

## PRODUCT PREVIEW

# On-site GRANT REVIEW

### SITUATION

When a donor designates a gift, for a nonprofit or program, there are usually agreed-upon deliverables regarding the grant. After the grant has been made, the donor typically wants to know if the deliverables have been effectively achieved and if the funds have been used wisely. When a grant is made internationally, it usually takes additional measures to determine this. Most donors do not have the time to travel internationally to check on their grants, and in some cases the program is in a remote location or an area with security risks. In all these cases, an *On-site Grant Review* is required. This provides the donor with the critical information needed to determine whether the agreed-upon tasks have been accomplished, and the impact of the grant.

### MARKET

Major donors and foundations that have already made a grant, or that are considering making an additional grant, use this product. Because of the effort involved, an *On-site Grant Review* is usually associated with a fairly large gift. The donor will typically provide the *On-site Grant Review* to the nonprofit—as an in-kind gift—so that management can study it to make organizational or program adjustments. Also, observations or recommendations may be shared with other donors who are considering support of the organization and value a third-party, objective assessment.

### DESCRIPTION

An *On-site Grant Review* focuses on comparing outputs and outcomes to the agreed-upon deliverables in the granting document. This is likely to include a basic level of program evaluation related to knowledge or behavioral change of those being served. Other factors may be included if the client so specifies. A grant review plan will be designed, taking into account factors such as the following:

1. Agreed-upon deliverables in granting document(s)
2. Availability of advance documentation (mailed or available on-site)
3. Donor concerns/issues
4. Organization location
5. Access to key personnel and population served
6. Need for an interview survey or focus group instrument if outcomes are to be assessed
7. Degree of budget/financial review

Generally, an *On-site Grant Review* will include multiple interviews with key personnel and clients served. The report typically blends narrative information and quantitative data, and contains the following sections:

1. Executive Summary
2. Background & Methodology

3. Key Findings
4. Statistical Data
5. Analysis & Recommendations

Commonly, additional information, based on the custom design, is included.

### PRODUCT USES

Likely uses include helping donors:

1. Assess if agreed-upon deliverables have been accomplished.
2. Determine if continued funding is merited.
3. Identify program and grant administration areas that require improvement.
4. Recalibrate terms for future payments.

### DELIVERABLES & FEES

The report is 6-12 pages in length. 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; it depends on the complexity and location of the project and may range from \$7,500 to \$20,000 or more, plus out-of-pocket travel expenses.

### BENEFITS

- ✓ *Assesses if a grant is working as intended.*
- ✓ *Provides objective data to determine future funding.*
- ✓ *Enables decision making by providing a financial “audit” of how funds have been used.*
- ✓ *The nonprofit receives an independent evaluation to guide in organizational/program improvement.*

### CONTACT US

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

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