
GRANTMAKING

Grantmaking Basics, A Field Guide for Funders: Reviewing Grant Proposals

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PANNING FOR GOLD

How to Review Grant Proposals

During the course of your professional life, you will read hundreds, even thousands of grant proposals. The skill you bring to this task will significantly determine your giving program's success at advancing its mission and helping the nonprofit sector to aid our society in every imaginable way.

Of course, nobody starts out in the funding world as a deft and canny reviewer of grant proposals. That comes only with time and the enlightening (if occasionally exhausting) experience of scanning, studying, analyzing, questioning, summarizing and digesting a huge number proposals whose quality will undoubtedly range from the sleep-inducing to the sublime.

But let us start at the beginning.

What is a grant proposal, and why do we use it? Think of a grant proposal as a prospectus for an investment opportunity. In this case, the return on investment that you are seeking is not monetary profit, but public benefit.

A serviceable proposal details one of society's standing needs or problems. It outlines an organizational strategy for addressing the problem and justifies the methods. The proposal indicates who will handle each important task, for what duration and at what cost. Like a prospectus for a new business, the grant proposal must convince you that the organization is sound and its plans are likely to achieve its intended goals.

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Assuming the proposal fits your guidelines, it is your job to determine whether the venture enjoys a fair chance of success and, as important, whether it belongs in your foundation's diverse portfolio of investments in the common good.

OPPORTUNITIES FOR EVERYBODY

Why Proposals Make Sense

For grantmakers, the proposal format has several obvious benefits. First, it reinforces your foundation's own need to be clear about its funding goals. You cannot accept proposals from organizations engaged in all varieties of endeavor from every corner of the world. Should you try, you will inevitably flood your foundation with paper and drown the staff in a sea of ungratifiable expectations. Instead, you and your board must forthrightly confront the matter of limits by establishing guidelines for your grantmaking. By declaring your intention to entertain proposals of one sort and not another, your foundation or giving program will itself gain clarity, definition and identity.

Beyond tightening up your own operations, the proposal offers the most efficient means of quickly learning about a potential grantee's current programs, future plans, past accomplishments. This informed introduction can serve as an embarkation point for additional discussion, site visits, deeper investigations that can lead to collaboration. In fact, the proposal often signals the beginning, not the culmination of a relationship between grantmaker and grantseeker.

Grantmakers, however, are not the only ones to benefit from the proposal process. When prepared with care, deliberation and integrity, the arduous task of proposal writing can also deliver substantial benefits to organizations seeking grants.

Proposal writing can make organizations take a hard look at their programs and goals. The process can clarify basic organizational assumptions by rendering once-vague thoughts into resonant prose. It can compel staff and board to order their priorities and firm-up plans, while drawing together key people to forge new working alliances within the organization or with other agencies. It may even result in clarification of the organization's mission, an extremely healthy process that is too often bypassed in the bustle of daily labors. Finally, a growing file of well-crafted proposals can add to the

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organizational memory by documenting the plans, programs and thinking that has characterized efforts down through the years.

Of course, we are talking here about an ideal situation in which organizations submit well-wrought proposals born of assiduous planning and careful review. Unfortunately, not all proposal writers will excel at their job. At worst, they will offer incoherent summaries of half-baked ideas, or they will set out on a fishing expedition, dangling before you a variety of glittery, but ill-conceived programs in an attempt to merely attract funding. These lackadaisical efforts waste everybody's time. In the end, organizations lose on two counts: You will not fund them and they will learn nothing from the process.

Most proposals fall somewhere in the middle. They will introduce you to an interesting organization committed to a just cause through a variety of serviceable means. But the question remains: Is this particular project right for your foundation?

READING THE PROPOSAL

Try to be mindful that a well-written proposal does not automatically mean you have discovered the perfect program. Nor does a poorly-written proposal necessarily indicate an unfundable organization. If it only were otherwise, the grant review process would prove a snap. In truth, the evaluation of proposals is rife with paradox and complication.

Yet you should find it relatively easy to begin your work if these three conditions pertain:

- ◆ Your foundation or giving program's priorities are clear, and you have provided useful guidelines to help applicants present their best case.
- ◆ The applicants have studied the guidelines and followed them.
- ◆ You have set aside sufficient uninterrupted quiet time to read the proposals.

Clearly, the first condition is a responsibility you share with your board of directors. If you collectively neglect this task, you will simply buy days, weeks and months of wasted hours spent poring over irrelevant applications. Even if you do resolutely order your priorities and painstakingly prepare your guidelines, you will still be bothered now and then by inappropriate proposals. A grantseeker will ask you to underwrite the

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construction costs of their new offices when the guidelines are clear that your foundation does not fund building campaigns, or a Florida-based organization will seek support when your foundation only funds programs in Michigan. The point is to limit the number of errant applications heading your way and save everybody time and energy.

Beyond offering clear direction to grantseekers about funding goals and requirements, you cannot ensure the submission of good proposals. It is largely up to the applicants to rise to the challenge - the second condition.

The third condition, so deceptive in its simplicity, is the one that most frequently haunts program officers. Experienced grantmakers routinely observe that it is very difficult to carve out enough free time to give their proposals the attention they deserve. Yet in this constant struggle over time, you must prevail. Proposal reading is demanding work: Endeavor always to give it your undivided attention.

THE VIRTUES OF SCANNING

You need not, however, give every proposal the same degree of attention - at least not initially. Try on a regular basis, perhaps weekly, to scan the proposals that have recently landed upon your desk.

Look for the name of the organization and the person who signed the letter of introduction. Try to determine why the proposal was sent your way. Was it referred by a colleague? Is the applicant following up on a previous discussion with you? Is there any reason why you must take action immediately?

If the request is urgent, you might sit down and read the proposal right away and formulate your funding recommendation. If the proposal obviously does not fit your guidelines, you can dispatch it immediately by writing the applicant a decline letter.

SAYING NO AND FEELING (SORT-OF) O.K. ABOUT IT

This book is about making grants, connecting resources to feasible and practical approaches for making our world a better place. It is about the steps and stages of a

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grantmaker's work in getting to the message all grantseekers want to hear: "We are pleased to offer support. . ."

But we must also face the fact that a part of the daily reality of making grants is turning down many worthy requests. In fact, most of us turn down many more grant requests than we are able to recommend for support. So, how do you say no responsibly and constructively?

OUTSIDE GUIDELINES

The easiest requests to deny are the ones that clearly do not fit with your foundation's current guidelines or funding priorities. A worthy request from a senior center submitted to a corporate giving program that is focused exclusively on the arts is easy to deal with. In such a case, the grantmaker's job is to respond quickly so that the applicant's expectations are not unnecessarily inflated. The sooner you deliver the news that your foundation or giving program cannot offer the sought-for support, the better. It allows the applicant to use the time to locate other more likely sources of support for its work.

If you are impressed or intrigued by the proposal, you may be able to connect the applicant with a funder who would be more likely support the request. If you do succeed at this sort of matchmaking, it can be very gratifying for all involved, but be sensitive about when (and how often) you send unsuccessful grant applicants to a colleague at another foundation. Remember that you are increasing your colleague's workload. You may also be wasting a grantseeker's time unless there is a reasonable hope of success in securing funds. As a courtesy, you may want to check with your funder colleagues before you refer a grantseeker to them.

