



## 2024 Site Visits Committee Guide

Thank you for supporting Cummings Foundation—and local nonprofits—by participating on the 2024 Site Visits Committee. We are delighted and most appreciative to have you involved in the important undertaking of fostering relationships with grant winners, evaluating the results of the Foundation’s investment, and allocating substantial additional funding to current grantees.

Committee members will collectively visit and evaluate 370 nonprofits, including all recipients of 10-year awards as well as organizations in their final two years of shorter-term grants. We expect that you will find much personal satisfaction in getting to know some of the extraordinary beneficiaries of Foundation grants.

### *Foundation Contacts*

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*Karen Grant, Suffolk (J-Z) Subcommittee Chair*

*Bob Keefe, Suffolk (A-I) Subcommittee Chair*

*Nancy Powers, Middlesex North Subcommittee Chair*

*Greg Smith, Essex Subcommittee Chair*

*Susan Lewis Solomont, MetroWest / Middlesex South Subcommittee Chair*

*Andrew Bishop, deputy director, 781-569-2337, [aeb@cummings.com](mailto:aeb@cummings.com)*

*Joyce Vyriotes, executive director, 781-932-7072, [jkv@cummings.com](mailto:jkv@cummings.com)*

### *About Cummings Foundation’s Volunteer Structure*

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Community volunteers are an integral part of Cummings Foundation’s grant program. The Foundation believes that by tapping into the deep expertise and rich diversity of greater Boston professionals and community members, it is better able to understand the issues local communities are facing, strengthen relationships with beneficiaries, and determine where to invest additional funding. This model is part of Joyce and Bill Cummings’ ongoing efforts to “democratize philanthropy,” enabling a diverse group of individuals to play an active role in the Foundation’s giving.

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## *Our Approach to Nonprofits*

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They are the heroes: the nonprofit executive directors who also serve as HR managers, development officers, and marketing managers; the program staff who work diligently and passionately, often for low pay and even less recognition; the volunteers who devote precious free time in service to others. They are the heroes—not us.

We are privileged to be in a position to support their life-changing, equity-promoting, barrier-breaking, purpose-igniting work. We are not seeking to judge, eliminate, or vote out. Rather we endeavor to learn and discover synergies so Cummings Foundation can invest in organizations and efforts that match its values and priorities and that have the most meaningful, positive, and sustainable impact on local communities.

Foundation staff and volunteers possess valuable expertise gained through varied professional and personal experiences; however, we recognize and respect the intimate knowledge that nonprofit representatives have of the causes and the people to which they have dedicated their careers. The grant candidates are the true boots-on-the-ground experts, and they deserve not just a seat at the table, but the seat at the head.

We respect the beliefs of diverse populations and the uniqueness of individuals, and we believe that all people deserve to live with dignity and to have the opportunity to improve their circumstances. We recognize that we all have biases, but we strive to be aware of them, set them aside, and eliminate them from our thinking, questions, and comments. We welcome candid reminders from others when we demonstrate an unconscious bias.

*We are most grateful for the participation of our volunteers  
and for the respect and kindness they show to all grant candidates.*

## *Our Guiding Principles*

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Having embarked on our collective journey of philanthropy, we pledge to work to help ensure that no one is ever left behind.

Recognizing that the dignity of every human person is fundamental, Cummings Foundation's primary goal is to help meet the most basic needs of all people in all segments of our society.

We seek to promote and empower the social and economic inclusion of all, irrespective of age, sex, disability, race, ethnicity, origin, religion, or other status.

We will work to improve the lives of those within our priority funding regions by directly supporting the work of other effective charitable organizations.

And we will endeavor through our local outreach to aid the furthest behind first.

—Joyce and Bill Cummings



*This "color wheel" is a photo of the actual pin presented to Bill Cummings when he spoke at the United Nations in June 2019. Many of the words and sentiments here were inspired by portions of the United Nations' document "Transforming our World: the 2030 Agenda for Sustainable Development." Cummings Foundation, Inc. supports the [SDGs](#).*

## Site Visits

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Site visits will take place between January and August and will focus on each nonprofit's work, how it has used its grant funding in the past year, and the opportunities and challenges it faces. Volunteers will learn more about an organization's mission, see its facilities, meet key staff, perhaps observe a funded program, and get an overall sense of how the nonprofit operates. These visits are a key component of the long-term relationships between Cummings Foundation (CFI) and grant winners.

