

PRODUCT PREVIEW

Charity CHECKUP

SITUATION

When a donor wants a quick “check it out” review of an organization, rather than an in-depth analysis, the *Charity Checkup* provides a quick snapshot of the current status of a nonprofit. It is commonly used by a donor to obtain an initial assessment of an organization he/she is interested in supporting, or to check on one already supported. Additional analytical research may follow if the *Charity Checkup* uncovers an area that raises concern.

MARKET

Donors, prospective donors, and foundations use this product. It is appropriate for small to medium grants. As a short report that can be produced quickly, donors can use the *Charity Checkup* even when they are not contemplating a large gift.

DESCRIPTION

This product is a concise, 2-page report that describes the key attributes of an organization and includes a brief risk assessment.

The *Charity Checkup* covers 21 key areas including:

- ✓ Mission statement
- ✓ Audience/clients served
- ✓ Strategy
- ✓ Financial information
- ✓ Senior executive’s compensation
- ✓ Immediate financial needs

Sections are often presented as bullets. The reader can gain a basic understanding of an organization in just a few minutes.

Compared to a *Charity Brief*—a purely descriptive profile of an organization—a *Charity Checkup* makes a basic evaluation of an organization. It is used if there is a general question or minor concern regarding the nonprofit.

The *Charity Checkup* includes a brief evaluation of organizational performance in seven key areas. A preliminary risk assessment is provided in these areas:

1. Funding
2. Governance
3. Staff & Volunteers
4. Financial
5. Program Effectiveness
6. Leadership
7. External

PRODUCT USES

Likely uses include helping donors:

1. “Check up” on an organization presently supported.

2. Assess risk or the likelihood of grant-threatening issues.
3. Be aware of an issue before it becomes a major problem.
4. Evaluate whether or not to continue support of an organization.
5. Design a gift to strengthen a particular area within a nonprofit.
6. Uncover areas to investigate deeper.

BENEFITS

- ✓ Provides a highly accessible snapshot of a nonprofit.
- ✓ Easy to read, just the facts!
- ✓ Includes key business details generally omitted from organizations’ presentations.
- ✓ Highlights areas of potential risk within an organization.
- ✓ Provides an “early warning” system to prevent being blindsided.

DELIVERABLES & FEES

The report is two pages in length—one sheet, front and back. Up to 5 copies will be made available, upon request, and are included in the fee. Additional copies carry a nominal charge. The fee is \$2,500 for U.S. entities, plus out-of-pocket travel expenses, if applicable.

CONTACT US

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

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