New Mexico. Along the way, I met leaders of the community and the organization. The cultural, social and political significance of these irrigation ditches could not have been conveyed on paper or in an office. If you are making a commitment to a group that may last for a couple of years, it helps to know as much as you can about the environment in which the group is working.

**What do you need to know about this organization?** I often ask people to tell me how and why they got involved with the organization. Their

answers tell a lot about the people involved, where they've come from, and the value the organization holds in their lives. It helps to set the context of why you're there. It can also be useful to ask them what they feel the strengths and weaknesses of the organization are. How do they evaluate themselves? We try to be open with our own perceptions, and let them respond.

We try to see the organization in action, whether that means attending a city council meeting with hundreds of group members, watching children plant seeds in back-yard gardens, or visiting families renovating abandoned buildings in the South Bronx. This is always fun, and more importantly, it is an opportunity to see the role and the strength of the organization in the community.

**How can you best listen to the grantee?** A site visit may be the first contact a nonprofit has had with the philanthropic world. Furthermore, because foundations have control over a scarce resource, they are invested with quite a bit of power. It is important therefore to be open and to respect the dynamics at play. We encourage questions that members may have about Needmor and our process:

who we are, where the money came from, and what happens next. When possible we offer information that may not be readily available to them—groups working on similar issues, for example, or other foundations that might be interested in their work. Because foundations are exposed to the work of so many nonprofits, they have a vast amount of information to share with grantees. Lastly, don't forget to say thank you. People have taken time off work to meet with you. Some have sometimes traveled long distances to be there, and need to know that their effort was appreciated.

We periodically ask grantees to give us feedback (anonymously) on our site-visit process. We have learned quite a bit about ourselves this way. One group let us know, for example, that while their members had made an effort to dress to the occasion, our visitors had arrived in old blue jeans. Funders can always stand a little criticism. ?

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*Abbot Stranahan is chair of the board of The Needmor Fund in Boulder, Colorado.*