

STRATEGIC INITIATIVES INC.

Grant Management Training Series

Managing Funded Projects with Confidence

Grant Management 101

Managing Funded Projects with Confidence

RECOMMENDED AUDIENCE

Program staff, coordinators, managers, leadership teams, and anyone involved in delivering funded projects.

FORMAT

Virtual or In-Person

LENGTH

90 Minutes

This introductory session provides participants with a practical overview of grant management fundamentals. It is designed to help staff understand what happens after funding is secured and how their role contributes to successful project delivery.

Participants will learn how to interpret funding requirements, understand their responsibilities, stay on track with deliverables, and develop strong documentation practices that support reporting and accountability.

All training sessions include participant resources, practical tools, templates, and question-and-answer opportunities designed to support immediate application in the workplace.

KEY LEARNING AREAS

- **Understanding Funding Agreements** Participants will learn how to identify key obligations, reporting requirements, timelines, and deliverables contained within funding agreements.
- **Managing Deliverables and Milestones** Practical approaches for keeping projects on track, monitoring commitments, and meeting deadlines.
- **Documentation and Record Keeping** Best practices for maintaining project records, organizing documentation, and preparing for reporting and reviews.
- **Avoiding Common Grant Management Mistakes** An overview of the issues most commonly encountered during project delivery and strategies to prevent them.

INCLUDED RESOURCES

[Grant Management Checklist](#)[Deliverable Tracking Template](#)[Project Documentation Guide](#)

Grant Management 102

Reporting, Compliance & Risk Management

RECOMMENDED AUDIENCE

Staff directly responsible for grant administration, reporting, project management, and funder relations.

FORMAT

Virtual or In-Person

LENGTH

90 Minutes

This intermediate-level session builds on foundational grant management skills and focuses on the areas that most frequently create challenges for organizations: reporting, compliance, financial oversight, and risk management.

Participants will gain practical tools to strengthen processes, improve reporting quality, and reduce project risk.

KEY LEARNING AREAS

- **Reporting with Confidence** How to gather information, document results, monitor outcomes, and prepare stronger funder reports.
- **Financial Compliance Fundamentals** Understanding eligible expenses, budget monitoring, financial documentation, and common compliance issues.
- **Risk Management** Identifying potential concerns before they become problems and developing strategies to manage project risk.
- **Preparing for Reviews and Audits** How to ensure documentation and processes are organized and ready for funder review.

INCLUDED RESOURCES

Reporting Calendar Template

Grant Compliance Checklist

Risk Management Framework

Advanced Training Series

Organizations with multiple funding agreements or growing project portfolios often benefit from more specialized training. These workshops can be delivered as standalone sessions or as part of a broader organizational capacity-building strategy.

Budget Management for Funded Projects

Length: 90 Minutes

This session focuses specifically on the financial side of grant management. Participants will learn practical approaches to budget monitoring, expense tracking, financial documentation, and managing budget variances.

Topics include:

- Budget monitoring and forecasting
- Financial reporting requirements
- Managing project changes and budget adjustments
- Eligible and ineligible expenses
- Documentation and audit preparation

Audit Readiness & Compliance

Length: 90 Minutes

Designed for organizations managing government funding or preparing for audits and compliance reviews.

Topics include:

- Building audit-ready systems
- Internal controls and accountability
- Preparing teams for funder reviews and audits
- Documentation requirements
- Managing compliance risk

Advanced Training Series

Managing Multiple Grants Simultaneously

Length: 90 Minutes

As organizations grow, managing numerous grants, funders, and reporting timelines becomes increasingly complex.

This session provides practical tools for:

- Managing multiple funding agreements
- Tracking deliverables across projects
- Building efficient project management systems
- Developing reporting calendars
- Assigning team responsibilities

Performance Measurement & Outcome Reporting

Length: 90 Minutes

Funders increasingly expect organizations to demonstrate measurable impact.

Participants will learn:

- Outcome tracking strategies
- Collecting meaningful data
- Using evidence to support future funding applications
- Performance measurement basics
- Reporting on impact

Advanced Training Series

Building Internal Grant Management Systems

Length: 90 Minutes

Designed for organizations looking to strengthen internal capacity and create repeatable systems for project delivery.

Topics include:

- Grant management workflows
- Internal reporting structures
- Organizational accountability practices
- Team roles and responsibilities
- File management systems

Funder Relationship Management

Length: 60-90 Minutes

Strong funder relationships often contribute to stronger project outcomes and future opportunities.

