

PRODUCT PREVIEW

Grant EVALUATION

SITUATION

When a donor wants to know how a sizable grant has been utilized, a *Grant Evaluation* provides detailed review and analysis. It is particularly helpful when the grantor has questions concerning the grant-funded activities, achievements to date, effectiveness of strategy, fund utilization, administration and staff, or compliance with terms and conditions. When a grant is designed with milestones that trigger renewal or subsequent phases, a *Grant Evaluation* may be used to assess progress-to-date and, if necessary, help design remediation steps, and determine if subsequent funding is warranted and at what level.

MARKET

Grantors agents such as foundations and government agencies use this product. Because of the diversity of expertise required and the extent of work involved, clients seeking a *Grant Evaluation* will typically lack the necessary staff or resources to conduct this type of analysis. In the case of government grants, the granting agency may need assistance in monitoring numerous programs funded by a single grant. Additionally, the client can provide the *Grant Evaluation* report to the grantee for the board or management to use to improve grant performance and general operations.

DESCRIPTION

Typically, a *Grant Evaluation* includes an in-depth analysis of documents submitted by the grantor and grantee, and the findings from a site visit conducted at the grantee's facilities. The granting documents (request for proposal, proposal, award letter, etc.) are reviewed and the grantee's performance is compared to expectations. While the scope of assessment can be tailored to a client's needs, this product is usually a very comprehensive report that profiles an organization, provides detailed information about its grant-funded activities, outlines achievements or missed objectives, and provides findings and recommendations.

A *Grant Evaluation* report addresses 50+ items organized under the following headings:

1. Organizational Profile
2. Grant Project
3. Key Organizational Findings
4. Key Programmatic Findings
5. Organizational Capacity
6. Key Statistics
7. Grant Performance
8. Issues & Recommendations
9. Conclusion

Narrative information and quantitative data are blended in this detailed report. To provide a thorough assessment, the

product includes investigation to identify any problems associated with the grant program's implementation and oversight, or reasons for its success. Issues with the grantee, funded program, and/or grant, if any, are identified. Each issue has a corresponding recommendation for the grantee; the client will typically provide these to the grantee, requiring implementation to guarantee continued funding.

PRODUCT USES

Likely uses include helping donors:

1. Determine the level of future funding.
2. Identify what works and "best practices."
3. Uncover areas needing improvement or monitoring
4. Identify needs for technical assistance and/or capacity building.
5. Revise the terms of current or future grants.

DELIVERABLES & FEES

The product is a 12+ page, full color, bound report. It is based on a comprehensive document review, a 1-2 day site visit, and extensive pre- and post-visit correspondence with the grantee. Five copies will be made available and are included in the fee; additional copies carry a nominal charge. A flat fee is quoted for each engagement. Fees range from \$10,000 to \$25,000 depending on the size and complexity of the grant and the scope of investigation sought by the client, plus out-of-pocket travel expenses.

BENEFITS

- ✓ *In-depth understanding of grant performance—exactly what is happening versus the expected achievements.*
- ✓ *Constructive recommendations to remediate identified issues.*
- ✓ *Insight into what works and what doesn't, to help formulate best practices for future grantmaking.*
- ✓ *Independent perspective from sympathetic, seasoned analysts with extensive nonprofit experience.*

CONTACT US

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

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