

PRODUCT PREVIEW

Advisory MEMORANDUM

SITUATION

The *Advisory Memorandum* meets the need of a donor or potential donor who needs counsel regarding a *specific question or issue* pertaining to a charity. When a comprehensive description or analysis is not required, but research and advice focused on a particular area, this product can fit the bill. The donor seeks outside experience and counsel to provide in-depth, analytical research on a clearly defined issue prior to making a further commitment.

MARKET

Major donors, prospective donors, foundations, and corporate funders use this product. Supporters who have significant knowledge of a known entity but require additional information on a targeted issue can utilize the *Advisory Memorandum*.

DESCRIPTION

This product is a focused memorandum systematically attacking an issue about a nonprofit, or sometimes several nonprofits. It answers a question raised by a donor such as:

- ✓ What is the best way to fund this organization that operates overseas?
- ✓ Is this start-up with no track record a sound philanthropic investment?
- ✓ Is the organization's strategy effective, and if not, how should it change?
- ✓ Why has the expansion of the organization seem to have stalled, and what should I do about it?
- ✓ Should the organization stand alone, or should it merge with a more established entity?
- ✓ Is the infrastructure adequate for growth?
- ✓ If I were to designate a gift to an area of need, what are the top three options?

The *Memorandum* starts with the background to the issue and the current situation. Often, a brief overview of the organization is individual. It then focuses on the question raised. The format and topics covered vary for each issue. It concludes with a clear set of recommendations that directly address the issues raised by the donor.

PRODUCT USES

Likely uses include helping a donor:

1. Resolve a problem he/she has with a nonprofit.
2. Remove uncertainty or obstacles to giving.
3. Make clear the way forward with an organization.
4. Identify a need, program, or initiative within a larger organization to support.
5. Understand operational, financial, or legal technicalities.

DELIVERABLES & FEES

The report is usually 3-10 pages in length and conveys a clear set of recommendations pertaining to the issue raised. Fees vary based on the nature of the research required and are generally in the range of \$2,000 to \$7,500 for U.S. entities, plus out-of-pocket travel expenses, if applicable.

CONTACT US

For more information on the *Advisory Memorandum* or other products and services for committed and reflective philanthropists, please contact us at the address below.

BENEFITS

- ✓ *Direct, clear-cut answer to a specific issue.*
- ✓ *Insight based on independent, outside analysis.*
- ✓ *Research and professional judgment supports recommendations.*
- ✓ *Practical advice based in deep understanding*

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