

## PRODUCT PREVIEW

# Informational MEMORANDUM

### SITUATION

The *Informational Memorandum* provides well-researched information on a specific topic of interest to a donor. The subject investigated may relate to a single nonprofit organization, or be a technical issue regarding nonprofits in general. When a donor requires in-depth analysis of an issue (not an organization, program, or grant), this product meets the need. An *Informational Memorandum* can also be used to update a project or provide additional insight alongside another product. It meets donors' needs for professionally presented information that is nuanced by persons with solid experience in the nonprofit sector, and which builds on in-depth, analytical research.

### MARKET

Major donors, prospective donors, foundations, corporate funders, and government agencies use this product. Any donor who requires highly reliable, perceptive knowledge of a specific topic to support a giving decision can utilize an *Informational Memorandum*.

### DESCRIPTION

This product is a focused memorandum systematically addressing an issue about a nonprofit, or nonprofits in general, in a systematic way. It answers a question raised by a donor such as:

- ✓ What other organizations do similar work to the one I support? How do they differ?
- ✓ Who are the partner options for the venture philanthropy project we are doing?
- ✓ In aggregate, what are the outcomes that our grants in a specific field have achieved?
- ✓ What is standard practice for a nonprofit board regarding non-independent members and family members as directors?
- ✓ What is the status of the project we are funding with our grant?
- ✓ What problems have been encountered in the execution of your research?
- ✓ What is reasonable compensation for the executive whose compensation we will underwrite?

The *Memorandum* starts with a brief overview of the situation and then describes the methodology used to develop the *Memorandum*. This is followed by a well-structured analysis of the issue. The format and topics covered vary for each issue. Recommendations for the donor are not included in an *Informational Memorandum*; it is limited to the comprehensive provision of information.

### PRODUCT USES

Likely uses include helping donors:

1. Understand a substantial issue that affects a current or future funding decision.

2. Learn more about best practices in the nonprofit world.
3. Obtain reliable information to share with a grantee on a topic of concern.
4. Get an update on a funded nonprofit project or commissioned research product.

### DELIVERABLES & FEES

The *Memorandum* is usually 3-6 pages in length and may contain supplemental appendices. Fees vary based on the nature of the research required and are generally in the range of \$1,500 to \$7,500. Travel would not usually be necessary, but out-of-pocket travel expenses are additional, if applicable.

### BENEFITS

- ✓ *Independent, outside analysis provides definitive information on a specific issue.*
- ✓ *Based on thorough research and professional judgment—not skimpy internet searches.*
- ✓ *Scope of Memorandum can be scaled for the magnitude of the issue.*

### CONTACT US

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

CALVIN EDWARDS  
& COMPANY  
*Maximizing the Good of Giving*

1200 Ashwood Parkway, Suite 140 Atlanta, GA 30338

PHONE 770.395.9425 EMAIL [Info@CalvinEdwardsCompany.com](mailto:Info@CalvinEdwardsCompany.com)