Proposal Analysis in Grantmaking is designed to help you hone the essential skills of grantmaking, including proposal review, conducting due diligence, making funding recommendations, managing relationships with grantees, and other core competency areas for grantmakers.

This two-day course includes an exploration of the many factors that inform foundation strategy, preparing you to better grasp and communicate how a proposal or potential grantee will fit into your foundation’s overall mission.

What you’ll learn in this course:

- Methods for assessing proposals efficiently
- How to conduct due diligence and manage risk
- How to structure grants and leverage assets beyond grantmaking
- How to monitor grants and manage reporting
- Different approaches and methods to evaluation
- Grantee relationship management and communications

The Grantmaking School

Developed by philanthropic leaders, The Grantmaking School helps foundation staff and donors succeed by providing essential skills, knowledge, tools, and resources.

Highly rated by foundations from across the nation, The Grantmaking School is designed to help grantmakers rediscover or re-examine key philanthropic functions and concepts.

Bring The Grantmaking School to your organization!

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“Great content! This was a really insightful and informative training.”
Participant from The Winnipeg Foundation

“Extremely relevant content — I really enjoyed this course.”
Participant from the Kresge Foundation
Course Overview

DAY ONE
Advancing Diversity, Equity, and Inclusion in Grantmaking
• Overview of DEI
• Advancing Equity in Philanthropy
• What Implicit Bias Is and How It Works
• Applying an Equity Lens to Grantmaking

Organizational Culture
• Elements of Foundation Culture
• Culture as a Strategy for Change
• Developing a Change-Making Culture
• Risk Tolerance

Overview of Grantmaking
• Elements of Grantmaking
• Mission, Vision, Values
• Strategy

Solicit and Review Proposals
• Solicit Proposals
• Proposal Review
• Characteristics of a Good Proposal

Due Diligence
• Conducting Due Diligence
• Assess Risk
• Organizational Development & Capacity
• Organization Life Cycle
• Site Visits

Overview of Financial Analysis
• The Importance of Financial Analysis
• Definition of Financial Health
• The Process
• Project Budget
• Organizational Budget

DAY TWO
Overview of Financial Analysis (cont.)
• Statement of Financial Position
• Statement of Activities
• Audit
• IRS Form 990

Negotiating Grant Terms
• Grant Recommendation
• Options for Structuring the Grant
• Assets Beyond Grantmaking

Grant Agreements and Declines
• Grant Write-Ups
• Strategic Grant Agreements
• Grant Award Conversation
• Decline Proposals
• Types of Declines
• Etiquette

Monitoring & Reporting
• Monitoring the Grant
• Assessing Grant Progress
• Grant Reporting
• Managing Problem Grants
• Close-Out Reports
• Exit Strategies

Evaluation and Learning
• Why Evaluation Matters
• Theory of Change
• Logic Model
• Evaluation Approaches
• Levels of Evaluation

Developing and Managing External Relationships
• Power Dynamics/Arrogance Traps
• Methods for Reducing the Power Differential
• Managing the Grantor-Grantee Relationship

Learn More
JohnsonCenter.org/theGrantmakingSchool