

Dodge Foundation Site Visit Rubric  
Quality of Preparation

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| <b>1<br/>Poor<br/>Unacceptable</b>  | <b>2<br/>OK<br/>Acceptable</b>   | <b>3<br/>Our Standard<br/>Respect for Grantees</b>  | <b>4<br/>Our Goal:<br/>Exceeding the Standard</b>   |
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| <p>Regarding substance:<br/>Program officer skims proposal:<br/>- doesn't know names of key people, or who's going to be at site visit.<br/>- falls back on asking, "Would you walk me through this proposal?"<br/>- says, "Can you come to our offices by noon tomorrow?"</p>  | <p>Program officer reads proposal and report, has some questions prepared, knows who will be at the site visit</p>   | <p>Program Officer thoroughly reads proposal and report on last year's grant (in relation to specifics of grant letter); reviews last year's write-up to see what issues rose to the top; checks with colleagues in-house, and, when appropriate, in the field for any further background that sheds light on organizational health and/or work to be funded. PO develops questions that are not already answered in proposal</p> | <p>PO expands own knowledge of field in appropriate way in preparation for visit and review.</p> <p>PO consults other supporting materials, becomes immersed in the big picture of grantee's work, aware of national trends and cycles of calendar year</p>   |
| <p>Regarding logistics:<br/>PO has no idea how to find their office, leaves Dodge with no directions, map, or phone number. PO relies on instinct to find the right place and ends up in Moorestown instead of Morristown.</p> <p>PO requests last-minute meeting; or shows up and they didn't know we were coming; or is late and doesn't call; or gets confused and doesn't show up at all.</p> | <p>PO arranges for site visit over the phone when it makes sense for grantee and there is little to be gained from a face-to-face meeting (e.g. we know the grantee well or have just seen him/her.)</p> | <p>Grantees get sufficient notice, choice of time for meeting, advance notice of any major questions or concerns, and an opportunity to invite others they think important to the meeting. We ask if there is anything else they want us to see before the site visit.</p> <p>Grantee is clear about when we are showing up. PO leaves Dodge with all appropriate information, arrives at right place, at right time.</p>         | <p>PO (or program assistant) makes phone call 2-3 days before the visit to confirm appointment and asks if there is any new information we should be aware of, or if there is anything on the grantee's mind that is not included in the proposal.</p>  |
| <p>Other considerations:<br/>PO schedules visits so tightly that he/she arrives too fried to do the site visit justice, or does not allow time to consolidate notes and understandings gained before moving on to something else.</p>   |  | <p>We have taken time to ask whether the right person is doing the site visit.</p> <p>We want to not fall off the fine line between social and professional; if PO is a personal friend of grantee, we send someone else. We don't want one person to become the only contact and champion for an organization.</p>   | <p>We view the relationship with grantee within a year-long cycle. More than one of us is in contact during the year; we have conversations that are not about the proposal under review. We remember that funders don't have all the answers and behave accordingly. We are partners with our grantees to improve society.</p> |

Dodge Foundation Site Visit Rubric  
Quality of Visit and Conversation

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|--|--|---|--|
| <p>Program officer:</p> <ul style="list-style-type: none"> <li>• Conveys aura of mystery about what we do and how we do it.</li> <li>• Asks questions they have already answered in the proposal.</li> <li>• Lets frustrations come out when things are not going well with the organization.</li> <li>• Takes no notes and leaves the visit with no specific information.</li> <li>• Takes a cell phone call in the middle of the visit.</li> <li>• Loses sight of grantor/grantee relationship.</li> </ul> | <p>Program officer:</p> <ul style="list-style-type: none"> <li>• Goes to them, at their convenience, on time, with appropriate attire.</li> <li>• Has informed conversation about the proposal and lets them know when they will hear from us.</li> <li>• Asks if they have any questions for us.</li> </ul> | <p>Program officer;</p> <ul style="list-style-type: none"> <li>• Places the visit in a context: the past relationship is known and valued.</li> <li>• Asks the right questions of the right people; knows who does what and who thinks about what.</li> <li>• Is aware of Life-cycle issues, does not have the same conversation year after year.</li> <li>• Is clear about the process: when things happen, how many groups are being considered, when and how grantee can still communicate with us, etc.</li> <li>• Recognizes the value of grantee's time.</li> <li>• Expresses appreciation for grantee's work, regardless of outcome of specific grant proposal.</li> <li>• Takes notes sufficient enough to inform the write-up, but not so much as to not be fully present in the conversation. (<i>Wait a minute. That's great. I need to write that down.</i>)</li> <li>• Clearly maintains the balance between the social and the professional.</li> <li>• Gives even more time to groups likely to be declined, so they know they have been heard.</li> </ul> | <p>Program officer:</p> <ul style="list-style-type: none"> <li>• Intervenes and significantly changes the conversation for the better by getting to important things that need to be said.</li> <li>• Acts as a resource, or consultant; connects group to others in a helpful way; helps brainstorm about the future in a productive way.</li> <li>• Notes impressions and body language, asks "what are they trying to convey to me?"</li> </ul> |

Dodge Foundation Site Visit Rubric  
Aftermath Outcomes

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| <b>1<br/>Poor<br/>Unacceptable</b>  | <b>2<br/>OK<br/>Acceptable</b>   | <b>3<br/>Our Standard<br/>Respect for Grantees</b>  | <b>4<br/>Our Goal:<br/>Exceeding the Standard</b>  |
|---|--|---|--|
| <p>Program officer:</p> <ul style="list-style-type: none"> <li>• Forgets about the visit.</li> <li>• Forgets to send information or names as promised during the site visit.</li> <li>• Moves on to something else with nothing to show for having made the visit.</li> </ul> | <p>Program officer:</p> <ul style="list-style-type: none"> <li>• Makes notes sufficient enough to provide details for case for funding.</li> <li>• Follows through on any clear promises.</li> </ul> | <p>Program officer:</p> <ul style="list-style-type: none"> <li>• Organizes impressions and understandings quickly, through dictation into recorder or list of bullet points.</li> <li>• Notes any “to do” items, such as promising to send a book or a reference, or promising to get grantee in touch with someone; follows through quickly on these items.</li> <li>• Keeps colleagues at Dodge informed about what’s been learned, particularly regarding points that may affect other reviews.</li> <li>• Checks in with any partner organizations in work to be funded.</li> </ul> | <p>Program officer:</p> <ul style="list-style-type: none"> <li>• Sends an email or card after the visit thanking them for their time.</li> <li>• Makes effort to see the program we have learned about taking place; makes follow-up visit to observe first-hand what was talked about during the site visit.</li> <li>• Follows up not only on promised connections but also thinks, “who else should this grantee know about?”; makes connections, even cross-sector.</li> <li>• Calls others in the field who are connected to or affected by Grantee’s work, so as to incorporate those views and perspectives into the write-up for the Board.</li> </ul> |