

PRODUCT PREVIEW

Project INSPECTION

SITUATION

When a donor plans to designate a gift, or has already given one, for a specific program or project, a *Project Inspection* gives a concise assessment following a site visit. It provides a basic overview of the project or a simple analysis of the current accomplishment of agreed-upon deliverables by reporting observations from an on-site inspection. It is particularly useful when a quick “checkup” is needed to ascertain if deliverables are being accomplished, or to compare “side-by-side” a variety of possible projects in which to invest. It is useful when a quick review or comparison is needed.

MARKET

Major donors seeking to obtain a deeper understanding of a program—or multiple programs—can use a *Project Inspection*. Projects could be within one organization or across multiple nonprofits. It could possibly precede greater analysis and due diligence. It provides sufficient information to justify or verify small to medium gifts (possibly up to \$100,000) and to design or recommend further research regarding a larger gift.

DESCRIPTION

In a concise manner, a *Project Inspection* lays out what an initiative sets out to achieve or has already accomplished. The objective is to provide a straightforward, businesslike summary of vital information supplemented with thoughtful insight. This product does not give an in-depth assessment of the effectiveness of an existing initiative, nor does it pass judgment on the viability of a proposed project in its planning stages.

Key facts are generally provided in the following categories:

1. Site Visit Details
2. Project Description
3. Rationale
4. Target Audience/Clients
5. Strategy
6. Current Status
7. Outcomes (or planned outcomes)
8. Timeline
9. Project Budget

The product is essentially descriptive, not evaluative, in character, though the facts and data provided support a thoughtful assessment. Information is provided—in a very detailed and precise form—to make a determination of the project’s purpose, strategy, and overall plan. If a grant has been made, it is used to ascertain if agreed-upon deliverables have been accomplished.

Basic recommendations pertaining to the donor’s objectives are provided. Further investigation of projects may be designed based on the findings in a *Project Inspection*, and would possibly include an *Advisory Memorandum* and/or a *Program Evaluation* (see *Product Previews* on the products).

PRODUCT USES

Likely uses include helping donors:

1. Understand at a deeper level a specific project or program.
2. Verify in a quick manner if agreed upon deliverables have been accomplished.
3. Discriminate between options to designate a gift.
4. Identify project areas for further research (e.g., strategy, logic model, program evaluation, budget, etc.).

DELIVERABLES & FEES

The *Project Inspection* is a terse 2-page report. Five copies will be made available and are included in the fee; additional copies carry a nominal charge. Because a *Project Inspection* involves a site visit, fees vary based on location and project scope. *Project Inspections* are often grouped to create economies, particularly if the location is international. A fee will be quoted for each engagement. Any out-of-pocket travel expenses are additional.

BENEFITS

- ✓ Quickly lays out what an initiative sets out to achieve or has already accomplished.
- ✓ Reports if agreed-upon deliverables have been accomplished.
- ✓ Validates activity & output reports from project.
- ✓ Provides peace of mind for remote investments.
- ✓ Helps determine if further research is needed.

CONTACT US

For more information on the *Project Inspection* product, or alternative products and services for committed and reflective philanthropists, please contact us at the address below.

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