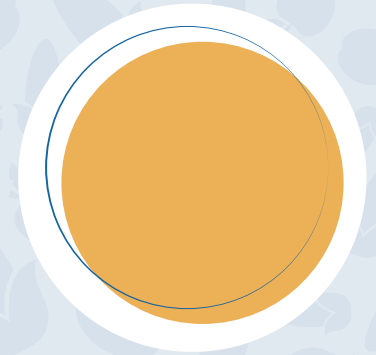


YiP Info

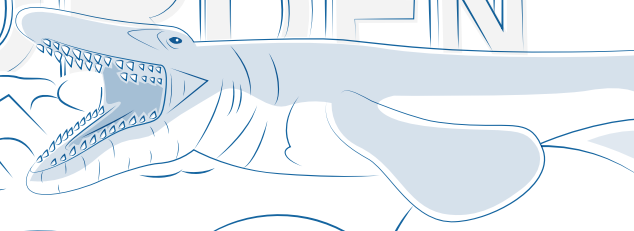


Site Visits - The Basics

Visit local registered charities, to learn, interview staff and volunteers, take photos, ask questions, and discover the needs of the community.



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What is a Site Visit?

A visit to examine a local Morden area not-for-profit organization to determine its suitability for a Youth in Philanthropy grant. In other words, it is a meeting with one or more staff, board members, and/or volunteers of a registered charitable organization at their office or location for the purpose of learning more about what they do, who they do it for, and why they are doing it. A site visit allows a person to see first-hand what an organization is all about and many YIPsters say that site visits are the best part of Youth in Philanthropy!

Successful Meaningful Site Visits

Before starting to set up site visits, here are a few things to keep in mind:

- Never visit an organization without making an appointment!
- If an appointment is made and the group absolutely cannot make the site visit, call the organization as soon as possible to reschedule.
- Site visits do take up a grantee's time so be courteous and aware of how the visit may affect the day-to-day activities of the organization and their staff.
Note: You may not be the only committee visiting an organization.
- At least two YIPsters are required to attend the site visit. Let the organization know how many people they can expect.
- Let the contact at the organization know how much time to allow for the meeting (most site visits take 30 minutes to one hour).
- Ask the organization to have some printed materials ready (annual reports, brochures, etc.) to take to show the rest of the committee at a later time.
- Come prepared: bring a list of questions, a notebook, and a pen. This will help when filling out the site visit forms and making granting decisions later on.
- Ask the person you are meeting with for his or her business card. Submit the organization's contact's full name, phone number and address in the final report, as this is a great way to get the info. Not to mention it will be useful for following up later on.
- Each committee should visit a minimum of two local Morden area organizations per year, and/or a maximum of five. You may go as one large group on a site visit or you may divide up into small groups and visit more organizations, then all report back to each other on the findings.

What is a Site Visit?

Before the Visit

Business communication tips that will help when arranging site visits.

Introduce Yourself

Once the YIP committee has selected the organizations that they would like to learn more about, the next step is introducing you and YIP to the organizations with a letter, phone call, or email. Email and letter templates are available from the Morden Area Foundation, upon request.

Arrange a Meeting

Introduction letter or email

- Introduce yourself and set up the site visits well in advance of the day chosen to visit.
- Research the organization — go to their website to find out the name of the organization’s Executive Director, or call the organization and ask for the most appropriate person to talk to, and their contact information such as mailing address or email.
- The first communication with the organizations should: introduce yourself, YIP, and the committee, share what the YIP committee hopes to learn during the site visit, and explain the YIP granting process. Please address the email or letter to an actual person, rather than “To Whom it May Concern.”
- Make sure emails are sent from an official address. Email addresses like “superkitty69@hotmail.com” often go straight to junk mail.
- When communicating with an organization via e-mail, make sure to always use an appropriate description of the message in the subject line (e.g. Youth in Philanthropy Meeting). An organization that receives an e-mail from an unfamiliar recipient with a vague subject line may think that the e-mail is spam or contains a virus.
- Keep the message concise and professional. Follow the same template as a letter. Do not use emojis. Sign the message with your full name and school name.
- Always make an appointment before arriving for your site visit.
- It is NOT recommended to change appointments but if it is unavoidable to change the appointment time for any reason, give as much advance notice as possible, and reschedule. Please do not reschedule a meeting more than three times.

