



SPERLING CENTER  
FOR RESEARCH  
AND INNOVATION

## Site Visit Checklist

An essential part of any program’s sustainability plan is cultivating and strengthening buy-in from your key stakeholders, including funders, school, district, and community leaders. A great way to engage stakeholders and stay top-of-mind is to offer the opportunity to see the program in action through virtual or in-person site visits.

The checklist below will help you plan and execute site visits so that guests leave the experience feeling enthusiastic about your impact and invested in the long-term success of your program.

Develop a Plan	Who is Responsible?	Notes
<b>Prep &amp; Schedule</b>		
Create a list and determine who should be invited for a site visit.		
Determine the best dates and times for a visit.		
Determine if the visits are going to be in-person or virtual.		
Plan for 3-4 classroom/activity visits to include a range of grades and activities (academics, enrichment, etc.).		

## Site Visit Checklist

Develop a Plan	Who is Responsible?	Notes
<b>Staff</b>		
Assign roles for staff (or youth!): who will welcome guests, lead the tour, and be available to speak with guests.		
Communicate to staff when guests will be stopping by their classroom or activity and when they will be recorded if visiting virtually.		
Virtual: Ensure media release/video consent forms have been secured for all young people in classrooms/activities that will be visited.		
Create a briefing document for staff on guests, talking points/key messages, site visit schedule, as well as any safety protocols for in-person visits.		
<p>In-person: Create Observation Stations in classrooms or activities that will be visited where guests can find a description of the lesson/activity as well as youth work samples.</p> <p>Virtual: Create digital sample packets for guests that include lessons and/or activities they will see that day for context during visit.</p>		
In-person: Notify any office/security staff of visit and provide guest list, if needed.		

# Site Visit Checklist

Develop a Plan	Who is Responsible?	Notes
<b>Guests</b>		
Confirm the number of potential guests, their names, roles, and contact information.		
In-person: Provide directions, instructions on school entry, safety protocols, and parking.		
In-person: Obtain security clearance if necessary.		
Virtual: Review/share any technology requirements and provide login/access information.		
Share visit outline/agenda and generate excitement about what guests will see during the visit.		

# Site Visit Checklist

Develop a Plan	Who is Responsible?	Notes
<b>Information &amp; Resources</b>		
Prepare Program Packets for guests: <ul style="list-style-type: none"> <li>• Program overview one-pager (goals, themes, partners, etc.)</li> <li>• Visit agenda</li> <li>• Program schedule</li> <li>• Virtual: Tech/Log in information</li> <li>• In-person: Site/School Map w/Restroom locations</li> <li>• In-person: Safety protocols and expectations for interacting with youth</li> </ul>		
In-person (Recommended): Order/prepare refreshments for guests.		
Virtual: Secure audio and visual equipment needed. In-person (Optional): Secure audio and visual equipment if planning a formal presentation.		
Prepare SWAG/take-aways (e.g. pens, notebooks, bookmarks) with the program/school name and logo as gifts (Recommended)		

## Site Visit Checklist

Day of Site Visit	Who is Responsible?	Notes
Ensure a welcoming and content rich environment (e.g. post youth work, themes/slogans, etc.)		
In-person: Arrive early to post signage around school/site for easy navigation.		
In-person: Set up a meeting space with chairs, water, and materials including curriculum samples and examples.		
Virtual: Check any audio and visual equipment or other technology you intend to use during the visit.  In-person (Optional): Check any audio and visual equipment or other technology you intend to use during the visit.		
In-person: Have staff wear summer t-shirts, lapel pins, or name tags.		
Welcome guests, share Program Packets (in-person or digitally), and review materials together.		
Conduct Site Visit: <ul style="list-style-type: none"> <li>• Program welcome and staff introductions</li> <li>• Classroom Visits / Activity Observations</li> <li>• Q&amp;A</li> </ul>		

## Site Visit Checklist

Follow Up	Who is Responsible?	Notes
Debrief site visit with participating staff.		
Send Thank You Notes/Emails to all guests.		
Follow up with any information or materials that guests requested.		
Share thank yous and gratitude with staff and youths for welcoming guests.		