CFI is fortunate to have the expertise of more than 175 volunteers who dedicate their time, thoughtfulness, and experience throughout the year to various aspects of its grant-making initiatives. These volunteers review letters of inquiry, grant applications, and impact reports; complete financial reviews; attend Presentation Days; and participate in site visits. To accomplish all of this, volunteers take time away from day jobs, retirements, and families to learn about the critical work taking place across local communities. The Foundation is profoundly grateful to these individuals for the generous investment of time in this shared work.

Out of respect for, and to preserve the trust of, applicants and grantees, information learned as part of any CFI volunteer role that is not readily available through public sources must not be shared outside this committee. In addition, volunteers should forego their self-interests and never leverage applicant or grantee information for personal or professional gain (i.e., soliciting the business of an applicant).

### *Before the Visit*

**Select nonprofits to visit:** All nonprofits to be visited are listed in your subcommittee's Google Sheet. Please sign up for at least 10 visits by typing your name in the Site Visitor 1 column (D) for half of your visits and the Site Visitor 2 column (F) for the other half. Volunteers who have the time and interest are welcome to sign up for more visits if their schedules allow. Please wait until February 15 before doing so, however, so other volunteers have time to sign up for their 10 visits first. Please consider signing up for some nonprofits that already have one site visitor, as these visits can then be scheduled right away.

We ask that site visits be completed by March 31 for organizations that are currently being considered for a new grant (see Column B in Google Sheet). This timing will allow the Final Grant Selection Committee to include your reports in its decision-making process. It also avoids the awkwardness of contacting an organization that has just found out that it will not be receiving a grant this year.

Committee members are asked *not* to sign up for any nonprofits with which they have a relationship that could pose a conflict of interest (i.e., organizations with which you or an immediate family member has an employment or volunteer relationship, or any relationship that could make it difficult for you to remain impartial).

**Connect with visit partners:** We encourage committee members to conduct visits with multiple different members, which will allow everyone the opportunity to observe and learn from each other. Most visits will be performed by teams of two volunteers. The second site visitor to sign up

for a nonprofit should connect with his/her visit partner to compare calendars. Volunteer contact information is found on the Contacts tab of the Google Sheet.

**Schedule visits:** The Foundation has emailed a letter (see page 12) to inform each nonprofit that a volunteer will be in contact to schedule a site visit. Accordingly, they should be expecting your call or email. After conferring with his/her visit partner, Site Visitor 1 should contact the nonprofit (see Columns L-N of the Google Sheet for contact information) to schedule the visit.

Please check the date of the organization's last site visit (Column C), and try to schedule your visit so they are spaced appropriately. If the column is blank, the organization will be receiving its first site visit this year; these are ideal organizations to start with. Bear in mind that it will typically be more beneficial to visit a school during the school year and a summer program during the summer.



**NOTE:** We recognize and fully appreciate that site visitors are generously balancing their volunteer service with many other commitments (including, in some cases, full-time jobs). As the visit scheduling process often involves the volunteers and several nonprofit representatives holding multiple date/time options on their calendars, we kindly request that site visitors reply to scheduling emails or voicemails within a reasonable timeframe.

After the visit is scheduled, please add the visit date to Column H of the Google Sheet so Foundation staff and your committee chair are aware. Please contact the Foundation if you have any trouble reaching a nonprofit or if you learn that any of a nonprofit's contact information has changed.

Volunteers are encouraged to use their discretion to determine the length of each site visit. It may depend on the time available in the volunteers' schedules as well as the nature of the nonprofit. In most cases, 60 to 90 minutes will be adequate to gather the necessary information. We recommend informing the nonprofit in advance how much time you expect the meeting to last. Doing so will allow the staff to plan accordingly and increase the likelihood of your staying on schedule.

Below is a sample script that might be helpful when you first reach out. Please use as much or as little of it as you would like.

