

**Site Visit Rubric**  
**Quality of Visit and Conversation**

***DRAFT***

<b>1 Poor Unacceptable</b>	<b>2 OK Acceptable</b>	<b>3 Our Standard: Respect for Grantees</b>	<b>4 Our Goal: Exceeding the Standard</b>
<p>Program officer:</p> <ul style="list-style-type: none"> <li>■ Conveys aura of mystery about what we do and how we do it.</li> <li>■ Asks questions they have already answered in the proposal.</li> <li>■ Lets frustrations come out when things are not going well with the organization.</li> <li>■ Takes no notes and leaves the visit with no specific info.</li> <li>■ Takes a cell phone call in the middle of the visit.</li> <li>■ Loses sight of grantor/grantee relationship.</li> </ul>	<p>Program officer</p> <ul style="list-style-type: none"> <li>■ Goes to them, at their convenience, on time, with appropriate attire.</li> <li>■ Has informed conversation about the proposal and lets them know when they will hear from us.</li> <li>■ Asks if they have any questions for us.</li> </ul>	<p>Program officer:</p> <ul style="list-style-type: none"> <li>■ Places the visit in a context: the past relationship is known and valued.</li> <li>■ Asks the right questions of the right people; knows who does what and who thinks about what.</li> <li>■ Is aware of Life-cycle issues, does not have the same conversation year-after-year.</li> <li>■ Is clear about the process – when things happen, how many groups are being considered, when and how grantee can still communicate with us, etc.</li> <li>■ Recognizes the value of grantee’s time.</li> <li>■ Expresses appreciation for grantee’s work, regardless of outcome of specific grant proposal.</li> <li>■ Takes notes sufficient enough to inform the write-up, but not so much as to not be fully present in the conversation. (“Wait a minute. That’s great. I need to write that down.”)</li> <li>■ Clearly maintains the balance between the social and the professional.</li> <li>■ Gives even more time to groups likely to be declined, so they know they have been heard.</li> </ul>	<p>Program officer:</p> <ul style="list-style-type: none"> <li>■ Intervenes and significantly changes the conversation for the better by getting to important things that need to be said.</li> <li>■ Acts as a resource, or consultant, connects group to others in a helpful way, helps brainstorm about the future in a productive way.</li> <li>■ Notes impressions and body language, asks “what are they trying to convey to me?”</li> </ul>