

2012
PRACTICAL
WISDOM
FOR GRANTMAKERS

grantcraft

A MAP OF THE CRAFT



www.grantcraft.org

UNDERSTANDING MY ROLE

What is my role and how can I shape it?

- **Becoming an Effective Grantmaker:** Learning legal and fiscal responsibilities. Expanding your grantmaking tool kit. Getting professional development.
- **Developing Leadership Skills at Work:** Understanding your role in a system. Managing tensions productively. Understanding the role given to you and how you take it up.
- **Learning from People Who Are Different from Yourself:** Assessing your network. Using attentive listening skills. Creating alliances across difference.
- **Looking Out for Ethical Dilemmas:** Recognizing ethical challenges in grantmaking. Understanding grantmaking ethics inside your foundation.
- **Managing Workload:** Reducing the frazzle factor in grantmaking. Balancing conflicting demands. Integrating work and personal life.
- **Supporting Initiatives:** Managing roles and expectations with grantees. Working with consultants and intermediaries. Building collaboration. Troubleshooting.

PLANNING MY WORK

How can I figure out what needs to be done?

- **Inheriting a Grant Portfolio:** Making sense of what's happened. Sharpening the focus. Keeping up momentum.
- **Programming on a Blank Slate:** Defining goals. Narrowing the field. Building a framework. Getting proposals.
- **Scanning the Landscape:** Deciding why and when to do it. Identifying problems and existing solutions. Moving beyond the usual networks. Staying current while making grants.
- **Strategic Planning:** Understanding it. Putting a planning process in place that works for you, your grantees, and your foundation.
- **Using Competitions and Requests for Proposals:** Shaping the competition so it serves grantmaking goals. Managing the process. Working with those who are not selected.

DESIGNING THE GRANT

How can I design a grant to fit the need?

- **Building Knowledge:** Making grants for research, assessment, and learning. Supporting dissemination efforts.
- **Developing Organizational Capacity:** Making grants to support management, technology, boards, volunteers, and staff. Integrating general operating support into grants.
- **Making Grants Internationally:** Making grants without staff in other countries. Supporting world conferences and summits.
- **Providing Social Investments:** Learning the rules and regulations of program related investments (PRIs). Calculating risk and repayment. Leveraging funds from other sources.
- **Responding to Emergencies:** Doing quick turnaround responses. Supporting local partners. Coordinating with other funders. Addressing long-term recovery.
- **Strengthening the Financial Security of Grantees:** Making grants for core support, capital endowments, and fundraising.
- **Supporting Individuals:** Developing fellowships, awards, travel grants, and professional development grants.
- **Testing New Ideas:** Making grants for pilots and demonstrations. Supporting planning activities and early-stage innovation.

WORKING WITH GRANTEES

How can I build effective relationships?

- **Conducting Meaningful Site Visits:** Communicating plans and expectations. Preparing the visiting team. Setting realistic learning goals. Being a good guest.
- **Creating a Space for Candor:** Getting and giving authentic feedback. Preparing for difficult conversations. Getting a good discussion going.
- **Making Connections Among Grantees and Others:** Arranging successful grantee exchanges and learning tours. Convening members of a field. Involving non-grantee organizations and applicants.
- **Making Grantee Reporting Useful:** Clarifying expectations upfront. Creating useful financial and narrative feedback. Deciding what to do with what you read.
- **Responding When Projects Flounder:** Coming to the rescue when good grants go astray. Recognizing warning signs. Deciding to intervene. Shaping your response.
- **Saying Yes and Saying No to Applicants:** Understanding grantseeker expectations. Managing your role as a decision giver.
- **Starting with an Exit Strategy:** Using benchmarks to define progress and success. Being clear about program boundaries. Communicating with grantees about the future.

LEADING ON THE INSIDE

How can I make a difference in my foundation?

