

PRODUCT PREVIEW

Charity DISCOVERY

SITUATION

When a donor knows the sector to which he/she wishes to contribute, or the social impact to achieve, but not the organization to support, the *Charity Discovery* product identifies qualified grantee candidates. Sometimes a grantmaker designs a comprehensive strategy to have a broad impact by funding a family of programs at multiple nonprofit partners. In such a case a *Charity Discovery* can help identify suitable partners to fulfill roles in a larger plan.

MARKET

Major donors who approach their work strategically, seeking “best in class” organizations or precisely qualified partners, use this product. It is for proactive grantmakers who are actively identifying potential grantees, not for those whose process is to respond to incoming requests. Because of the diversity of expertise required and the extent of work involved, clients seeking a *Charity Discovery* will often lack the resources to conduct this type of research.

DESCRIPTION

A *Charity Discovery* involves a multi-step process that generally takes several months to execute. While the scope of research will be tailored to a client’s needs and criteria, this product is usually very comprehensive. The systematic process yields a small set of precisely-qualified candidates.

A *Charity Discovery* generally uses the following process:

1. Identify client requirements for nonprofit candidates. These typically include geographic, mission, stage of development/sophistication, capacity, experience, etc. Craft precisely-stated, objective, initial criteria.
2. Identify databases likely to contain nonprofit candidates in our proprietary *Directory of Nonprofit Databases*—an internal 95-page document that details 60+ databases containing information on nonprofit organizations.
3. Search for organizations in the selected databases matching initial criteria, and compile potential candidate list. This could be scores of organizations, or more than a thousand.
4. Administer a short survey of “disqualifying” questions based on client requirements, to potential candidates. Compile responses.
5. Develop next level of qualifying criteria with client. Design and administer longer survey (about one page) to assess candidate performance in critical areas.
6. Rank respondents to form final candidate list.

7. Identify 3-5 finalists for further in-depth research and site visits.
8. Conduct site visits and prepare written assessment; possibly create another CEC product on each (e.g., *Charity Brief*, *Nonprofit Examination*).
9. Select grantee(s).

Written reports are presented periodically throughout this detailed process. Substantial data is collected on numerous organizations en route to a final decision; this helps to shape the process as it proceeds and can serve other purposes for the client.

PRODUCT USES

Likely uses include helping donors:

1. Identify one or more organizations to support.
2. Identify new, alternative organizations to compare to ones currently funded.
3. Create a collaboration of nonprofits to achieve a common goal.

BENEFITS

- ✓ *Criteria-driven approach assures finding organizations that meet pre-set requirements.*
- ✓ *System of discovery is thoroughly objective, not dependent on “friends and colleagues”—finds new, unknown nonprofits.*
- ✓ *Comparison-based strategy leads to identifying highest-performing qualified candidates.*

DELIVERABLES & FEES

The product is delivered as a series of detailed reports, by stage. Extensive appendices are included listing and rating nonprofit candidates. One copy is provided; additional copies carry a nominal charge. The scope of a *Charity Discovery* can vary enormously depending on how restrictive client requirements are. A flat fee or hourly rates are quoted for each engagement, and may range from \$10,000 to \$40,000, plus out-of-pocket travel expenses.

CONTACT US

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

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