ESSENTIAL SKILLS & STRATEGIES for NEW GRANTMAKERS

Being Grounded in Philanthropy
Length - 1 hour
Understand:
• The role of philanthropy in society
• Key events in the development of philanthropy
• Current issues and debates about philanthropy
• The infrastructure that supports grantmakers
Be able to:
• Function with an awareness of the macro context in which you are working
• Benefit from the collective experiences and knowledge in the field of philanthropy

Navigating Legal and Ethical Issues
Length - 3.5 hours
Understand:
• Basic laws and regulations affecting grantmaking
• Ethical issues common to grantmakers
• Strategies for managing ethical challenges
Be able to:
• Conduct grantmaking that is within customary due diligence requirements
• Recognize and manage ethical challenges

Making Sound Funding Decisions
Length - 3.0 hours
Understand:
• Key characteristics of effective nonprofits
• Typical steps and best practices used in the proposal review process
• Issues to consider in arriving at a funding recommendation
Be able to:
• Assess the viability of the applicant and proposed project
• Know what additional information to gather and how
• Make defensible funding decisions

Communicating Funding Recommendations and Decisions
Length - 1.5 hours
Understand:
• Perspectives foundation leaders and trustees bring to funding decisions
• Typical steps and best practices in the funding recommendation process
• Issues and strategies for delivering funding decisions to applicants
Be able to:
• Prepare and deliver compelling funding recommendations
• Prepare and deliver final funding decisions to applicants

Maximizing Grant Impact with Large-Scale Strategies
Length - 2.0 hours
Understand:
• Common strategies outside of the grantmaking framework for achieving greater good
• Pros and cons of each strategy
Be able to:
• Use common strategies to enhance the probability of success, and the positive impact, of individual grants

Managing the Grant Portfolio
Length - 3.0 hours
Understand:
• Standard expectations and requirements of grants management
• Typical issues and effective practices in grants management
Be able to:
• Monitor grants
• Anticipate and manage grant execution problems

Managing Personal & Professional Challenges
Length - 1 hour
Understand:
• Inherent tensions in the role of the grantmaker
• Common practices for harmonizing personal wellbeing and professional excellence as a grantmaker
• Opportunities and resources for continuous learning and for on-the-job support
Be able to:
• Manage inherent tensions of the grantmaker role
• Be a content and effective practitioner long-term
• Stay well-informed on emerging knowledge and practices of the field
• Benefit from resources for job-related support

Total Time - 15.0 hours