MANY FINE PROPOSALS

More difficult, but still straightforward, are the requests that technically fit the guidelines but where the competitiveness of the grant process will not allow for all applications to succeed. Here in the guidelines it is essential for you - the grantmaker - to be clear about the criteria for making decisions to fund or to deny. Are you looking for innovative approaches and start-up efforts, or are you committed to supporting the tried and true efforts of a few exemplary organizations? It may even be helpful to let the

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applicant know what their chances of success are. If you are only able to support one request in ten, it is easier to hear the news and harder to see it as a personal failure.

A GREAT IDEA, BUT...

You face another kind of dilemma when you encounter a proposal that simply cannot be funded as written, but hints at a promising approach in need of further development. In such a case, you must decide how much time to invest in coaching the grantseeker so that they can submit a more competitive proposal next time. Grantees would like a complete description of all of the reasons you are denying this proposal. This, they feel, would allow them a better opportunity to correct misconceptions, explain things differently, provide additional information or at least learn what is wrong and why they failed. Remember that almost any communication from you will increase a grantseeker's hopes. Be judicious and specific when inviting a new proposal - and be honest with the grantseeker about the real potential for success if he or she puts in the extra effort a new proposal will require.

NO MEANS NO

Finally, there is the case of the persistent grantseeker who will not accept "no" for an answer. John Q. Grantseeker calls for an explanation of your reasons for denying the request. He demands reconsideration; he pleads for advice and instructions for resubmitting. You feel sympathetic, but you know that there is nothing this grantseeker can do to make his proposal competitive. In this case, a firm and brief response is needed. Do not send a mixed message by engaging in long conversations or helping the grantseeker to rewrite his proposal. Remember that if you are to succeed in your job, you must invest most - if not all - of your time working with grantseekers who have the potential to become grantees.

Your overall goal is to create a speedy in-and-out box so that you never have a mountain of proposals sitting on your desk. In clearing away both the urgent and the irrelevant, you will afford yourself more time to study most proposals that fall somewhere in between.

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READING CLOSELY

Reviewing grant applications would be far easier if you dealt with only ten proposals each year. But most program officers find their desks piled high annually with scores of proposals, if not hundreds. The sheer magnitude of the task adds another dimension to your work. Indeed, it is an accomplishment of the first order to meet this challenge with a graceful balance of judgment, intuition, curiosity, zeal and a healthy dose of skepticism.

In most foundations, grantmaking spans a dizzying range of pursuits. Education, the environment, welfare reform, urban reclamation, human rights, animal rights, the justice system - nobody can possibly claim expertise in all of these fields. Yet over time, you will need to become at least conversant with every area your foundation considers funding. To a significant degree, your continuing education begins - and proceeds throughout your career - with reading and re-reading grant proposals that inform you of the context, controversies, problems and best practices in numerous fields.

With all that said, there are several ways for you to make the process more comfortable and productive.

First, when it is time to sit down and study the proposals that warrant careful consideration, make certain once again that you have allotted sufficient time to work without interruptions. Redirect your phone calls. Schedule meetings for other days. Then begin to read slowly, concentrating on the document as though it was a contract whose terms and stipulations will seriously affect your future (as, indeed, they may).

As you read, take notes in the margins of the proposal or on a separate pad of paper. As questions arise, jot them down. Some questions will probably be answered further along in the text. If they are not, consign them to a more permanent list for further follow-up.

Throughout your reading, you should search for these signal virtues:

- ◆ **Credibility.** The proposal will indicate in numerous ways whether the organization appears to be a reliable potential grantee. Ask yourself: Does the organization know what it wants to accomplish? What is the evidence that the organization is

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currently achieving its goals? What kind of reputation does the group enjoy within its community and beyond?

- ◆ **Capability.** Your foundation is not merely in the business of supporting good ideas; you are also investing in people who can turn these ideas into reality, as well as an organization that has the structure and systems in place to achieve its goals. What skills do the organization's staff and board bring to the project? Are they relevant to the project's aims? Has the organization succeeded in similar endeavors of equal size and scale to what they are now proposing? In short, you want to find out if the staff and board of the applicant organization can carry out the project or program effectively. (Some foundations appreciate attachments, such as press clippings and staff biographies as evidence of both credibility and capability.)
- ◆ **Feasibility.** You will be trying to determine whether the proposal is advancing a worthwhile project built upon a good idea that can be successfully implemented by the sponsoring organization. This question of feasibility naturally touches upon both credibility and capability; an incredible, incapable organization is not the logical source of exemplary work. But you must also consider the project on its own terms, apart from the sponsoring organization. Simply put: Can it be done? You will need to consult the budget to make certain that the organization has allocated sufficient resources to execute the various tasks and strategies described in the proposal.
- ◆ **Importance.** Beyond the very sensible question of can and will a project be completed, you will necessarily ask yourself: Should it be done? Is the project significant? Is there evidence that the proposal will trigger action or work that the community wants? Will it make a difference in the community it purports to aid or resolve the issue it addresses? Given your other opportunities for funding, is it the right one to support at this time?

QUESTIONS TO ASK WHEN READING THE PROPOSAL

Joel Orosz, of the W.K. Kellogg Foundation, has sagely observed that there are really only four kinds of proposals

- ◆ Good idea, good proposal
- ◆ Good idea, bad proposal
- ◆ Bad idea, good proposal
- ◆ Bad idea, bad proposal

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The first and last categories are easy to handle. (Reject the latter outright; seriously consider the former.) It is the other two kinds of imperfect, yet promising applications that will prove most nettlesome and numerous. ...

LOOKING FOR TROUBLE

COMMON PROPOSAL PROBLEMS

Consistency and clarity are the hallmarks of excellent proposals. In the best of all possible worlds, you will encounter proposals that address a genuine need with a program based on realistic expectations and imaginative ideas. Capable people committed to the project's success and backed up by a board that comprehends and supports the organization's overall mission will staff the organization. Administrators will have allocated sufficient time, money and personnel to accomplishing the project's measurable goals. They will chart the project's continuing progress, providing a clear, frank evaluation upon its completion.

Unfortunately, most proposals do not match this ideal. It is this realm of imperfect proposals that makes your work so demanding.

You will find that through inexperience or lack of sophistication in proposal writing, grantseekers most commonly err through omission.

- ◆ **Financial information**, including the project budget, potential sources of income, annual organizational budget or audit, is missing, incomplete or inadequately rendered.
- ◆ **Board lists** fail to include affiliations, professional skills or contact numbers.
- ◆ **Evaluation plans** are sketchy or absent.
- ◆ **Staff biographies** fail to correlate past experience to the skills needed to complete the project.
- ◆ **Knowledge of best practices** is not apparent in the narrative, thereby failing to demonstrate the staff's grasp of the field or their own organization's experience.
- ◆ **Budget expenditures** are not justified, suggesting that the applicant may be attempting to plug holes in the organization's leaky operating budget.
- ◆ **Explanations of rapid staff turnover** or recent changes in leadership remain unexplained, raising questions about organizational continuity, direction and morale.

