

Philanthropic and Nonprofit Advisory Practice

List of Services, Sample Guiding Questions and Project Examples

Initial Program or Organization Consultation

Service	Sample Guiding Questions	Examples
Preliminary Assessment*	Do you want to assess elements of an organization or program but don't quite know where to start?	Advise on an evaluation framework for a start-up sanitation and hygiene service targeting East African slums.

*In some cases this service is low-cost or pro bono, depending on the client need and profile.

Evaluation, Monitoring, & Research

Service	Sample Guiding Questions	Examples
Benchmarking & Best Practices	What organizations provide the services you want to fund or that are similar to yours? Do they do it well? If not, why not?	Perform a regional landscape analysis of transitional housing programs to identify best practices.
Demographic Profiles and Segmentations	Who are the people you are trying to help? Where are they? What other demographic attributes would be useful to know to serve your beneficiaries more effectively?	Estimate how many low-income, at-risk children in a community need child care.
Economic Impact Assessments	Do you need help quantifying and communicating the economic impact of your program or organization?	Quantify a project's economic benefits, such as increases in revenues and jobs, to help attract capital investments in a major Seattle public market.
Environmental Impact Studies	What is the environmental impact of a program or organization? Are these benefits sustainable? Have environmental impacts been properly analyzed?	Design a program to encourage the trading of development rights to preserve resource lands and concentrate development in urban centers.
Impact Modeling & Cost Effectiveness	Can you quantify impact goals? Is a specific program or service cost effective relative to the impact it is designed to achieve? What is considered a good return on investment?	Estimate how many people a public access computing program will reach, and how much these "free" computers will cost in terms of training, technical support, connectivity and hardware replacement over time.
Needs Assessment & Market Research	What do your beneficiaries need? What do they think of your services? How often and how long do they use them?	Survey and analyze client attitudes and usage rates at food banks.
Outcome-Based Planning & Evaluation	Does your strategy and organizational goals include defined, measurable outcomes and outputs? Are they integrated into your strategy and operations?	Develop a database of outcome and output indicators for a portfolio of grants and map them to the program's overall strategic goals.
Performance Management	Do you monitor performance in a manner that provides useful, actionable feedback? Can you measure, report and analyze qualitative and quantitative performance?	Use mobile phones to provide market prices to smallholder farmers in Sub-Saharan Africa for an agriculture project.

Finance & Operations

Service	Sample Guiding Questions	Examples
Financial Planning, Analysis, and Budgeting	Does your organization or grantee need financial technical assistance to meet program goals or milestones?	Develop a user-friendly Excel financial model and teach a grantee how to monitor budgets and cash flows.
Organizational and Program Due Diligence	Is a grantee organization equipped to succeed? Does it have the proper organizational structure, plans and controls in place?	Analyze if a grantee has the expertise and capacity to successfully absorb an increased level of funding.
Operational Planning and Analysis	How do philanthropic or organizational processes affect grantees?	Improve grant pipeline forecasting techniques and grant management processes to minimize adverse effects on grantees.
Program Financing and Sustainability Planning	What is the projected cost to implement and sustain a program? What is an appropriate exit strategy?	Forecast a range of scholarships an endowment can fund given portfolio volatility, tuition expenses, administrative costs, & drop-out rates.
Program Related Investments (PRI)	Can your organization conceptualize when it is appropriate to use a PRI? What kind of underwriting, due diligence, and terms of engagement are necessary?	Help a grantee that is falling short of revenue targets construct a financial model to understand its options for performance improvement.

Strategies and Assessments

Service	Sample Guiding Questions	Examples
Business planning	Do implementation plans align with and support your strategy? What activities, resources, and timelines are required?	Analyze if an organization or program's growth plans to achieve an objective are realistic in terms of staffing, resources, timing, etc.
Organizational or Program Assessment	Is your organization making a difference? What are your strengths and areas for improvement?	Determine if a public-private initiative is properly structured and the lead organization has the ability to effectively manage multiple subcontractors.
Program Design, Implementation and Risk Analysis	Is a program designed to maximize its intended impact? What are the risks? Can they be mitigated?	Create a limited Request for Proposal (RFP) process and identify and encourage the most qualified candidates to participate.
Strategic Planning	Do you support your mission with measurable strategic goals? What is your vision and measures of success? Would better information augment your strategy?	Determine how many libraries need to be targeted in order to achieve the goals of a nationwide public access computing initiative.