

The Family Advisor: Site Visit Companion

A Colleague's Perspective on Site Visits

by Sybil Hite

At the Hite Foundation, a small family foundation in New Jersey started by my husband less than ten years ago, some of our grantmaking is done out of state. However, a significant proportion of our efforts are focused in New York and New Jersey, precisely because of the importance we assign to site visits. Site visits serve a number of functions and can be utilized in a variety of ways. Overall, it is my belief that grantmaking is most effective when coupled with some involvement with the grantee and this is why we try to incorporate site visits into the strategy of a local geographic focus. Of course, some larger foundations have the resources available to conduct site visits that involve considerable time and travel. However, because we are small, we have chosen to limit the travel expenses of our site visits by focusing these visits in a more localized area.

This is not to say that we have never done site visits in far flung places. If we happen to be traveling in an area where we have a grantee, we do take advantage of the opportunity to visit them. On a trip to Israel a year ago, we visited an after school program for Ethiopian Jewish children, that we fund through an organization in New York. In this case, the site visit provided a way of involving the younger generation, since our children were with us. When our older daughter, then 14, responded with an appreciation of how fortunate she was, my husband and I felt that particular site visit to be extremely worthwhile.

Site visits are useful not only in terms of deciding whether or not to make a particular grant, but can also be helpful in providing guidelines as to how to structure the terms of a grant. When considering whether to fund a two week summer program in Newark, my consultant and I did a site visit to an after school program run by the prospective grantee. Noticing that the class did not appear full, we questioned whether there would be a problem in recruiting sufficient students for the summer. On being reassured that this was not an issue, we went ahead with funding, because the program was exciting in concept and filled a vital need. We were rather disappointed, however, when we visited the program during the summer, only to discover that not as many students were attending as had been agreed to in the terms of the grant. This then became one of the reasons why we subsequently indicated to the organization that we would be unable to fund it again, until a number of administrative changes were made. Looking back on this process, it seems to me that without the initial site visit, we would probably have taken at face value the organization's proposal to serve a certain number of children. Our ability to monitor this particular grant would have been severely compromised.

A final aspect of site visits that I would like to touch on is the issue of personal satisfaction to the grantmaker; for me, site visits are the payoff in what is often quite a difficult job. When my husband first started the foundation and it was considerably smaller than it is now, the statutory payout requirements could be met by simply donating to our favorite charities. As the foundation grew larger, it seemed like a good idea to structure our grantmaking program. We hired a consultant to ensure that our giving would be conducted more professionally. The consultant helped us formulate a grantmaking strategy and initiated a process that was designed to increase

the effectiveness of our giving; making site visits became an integral part of this process. With this process in place, I felt that my husband and I could really start to make a difference with our foundation.

Writing a check to a nonprofit is not in and of itself a particularly satisfying activity and it is only one step in getting the job done. There is no greater satisfaction than having some involvement with the organization you are helping to fund. Site visits accomplish this. Nothing beats getting to know the people and their work up close and having the chance to work in partnership with an organization to get a critical job done.

This packet offers a series of articles on both the rationale for site visits and advice on how best to conduct them. It includes *Why We're Sold on Site Visits*, a personalized account of how one young woman was introduced to the workings of her family's foundation through site visits; she also describes meeting with prospective grantees as an essential part of decisionmaking and shows how the process is constantly being refined. This theme is continued in *Adding the Human Dimension*, where insight is obtained as to how the site visit is viewed and used by a number of different foundations. The *Site Visit Checklists* are self-explanatory, and indispensable to anyone embarking on the process for the first time, though those with experience will also find them beneficial.

As Barbara Greenberg, president of The Philanthropic Group, indicates in the enclosed article from the *Family Matters* newsletter, site visits are an indispensable tool in assessing the efficacy of a grant. Making a grant is seen as making an investment, so "for the best possible return, you want to choose managers who have performed well and have good potential to achieve results in the future...Site visits help us to assess the manager's knowledge and ability to get the job done, decide whether to make a grant, whether a project is on target, and whether to fund the organization again."

(Sybil Hite is vice president of The Hite Foundation in Summit, New Jersey.)