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- ◆ **Little discussion of external trends** or internal organizational challenges that may affect the chances of success.

EIGHT QUALITIES OF EXEMPLARY PROPOSALS

1. Energy. The proposal bristles with enthusiasm, urgency, passion. It suggests a group of people who can barely contain their eagerness to begin working. As a reader, you find yourself inspired and excited by their plans.

2. Expertise. The proposal's authors know what they are talking about. Their plans reflect a deep understanding of the problem they are addressing. They are aware of similar efforts that have been undertaken in the past. Their theoretical knowledge is tempered by time-tested experience in the field. They inform their practice with solid theory and continue their own professional development despite the demands of their daily work.

3. Commitment. The proposal reflects the organization's genuine priorities rather than being one of many programs it is currently juggling. The grantseekers demonstrate their willingness to invest their own unrestricted resources in the project. Rather than moving on to a new endeavor in the near future, the organization is committed to continuing the project.

4. Clarity. The proposal is clear about what the organization wants to do, why it is important and how it will be carried out and evaluated.

5. Collaboration. The grantseeker has formed alliances with other organizations to advance their mutual goals. The people served by the proposed project have participated in its planning. All involved parties appear more interested in getting results than carving out turf.

6. Benefits. The organization is less concerned with underwriting its own needs than improving society. The project's goals are indisputably worth striving for and the target group is appropriate.

7. Comprehensiveness. The problem's complexity is matched by the sophistication of its proposed solution. The grantseekers' thinking reflects a comprehensive strategy, rather than a piecemeal approach.

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8. Effectiveness. A well-designed, ongoing evaluation reflects the group's commitment to getting results. The project has the potential for achieving a wider impact if it is replicated elsewhere in the future.

Keep in mind that applicants will be striving to put their best foot forward. Do not expect them to stress the obstacles to their success or their own implacable organizational difficulties. Give them the benefit of the doubt, then ask for whatever additional information you may need in order to make an informed decision.

WHEN THE TRUTH LIES ELSEWHERE

GETTING BEYOND WORDS

When you do encounter an interesting proposal promoting a worthy idea, you should not assume that your job is nearing completion. Actually, it is just beginning.

Let us say you have reviewed a proposal submitted by a long-established organization that rings out with commitment and enthusiasm, while passionately establishing a critical need that can be addressed by the project's logically outlined strategies. Now you must ask: Do these qualities characterize the entire organization or are they the product of skillful grantwriting and perhaps a professional grantwriter?

On the other hand, when you read a muddled proposal from a grassroots organization or start-up venture - unable to benefit from the services of a professional development officer or fundraising consultant - you may need to look at the question from the opposite direction. Ask yourself: Is a valuable effort being undersold because of the organization's lack of an articulate advocate? Does an unsophisticated approach to organizational charts, financial statements and budgets reflect an inept effort or a worthwhile venture at an early stage of development?

Reviewing proposals is not like judging an essay contest. Whether a proposal is eloquent or incoherent, you will still need to burrow underneath the prose to acquire a genuine sense of organizational reality. Do not ever entirely trust what you find on paper. The proposal is a very important indicator of an organization's aims, plans and accomplishments, but it can never tell the whole story.

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If you are dealing with an agency that has a long history with your foundation, you can begin to plumb the depths of organizational life by digging into your own files. Consult their final reports to determine whether the organization actually has performed as promised in the past. Refresh your memory about your foundation's prior relationship with the organization and ask whether it bears repeating.

If you have not previously worked with the group, you can consult other funders who have. Ask them to talk frankly about their experience. Apply the same rigor to this task as you would when following up the references of a job applicant for a key position inside your organization. In truth, you are embarking on a kind of partnership that demands a clear-eyed appraisal of your potential grantee's strengths and weaknesses.

HELP FOR HIRE

Outside Reviewers and Advisors

At times you may find yourself needing help in evaluating a proposal. Assistance can come in several forms: coworkers at your foundation, colleagues working at other foundations or funding agencies, or experts outside the field of philanthropy, such as community leaders or scholars.

If you do not have collegial contacts, then the request for help may be a good first step in building them.

Let us say your foundation or corporate giving program has recently decided to concentrate on child development, an area in which you have no previous experience. Over time, you will need to familiarize yourself with the field's key issues and your foundation's grantmaking history. More immediately, you must grapple with the applications piling up on your desk. This is a perfect moment to bundle up some of your proposals and ship them off to an outside expert.

Of course, you will be looking for a good deal more from the expert than a simple approval or rejection of each proposal. You can benefit most by studying the experts' assessment: First, by reading his or her report on each proposal, and then by engaging in a frank conversation about the decisionmaking process. The next time a batch of similar proposals arrives, you will be better prepared to evaluate them yourself.

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What should you be looking for in an outside expert?

- ◆ Personal experience in running or designing programs like the ones you are reviewing.
- ◆ The ability to analyze complicated situations and write up findings in a clear and succinct manner.
- ◆ Perspective as a policymaker in the field, or the proper educational credentials and an abiding, scholarly interest in the area.
- ◆ Enough time to review the proposals and return them to you when you need them.

Whomever you select, you will want to avoid any possible conflict of interest. Stay clear of people directly connected to organizations seeking funding. Even if they can complete the job effectively, you may face the appearance of impropriety, which can be as destructive as the thing itself.

When you have a personal relationship with an applicant, the situation may also become sticky. In these cases, consider an outside reviewer as a complement to your own reading. Regional Associations of Grantmakers (RAGs) are good resources for referrals.

WHEN TALK IS NOT CHEAP

Communicating With Applicants During the Review Process

Grantseekers and grantmakers cannot possibly share the same point of view. Grantseekers are concerned with their own institution. Their attention focuses on the one proposal they have dispatched to your foundation. On the other hand, many grantmakers see hundreds of proposals each and every month. Their outlook is necessarily broader, although not necessarily as deep.

This inevitable difference sometimes complicates communication. Grantseekers long to hear a hint of encouragement in your voice, even when you are telling them why you cannot possibly fund their project. They may regard any suggestions you make as a directive linked to future funding. They may not hear you at all, their ears clogged by the implications of your approval or refusal to fund their project.

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Strive to keep conversations with grantseekers

- ◆ Practical. Let them know if you want to see additional information or require clarifications on any part of their proposal.
- ◆ Informative. The most common inquiry you will receive from applicants after they have submitted a proposal: When will we hear from you about your decision? It is only fair that applicants be apprised of the timing of your review process and kept informed of any unusual delays. It is also of benefit to both grantseeker and grantmaker to be clear about the steps and stages of the grant review process.
- ◆ Uncommitted. Do not make promises you cannot keep.

Unless you can guarantee that your funding recommendations will be adopted, wait until your board has taken action before passing along the news to grantseekers. If you have to retract a promise of funding, it will make your foundation appear indecisive, while you look less than competent. Even worse, it suggests that you and your board are in conflict over funding priorities. Grantseekers will have nowhere to turn, having lost faith in you both. Keep in mind that you generally do not have the power to approve grants; you only have the power to deny because your negative response will most likely halt the application before it ever reaches your board. Strive for truthfulness and transparency in your relationship with the grantseeker.

