

Site Visit Report

Visitors: _____

Date of visit: _____

Organization: _____

Amount requested: _____

Purposed of request: _____

1. Is there adequate talent in the leadership (board and staff) to make the program/organization a success?
2. Is there a probability of sustained change from our involvement — either within the organization or in the social problem being addressed?
3. Will our involvement (financial or other) help the organization succeed in gathering additional commitments from others?
4. Is there a better way to help, apart from the request as it stands?
5. Does this further our goal of increasing community-wide and neighborhood participation in meeting social needs?

Strengths: _____

Weaknesses: _____

Recommendation (full funding, partial, none, more?): _____

Perceptions of interview (were they knowledgeable about program, etc.): _____

Other comments (e.g. ambience, etc.): _____

SOURCE: *The Trustee Notebook*, p.83.