



International
Fundraising
Academy

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PLAYBOOK

SPECIALIZED COURSE
GRANT WRITING INTERNATIONAL

SPECIALIZED COURSE

INTERNATIONAL GRANT WRITING

Includes core content + new key blocks + focus on EU, multilateral, and global donors.

Playbook

Contents, Learning Objectives, and Assessment Rubrics

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INTRODUCTION

Course objective

Train professionals, consultants, and organizational teams in identifying, designing, and drafting high-level proposals for national and international calls for proposals, mastering the evaluation criteria of the European Union, US Government agencies (USGov), multilateral organizations, and private foundations; integrating global methodologies, strategic storytelling, cross-cutting approaches, and digital tools to increase the competitiveness, sustainability, and impact of their projects.

Target Audience – International Grant Writing Course

The course is designed for:

1. **Third sector professionals**
 - Directors, managers, and technical staff of **NGOs**, foundations, civil associations, and community organizations seeking access to funds from the European Union, multilateral agencies, the USGov, and international foundations.
2. **Consultants and project development specialists**
 - Independent professionals or consulting firms seeking to expand their service portfolio by drafting globally competitive proposals.
3. **Public agency and local government officials**
 - Those responsible for international cooperation, planning, economic development, the environment, education, health, or other sectors that require the formulation of proposals for international financing.
4. **Social entrepreneurs and impact startups**
 - Founders and teams seeking funding through programs focused on innovation, sustainability, climate change, social inclusion, or technology for development.
5. **Researchers and academics**
 - Members of universities, research centers, or innovation laboratories are interested in submitting proposals to international funds in the areas of science, education, health, and technology.
6. **Community leaders and change agents**
 - People with social or environmental projects who seek to develop technical skills to compete for international grants and establish strategic alliances.

Results that the participant will obtain

Upon completion of the course, participants will be able to:

- Identify funding opportunities that are appropriate for their project or organization.
- Write comprehensive, customized proposals tailored to the type of donor.
- Integrate **theory of change, indicators, budget, and storytelling** into a solid proposal.
- Present their project persuasively to donors and evaluation panels.
- Efficiently manage the implementation and reporting of a grant awarded.

Recommended prior skills

- Basic knowledge of project management.
- Ability to write clearly in Spanish (and preferably in English).
- Familiarity with the Sustainable Development Goals (SDGs) and international cooperation agendas.

Unit I – Introduction and Strategic Fundamentals

Specific Learning Objectives – Unit I

Upon completion of this unit, participants will be able to:

1. **Define** what a grant is and differentiate it from traditional fundraising, identifying strategic implications for fundraising.
2. **Recognize** the main types of proposals according to the type of donor: EU, multilateral agencies, USGov, and private foundations.
3. **Interpret** and compare the evaluation criteria of global donors (EU, USGov, Foundations) to plan competitive proposals.
4. **Analyze** the call for proposals scoring system and its impact on prioritizing application efforts.
5. **Apply** storytelling techniques to strengthen the narrative impact of a proposal.
6. **Use** practical tools (eligibility checklist and visual funding map) to select opportunities aligned with the institutional profile.

Contents:

- What is a grant and how does it differ from traditional fundraising?
- Types of proposals according to donor: EU, multilateral agencies (UN, IDB, World Bank), US Government Funding (USGov), and private foundations.

New 2025 Edition: overview of global evaluation criteria:

- EU → Excellence, Impact, Implementation.
- USGov → Relevance, Sustainability, Organizational Capacity.
- Foundations → Strategic Fit, Innovation, Impact Potential.
- Scoring system in evaluations: how criteria are weighted in the EU, USGov, and multilateral organizations.
- Workshop: comparative analysis of two real scorecards.
- Storytelling for social impact.

Templates and resources: eligibility checklist by donor type, visual map of funds.