GETTING BETTER ALL THE TIME

How To Improve Your Proposal Reviewing Skills

Despite all the challenges, you will certainly sharpen your proposal-reviewing skills as your career progresses. Reading proposals with care and concentration demands strength, endurance, flexibility; it will keep you fit on the job. You can, however, speed up the development of your reviewing skills if you are willing to take some extra effort.

To begin, try to make the review process as interactive as possible. Do not merely scan the words on the page. Speak back to each proposal; try to engage yourself in a conversation in which you point out the proposal's virtues and shortcomings. Beyond making judgments about fitness for funding, formulate your own criteria for excellence as you might cultivate a personal aesthetic for viewing art or listening to music. The point here is to turn proposal reviewing into a profoundly conscious act.

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Take care to vary the kinds of proposals you review. Notice the ways that different kinds of organizations approach the proposal writing process. Do artists and scientists conceive of their projects in opposing or complementary ways? What values and preconceptions underlie the proposals submitted by educators, by environmentalists, by groups involved with international development? Precisely what is the meaning of the jargon indulged in by various constituencies and organizations?

Rely on your colleagues for advice. Ask staff people at other foundations to forward their own examples of exemplary proposals. Note the variance from your own maturing standards. Contrast the values celebrated by your colleagues. Engage other foundation professionals and your nonprofit collaborators in an ongoing discussion about what constitutes a good proposal. Stay open to other people's ideas. And keep reading.

CONDUCTING SITE VISITS AND INTERVIEWS

A Guide for Program Officers

Few tasks in the foundation world prove as interesting, rewarding and exhilarating as the site visit.

Site visits can lift your spirits and enliven your day by reminding you precisely why you chose to work in the foundation world. They invite you to compare plans with accomplishments, the ideal with the real, the fundable with the feasible. By speaking in-person with grant applicants and surveying their operations, you can gather crucial information, add depth and texture to your funding recommendations, cultivate your professional skills and expand your knowledge of the extraordinarily diverse non-profit world.

Yet, while the benefits of site visits are potentially vast, the challenges also remain formidable. To start, how do you decide which applicants to visit? It all begins with the proposal.

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WHEN TO GO

In most cases, the proposal will be your primary means of determining which organizations and projects enjoy sufficient potential to justify an in-depth, in-person site visit and interview.

Before scheduling any site visit, you should carefully review the proposal and ask yourself six basic questions:

1. Is the proposed project within our foundation's guidelines?
2. Does it describe a program or project that appears realistic and reasonably constructed?
3. Are skilled, committed, dependable people running the organization?
4. Will the project's success really make a difference in the world?
5. Do you have any important questions about the project that are not answered in the proposal?
6. Do you know enough about the organization, its managers and its proposed actions to make a recommendation without conducting a site visit?

Of course, these questions are not meant as exhaustive criteria for determining an organization's worth or a project's potential. They are simply guidelines suggesting when you should consider stepping through the door to learn more.

In short, they tell you whether your foundation might benefit from taking a longer, harder and more personal look at an organization, its plans, its programs and its people.

WHEN TO STAY HOME

Of course, there are also plenty of good reasons not to take the time to conduct a site visit. Among the least defensible motivations:

- ◆ You or the applicant feel like "shooting the breeze" for an hour or so.
- ◆ You long to share your opinion and offer "expert" advice.
- ◆ You have not had an opportunity to read the organization's proposal; instead, you will drop by for the oral rendition.
- ◆ An old friend on the organization's board would really appreciate it if you could pay a short visit.
- ◆ You have time on your hands today; why not get out of the office for a break, even though there is really nothing to see or learn?

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A foundation representative motivated by any of these flimsy rationales would be better off staying home. A site visit is not a trifling matter; it is a fundamental tool for conducting important research. Site visits raise the expectations and involve considerable preparation time on the part of the grantseeker. Justifiable site visits represent a crucial step in uniting a worthy applicant and a responsible foundation in their mutual effort to make the world better. Unjustifiable site visits waste the time of the grantmaker and the grantseeker.

BENEFITS OF THE SITE VISIT

Once you have wisely chosen an organization to visit, what benefits can you expect from your effort?

Meet the People

First, and perhaps most important, you will meet key staff and board members. These are the people responsible for implementing the project you have only read about. Through their proposal, the staff has asked you join them as collaborators; step one is getting acquainted. In the best of circumstances, your first site visit will mark the beginning of a long and fruitful working relationship. In the worst situations, it can prevent you from hitching your foundation's money and reputation to a venture that is creeping toward disaster.

In addition to speaking with the executive director and the project manager, you should also try to meet with at least one active board member, particularly in smaller nonprofits. After all, your grant will go directly into the organization's coffers. You should learn about the group's long-term commitment, durability and fiscal health by speaking with the individuals who are legally, financially and morally charged with its oversight and governance.

If at all possible, meet with the frontline staff who serve the clientele. In this way, you can determine whether the proposed project has the necessary depth of skills, knowledge and motivation to fulfill its promise, or whether the project's fate balances on the overloaded shoulders of the executive director.

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LEARN MORE ABOUT THE ORGANIZATION AND ITS PROJECT

The best projects raise questions. Some questions - provoked by your careful reading of the proposal - can be answered quickly by the organization's knowledgeable people. Other matters may demand research, some consideration and another call or meeting at a later date.

In any case, the site visit stands as your chance to learn abundantly more than you knew when you read the proposal.

At the site visit, you can ask the staff and board to elaborate on their plans, goals and vision. With luck - and the proper management of the interview on your part - they will soon move beyond the standard fare of pleasant generalities to delve into the livelier, more invigorating issues that make their work important and interesting. You will become privy to the operational details and philosophical principles that characterize their field. You will glean some of the texture and turmoil that speaks to the deep truth of the organization, its project and its mission.

SEE BEYOND THE PROPOSAL

Some organizations are blessed with fluent, persuasive proposal writers on staff; other organizations hire them on a contract basis. In either case, you must learn to distinguish the rhetoric from reality, the promises from real potential.

This need is compounded by the fact that in most organizations the person writing a grant proposal is not the same person who will implement the project. As a result, misinformation may seep into the planning. The proposal may suffer from an inflated prose style that raises questions about its credibility. In fact, these conditions are so common that we probably should not characterize them as "problems"; it is nonprofit reality. Overanxious project planners frequently feel compelled to promise too much in pursuit of their grant. You can use your site visit to redirect responsibly the conversation toward more realistic goals and to avoid the mutually chafing bind of approving a grant that asks for more than can be delivered. Incremental progress is usually the order of the day.

On the other hand, some excellent organizations - particularly newcomers to the field - find themselves tongue-tied when they sit down to write about their efforts. A site visit

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can help you tease out qualities in a project that may not be visible in a disorganized or thinly argued grant proposal.