You should follow up with a phone call if you have not heard back from the organization within a few days

- Confirm with the original contact person that he or she has received the initial letter.
- Ask if there are any questions about YIP or the committee.
- Arrange a time to meet that is convenient for both of you.
- Let them know that you would like a tour of the organization.
- Ask for directions to the organization.
- Give them your contact information.

Arrange a Meeting

Voice Mail

- When calling an organization, especially if it is on lunch hour or after school, be prepared to leave a voice mail message.
- When leaving a voice mail message, clearly state your name and which committee you are from.
- Express your intentions and the specific reason for the call.
- Leave your contact information.
- Note what time would be best to contact you in return.

An Example of Such a Message is ...

“Hello my name is Jane Doe calling from XYZ High School’s Youth in Philanthropy committee. I am calling to confirm that you received the letter I sent you last week and ask if it would be possible to meet with you in person. You can reach me after 4 o’clock today or before noon tomorrow at 204-555-1234. I look forward to speaking with you soon. Thank you.”

Developing Questions for Site Visits...

It is best to develop site visit questions as a full group and make sure that everyone is asking the same questions on each site visit. This will give a basis on which to compare the organizations being visited, which will be very useful come grant-making time.

Arrange a Meeting

Here are a Few Ideas:

- The questions should be based on the granting areas of focus and criteria, and reflect the interests of the YIP committee.
- Go to the site visit with at least 10 – 15 questions to ask the organization.
- Remember to take the list of questions with you when going on the site visit.
- It is up to you to develop the questions that best suit your group.
- Ask the organization to talk about its mandate and history.
- What services does the organization provide and to whom?
- How many people does the organization reach?
- How many people work there? How many volunteers does the organization have?
- If the organization was to receive a grant of whatever amount, how could the organization use it best?
- What are the greatest opportunities and challenges of the organization?
- Describe a success story from the organization for us?
- What other revenue does the organization receive? Who else funds the operations?
- Has the organization received a grant from a Youth in Philanthropy committee in the past? If yes, what was it for and how did the organization follow up with the committee?
- Is there anything else the organization may want us to know? Are there any questions for the YIP committee?

During the Site Visit

Tips for Meeting in Person

- Before leaving for the site visit, know where you are going and how long it will take to get there. Google or contact the organization for directions and where parking is available.
- Be punctual, courteous, and professional. Remember – during site visits, YIP committee members are ambassadors for the school as well as the Morden Area Foundation. Also, you may not be the only committee visiting the organization.
- At the beginning of the meeting, let the organization know how long the meeting will take and stick to that time.
- Come prepared so time can be used well.
- Let the organization know what the expectations are and what they can expect in return. Provide the organization with information on the YIP granting process and timeline.
- Always be respectful of the other person's time and expect the same from them. Site visits go over and above the organization's day-to-day tasks therefore please be certain to stay aware of being respectful, thankful, and concise.
- Make eye contact.
- Remember to bring a written list of questions to your meeting. This will help to keep you focused and on track.
- Remember to bring a pen and paper and take notes.
- Ask the host for a business card so personalized thank you notes or emails can be sent to them later.
- Do not accept large gifts – this could be perceived as a conflict of interest.
- Express your gratitude before leaving.

After the Site Visit

After the site visit, there are a couple things your committee should do:

Make notes about all experiences on the site visits while information and impressions are fresh in your mind. This will come in handy when making the granting decisions as well as writing the final report story! Every committee member who attended the visit should have input on these notes.

Send a letter and/or card to the organization visited thanking them for taking the time to meet with you. If you require a sample, please contact the Executive Director at the Morden Area Foundation.

Summary

- 1. Introduce yourself and set up a time to meet**
- 2. Prepare questions**
- 3. Go on a site visit**
- 4. Fill out site visit report**
- 5. Send out thank you letters**

Questions?

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