

PRODUCT PREVIEW

Project DIGEST

SITUATION

When a donor plans to designate a gift for a specific program or project, a *Project Digest* describes the project in detail and highlights its connection to the organization's larger mission. This product does not assess the effectiveness of an existing initiative, nor does it pass judgment on the viability of a proposed project in its planning stages. It is particularly useful to compare "side-by-side" a variety of possible projects in which to invest. Its concise presentation lends itself to quick review and comparison.

MARKET

Major donors seeking to obtain a deeper understanding of a project—or multiple projects—can use a *Project Digest*. It provides a profile a specific project—with sufficient information to justify small to medium gifts (possibly up to \$100,000) and adequate data to design further analysis and due diligence for a larger gift. A *Project Digest* (addressing the program or project) is often paired with a *Nonprofit Examination* (addressing the entire organization).

DESCRIPTION

In a concise manner, a *Project Digest* describes exactly what an initiative sets out to achieve and how it seeks to do it. It brings sharp focus to a project and often distills scores of pages of proposals and plans into a straightforward, businesslike summary of vital information. The product is designed to be comprehensive but give quick, deep insight to analytical readers. It achieves this by providing key facts under the following 16 headings:

1. Organization Snapshot
2. Mission Statement
3. Project Description
4. Duration
5. Rationale
6. Target Audience/Clients
7. Strategy
8. Current Status
9. Projected Impact
10. Desired Outcomes
11. Project Relationship to Overall Charity
12. Relationship to Other Charity Initiatives
13. Estimated Timeline & Milestones
14. Project Budget
15. Funding Sources
16. Project Funding Balance Required

The product is descriptive, not evaluative, in character, though the facts and data provided support a thoughtful assessment. Sufficient information is provided—in a very detailed and precise form—to make a determination of the project's purpose, strategy, and overall plan. However,

program effectiveness, if needed, would be addressed in a different product.

Further investigation of projects to which a donor may designate a significant gift may be designed based on the findings in a *Project Digest*, and would possibly include an *Advisory Memorandum* (to assess project viability) and/or a *Program Evaluation* (to assess project effectiveness).

PRODUCT USES

Likely uses include helping donors:

1. Understand at a deep level a specific project or program
2. Gain a solid orientation to multiple projects of an organization that the donor has identified as a potential grantee
3. Discriminate between options to designate a gift
4. Identify project areas for further research (e.g., strategy, logic model, program evaluation, budget, etc.)

BENEFITS

- ✓ *Creates clarity by providing a comprehensive summary of a single project or program in precise terms.*
- ✓ *Analyzes organizational documents and strips away "spin" to get to the point.*
- ✓ *Highly readable, accessible presentation supports decision-making.*
- ✓ *Facilitates sharing a project with peers and other potential funders.*

DELIVERABLES & FEES

The report is a terse 2 pages in length. Five copies will be made available and are included in the fee; additional copies carry a nominal charge. A flat fee of \$2,250 applies unless travel is required, in which case an additional fee will be included. Any out-of-pocket travel expenses are additional.

CONTACT US

For more information on the *Project Digest* product, or alternative 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