



Charting for Impact: A Site Visit Guide

Speaking directly with nonprofits can be a great way to learn about their values, impact, sustainability efforts, and aspirations. This site visit worksheet can guide your conversations with leaders of nonprofits and help you understand how you can best support their work.

What is a nonprofit site visit? Site visits are an opportunity for you as a donor to learn more about a nonprofit's programs and day-to-day work and to establish a stronger connection with the organization. Traditionally, site visits are in-person meetings with nonprofit staff or board members at the organization's implementation site or headquarters.

Small, community-based nonprofits may not be able to accommodate your request for a site visit. This is because their limited staff time is focused on actively helping people in the community—and that's a good thing. Instead, consider having a virtual meeting or phone call with a staff member or attend a planned event such as an open house.



Site Visit Tip

"Site visits are a good opportunity for donors to see our work in action and understand our relationship with the community. We strategically try to schedule visits during less busy periods of the year when we can offer engaging visits without overwhelming our small team."

Reyna Lopez Osuna

Executive Director, Pineros y Campesinos Unidos del Noroeste

Site visits are a good opportunity to make connections, but they are not a necessary step when researching an organization.

When to consider a site visit:

- The nonprofit invites you, and you have an interest in developing a relationship or strengthening an existing relationship.
- A nonprofit has on-site programs that you'd like to visit in person.
- You would like to deepen your involvement with the nonprofit. For example, you are considering a multiyear gift or taking on a board position.

When nonprofits are engaged in sensitive and potentially confidential work, such as supporting survivors of domestic violence, site visits may not be appropriate. These organizations prioritize the safety and privacy of their clients, which can be compromised by allowing visitors to their facilities. Inquire about a nonprofit's policies and preferences.

Tips for a successful site visit



Schedule the visit based on the nonprofit's availability

Be mindful of the nonprofit's limited time and resources, and defer to the nonprofit's preference when determining the length of your visit. You can have an effective site visit in as little as 45 minutes, and most visits do not go longer than 90 minutes. You should also defer to the nonprofit's preference for which staff members you will meet with during the site visit.



Plan ahead

Do your research on the nonprofit ahead of your visit. You should plan to allocate as much time preparing for the site visit as you'll spend on-site. Prepare a few questions to ask during the visit and consider sharing those questions ahead of time with your host. Remember that site visits are an opportunity to have a meaningful and collaborative conversation with nonprofit leadership.



Listen and reflect

During the site visit, you'll have the opportunity to learn from nonprofit staff and get answers to any questions you may have. Listen, take notes, and reflect on what you learned after the visit. If you are invited to observe a program or interact with program participants, be mindful of what is appropriate engagement within the context of the program. If you're not sure, ask the nonprofit staff. Afterward, consider setting aside time to debrief on your own or with a trusted advisor.



Be transparent about your next steps

When possible, communicate your decision-making timeline and any other next steps that involve your host.



Follow up and say thank you

Site visits require a lot of staff time and preparation. Thank the nonprofit staff for their time.



Site Visit Tip

"The Fidelity Charitable® Catalyst Fund aims to elevate nonprofits and empower local communities through philanthropic support. I recognize the hard work it takes for a nonprofit to accommodate a site visit. As a result, our team provides a small gratitude grant to the organization after our visit, regardless of our plans for a larger grant to the organization."

Tony Bowen

Executive Director, Fidelity Charitable® Catalyst Fund

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Charting for Impact: Site Visit Worksheet

This worksheet can help you prepare for a site visit and reflect on what you learned afterward. Follow these steps to fill out the table on the back of this page:



Reflect on the four points

Reflect on the four points of the Charting for Impact Framework (value alignment, approach & effectiveness, leadership, and sustainability), before your visit. Using the [framework](#), write down questions you may want to ask the nonprofit staff during your visit. Consider asking open-ended questions to create a more expansive dialogue with nonprofit leadership.



Write it down

During or after the site visit, write down what you learned. What resonated with you? What were you excited by? What opportunities for support did you identify (e.g., volunteering, funding, etc.)?



Create an action plan

Create an action plan, ensuring it will not burden the nonprofit with additional work. Inform the nonprofit of your next steps so that staff members understand that their time was well spent.

Charting for Impact	Questions for the nonprofit	Notes
 VALUE ALIGNMENT	Example: How is your organization living out its values in its day-to-day work? (You may see evidence of values-inclusive work on-site.)	
 APPROACH & EFFECTIVENESS	Example: What external partners do you have in the community that help you expand your impact?	
 LEADERSHIP	Example: How does your leadership team make major decisions? Whose voices are included in the process?	
 SUSTAINABILITY	Example: What are your aspirations for your organization in five years? Ten years?	