



yip info:



Site Visits - The Basics



# What is a site visit?

A visit to examine a 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, or volunteers of a 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 lets you see first-hand what an organization is all about and many YiPpers say that site visits are the best part of Youth in Philanthropy!



# Successful and Meaningful Site Visits

Before you start setting up your site visits, here are a few things to keep in mind:

- Never visit an organization without making an appointment!
- If you have made an appointment and your group absolutely cannot make the site visit, call the organization as soon as possible to reschedule.
- Site visits do take up a grantees 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 2, and no more than 5, YiPsters attend the site visit.** Let the organization know how many people they can expect.
- Let the contact at the organization know how much time you have to spend (most site visits take 30 minutes to 1 hour).
- Ask the organization to have some printed materials ready for you to take (annual reports, brochures, etc.) so you can show the rest of your committee.
- Come prepared: bring your list of questions, a notebook, and a pen. This will help when filling out your site visit forms and making your granting decisions later on.
- Ask the person you're meeting with for his or her business card. You must submit your contact's full name, phone number and address on your final report, and 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 5 organizations, and a maximum of 20 organizations.

# before the visit:

Business communication tips  
that will assist you when you are  
arranging site visits.

## Introducing yourself

Once you have selected the agencies that you would like to learn more about, the next step is introducing yourself and YiP to the organizations with a letter, phone call, or email. Email and letter templates can be sent to you in fillable, Word format upon request to the Youth Engagement Coordinator.



## Arranging a Meeting

### Introduction letter or email

- Introduce yourself and set up your site visits well in advance of the day you would like 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 info - mailing address or email.

- Your first communication with the organizations should: introduce yourself, YiP and your committee, share what you hope to learn during the site visit, and explain the YiP granting process. You should address your email or letter to an actual person, rather than "To Whom it May Concern."
- Make sure you send your emails from an official address. Email addresses like "superkitty69@hotmail.com" often go straight to junk mail.
- If you're communicating with an agency via e-mail, make sure that you always use an appropriate description of your message in the subject line (e.g. Youth in Philanthropy Meeting). An agency 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 your message concise and professional. Follow the same template as you would a letter. Don't use emojis. Sign the message with your full name and school name.
- Always make an appointment before you arrive for your site visit.
- We don't recommend changing appointments but if you have to change your appointment time for any reason, give as much advance notice as possible and reschedule. **Don't** reschedule a meeting more than three times.

write



# before the visit: ...continued

## Follow up phone call

If you have not heard back from the agency within a few days, you should make a follow-up phone call.

- Confirm with the original contact person that they have received the initial letter.
- Ask if they have any questions about YiP or your 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.

## Voice Mail

- When calling an agency, especially if it's on your lunch hour or after school, you should 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 why you are calling.
- Leave your contact information.
- Note what time would be best to contact you.

## An example of such a message is:

"Hello my name is Jane Doe calling from XYZ High School's Youth in Philanthropy committee. I'm calling to confirm that you received the letter I sent you last week and to see 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."



# developing questions for site visits

It's best to develop your site visit questions as a full group and make sure that everyone is asking the same questions on each site visit. This will give you a basis on which to compare the organizations you're visiting.

Here are a few ideas:

- Your questions should be based on your granting areas of focus and criteria, and reflect the interests of your committee.
- Go to your site visit with at least 10 – 15 questions to ask the agency.
- Remember to take your list of questions with you when you go on the site visit!
- It's up to you to develop the questions that best suit your group.
- Tell us about your organization's mandate and history.

- What services do you provide and to whom?
- How many people does your organization reach?
- How many people work here? How many volunteers does your organization have?
- If you were to receive a grant of up to \$1,500, how could your organization use it best?
- If you were to receive a grant of up to \$300 how could your organization use it best?
- What are your greatest opportunities and challenges as an organization?
- Can you describe a success story from your organization for us?
- What other revenue do you receive? Who else funds your operations?
- Has your organization received a grant from a Youth in Philanthropy committee in the past? If yes, what was it for and how did you follow up with the committee?
- Is there anything else you want us to know? Do you have any questions for us?



# during the site visit:

## Tips for Meeting in Person

- Before you leave 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, where parking is available or for the nearest bus route and stop.
- Be punctual, courteous and professional. Remember — when on site visits, you are an ambassador for your school as well as The Winnipeg 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 that you can use the time well!
  - Let them know what your expectations are and what they can expect in return. Provide them 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 so make sure 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 your host for a business card so you can send personalized thank you notes or emails to them later.
- Don't accept large gifts – this could be perceived as a conflict of interest
- Express your thanks before leaving!



# Thanks!



# after the site visit:

YOUTH in PHILANTHROPY  
A PROGRAM OF THE WINNIPEG FOUNDATION

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

## Make notes

about your experiences on the site visits. This will come in handy when making your granting decisions as well as writing your final report story!

## Complete

your site visit report form as soon as possible, while the information and your impressions are fresh in your mind. Every committee member who attended the visit should have input into the site visit report.

## Contact

the Youth Engagement Coordinator at The Winnipeg Foundation to request site visit forms and a sample thank you letter, sent to you in a fillable, Word format.

## Send

each agency you visited a letter, note, or email, thanking them for taking the time to meet with you.

# Summary

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

## Questions?

Contact: [yip@wpgfdn.org](mailto:yip@wpgfdn.org)  
The Winnipeg Foundation  
1350-One Lombard Place  
Winnipeg, Manitoba R3B 0X3  
[www.wpgfdn.org](http://www.wpgfdn.org)  
Facebook: The Winnipeg Foundation  
Twitter: @wpgfdn  
Instagram: wpgfdn

Check out the other topics in this series!  
Grantmaking 101  
TWF and YWC  
Developing your committee  
Site Visits  
Taking Initiative!  
Research and Reporting



**YOUTH in PHILANTHROPY**  
A PROGRAM OF THE WINNIPEG FOUNDATION