



Site Visit Review Tool

All consultants working with ECDC selected MITA sites will be utilizing an assessment tool to ensure that consistent and well-rounded reviews of each site take place in order to most accurately determine where to place the emphasis of this year's technical assistance. This summary of the tool is intended to provide you with an understanding of the subject areas that will be considered as the consultants work with you to make their review and assist with your work plan.

1. Overall organizational guidance – mission, vision, value set

2. Organizational leadership

- Board of Directors – roles, responsibilities, and level of engagement
- Senior Staff – roles, responsibilities, accessibility and succession

3. Management practices and structure

- Lines of authority
- Systems and policies in place
- Appropriate planning mechanisms
- Risk management procedures
- Human resources – systems, management, and staff development

4. Budget and finance

- Tools available to plan and manage budget and finances
- Financial reports and transparency
- Resource development, allocation, and management

5. Services and programs

- Program design, delivery, and evaluation
- Staff/volunteer expertise
- Reporting
- Information systems

6. Relationships and communications

- Partners and level of involvement
- Marketing plan and delivery
- Any collaborations, alliance, etc., between partners and/or funders and organization that helps further the work