GAIN A SENSE OF PLACE

You should also open yourself up to acquiring a "feel" for the organization and its people. We are talking here about gut reactions, but something else, too. Look around: Is the space adequate? Is it well-organized or are files scattered everywhere? Does it feel "user-friendly?" On closer inspection, our "intuition" about people and places is often triggered by subtle clues. If the organization you are visiting feels rather "empty" or "slow," It may be due to the fact that you have not heard the phone ring all morning or noticed a single client walk through the door. ("When do things get moving around here?" you might want to ask, in the least provocative way possible.) On the other hand, if you encounter an organization that is jumping with purposeful activity, teeming with enthusiasm, determination, joy, then that is certainly worth noting, too.

ADVANCE PROFESSIONAL DEVELOPMENT

Site visits can also do you the enormous favor of extending your education in all the program areas that your foundation funds.

As a foundation executive or program officer, you simply cannot keep up with all the latest developments in juvenile justice, community economic development, the arts, education and the environment. That is asking too much of any one person. But you can take advantage of your position to conscientiously and persistently seek out information from experts dealing with the issues on a day-to-day basis: the leaders of the nonprofit organizations striving for your support. Learn from them; ask questions.

What are the trends you see coming? What should our foundation be looking at? What changes do you anticipate in your field? Are there ways in which people frequently misperceive your issue, your clients, your organization? How have you overcome the challenges that other agencies now face? Who else is doing good work in your field? What should I take special care to learn?

By talking with intelligent, well-informed nonprofit managers, workers and board members about their areas of expertise, as well as their individual projects, you can draw upon their collective experience to discreetly inform your own perspective. In the

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end, this kind of conscious, continuing education will make you a more effective foundation representative, which in turn will benefit everybody.

DETERMINE ACTUAL NEED

A site visit might also tell you whether an organization really needs your money. But beware: This kind of judgment can be fraught with paradox. A brisk, orderly, well-managed organization might point to a good bet for funding, or to a group that already has enough money to accomplish its goals.

Beyond the simple calculation to support or deny a funding request, the site visit can provide a basis for determining whether an organization needs as much money as it is requesting, or instead technical assistance to address organizational problems it might be overlooking.

PROVIDE HELPFUL ADVICE

Occasionally, you will stumble upon an opportunity to offer useful counsel. Perhaps the organization is attempting to launch a program that you have already seen fail at another location. Maybe you perceive the budget to be too small, the project goals too diverse or the staffing insufficient to the operational demands.

Recommendations should be offered sparingly. Your primary reason for undertaking a site visit is to learn, not teach. Help out when you can, but do not complicate your role by becoming everybody's dependable purveyor of unsolicited advice.

YOUR HOMEWORK ASSIGNMENT

Before you visit an organization, or ask its representatives to visit you at your office, you have some homework to complete. Successful meetings demand preparation. A site visit or interview with grantseekers is not a chance encounter; it is a planned, purposeful tool for communicating vital information. "Winging it" is a profound disservice to everybody involved and a sign of arrogance on your part.

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Prior to leaving your office, make certain you have completed the following tasks:

- ◆ **Read the proposal carefully** and analyze its strengths and weaknesses, noting the key points you want to cover during your visit.

Keep in mind that the people you are meeting will assume your fluency with their proposal. Why else would you be visiting them? If you show up to the meeting as a blank slate, hoping to absorb all pertinent information on the spot, you are almost certain to miss central issues, confuse the staff with your unapologetic ignorance and convey the corrosive message that your foundation does not really take its philanthropic role very seriously.

Even if you have carefully read the proposal several weeks earlier, took good notes and feel confident about your comprehension, read it again just before your visit. Few people can contain myriad prospective projects in their working memories without confusing the details. Keep your acquaintance with the proposal fresh.

- ◆ **Write down the questions** you want to ask. Do not imagine that you will remember them all; nobody does. What is more, the process of formulating your list will jog your mind in useful ways, suggesting related issues that you might have otherwise overlooked. It will also remind you of what you already know and, therefore, need not bother to explore during your limited allotted time. Finally, your list will convey the proper note of seriousness: You have prepared for your visit and expect that the organization has done the same.
- ◆ **Learn enough about the field** so that you can participate intelligently in the conversation. If you are going to visit a child care center, but you have never been to one before, you know nothing about the field, and you could not tell a national model from a felonious mess, then you are probably not going to be a very effective observer. In such occasions, you need to undertake some remedial education: read articles and books, talk to the experts and colleagues, make unofficial visits to similar sites. One of the great privileges of working as a foundation executive or program officer is the opportunity to continue your education about the issues and institutions that matter most in our society. One of the job's prime responsibilities is making certain your ignorance, however forgivable, remains temporary and no worthwhile organization is made to suffer because of a lazy learning curve.
- ◆ **Only now call the organization to set up your appointment** for a mutually convenient day and hour. If the managers need time to tidy up their offices and

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reconfigure their plans, respond accordingly. You want the visit to be as productive as possible; catching people unaware should not be part of the agenda.

Be sure to tell the organization's director how long you will want to visit. Two hours seems typical for the first visit; in some circumstances, an entire day may be justified. Budget sufficient time to cover all your questions and allow enough flexibility so that if something interesting develops, you can roll with it.

Tell the executive director exactly what you hope to learn. (This should be easy because you have already studied the proposal and composed a list of questions.) When you are done, ask if there are other points, places or people that you should also discuss, visit or meet.

Finally, stipulate precisely who you would like to meet. Inevitably, you will want to talk with the executive director, the project manager, and perhaps a board member. In some instances, you may want to meet the organization's clients or constituents, particularly if you have questions about the project's ability to serve them effectively. If so, meeting with them separately may be more appropriate.

Keep in mind, however, that most clients know little about organizational philosophy, management, operations or finances. They simply do not ponder these matters with the same degree of interest or motivation as the staff. If they are being served - even at a minimal level - they may express their complete satisfaction. Conversely, if they are not getting what they imagine to be their due, they could lapse into uninformed ire. In most cases, however, you can count on people's sense of courtesy preventing them from complaining in front of the agency staff.

- ◆ **Dig a little deeper** for other informed perspectives. The site visit should not be the only informational expedition you undertake. Before you leave your office, you might also talk with the organization's colleagues, collaborators and competitors. You could discuss their performance with other funders or government agencies. Just keep in mind that you are calling up in order to listen, not offer your own opinions. Indeed, you could easily stir up a poisonous situation - not to say, a libelous one - if you are perceived to be spreading bad news about an organization, whether you have met them or not. All conversations must remain confidential.

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STAGING THE SITE VISIT

Site visits tend to put everybody on edge, at least initially. If you are new to the role of program officer, you will probably feel somewhat self-conscious yourself. (Who am I to judge these hard-working groups? What if I say something foolish? How will I measure up to the more seasoned program officers who have visited in the past?) Self-doubt and uncertainty is natural. In fact, every meeting should probably contain a small spark of nervousness, if only to ignite your efforts. The point is to manage the edginess on both sides so that your communication remains unclouded and you can proceed through the agenda. Over time, interviews and site visits will begin to feel comfortable as you make more and more of them.

