

**Meeting #2 OVERVIEW** - Discerning Strengths & Needs, Site Visit Checklist  
**Meeting #2 DISCUSS & DECIDE** - Prioritize & Choose Top Charities for Site Visits

## “HOMEWORK” to do between meetings 1 & 2:

- ✓ Research a few charities mentioned by the group
  - Stop in and visit the sites, casually
  - Website review; add yourself to their e-mail list
  - Take a look at the charity’s review, disclosures & IRS 990 Tax Form on [www.guidestar.org](http://www.guidestar.org) Email = [info@chescof.org](mailto:info@chescof.org) pw=lincoln

## SESSION #2: Discerning Nonprofit Strengths & Needs, Site Visit Checklist

- ✓ What should we look for on our site visits?
  - Performance, Challenges, Hopes & Dreams
- ✓ How can we tell if a nonprofit does good work?
  - Management/Administration
  - Fundraising
  - Programs & Services



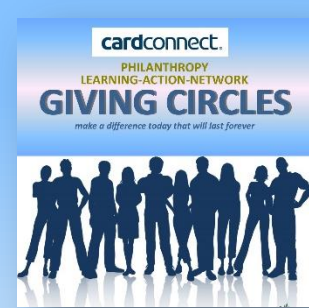
# SITE VISIT CHECKLIST

## AIMS

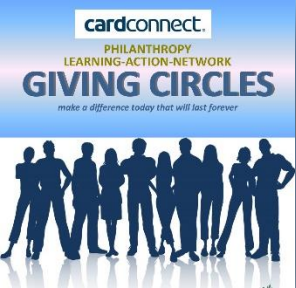
- ✓ **Develop relationship**
- ✓ **Understand day to day joys and sorrows**
- ✓ **Feel/see areas not captured in reading/online**  
**Performance, challenges, hopes & dreams**

## **DISCERN: Performance, Challenges, Hopes & Dreams**

- **Organizational history & track record**
- **Constituents served**
- **Organizational vision & strategy**
- **Plans, initiatives, outcomes, evaluation**
- **Governance & executive leadership**
- **Human resources: staff & volunteer**
- **Relationships, partnerships & networks**
- **External communications**
- **Financial health**







## Meeting #3 - Charity Site Visits

### Site Visit #1: NPO Date, Time, Place

#### SITE VISIT CHECKLIST

##### AIMS

- ✓ Develop relationship
- ✓ Understand day to day joys and sorrows
- ✓ Feel/see areas not captured in reading/online

##### DISCERN: Performance, Challenges, Hopes & Dreams

- Organizational history & track record
- Constituents served
- Organizational vision & strategy
- Plans, initiatives, outcomes, evaluation
- Governance & executive leadership
- Human resources: staff & volunteer
- Relationships, partnerships & networks
- External communications
- Financial health

### Site Visit #2: NPO Date, Time, Place

[www.guidestar.org](http://www.guidestar.org)

Email = [info@chescofc.org](mailto:info@chescofc.org)

pw=lincoln

After site visit/s: Revisit charity's website, [www.guidestar.org](http://www.guidestar.org) & IRS 990 tax form.  
E-mail your site visit observation notes to [karen@chescofc.org](mailto:karen@chescofc.org) or [beth@chescofc.org](mailto:beth@chescofc.org)