

# ESSENTIAL SKILLS & STRATEGIES

for NEW GRANTMAKERS

## Being Grounded in Philanthropy

## Managing Personal & Professional Challenges

## Navigating Legal and Ethical Issues

## Making Sound Funding Decisions

## Maximizing the Impact of Grants

## Communicating Funding Recommendations and Decisions

## Managing the Grant Portfolio

### 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

### 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

- Support grantee success
- Learn from grant experiences

### Maximizing the Impact of Grants

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 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