If you are not completely at ease right now, imagine how the applicant feels. A site visit multiplies hopes. You have indicated interest in the organization's grant proposal. Eventually, your visit will lead to a recommendation: either to disburse or to deny funds. Some organizations will have difficulty shaking this fact from their mind: Money will be the persistent subtext of their experience with you. That is an unflattering prospect, but true nonetheless. Only the most experienced nonprofit managers will perceive that you can help them in other ways, such as rethinking their program strategies or forging links to other service providers.

In the worst cases, this can lead to an adversarial standoff. The organization wants their grant and you are searching for reasons not to give it to them.

This undercuts and undervalues the relationship between your foundation and the applicant. You should not be conducting a site visit for the purpose of mounting criticism or withholding support. You are not aiming to be an obstacle. Rather, you should always be searching for potentially powerful collaborators with whom you can help ameliorate some of the world's problems and magnify its beauty. Your foundation's wealth is truly valuable only when it can be placed at the disposal of effective organizations.

LOCATION, LOCATION, LOCATION

Consider the basics of conversational comfort. If you are conducting an interview at the organization's site, make certain you have secured a quiet, private location. If the executive director insists on occupying a busy spot full of jangling telephones and

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incessant foot traffic, ask to relocate. Assure him or her you want to devote your full attention to the interview and, by implication, you expect the same.

If the interview is scheduled for your office, be aware of your foundation's various and often unconscious declarations of institutional wealth and power. Even if you do not occupy a fancy office, subtle reminders of the disparity between the grantgiver and grantseeker may intimidate, distract or even provoke your visitors.

Be assured that you cannot make this disparity disappear. But you can reduce it to a tolerable level. Remember to

- ◆ shake off the initial stiffness by shaking hands and offering a warm, congenial smile.
- ◆ step out from behind your desk to meet your guests.
- ◆ set up the seats to suggest collegial exchange.
- ◆ offer coffee, tea, juice, water, perhaps something to snack on.
- ◆ smile again, relax and enjoy your encounter because if you are not comfortable, the other person is really going to squirm.
- ◆ most important: be prepared to listen.

STAYING ON TRACK

A good grantmaker manages the meeting. To accomplish this task, you must stay on top of three factors.

- ◆ **Time.** Keep everybody apprised of your time limitations from the outset. If you have scheduled a two-hour visit, gently remind the applicant of your schedule. Clear time constraints help everybody maintain the proper pace so that you do not find yourself cramming two hours worth of crucial talk and observation into the last 20 minutes.
- ◆ **Goals.** Review your agenda with the people in charge: These are the five things I would like to accomplish during this visit. One, I want to walk around your site and take a look at your operations. Two, I would like to meet several of the frontline staff. Three, I want to talk with your executive director about finances. Four, I would like to have a conversation about your plans for the future with your board members. And five, I want to be certain to leave enough time for you to talk with me about anything on your mind. Finally, I want to answer any questions you may have about how our foundation operates.

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- ◆ **Focus.** To profit from your visit, you need to free your mind of extraneous matters. If you are thinking about lunch, your next interview or all the work left moldering back on your desk at the foundation office, then you might as well not be at the site visit. In fact, only by assuming an engaged, energetic listening manner - the kind of attentiveness that wears you out by the end of the day - will you be able to keep the conversation on-track when it threatens to stray. Of course, it is easy enough to talk about the necessity of keeping one's mind clear; it is considerably more difficult to do so.

Paying attention is one of the skills that you will cultivate over time as a program officer: the result of practice, heightened confidence and self-discipline.

HOW DO YOU KNOW WHEN A SITE VISIT IS GOING BADLY?

The site visit comes in all shapes, shades and sizes. For new program officers in particular, it can be difficult to tell when a visit is going well because success also assumes many forms.

However, it is rather easy to recognize when the site visit is falling apart and threatening to leave you with nothing to show for your effort. Among the tell-tale signs:

- ◆ **Nobody knows the answers** to your questions. What does this indicate? Perhaps the group is hiding something, or maybe they really do not know the answers. Indeed, perhaps nobody has ever posed your questions before. Or your questions are too vague, complex or irrelevant to elicit an intelligent response - another entirely plausible explanation.
- ◆ **Key people fail to show up** for your visit, despite clear and repeated requests. Among the more troubling absences: the bookkeeper or chief financial officer, board members, the project manager or the executive director. Without the people who can address your questions, the visit is pointless.
- ◆ **You have a bad feeling** about the organization in general. Does something look, sound or feel wrong? Are you confused about what is actually happening on an operational basis? Does the real action seem to be somewhere else? Are you thankful you are not a client using this agency? Sometimes you have to trust your instincts and then ask yourself: What is the matter here?

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SITE VISITS BY WANDERING AROUND

In some cases, you will need to flesh out your conversation with the executive director and board members by actually watching the organization in action. Indeed, if feasible, it is almost always worth the effort. By spending an hour or so with the frontline staff and perhaps some of their clients, you will glimpse a portion of the organizational reality that usually eludes the formal interview process. On the most basic level, you will want to find out if the group is doing what it claims: Does the child care center provide a warm, safe, clean environment for its kids? Do the clinic workers deliver a steady stream of health services to the poor? Is the arts organization offering music lessons and staging concerts?

Beyond your (admittedly) cursory inspection, you will have a chance to talk with the people delivering services. Ask them what makes their work worthwhile? How do they measure progress? What impedes their efforts? Why have they dedicated their professional lives to this particular field and this organization?

In many groups, the division between the administration and the service-delivery staff proves considerable. That is not necessarily a problem. It does mean that if you spend all your time in the administrative offices, you will only end up with part of the picture.

MEETINGS WITH PEOPLE YOU JUST PLAIN DO NOT LIKE

Occasionally, you will find yourself meeting with a staff or board member who rubs you the wrong way. It is inevitable; even the most open-minded person cannot take a shine to everybody. Like most of life's uncomfortable moments, this situation presents both dangers and opportunities.

To avoid consigning an unpleasant person to the trash heap of your affections and thus unfairly scuttling his organization's chances for support, you must ask yourself: Why, exactly, do I feel put off? Is it because I am reminded of my over-bearing brother, selfish sister-in-law, the neighbor who never cleans up his yard? If so, the demons of ill will are pretty easy to wave away. Recognize your part in the unfortunate encounter, be more accommodating than your inclinations urge and get on with your interview.

On the other hand, if this person's hubris, hectoring or humorlessness appears to interfere with his managerial duties, then you may have stumbled into a more

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complicated dilemma. Obnoxious individuals seldom make good managers. When faced with an unusually difficult person at the head of a strong organization with sound plans and a good reputation, you will need to peer more deeply into the organizational dynamics to see if some kind of personnel disaster is brewing off-stage. Indeed, it is crucial in these situations to acknowledge your feelings so that they will lead to a fair and thorough investigation.

EXCAVATING INFORMATION

Once you have arrived for your site visit, what should you be looking for? Most simply, you can focus your quest on five essential issues:

- ◆ What is really happening?
- ◆ How is it happening?
- ◆ Who is involved?
- ◆ What does the physical appearance of the site indicate?
- ◆ What is the public benefit derived from the effort?

