

## Site Visit Prep Letter and Guidance for Nonprofits

The site visit is an important step in the application process. It provides insights into a request that can only be obtained through direct discussions between the Foundation and the principals of the organization. It's also an opportunity for us to share information about the O'Neill Foundation and its grantmaking activities.

We'd ask that you keep the following items in mind as you put together the agenda for our visit:

- Be sure to assemble the principals of the proposed project. Key agency staff (including the Executive Director), representatives from any collaborative agencies, and any consultants that will be on the project. Note—while the attendance of a Board member is not required it does demonstrate commitment to the proposed project.
- Provide an overview of the organization's mission, vision and primary programs.
- A description of the assessment process used to determine the need for the capacity building project.
- A detailed explanation of the project's logistics, budget, evaluation process and sustainability plan.

At the site visit, the O'Neill Foundation will be ready to:

- Define our definition of Capacity Building and fully describe the Foundation's grantmaking process and provide deadline and notification dates.
- Share any concerns and ask questions regarding the proposed project.
- Share the names of other organizations we may know of that are undertaking similar projects and may have advice or information to share.

We ask that you e-mail to [mccuetmm@oneillfdn.org](mailto:mccuetmm@oneillfdn.org) the agenda **no later than 2 business days before the visit**. Also, please include any pertinent handouts in a PDF file so that they may be shared in advance with any Foundation representative that will be attending the site-visit via phone.

Lastly, in order to assist us during our visit, please complete and return the attached **Site Visit Day of Information sheet** to assist us in our arrival.

Thank you in advance, we at the O'Neill Foundation are looking forward to the visit. Please don't hesitate to contact me with any questions you may have prior to the visit.

Respectfully,

Timothy M. McCue