

SITUATION

When a donor or prospective donor seeks analysis and insight on a broad topic spanning multiple nonprofit organizations, a charitable sector, or industry practices, a *Research Report* addresses the topic. It provides well-researched information on a custom question requiring substantial research—not a narrow, technical matter (these are addressed in an *Informational Memorandum*). It gives in-depth analysis of an issue, not an organization, program, or grant (again, these are addressed in a variety of other products). It meets donors’ needs for professionally presented information that is nuanced by persons with solid experience in the nonprofit sector, and which builds on careful, well-structured research.

MARKET

Major donors, prospective donors, foundations, and government agencies use this product. Any donor who requires highly reliable, perceptive knowledge of a topic requiring substantial research—generally, to support a giving decision—can utilize a *Research Report*.

DESCRIPTION

This product relies on research that is custom designed into a methodology to meet the client’s needs. Techniques employed may involve: expert interviews, surveying a sample of a population, analysis of available industry data, statistical analysis of a data set (either acquired by survey or provided by a third party), site visits to representative nonprofits, and other measures. It answers a question raised by a grantmaker such as:

- ✓ What is the state of development of distance learning technology in a developing country? Is it a viable means to educate on selected topics?
- ✓ In aggregate, what are the outcomes or outputs that our grants in a specific field have achieved?
- ✓ What is reasonable compensation for the executive whose compensation we will underwrite?
- ✓ What technological platforms exist to support program implementation, and are they adequate?
- ✓ What results are being achieved by organizations working in a sub-sector within a geographical region? How might these results be improved?
- ✓ What sector-wide initiatives might create broad improvement across multiple organizations?
- ✓ What are standard practices for small-medium sized foundations regarding proposal processing and approval?
- ✓ What is the aggregate capacity of a family of related grantees?

Commonly, *Research Reports* are used to help shape a giving strategy, not to undergird a specific grant to a single

organization. The *Report* starts with a brief overview of the situation and then describes the methodology used. This is followed by a well-structured analysis of the issue, focusing on key findings. The format and approach vary for each *Report* based on the issue addressed and the methodology employed. Generally, recommendations are included.

PRODUCT USES

Likely uses include helping donors:

1. Gain perspective on a broad topic to help shape a broad giving strategy.
2. Obtain information to share with other funders to help support philanthropic collaboration.
3. Understand a substantial issue that affects a current or future funding decision.
4. Learn more about a sector or sub-sector—detailed, reliable concrete information.

BENEFITS

- ✓ *Independent, outside analysis provides definitive information on a major issue.*
- ✓ *Based on a sound research methodology and professional judgment—not personal opinion or skimpy internet searches.*
- ✓ *Scope of Report can be scaled for the magnitude of the issue.*

DELIVERABLES & FEES

The *Research Report* is usually 15+ 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 \$7,500 to \$20,000. Out-of-pocket travel expenses are additional, if applicable.

CONTACT US

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

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