*I'm <name>, a member of Cummings Foundation's volunteer Site Visits Committee, and I've been appointed to meet with your organization to learn more about your work. I'd like to arrange a time for a visit with another volunteer, <name>. We look forward to this being a conversation with key staff and volunteers, and perhaps someone your organization serves. We expect this visit to take between <60 to 90 minutes>. Which of the following dates and times work for you?*

Consider asking for the names and titles of the staff members or volunteers with whom you will meet, and feel free to make specific requests, such as to meet some of the people served by the organization or, if possible, observe a program while in session.

Please also confirm the specific location/address you will be visiting, as some organizations have multiple sites.

**Review background materials:** Committee members may learn about their selected organizations at any time by logging into Foundant, our online grants management system. See *Foundant Instructions* (page 8) for step-by-step instructions. Please review the original grant application, the most recent impact report, and, if available, previous site visit reports.

The organization’s application can be quickly accessed through the Google Sheet. Simply go to Column O, hover over the project name, and then click on the link that appears to go directly to the application. Then follow the Foundant instructions to access the impact reports and previous site visit reports. *NOTE: You must log in to Foundant before clicking the application link in the Google Sheet.*

Committee members may also want to review each organization’s website, look up biographical information about the key staff members who will participate in the site visit, and read news articles/media releases available online.

**Review the site visit report (page 11):** Becoming familiar with this report in advance will result in a more productive visit and will make it easier to complete the form after the visit.

**Contact committee chairs or Foundation staff with questions:** We are readily available to answer your questions or serve as a sounding board. Please do not hesitate to reach out to your committee chair or Foundation staff via phone or email if we can be of assistance.

**Think about Diversity, Equity, and Inclusion (DEI):** The words diversity and inclusion are often stated together, but having diversity within a group of people does not necessarily mean that the group is inclusive. Inclusiveness promotes and sustains a sense of belonging, and it values and respects people’s varying backgrounds and beliefs. Please read the Inclusive Language Guide (page 9) and watch [this eight-minute video about recognizing implicit bias](#). If you have seen these materials before, we hope you will look at them again as an important refresher.

### *During the Visit*

**Visit format:** All visits should be held in person, as ongoing feedback from nonprofits and volunteers affirms that this format offers a much richer and more productive site visit experience for all involved.

**Protect your time:** At the beginning of the visit, remind the nonprofit representatives of the time you need to conclude the visit.

**Say thank you:** Please express to the staff members and volunteers that Cummings Foundation values their work highly and is incredibly grateful for their efforts and dedication.

**Understand the dynamics:** Because you are a representative of a funding organization meeting with nonprofits that need funding, there will always be a power dynamic at play. Committee members can lessen the discomfort and limitations of this dynamic by approaching the meeting with the intention of learning—not of investigating, judging, or instructing. Presenting yourself with a friendly demeanor, well-researched and thoughtful questions, and a sincere interest in the nonprofit and the people it serves will help put the nonprofit representatives at ease and pave the way for a more candid and enjoyable conversation.

**Gather information:** Please treat the visit as a discussion, rather than an interview, and make it a priority to use inclusive language (see pages 9-10). Allow the conversation to develop naturally while at the same time collecting information that will help you understand the organization and will enable you to complete the site visit report. You will likely want to take notes; consider also allowing some time immediately following the visit to record more extensive notes and impressions or to write your report. (See page 14 for “10 unconventional ‘ice breaker’ type questions” as one way to start off the site visit.)

**Responding to funding inquiries:** If you encounter any questions during the site visit about an organization’s pending LOI/application, or if it has been recently declined for funding, simply encourage the organization to reach out to the Foundation for more information about those areas and explain that the site visit focus is on the current grant. You can also share that the information collected during the site visit will be appended to the organization’s grant file and will be available to future grant evaluators should it choose to reapply (emphasizing the value of your site visit).

**Enjoy yourself!** Many philanthropists say that site visits are the most interesting and fun part of funding. It is a chance to connect with people who are doing great work and learn about their needs and successes. It is also an opportunity to see the staff and board’s enthusiasm for their mission, their commitment to it, and their hopes for the future.

**Ask a final question:** Before concluding, ask one more open-ended question (e.g., What should we know that we have not asked?) to give the nonprofit a chance to fill in a gap in information.