This session explores:

- Effective communication with funders
- Sharing challenges proactively
- Positioning for future funding opportunities
- Managing project changes and amendments
- Building trust and credibility

Advanced Training Series

Executive Oversight of Funded Projects

Length: 60-90 Minutes

Designed for Executive Directors, CEOs, senior leadership teams, and Board members.

This session focuses on governance, oversight, accountability, and risk management.

Topics include:

- Leadership responsibilities in funded projects
- Understanding organizational funding risk
- Building sustainable funding infrastructure
- Monitoring project performance
- Financial oversight

Customized Training

Every organization has different challenges, funding structures, and levels of experience.

Strategic Initiatives can design customized training programs tailored to your team's specific needs, funding agreements, project portfolio, and organizational goals.

Training can be delivered as:

- Standalone workshops
- Team retreats and professional development days
- Organization-wide grant management capacity building
- Multi-session learning series
- Leadership training

OUR APPROACH

Our training is practical, interactive, and built around real-world experience managing large-scale government-funded initiatives.

We focus on helping organizations build confidence, strengthen internal systems, improve compliance, and develop the capacity required to successfully manage funding from approval through project completion.

Because successful grant management is about more than meeting reporting deadlines. It is about building systems that support strong outcomes, strong funder relationships, and long-term organizational sustainability.

Investment & Delivery Options

Strategic Initiatives offers flexible training and capacity-building options designed to meet organizations where they are. Whether you are looking for a standalone professional development session or a more comprehensive organizational capacity-building engagement, our training can be tailored to your needs.

STANDARD WORKSHOPS

Our standard workshops follow the curriculum outlined within this guide and are designed for organizations seeking practical, professional grant management training.

WORKSHOP	LENGTH	VIRTUAL
Grant Management 101: Managing Funded Projects with Confidence	90 Minutes	\$1,500
Grant Management 102: Reporting, Compliance & Risk Management	90 Minutes	\$1,750
Budget Management for Funded Projects	90 Minutes	\$1,750
Audit Readiness & Compliance	90 Minutes	\$1,850
Managing Multiple Grants Simultaneously	90 Minutes	\$1,750
Performance Measurement & Outcome Reporting	90 Minutes	\$1,750
Building Internal Grant Management Systems	90 Minutes	\$2,000
Funder Relationship Management	60-90 Minutes	\$1,500
Executive Oversight of Funded Projects	60-90 Minutes	\$1,750

In-person delivery is available. Travel and accommodation costs may apply.

Investment & Delivery Options

Grant Management Core Series

For organizations looking to build a strong foundation in grant administration and compliance, we recommend our most popular training package.

Includes:

- Grant Management 101
- Grant Management 102

Investment: **\$2,750 Virtual**

This package provides staff with the core knowledge required to manage funded projects, reporting obligations, compliance requirements, and project risk.

Customized Workshops

Every organization has unique funding agreements, reporting requirements, systems, and internal challenges.

Customized workshops are designed around your organization's specific funding environment, project portfolio, and operational realities.

Includes:

- Pre-session consultation
- Customized examples and case studies
- Facilitated workshop
- Review of organizational needs
- Tailored participant resources
- Follow-up recommendations

Investment: **Starting at \$2,000**

CAPACITY BUILDING & SYSTEMS DEVELOPMENT

For organizations seeking more than training, Strategic Initiatives offers consulting engagements focused on strengthening internal grant management practices and organizational systems.

Grant Management Systems Review

Includes:

- Training session
- Recommendations report
- Follow-up consultation
- Review of current grant management practices
- Templates and tools

Investment: **Starting at \$3,500**

Investment & Delivery Options

Grant Management Capacity Building Package

Designed for organizations managing multiple grants or preparing for growth.

Includes:

- Two training sessions
- Internal systems recommendations
- Follow-up support
- Process and workflow review
- Customized tools and templates

Investment: Starting at \$5,000

HALF-DAY & FULL-DAY TRAINING OPTIONS

For organizations seeking broader professional development or organizational learning opportunities.

Half-Day Customized Training Session

3-4 Hours

Starting at \$3,500

Full-Day Grant Management Intensive

6-7 Hours

Starting at \$4,500

NOTE

All workshops can be customized for:

- Non-profit organizations
- Workforce development organizations
- Unions
- Municipal organizations
- Indigenous organizations
- Training institutions
- Community organizations
- Multi-partner initiatives

This training series is designed to support organizations managing federal, provincial, municipal, Indigenous, foundation, and private-sector funding agreements.