

Tier I & Zoological Applicant Site Visit Checklist

The site visit is a structured, professional engagement designed to help the Advisory Board better understand your organization's work, impact, and alignment with your application. In other words, the site visit is an opportunity to demonstrate your organization's impact and stewardship in action.

1. Purpose of the Site Visit

The site visit is intended to:

- Provide deeper understanding of your organization's mission and operations
- Observe how your programs and facilities function in practice.
- Confirm alignment between your written application and daily operations
- Clarify any questions related to scoring categories

Site visits are not audits. They are fact-finding conversations to support informed and equitable review.

2. Confirm Logistics

- Coordinate scheduling directly with your assigned Lead Reviewer
- Plan for at least 1 hour (1.5–2 hours recommended)
- Prepare a guided tour of relevant facilities, venues, offices, or parks

3. Recommended Participants

While not all roles are required, organizations are encouraged to have:

- Executive Director or primary organizational leader
- Financial representative (CFO, accountant, or equivalent)
- Development or grant representative
- Marketing/communications representative (if applicable)
- Board leadership representative (when possible)

Participants should be prepared to speak clearly to their areas of responsibility.

4. Be Prepared to Discuss the Five Scoring Categories

Site visit discussions will align with the four ZAP scoring categories.

1. Purpose (Artistic / Cultural / Botanical / Zoological)

- How your mission is advanced through programming
- How your discipline aligns with ZAP's mission
- Community need or gap your organization fulfills

2. Organizational Stability

- Leadership structure and staffing
- Board engagement
- Key partnerships
- Recent changes, challenges, and how they are being addressed

3. Community Engagement & Public Benefit

- Communities served
- Accessibility and outreach strategies
- Measurable impact
- Adaptability to community needs

4. Financial Accountability

- Budget overview and financial planning practices
- Use of ZAP funds
- Financial oversight processes
- Any notable changes in financial position

5. Financial Health

- FHT Checklist: Observations/Notes/Exceptions noted last year that fixes are completed
- QE Worksheet revisions from last year incorporated into this year's worksheet
- Financial Health Improvement Plan updates of progress or regression (applicable to applicants who failed the FHT Assessment within the past two years).

5. Review Your Application Before Visit

- Re-read your submitted application in Submittable
 - Ensure consistency between your application and your on-site presentation materials
 - Be prepared to clarify or expand on any section
- Ensure key staff are familiar with responses
 - Highlight strengths with clear examples
- Acknowledge areas of growth or reduction honestly
 - Be transparent and direct

6. Additional Engagement

The Lead Reviewer may:

- Attend at least one event or performance
- Request follow-up meeting(s)
- Ask to observe an organization's board meeting
- Visit additional locations within Salt Lake County

These requests are part of the review process and support full understanding.

7. Invitations & Activities Observation

ZAP encourages applicants to provide:

- Up to two complimentary tickets per year (non-fundraising events)
- Invitations to free activities that are held during the review period

Activities attendance allows Lead Reviewers to experience your work firsthand, supporting program evaluation.