### *After the Visit*

**Say thank you again:** We request that Site Visitor 1 send a “thank you” email to the nonprofit staff following the visit. Site Visitor 2 is welcome to send a note as well, although it is not necessary. Once a thank you note is sent, please record that information in Column I of the Google Sheet. To the extent that it’s helpful, feel free to use the sample below as a guide:

*Thank you so much for the time you gave to <name> and me during our site visit for Cummings Foundation. You are all incredibly passionate and dedicated to the important work you do to help <cause, e.g., senior citizens age in place and provide the many services they need to help them lead the healthiest lives possible>. We were impressed with the breadth of services offered and with your comprehensive, innovative, and integrated approach.*

*On behalf of Cummings Foundation, we appreciate the work you do and the time you gave us. Thank you.*

**Complete a site visit report:** Please complete an electronic site visit report for each nonprofit visited within 10 days of the visit. It will likely be helpful to complete it sooner, while the information is fresh in your mind. In cases where a couple is participating together, they will jointly complete just one report for each organization. The electronic versions of the site visit reports are found in Columns E and G of the Google Sheet.

For those unfamiliar with Google Sheets, a few things to note:

- There is no need to download the file; simply begin typing directly into the document.
- The document is automatically saved in real time. There is no save button.
- You can exit the document and reenter at any time without losing your work.



- The Foundation has access to the document and can view the completed site visit reports.
- If you would like a copy of the report for your records, you can print the file and/or download it to your computer.

**Parking Reimbursement:**

We recognize that volunteers who conduct visits in downtown Boston may incur expenses for parking or public transportation. To request reimbursement, simply email the receipts to Andrew Bishop at [aeb@cummings.com](mailto:aeb@cummings.com). You may find that platforms like [SpotHero](#), [ParkMe](#), and [Parking.com](#) can be helpful tools for reserving convenient and reasonably priced parking in advance.

**Share feedback:** Cummings Foundation is always seeking to improve its processes, and we would appreciate any feedback about what went well with the site visit process and what could be improved. It is likely that we will make changes to the process for next year's program, based on your comments and suggestions.

## *Foundant Instructions*

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*For data privacy and to protect the information of applicants/grantees, the Foundation does not make its grants management system user guide publicly available. Volunteers on grant selection and site visits committees are provided with access to applicant/grantee materials (e.g., letters of inquiry, applications, impact reports, site visit reports, contact records) to be well informed and adequately carry out relevant activities while representing Cummings Foundation.*



## *Inclusive Language Guide*

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*Adapted from multiple sources, including The Lenny Zakim Fund*

Cummings Foundation is committed to creating an inclusive, supportive environment for all people, regardless of differences. We strive to embody this spirit of inclusion during every interaction we have with nonprofit organizations. To that end, volunteers should avoid using language that is insensitive to cultural differences or that excludes or offends any group of people (based on their ability/disability, age, ethnicity and race, gender, gender identity and sexual orientation, etc.).

Communication is not what you say, but how it's heard. Making a conscious effort to use language that is more inclusive offers us a chance to grow and become better communicators while also caring for those with whom we are communicating. Here are some guiding principles:

- **Put people first:** Default to person-first constructions that put the person ahead of his/her characteristics, e.g., instead of “disabled people” or “the homeless,” use “people with disabilities” or “people experiencing homelessness.” People-first language keeps the individual as the most essential element; there is more to each of us than our descriptors. Mention characteristics like gender, sexual orientation, religion, racial group, or ability only when relevant to the discussion.
- **Be respectful of a person or group’s preference regarding vocabulary and be guided in your communication by that preference.** Listen to the words they use, and adopt those terms, e.g., Latino, developmental disability, transgender. If you’re unsure about the preferred language, simply ask. Also, if you meet someone with a name that is unfamiliar to you, repeat it back to the person and ask if you’re pronouncing it correctly. Practice until you get it right.
- **Avoid microaggressions:** Impact is more important than intent, so make a real effort to avoid unintentional microinsults based on stereotypes and biases. Examples include: Telling a person of color, “You are so articulate”; asking a person who appears Asian, “Where are you from?”; and downplaying the reality of racism with comments such as, “I don’t see color.”
- **Avoid phrases that suggest victimhood or deficit,** e.g., suffers from, confined to a wheelchair, needy, vulnerable. Instead, simply state the facts: has muscular dystrophy, uses a wheelchair, is experiencing poverty, historically underrepresented.
- **Don’t underplay the impact of mental health conditions.** Terms like bipolar, OCD, and ADD are descriptors of real mental health conditions. They are not metaphors for everyday behaviors. Also, avoid derogatory terms that stem from the context of mental health, e.g., crazy, mad, or psycho.
- **“Guys” is not a gender-neutral term.** The “universal male” (i.e., using “guys” to mean “people”) assumes that the default human being is male. Although “he” and “man” are often meant to be neutral, studies show that these words cause people to think specifically of males.