Producing the information that can answer these questions is, unsurprisingly, a complicated task. To this end, you will need to rely on a mixture of direct observation and conversation seasoned with strategic curiosity.

Of course, it is also worth noting at this point that you will run into agencies that simply are very well-run. You will not need to strenuously inspect the situation; you will not have to head off to the interview worried about what you may find. Instead, you will quickly recognize that the proposal is sensible, the agency is well-managed, its reputation appears solid, the results of its efforts are self-evident. In these cases, there really is not anything to dig up. Your mission is to build rapport and construct a basis for your long-term collaboration - a happy duty.

ASKING THE RIGHT (AND WRONG) QUESTIONS

Many site visits, however, will demand more thoughtful inquiry. Although one cannot specify the precise questions that you should habitually ask, it is possible to suggest the qualities that will best serve your inquiry.

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- ◆ **Variety.** Throughout your visit, ask different kinds of questions. Mix the specific ("How many clients will you serve next year?") with the open-ended ("Tell me about your development campaign."), as well as the unabashedly reflective ("What moments in your work have told you that you are on the right course?").
- ◆ **Order.** Ask questions in a logical progression. If you have five questions about staffing, work through them consecutively. If you jump around, you will confuse everybody and add an unwanted dash of chaos to an already complex encounter.
- ◆ **Permission.** Sometimes you will need to coax out details about the less pleasant aspects of organizational life. For instance, if you suspect that the board has been battling recently with staff, then a general question - "How are your board and staff relations?" - may not suffice. You will almost inevitably hear, "Oh, they are pretty good." Better to say: "Lots of organizations experience stress between their staff and board; it is really in the nature of the nonprofit structure. What are the points of conflict in your organization?" In this way, you have made their problem universal, relieved the pressure and given them the opportunity to be honest with you without fearing that you will misunderstand.
- ◆ **Good faith.** Formulate genuine questions whose answers will illuminate your understanding of the organization and its mission. Avoid any hint of sarcasm, meanness or self-righteous pique. Do not set traps. A grantmaker is neither a private investigator nor a public prosecutor.

The All-Important Last Questions

Toward the conclusion of your interview, do not forget to ask the following:

- ◆ What should I know that I have not asked you?
- ◆ What are you worried that I might have misunderstood?
- ◆ Is there anything that we have left out?

These questions go straight to the heart of your task: informing yourself about the organization in the most thorough and pertinent way possible. It also reinforces another essential truth: You are not the expert; they are. You are there to learn from them.

GRANTMAKING**TEN INTERVIEWING STYLES TO AVOID AT ALL COSTS**

Perhaps it is easier to categorically state how you should not behave as an interviewer. In all situations, avoid the temptation to be a

- 1. Big talker.** You love the sound of your own voice. You know that you have great wisdom to impart and act on this conviction without restraint. You are happy to endlessly relate your own theories, opinions and exploits, while the interview subject provides scant detail, parrots your prejudices and shies away from offering his or her own views.
- 2. Agile anticipator.** You affect an Olympian omniscience. You know the answers before they are given. At end the interview, you leave with a mixture of erroneous ideas, foggy recollections and half-truths.
- 3. Listless listener.** You are bored. You have heard all these answers many times before. You find yourself thinking about lunch or mulling over what your next question will be before you hear the answer to the present one.
- 4. Prosecuting attorney.** You proceed as if cross-examining a hostile witness. You put the interviewee on guard, grill him or her remorselessly and suppress the open expression of differing ideas.
- 5. Goodwill ambassador.** You have an aversion to asking difficult or sensitive questions. You skirt around the prospect of unpleasantness. You abhor offending people; you want to make friends.
- 6. Captious categorizer.** You are blessed with second sight, able to intuitively judge people's hidden motives. You classify others according to your own biases. You are the proud victim of your own prejudices.
- 7. Simultaneous doer.** During interviews held at your foundation, you perform like a one-person office: answering telephone calls, signing letters, dispatching duties to your staff. You are just too busy to give the interview your full attention.
- 8. Faulty question framer.** You ask leading questions, telegraphing the answers you desire to hear. You ask general questions that produce general answers. You dabble in

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vague and incoherent inquiries and then interrupt with new, equally confusing questions before you get your answers.

9. Triple-header questioner. You compose ridiculously complex questions with multiple parts that prove difficult to answer and impossible to track. A typical example: "Tell me all about your programs and how you raise money for them and then conduct their evaluation."

10. Tactless tactician. You hone in on personal questions, such as salary concerns, in front of other staff. You phrase your inquiries in a crude, rude and tasteless manner. It has never occurred to you that people might be offended.

AVOIDING EVASIONS

Some people prove rather artful at not answering questions. Consider the story of one site visit recounted by a foundation colleague.

The program officer had rendezvoused with the executive director at the construction site of the organization's new offices. For the next two hours, they toured the site, speaking with the contractor, the architect, some of the crew. The pair never stopped walking; they never sat down to rest. No time was allotted to exchange information, engage in conversation or even take a few notes. The director was charming, funny and full of energy; but she avoided answering all questions about finances. At the end of the tour, the director gushed over the wonderful opportunity to meet the program officer, shook hands goodbye and disappeared into the mist. The whole visit had been exquisitely orchestrated and it proved entirely unsatisfying. The program officer had observed the hole in the ground destined to be the new facility, but she did not learn a thing about the organization's programs and capacity, its sources for additional funding, its current budget, its vision for the future. The program officer had been handled - and by experts, it seemed.

How can you avoid this kind of situation? First, as we discussed earlier, you must do your homework. Given a clear sense of purpose, a roster of pertinent questions and a timely schedule, you will find yourself justifiably intolerant of distractions and determined to reach the heart of the matter with due diligence. When your hosts do veer off toward the elusive and the extraneous, you will be better prepared to rein them back in.

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Sometimes, you will just have to put your foot down. If the executive director wants to show you something off-site, make certain this unexpected "opportunity" does not obstruct your primary purpose. Remind the people in charge about the five things you must learn within the limits of your two-hour visit.

Nevertheless, if an organization is determined to evade your questions, you cannot squeeze information out of them. In these cases, you may need to compose a list of all the questions left unanswered during your site visit when you return to your office and then immediately send a letter to the board and staff with a request that the additional information to be supplied in writing.

What do you do when you are confronted with an outright lie? First, you must consider the source. Is the speaker compensating for a lack of knowledge? Repeating a half-truth that has achieved full currency inside the organization over time? Attempting to protect someone else? Acting on orders? ("Whatever she asks you, do not tell her about this year's budget shortfall.") Lapsing into habitual exaggeration? Omitting the unflattering? Are they simply, boldly, misstating the truth?

In any case, you will probably need to confront the prevaricator. Given the perils of libel, the psychology of denial and the discomfort you are likely to experience, it is best to proceed diplomatically. ("Your answer surprises me. I have always understood the situation differently. Could you explain further?" or, "Am I misinformed? Why do I have the impression that the situation is really more complicated?")

A FINAL WORD ABOUT ADVICE

It is always tricky giving advice. But as noted earlier, there are occasions when it is important to do so, as long as two conditions prevail.

