

SITE VISIT GUIDE

United Way Fund Distribution Committee panels conduct site visits to learn about the work of each program applying for a grant, evaluate the impacts of United Way funds, and help inform the allocation decision process. Meetings are typically 45 mins in length. Each panel includes 10-15 community volunteers.

SUGGESTED SITE VISIT AGENDA:

Agency Overview

5 min.

- introductions
- mission, history, range of services
- board and staff roles in managing the organization
- strategic issues

Program Overview

10 min.

**For multiple programs in one visit, be sure to clearly distinguish between programs.*

- highlights of logic model
- measurable outcomes, service delivery trends
- what's changed
- client success stories / testimonial

Finance Overview

5 min.

- budget highlights, changes to income/expense
- fund balances, status of reserves & endowments

Closing Comments

5 min.

- restate case for funding

Questions and Discussion with Panel

15 min.

- expect questions on attachments & multi-year trends

Tour

5 min.

