

Sector Survey REPORT

SITUATION

A *Sector Survey Report* is generally used when a major donor has a strong commitment to a nonprofit sector, usually within a specific geographic region. The product meets the need to know “who is doing what” within a field of nonprofit service. This need may arise as a donor enters a new field of grantmaking, or when a donor seeks to modify or enhance a strategy that is already focused on a sector.

Frequently, a user of this *Report* is developing a long-term, sector-wide, strategy for giving to a particular arena. It is not intended to undergird a specific grant to a single organization. The *Sector Survey Report* identifies and analyzes multiple organizations within the sector, and provides overall observations about the sector, including trends and recommendations if possible.

Nonprofit functions may be classified into twelve broad sectors, see our *Giving Resource: Charitable Sectors* (visit our website at www.calvinedwardscompany.com, go to Recommended Resources, then click on Giving Resources, and then Charitable Sectors to open a PDF). However, a client’s interests may be much narrower than an entire sector. A donor will commonly specify a narrowing of the sector using a variety of parameters such as: geographic region, organizational size and capability, target clients served, or philosophical orientation such as faith-based organizations.

MARKET

Foundations and major donors use this product. Any grantmaker that requires highly reliable insight into an entire field of nonprofit activity—not simply one or two organizations—will benefit from this product.

DESCRIPTION

A *Sector Survey Report* is a sizable undertaking that starts with identifying the nonprofit organizations in the sector, as constrained by the client’s parameters. To do this, we utilize our proprietary research tool, *Directory of Charity & Ministry Databases*, which lists 68 public and private databases containing nonprofit information. Pertinent databases are searched and organizations within the sector are identified, and the list is expanded with expert interviews of grantmakers and known nonprofit leaders in the field. Also, often the client has key organizational knowledge and entities to include in the research.

A survey is constructed to meet the client’s need for information and sent to all identified sector members, often upwards of 100. Surveys are reviewed in detail and data is

synthesized. Quantitative data is analyzed in Excel and selected tables and graphs are created. Key findings, observations, and trends are noted.

Reports contain chapters addressing methodology, observations & trends, sector statistics, and organizational profiles. Generally, recommendations are also included pertaining to the overall sector—a donor may use these to guide giving such that the sector innovates over time. The

recommendations may also be useful to the nonprofits working in the sector, and may be shared with these organizations if so desired by the donor.

BENEFITS

- ✓ Comprehensive view of a well-defined nonprofit sector.
- ✓ Independent, outside analysis provides definitive quantitative & qualitative information.
- ✓ Reliable data—based on sound research methodology & professional judgment—enables prudent strategy design.

The completed *Report* will address these topics:

- ✓ What organizations are working in the field?
- ✓ What are the key characteristics of these organizations—budget, staff, mission, strategy, programs, legal structure, outputs, etc.
- ✓ How do these organizations compare with each other?
- ✓ What are the key issues in the sector? If possible to ascertain, what trends exist?
- ✓ What are some of the fundamental aggregate dimensions of the sector (e.g., the total number of full-time staff working in the sector, and total revenue for the sector)?

PRODUCT USES

Likely uses include helping donors:

1. Develop or refine a giving strategy through sector-wide insight into, and perspective on, a clearly-defined field of nonprofit activity.
2. Identify qualifying organizations within a sector to fund.
3. Identify issues and/or trends to address with future funding.

DELIVERABLES & FEES

The *Sector Survey Report* is usually 70+ pages in length. Fees vary based on the dimensions of the sector (how constrained the inquiry is) and are generally in the range of \$25,000 to \$35,000. Out-of-pocket travel expenses are additional, if applicable.

CONTACT US

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

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