



## 2023 Site Visits Committee Guide

Thank you for supporting Cummings Foundation—and local nonprofits—by participating on the 2023 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 378 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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*Andrew Bishop, grants manager, 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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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’s professional community, 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.

—*Bill and Joyce 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 2023 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. Through this firsthand experience, 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 and grant winners.

### *Before the Visit*

**Select nonprofits to visit:** All nonprofits to be visited are listed in your subcommittee's Google Doc. 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 Docs). 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 Doc.

**Schedule visits:** The Foundation has emailed a letter (see page 11) 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 Doc 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.

After the visit is scheduled, please add the visit date to Column H of the Google Doc 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 7) 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 Docs. 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 Doc.*

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 10):** 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.

## *During the Visit*

**Visit format:** Ongoing feedback from nonprofits and volunteers affirms that the in-person format offers a much richer and more productive site visit experience for all involved. With that in mind, we will resume the in-person format for all site visits in 2023. We do, however, encourage volunteers to feel empowered to set the parameters for these visits and establish upfront what conditions will make them most comfortable (e.g., all participants are masked, declining to go on facility tours that would involve a high volume of people).

**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 8-9). 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.

**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 Doc. 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 Doc.

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

- There is no need to download the file; simply begin typing your answers 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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Go to [www.cummingsfoundation.org/grants/volunteers.htm](http://www.cummingsfoundation.org/grants/volunteers.htm), and click on **Volunteer Login**.

*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 said to be neutral, [numerous studies](#) show that these words cause people specifically to think of males.

Some habits are hard to break. When trying to change a language pattern, it is easy to fall back into old habits, at least on occasion. See below for some quick language substitutions for common situations that might help, and please be open-minded (perhaps 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 (There's bias inherent in using one group as a standard against which others are judged.)
<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 that could take place during a site visit.

<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 are doing for Smithfield and want to learn how we might be able to support your efforts.
Did other kids make fun of you for signing up for this mentoring program?	<i>Assumes that youth in that community are insensitive or don't value education</i>	What do you think other kids who are not involved in this mentoring program think about it?
Your location doesn't seem convenient/safe/etc. Why didn't you put it in XYZ location instead?	<i>Implies that you know more than the nonprofit about its community or area of expertise</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?



## 2023 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 11, 2023

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 a visit to take place by the end of August 2023.

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, 2023 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. In preparation, they 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 may 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. Also, included on the following page are “Tips for Nonprofits” that may be helpful.

We anticipate that all 2023 visits will be in-person rather than virtual. We do, however, encourage participants to feel empowered to set the parameters for what conditions will make them most comfortable (e.g., all participants are masked, declining to go on facility tours that would involve a high volume of people).

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  
Grants Manager

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!