

Whitecap Foundation: Checklist for Site Visits

Name of Organization _____

Whitecap Foundation conducts site visits before the first grant is made and once per grant cycle thereafter.

- Plan the visit for one hour.
- Meet with Project Manager in addition to Executive Director.
- Solicit general overview of organization (what they do, who they serve, any recent or anticipated changes, etc...).
- Describe how Whitecap Foundation operates including who we fund, how we work and what type of relationship we want to develop.
- Discuss how the specific project works that we might be interested in funding (process, methods, anticipated results, etc...).
- Identify the population being served and the specific numbers, who are being served by the project.
- Identify any program issues and how the organization is going to address them.
- Discuss any budget issues or needs and the specific proposal request.
- Discuss specific next steps for proposal submittal (clarify action steps and dates for completion).
- Discuss internet use (access, purpose for use, time spent on-line, etc...).