Some habits are hard to break. When trying to change a language pattern, it is easy to fall back into old habits. Below are some suggested language substitutions for common situations. Please be open-minded (and even grateful) when someone suggests that your language could be more inclusive. If you are unsure of the most appropriate terminology for the situation, simply ask—and then listen.

	<b>More Inclusive</b>	<b>Less Inclusive</b>
<i>When referring to a group of people</i>	Folks, people, you all, teammates, friends	Guys (or women) when referring to people overall
<i>When referring to staff</i>	Workforce, personnel, workers, team, colleagues	Manpower, man hours
<i>When referring to board leadership or facilitators</i>	Chairperson, chair, moderator, discussion leader	Chairman, foreman
<i>When referring to someone’s significant other</i>	Spouse, partner	Wife, husband, boyfriend, girlfriend
<i>When describing norms</i>	Typical	Normal
<i>When referring to groups traditionally called “minority”</i>	Historically excluded groups, marginalized groups, or underrepresented groups	Minorities (Not all marginalized groups are minorities.) Vulnerable (implies there is something inherently wrong with them)

To further illustrate the important difference language choices can make, please consider the following examples of questions or comments.

<b>Less Inclusive</b>	<b>Concern</b>	<b>More Inclusive</b>
Smithfield is a poor town with a lot of problems, but we want to help that community.	<i>Condescending; increases power dynamic</i>	We appreciate the important work you do in Smithfield and want to learn how we might support your efforts.
Your location doesn’t seem convenient/safe/etc. Why didn’t you locate it in XYZ?	<i>Implies you know more than the nonprofit about its community or cause</i>	Why did you choose this location?
As a first-generation college student, have you inspired your family to place a higher value on education?	<i>Implies that the family did not value education highly before</i>	How, if at all, has your college experience affected your family and their feelings about higher education?



## 2024 Site Visit Report

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Name of organization:	
Name of Committee member completing this report:	
Date of visit (mm/dd/yyyy):	
Names and titles of key person(s) met with:	

1. What is your overall impression of the organization?

2. What challenges and opportunities is the organization facing?

3. Do you have any concerns about Cummins Foundation continuing to fund the organization?

4. Is there additional information that a grant selection committee member should consider when evaluating future funding requests from this organization? Are there specific questions or areas of concern that a future Site Visit Committee member should focus on?

January 10, 2024

Dear Sandy:

To build relationships with grantee partners, Cummings Foundation visits annually with recipients of 10-year awards as well as organizations in their final two years of shorter-term grants. Members of our volunteer Site Visits Committee are looking forward to connecting with you this year and will be contacting you to arrange an in-person visit to take place by the end of August 2024.

Given that many committee members are balancing this volunteer commitment with full-time careers and personal responsibilities, we will greatly appreciate your doing your best to accommodate scheduling preferences. **If you have not been contacted by June 30, 2024 to schedule your visit, please reach out to us.**

#### **Visit Purpose**

Our goal is to get to know your organization and learn from you. The visitors will seek to understand more about your work, how you have used your Cummings grant during the past year, and the opportunities and challenges you face. You are welcome to share information about future plans, but we respectfully request that the visit *not* include a pitch for additional funding.

