


Rotary
Club of Toledo
SITE VISIT GUIDELINES

Please use these guidelines in preparing for and conducting site visits in connection with grant requests to be considered by service committees. While it is recommended that these guidelines be followed as much as possible, it is recognized that each site visit is unique, and other methods and questions may arise as a site visit unfolds. You are encouraged to ask other questions or take a different approach to get necessary information in evaluating the grant request.

I. PREPARING FOR THE SITE VISIT.

A. Homework. All grant request information will be provided to you by the Rotary office or the committee chairman. Review the information thoroughly and contact the Rotary office or the committee chairman if you have any questions or think any information is missing. You are also encouraged to check the applicant's website for additional information.

B. Scheduling. Call the contact person listed on the requesting organization's grant application and schedule the appointment far enough in advance to be able to prepare a site visit report before the deadline provided by the committee chairman. When making the call, share the purpose of your visit, and if possible, establish the length of time you wish to dedicate to the visit. Be sure that you will be meeting with the person or persons who are knowledgeable about the subject of the grant request.

II. MAKING THE VISIT.

A. Set Parameters.

1. Inform the organization representative of the purpose of your visit and that you are conducting the visit on behalf of the Rotary _____ Service Committee.
2. Advise the representative of the information you will be requesting at the site visit.
3. Let the representative know how much time you can spend.

B. Tour. It is helpful to take a tour of the applicant's entire facility. However, if time does not allow this, it is important to at least view and evaluate any part of the facility connected to the grant request.

C. Questions. Focus on questions that will help you understand the needs being addressed, the agency's approach to problem solving, the organization itself, and the overall financing of the organization. Suggested inquiries and questions include the following:

1. Review the mission statement of the organization and verify who is served by the organization, what goods or services are delivered and how they are delivered.
2. How does the organization measure its ability to succeed? What objective evidence exists to prove the organization's success?
3. What will be different about the organization's delivery of services if it receives the grant, and how will the organization be able to measure results connected to the use of the grant?
4. What is the timeline for implementing the use of the grant money and achieving the desired result?
5. What other funds are necessary to carry out the project, what are the prospects for such additional financing, and what will the organization do if their fundraising plans fall short?
6. Who will be working on the project which is the subject of the funding?
7. Who is responsible for insuring the financial health of the organization?
8. What are the major sources of financial support?
9. How are fundraising activities going in the current year?
10. Have any usual sources of funding been reduced or eliminated?

11. Are there any potential new sources of funding?
12. What recognition will Toledo Rotary receive if the grant is approved?

D. Address any concerns you have in connection with the applicant's financial information.

III. CONCLUDING THE VISIT.

A. Advise the organization representative(s) that he/she will make a five minute presentation at the upcoming _____ Service Committee meeting (the "Grant Meeting"), and be prepared to answer questions at that meeting.

B. Explain the grant consideration process. The committee will evaluate all grant requests made for the funding cycle at the grant meeting. If the committee decides the grant should be considered for approval, it will recommend the grant to the Foundation Advisory Committee. If the Foundation Advisory Committee determines the grant should be approved, it will recommend it to the Toledo Rotary Club Board. The Toledo Rotary Club Board makes the recommendation to the Toledo Rotary Foundation Trustees, for a final determination. The entire process may take two to four months.

C. Advise that during any of the foregoing steps, the grant may be denied, the amount requested may be modified, or suggestions may be made to the organization to resubmit the grant with certain changes. The organization will be notified of denial, approval, or any modification.

IV. ASSESSING THE VISIT.

A. Site Visit Report. All committee members making the site visit should discuss the site visit and decide who will prepare the site visit report. All persons making the site visit should review the draft report before it is finalized and submitted to the committee chairman. Submit the site visit report to the committee chairman by the deadline provided by the chairman.

B. Content of Site Visit Report. The site visit report should contain the following information:

- Organization requesting the grant
- Date of the visit
- Location of the visit
- Names of committee member(s) making the visit
- Names and titles of organization representatives at the visit
- The purpose and amount of the grant request
- A brief description of the organization's facility, focusing on any area to be improved by the grant request
- A brief description of how the grant money will make a difference for the organization
- A statement as to whether any additional funding is needed to complete the matter or project in question, the amount of such additional funding, and the likelihood of securing the funding
- An assessment of the actual need for the item or project in question
- An assessment of whether the matter or project in question is consistent with Toledo Rotary funding guidelines
- A summary of any concerns you have regarding the organization, its facility or the grant request

C. Committee Meeting. Committee members who conduct a site visit should be prepared to summarize the site visit and answer questions during the _____ Service Committee meeting at which the grant request is to be reviewed.