- ◆ You have information, perspective, experience or a word of caution that may truly benefit the organization.
- ◆ The people with power inside the organization are prepared to listen, consider and use your advice.

Even when advice is crucial, it must be delivered with grace and sensitivity. Make certain your words are understood to be an offering that can be declined.

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The language you use will highlight your intentions. If you speak in terms roughly the equivalent of "Now let me tell you how to do it," then the organization will understandably interpret your advice as a directive. Instead, you might approach the matter with tactical diffidence: "I have seen organizations take a variety of approaches in a situation like yours..." You could simply respond to their explication of a particular problem by asking them to puzzle it out for themselves. ("Yes, that is an interesting problem. What do you think is going on? What would you need to resolve this situation?") Sometimes, the best assistance you can give is to assume a Socratic role, persistently asking the organization to define its own terms of success, while echoing back a critically attuned version of what you have just heard.

You must also be aware that some groups will request your advice when they do not really want it. They are flattering you, hoping you will feel part of their organization. Still others will confuse your questions with advice. You ask, "Have you thought about merging with a like-minded organization in town?" They hear. "If you want our money, you better merge." On these occasions, it is crucial to assure the organization that sometimes a question really is just a question. ("Yes, I am actually wondering: Does a merger make sense? I do not know. You are the expert; tell me what you think.")

Be aware that when you do offer advice, sound or otherwise, most organizations will feel compelled to regard it very seriously. This is particularly true for small and mid-sized organizations. (When a large institution, such as a university, confronts bad advice from a program officer, its director can usually smile agreeably, pretend to take notes while actually doodling and then shake your hand goodbye, wondering why the foundation hired somebody like you.) Smaller, poorer, less experienced groups are more vulnerable. They will feel that you have just made them an offer they cannot refuse, even if it is a terrible one. It takes real strength of character to say, "Well, thanks, but no thanks. That may be good advice for some groups, but it is not really something we are interested in." Do not put anybody in this bind.

AN EYE ON RESULTS

Finally, you can keep your site visit on track by recalling a simple, yet often elusive truth about the proper relationship between foundations and nonprofits: It is not about you. It is not about them. Your chief concern should always be focused on the people you are both aiming to serve.

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Ultimately, your attention should be directed toward poor children, working families, participants in the arts and culture, the sick and the dying, students, advocates for ecosystems and animals - whatever your foundation's focus may be.

Of course, you hope to establish fruitful, perhaps even long-term relationships with the organizations seeking your support. Naturally, you want your personal relations to be cordial, honest, stimulating, gratifying. But most of all - and this cannot be overemphasized - you want to be certain that your foundation's money is going to be used in the most productive way possible. To accomplish this goal, you must step forward to serve as a broker between potential partners with their proper collaboration resulting in greater numbers of people living full, just, healthy, happy and productive lives.

ENDING WELL

How do you know when you are done with the site visit or interview? Simply put, it is time to leave when you have learned enough; but how much is enough?

An enterprising grantmaker can always dig up something new during the course of a prolonged visit, treating him- or herself to the unpredictable alarms and diversions of organizational life. But that is not your proper role. Rather, you should concentrate on acquiring enough knowledge so that you can return to your office and make an intelligent, informed recommendation about funding.

The appropriate moment for departure is often signaled by the fact that you have

- ◆ received credible answers to your questions,
- ◆ acquired a "feel" for the organization's staff, board and site,
- ◆ reached a point of consistency, where the people you are talking with reiterate the same basic information,
- ◆ exhausted your own curiosity about the key issues raised by the organization's proposal.

SAYING GOODBYE

When you recognize that it will soon be time to conclude your visit, you should indicate your readiness to the executive director and board. Then take a moment to summarize

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what you have discussed together and what you have observed on your own. Remind the staff of any questions left hanging that may require follow-up. Note the items that demand preparation, such as financial statements, position papers, board membership lists or insurance certifications. Do not forget to ask the agency staff if they have any questions. The site visit is as much an opportunity for the grantseeker to learn about your institution as for you to learn about theirs.

Finally, explain your foundation's decisionmaking process to the applicant. Rest assured: Nothing matters more to the organization than these next several steps. Their eyes, always, are on your foundation's actions leading to the approval or rejection of their grant. Therefore, in all fairness, the organization's staff and board should be apprised of

- ◆ your foundation's method for reviewing and approving grants,
- ◆ the role your foundation's staff and board will play respectively in this process,
- ◆ the timeline for notifying the organization of your decision,
- ◆ the rough odds of getting a grant (which might be indicated by noting the number of proposals you receive and the percentage of grants approved).

Organizations may also benefit from a review of your foundation's aims and philosophy. Summarize the kinds of grants you have awarded in the past, your current priorities, your plans for the future. If your annual report fairly reflects your present operations, leave a copy with the organization. The point is not to trumpet your sound policies and past recommendations. Rather, you are striving to demystify your foundation's approach to philanthropy and thereby minimize the organization's understandable anxiety about the future.

A word of caution: Do not make any commitments about the disposition of their grant. Such promises are entirely inappropriate. Even if you feel wildly enthusiastic - or profoundly negative - you should not disclose your intended recommendation; that is overstepping your role. Indeed, one of the worst things that a program officer can do during a site visit is mislead an organization into believing that the decision has already been made. In the end, your foundation's board will approve or reject the organization's proposal. You are a crucial part of the decisionmaking process; but you are rarely the final arbiter. To suggest otherwise is dishonest, irresponsible and even cruel.

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AFTER YOU LEAVE

Once the site visit has concluded, you have one final task: You must take the time to debrief yourself. It is best to formalize this process. Schedule 20 or 30 uninterrupted minutes at your desk to recollect your experience and make sense of your ideas, hunches, sensations and hesitations. Take notes. Ask yourself

- ◆ What did I want to learn from the site visit?
- ◆ What did I learn?
- ◆ What do I still need to understand about the organization in order to make a sound decision about their grant request?
- ◆ After you have finished reviewing the organization, take a few more minutes to evaluate your own performance. Ask yourself.
- ◆ If I were going to conduct the site visit over again tomorrow, what would I do differently?
- ◆ What new questions would I ask?
- ◆ What other places might I want to inspect; what other people should I meet?
- ◆ Did my actions today facilitate or impede the flow of information?
- ◆ Did I say anything that I now wish I had not?
- ◆ Did I leave out any important information?

If you are honest with yourself, you will probably conclude that your performance during the site visit rated something less than perfect. This imperfection is a sure sign that you are, like the rest of us, human. Do not berate yourself for mistakes or oversights; learn from them. Make a commitment to draw upon your experience and improve your skills over time. This advice pertains not merely to your first few months on the job, but for the duration of your career.

Grantmakers do not master their craft in weeks or even months. Your knowledge and abilities should continue to expand over the years, if you conscientiously seek their improvement.

Indeed, your continuing professional development should become an abiding personal priority. You owe it to yourself and your foundation. Most of all, you owe it to the countless nonprofit organizations who will come to rely on your judgment, integrity and skills far into the future.