

Site Visit Rubric
Quality of Preparation

D R A F T

1 Poor Unacceptable	2 OK Acceptable	3 Our Standard: Respect for Grantees	4 Our Goal: Exceeding the Standard
<p>Regarding substance: Program officer skims proposal: - doesn't know names of key people, or who's going to be at site visit. - falls back on asking, "Would you walk me through this proposal?"</p>	<p>Program Officer reads Proposal and Report, has some questions prepared, knows who will be at the site visit.</p>	<p>Program Officer thoroughly reads proposal and report on last year's grant (in relation to specifics of grant letter); reviews last year's write-up to see what issues rose to the top; checks with colleagues in-house, and, when appropriate, in the field for any further background that sheds light on organizational health and/or work to be funded. PO develops questions that are not already answered in proposal.</p>	<p>PO expands own knowledge of field in appropriate way in preparation for visit and review.</p> <p>PO consults other supporting materials - becomes immersed in the big picture of grantee's work, aware of national trends and cycles of calendar year.</p>
<p>Regarding logistics: PO has no idea how to find their office, leaves Dodge with no directions, map, or phone number. PO relies on instinct to find the right place and ends up in Moorestown instead of Morristown. Or (other screw-ups;) PO requests last-minute meeting (i.e. "can you come to our offices by noon tomorrow"); or shows up and they didn't know we were coming; or is late and doesn't call; or gets confused and doesn't show up at all.</p>	<p>PO arranges for site visit over the phone if: 1) it makes sense for grantee and 2) there is little to be gained from a face-to-face meeting (e.g. we know the grantee well or have just seen him/her)</p>	<p>Grantees get sufficient notice, choice of time for meeting, advance notice of any "major" questions or concerns, and an opportunity to invite others they think important to the meeting. We ask if there is anything they want us to see before the site visit.</p> <p>Grantee is clear about when we are showing up.</p> <p>PO leaves Dodge with all appropriate information, arrives at right place, at right time.</p>	<p>PO (or program assistant) makes phone call 2-3 days before the visit to confirm appointment and asks if there is any new information we should be aware of, or if there is anything on the grantee's mind that is not included in the proposal.</p>
<p>Other considerations: PO schedules visits so tightly that he/she arrives too fried to do the visit justice, or does not allow time to consolidate notes and understandings gained before moving on to something else.</p>		<p>We have taken time to ask whether the Right Person is doing the site visit.</p> <p>We want to not fall off the fine line between social and professional; if PO is a personal friend of grantee, we send someone else. We don't want <u>one</u> person to become the only contact and champion for an organization.</p>	<p>We view the relationship with grantee within a year-long cycle. More than one of us is in contact during the year; we have conversations that are not about proposals under review.</p> <p>We remember that funders don't have the answers and behave accordingly. We are partners with our grantees in a venture to</p>

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