

SITUATION

The *Charity Brief* provides a donor or potential donor a quick snapshot of the current status of a nonprofit. It is commonly used by a donor to get an initial description of an organization he/she is interested in supporting. Additional analytical research may follow if the *Charity Brief* portrays an organization the donor is interested in pursuing. Also, a donor may request this product so a charity has it on hand to provide to others who support, or are considering supporting, the organization.

MARKET

Donors, prospective donors, foundations, and corporate funders use this product. As a short report that can be produced quickly, donors can use the *Charity Brief* even when they are not contemplating a large gift.

DESCRIPTION

This product is a very concise, 2-page report that describes the key attributes of a charity. It is purely descriptive and provides no analysis, evaluation, or comparisons. Recommendations for the nonprofit can be included for an extra fee, but these would be based on minimal involvement with the organization.

The *Charity Brief* is very comprehensive, covering 49 areas including:

- ✓ Mission statement
- ✓ Audience/clients served
- ✓ Strategy
- ✓ Products/program services
- ✓ Legal matters
- ✓ Tax exemption and donation deductibility
- ✓ Senior executive’s qualifications & salary
- ✓ Board
- ✓ ECFA & other memberships
- ✓ Finances & fundraising
- ✓ Staff & volunteers
- ✓ Real assets
- ✓ Charity uniqueness
- ✓ Immediate financial needs

Each section is very brief, often presented as bullets. The reader can gain a comprehensive (though not in-depth) understanding of an organization in just a few minutes.

PRODUCT USES

Likely uses include helping a donor:

1. Identify an organization to support based on its fundamental characteristics.
2. Select from among several similar organizations.
3. Uncover areas to investigate deeper.

4. Share with other potential donors to introduce them to the organization.

DELIVERABLES & FEES

The report is two pages in length—one sheet, front and back. Up to 25 copies will be made available, upon request, and are included in the fee (charities usually want to distribute these to donors, foundations, or board members). Additional copies carry a nominal charge. An *Advisory Memorandum* with recommendations to the organization may be added separately. Fees are \$1,750 for U.S. entities, plus out-of-pocket travel expenses.

BENEFITS

- ✓ Provides a quick, comprehensive snapshot of a potential grantee.
- ✓ Easy to read, just the facts!
- ✓ Includes many business details generally omitted from organizations’ presentations.
- ✓ Convenient, easy basis to compare multiple organizations.

CONTACT US

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

**ORGANIZATIONAL ASSESSMENT
EVALUATION & DUE DILIGENCE REPORTS**

	Charity Brief	Nonprofit Examination	Strategic & Operational Audit	Due Diligence Report
Pages	2	8	15-20 & appendices	40+ & appendices
Contains	Businesslike, brief, comprehensive snapshot	Brief details in 70+ areas; evaluation; risk assessment	Detailed description in 11 categories	Comprehensive, in-depth description & issue analysis
Description	Brief	Short	Extensive	Extensive
Analysis	X	Medium	Substantial	Extensive
Nonprofit recommendations	Available separately	Available separately	Available separately	Extensive
Gift size/suitable for	✓ Small ✓ Opportunity comparison	✓ Medium ✓ Evaluate ✓ Diagnose issues	✓ Major or ongoing ✓ Identify areas to designate	✓ Very large ✓ Setting terms & conditions ✓ Advising a nonprofit
Functional Classification	Descriptive	Evaluative	Analytical	Investigative

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