- **Introducing New Ideas into Your Foundation:** Making a case. Building coalitions for change. Engaging your foundation in emergent ideas and strategies.
- **Making Grants as a Team:** Clarifying roles. Building trust and nurturing talent. Working across boundaries.
- **Starting an Employee Grantmaking Program:** Bringing more people into the grantmaking process. Designing a program to meet internal and external goals. Organizing your committee and getting started.
- **Supporting Accountability:** Communicating to constituents and the public. Keeping an eye on spending and costs. Sharing lessons, learning from each other, and focusing on results.

ORGANIZING FOR IMPACT

How can I support lasting change in my field or community?

- **Affecting Public Will:** Building support and constituencies. Reaching new audiences. Making the case for change.
- **Amplifying Voices:** Finding new grantees. Integrating new voices into conferences and publications. Balancing support for existing grantees and new ones.
- **Focusing on Equity:** Understanding the impact of all kinds of diversity on grantmaking goals. Helping organizations in a field or community be more diverse and inclusive. Grantmaking with a gender lens.
- **Influencing Public Policy:** Supporting advocacy. Working with politically active grantees.
- **Managing Risk:** Knowing what it is. Discussing it with grantees and foundation decision makers.
- **Scaling Up Successful Work:** Deciding to focus. Finding other funders. Choosing replication strategies.
- **Supporting Evaluations and Assessments:** Working with grantees. Matching the method to the need. Working with consultants. Understanding alternative techniques.
- **Using Communications:** Sharing what's worked and what's been learned. Working with communications consultants. Planning and supporting campaigns.

FINDING ALLIES

How can I get beyond the usual networks?

- **Collaborating with Other Funders and Donors:** Forming a funders' group. Attracting donors. Sharing roles and responsibilities.
- **Working with Business:** Partnering with the business sector on projects. Supporting changes in business practices. Bridging the cultural divide.
- **Working with Communities:** Finding stakeholders. Working with nonprofits that aren't grantees. Supporting community organizing.
- **Working with Government:** Partnering with the government sector on projects. Supporting changes in public policies. Creating learning opportunities.
- **Working with Intermediaries:** Creating intermediaries to serve a gap in a field or community. Balancing support for intermediaries and direct grants. Clarifying roles and expectations.
- **Working with Start-ups:** Moving from idea to organization. Managing your role in planning and development. Getting the most from technical assistance. Planning and building a stable future.

Go to www.grantcraft.org to find guides, surveys, blogs, links, videos, and other resources related to the practices identified here. You can also use this map to reflect on your own approaches, set professional development goals, plan learning workshops, and get a broad view of the craft as it is practiced today.

GrantCraft is designed to encourage conversations and reflection about the craft of grantmaking. We collect and share examples of good practices based on stories told by hundreds of funders who have contributed time and talent to the project. Previously a project of the Ford Foundation, GrantCraft is now a joint project of the Foundation Center, www.foundationcenter.org, and the European Foundation Centre, www.efc.be.



What else? Contact Lisa Philp at llp@foundationcenter.org or Rosien Herweijer at rherweijer@efc.be about other challenges and practices you would like to see here.

ABOUT THE FOUNDATION CENTER



Established in 1956, the **Foundation Center** is the leading source of information about philanthropy worldwide. Through data, analysis, and training, it connects people who want to change the world to the resources they need to succeed. The Center maintains the most comprehensive database on U.S. and, increasingly, global funders and their grants – a robust, accessible knowledge bank for the sector. It also operates research, education, and training programs designed to advance knowledge of philanthropy at every level.

ABOUT THE EUROPEAN FOUNDATION CENTRE



The **European Foundation Centre**, founded in 1989, is an international membership association representing public-benefit foundations and corporate funders active in philanthropy in Europe, and beyond. The Centre develops and pursues activities in line with its four key objectives: creating an enabling legal and fiscal environment; documenting the foundation landscape; building the capacity of foundation professionals; and promoting collaboration, both among foundations and between foundations and other actors.