

# Sample Site Visit Worksheet

Developed by  
Stephanie McAuliffe: The David and Lucile Packard Foundation  
for the July Institute for New Grantmakers, 2002

Purpose of/Rationale for Site Visit:

## I. Preparing for the Visit

- Organization:
- Time and Date of Visit:
- Address:
- Phone:
- Directions:
- Summary of the request:

Preliminary analysis of proposal:

Strengths +	Weaknesses -

- Questions raised:
- Other information or assumptions about organization:

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## II. Field Notes

- Persons interviewed (name/title):
- Impressions or Observations of:
  - Physical plan (Prompts: Do they appear to have the infrastructure necessary to accomplish what they propose in their request?):
  - Staff (Prompts: Do they appear to be adequately staffed? Does the staff appear to be motivated and engaged in their work?):
- Other:

### General questions/prompts:

- What are the trends you see coming?
- What special challenges are ahead for you/your organization?
- Within your organization?
- Financially?
- Concerning your clients/constituents?
- Who else is doing good work in your field?
- What else would you like me to know?
- Do you have any questions for me?

### Reminder: Be sure to...

- Explain the review and approval process.
- Confirm next steps. (What will they do? What will you do?)
- Establish a timeline for review and decision.

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## III. Debrief

- What are my overall impressions of this organization?
- What was learned during the site visit?
- What questions remain?
- What new issues emerged?
- What else do I need to know to make a decision on the request?
- What are my next steps?
- How can I improve my next site visit?