In preparation, volunteers will review your original application, your latest impact report, and the most recent site visit reports completed by other volunteers (if applicable). Following the visit, they will submit a brief report to Cummings Foundation, which will be viewed by our staff and will be viewed in the future by grant selection committees if your organization applies for additional funding after the fulfillment of its current grant.

#### **Visit Format**

You will, hopefully, find your Cummings visitors to be friendly, well-informed, and genuinely interested in your work. Their intention is to have a conversation, not an interview or a formal presentation (i.e., no need for a PowerPoint presentation). If you would like to learn more about the guidance these volunteers receive from the Foundation, you are welcome to view the [committee guide](#). These [Tips for Nonprofits](#), written by Cummings volunteers, may also be helpful.

We are grateful for your organization's efforts to improve the lives of those in local communities, and we look forward to learning more about that work through the visit. Please contact me with any questions at 781-569-2337 or [aeb@cummings.com](mailto:aeb@cummings.com).

Be well,



Andrew E. Bishop  
Deputy Director

Cummings Foundation volunteers are looking forward to meeting you and learning more about your nonprofit. Recognizing that you and your team are busy, and that your time is valuable, we offer the following suggestions from our volunteers to help you make the most of the visit.



### **Plan the attendee list**

Assemble the group of people who can best convey what is happening within your organization and, if applicable, the specific funded program/project. A well-rounded group will provide the visitors with a comprehensive perspective of your organization. Think about:

- staff (e.g., executive director, development professional, program specialist)
- volunteers (e.g., board member, program volunteer)
- people who have directly benefited from your work (if appropriate)

As one volunteer suggests, “Bring your stars to meet the visitors. It is the people who make the mission sing.” Providing the visitors with the names and titles of the attendees—either in advance via email or that day on a printed list—will be helpful.



### **Pick the day**

An organization’s busiest days often offer important and useful insight. If there is a day on which you have an activity planned, consider inviting the committee members to attend at that time. Bear in mind, however, that some volunteers also work full time and need to incorporate these visits into busy schedules. Accordingly, your flexibility is greatly appreciated.



### **Be prepared, but flexible**

Take the lead and think about what information you want to convey, but also be flexible enough to accommodate the visitors if they express interest in another aspect of your organization.



### **Share logistics**

Committee members find it helpful when they are given guidance in advance on the best way to reach your office and where they can park.



### **Relax and be yourself!**

As a previous Cummings Foundation grant winner, you have already shown that your organization does important and meaningful work. This meeting is a time to share your mission, successes, and plans with a new and interested group of people. Let your passion for your work show!

## Optional “Ice Breaker” Questions

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Thank you to Foundation volunteer Heidi Heinlein for sharing the resource below.



### 10 Unconventional “Ice Breaker” Questions to Ask a Nonprofit When You First Meet

These were developed for 2023 **Community Changemakers** event hosted by [Spur Local](#) (formerly the Catalogue for Philanthropy.) It will feature dozens of organizations serving the DC region who are there ready to tell their story and introduce themselves to the evening’s guests.

These are **10 unconventional “ice breaker” type questions** designed to prompt interesting conversations. You do not have to ask every organization all 10 questions. This just gives you a variety of starting points. Some of these are more challenging than others, but none are designed to be threatening or confrontational. They are listed below with the “easiest” questions first.

#### The Easy Questions

1. What are you just bursting to share about your organization? What are you most excited about?
2. How do you like to stay in touch with your donors and funders?
3. Tell me about your logo or Tell me how your organization’s name was created. What does it mean or represent?
4. How does your organization take care of its people? Can you give me a fun example?
5. What is your favorite fact or statistic regarding your organization or your organization’s work?

#### The More Challenging Questions

6. What do you feel is least understood or appreciated about your work? What do you wish more people knew about what your organization does?
7. Do you have a favorite donor or funder? (They don’t have to name them.) Can you tell me what about that relationship makes it special?
8. Does your organization have a values statement? If so, what value resonates most with you personally?
9. Has your organization needed to make some tough decisions or choices regarding diversity, equity or inclusion? Tell me about that process.
10. Can you think of a time when your organization has demonstrated leadership in your field or even the nonprofit sector as a whole?

For additional details, see the blog post “10 Unconventional “Ice Breaker Questions” on the Capital Philanthropy home page.



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