Assessment Rubric – Unit I

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Understanding the concept of grant and how they differ from fundraising	Clearly explain the concept, differentiate, and apply relevant examples.	Explain the concept and the difference with basic examples.	Partially explains the concept or confuses it with other types of financing	Unable to differentiate correctly
Identification of donor types and proposals	Identify and correctly classify all types of donors with examples.	Identify most with examples	Partially identified or without examples	Confuses or does not recognize categories
Analysis of global evaluation criteria	Interpret and compare EU, USGov, and Foundations criteria in depth	Interprets correctly most of the time	Shows partial or no understanding	Does not interpret criteria correctly
Implementation of scoring system	Accurately analyze scorecards and draw strategic conclusions	Analyze with a few strategic observations	Partially interprets	Does not interpret correctly
Using storytelling in proposals	Integrate storytelling in a coherent and persuasive manner	Integrate storytelling with some key elements	Integrates in a basic way without full consistency	Storytelling does not apply
Using practical tools	Apply checklist and fund map to optimally select opportunities	Apply tools with average precision	Partially applicable	Does not use tools or uses them incorrectly

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Unit II – Planning and Relations with Donors

Specific Learning Objectives – Unit II

Upon completion of this unit, participants will be able to:

1. **Establish** effective strategies for connecting and building trusting relationships with different types of donors.
2. **Formulate** key questions to validate interest and compatibility between the donor and the organization/project.
3. **Design** and execute a 3-minute pitch focused on capturing the attention of a potential donor.
4. **Differentiate** between a letter of intent and a pre-proposal, recognizing their strategic use.
5. **Integrate** post-grant sustainability criteria into initial project planning.
6. **Apply** digital tools (LinkedIn, Devex, FundsforNGOs, TED) to strategically research and approach donors.
7. **Draft** a clear, persuasive LOI tailored to the donor's profile.

Contents:

- Connect and build trusting relationships with donors.
- Key questions to validate interest and compatibility.
- Perfect 3-minute pitch.
- Differences between LOI and pre-proposal (real examples).
- Planning with a view to post-grant sustainability.

New 2025 Edition: Use LinkedIn, Devex, FundsforNGOs, and TED to research and approach donors.

- Simulation: Write an LOI and receive feedback.

Templates and resources: Pitch script, LOI template, map of actors and alliances.

Assessment Rubric – Unit II

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Donor relationship strategies	Presents clear strategies tailored to the type of donor, with practical examples.	Presents general strategies with some examples.	Presents basic strategies without relevant examples	It does not present clear strategies.
Key questions to validate compatibility	Formulate precise and strategic questions that allow you to evaluate the donor-project fit.	Ask useful but not exhaustive questions.	Ask generic questions with little strategic value.	Does not ask relevant questions
3-minute pitch	Present a structured, compelling pitch tailored to the donor.	It presents a structured pitch but with limited impact.	Presents an incomplete or unclear pitch	Does not present a functional pitch
Differentiation between LOI and pre-proposal	Clearly explain the differences and provide specific examples.	Explain differences with basic examples.	Shows partial understanding	Does not understand differences
Post-award sustainability integration	Consistently incorporates long-term sustainability strategies	Partially includes sustainability	Mentions sustainability in a superficial way	Does not integrate sustainability
Use of digital tools for research	Use at least 3 tools with clear practical examples.	Use some tools with limited examples	Using tools superficially	Does not use tools
Drafting of LOIs	Write a persuasive, tailored, and error-free LOI.	Write a clear LOI but with areas for improvement.	Draft a basic or generic LOI	Does not draft a functional LOI

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Unit III – Types of Proposals and Donors

Specific Learning Objectives – Unit III

Upon completion of this unit, participants will be able to:

1. **Differentiate** between federal (USGov), international, and philanthropic grants, understanding their particularities.
2. **Identify** key differences in requirements and formats between types of donors.
3. **Classify** grants according to project type (capital, sustainability, innovation, etc.) and focus sector.
4. **Relate** projects to donor priority sectors (arts, health, education, technology, human rights, environment, gender).
5. **Integrate** the Sustainable Development Goals (SDGs) and ESG/IMP criteria into proposal formulation.
6. **Select** the most appropriate type of grant for a real case, justifying the decision based on strategic criteria.

Contents:

- Federal (USGov), international, and philanthropic grants.
- Differences in requirements and formats.
- Grants by project type (capital, sustainability, innovation, etc.).
- Focus sectors: art, health, education, technology, human rights, environment, gender.

New 2025 Edition: integration of SDGs and ESG/IMP criteria.

- **Exercise:** identify the most appropriate type of grant for a real case.

Assessment Rubric – Unit III

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Understanding types of grants	Clearly differentiate between USGov, international, and philanthropic organizations, with examples.	Differentiate the majority with basic examples	Shows partial understanding	Confuses categories or lacks examples
Differences in requirements and formats	Identify and clearly explain key differences between donors	Identify differences but without in-depth detail	Mention general differences	Does not identify differences
Classification by project type	Correctly classify all types of grants with examples.	Classify the majority with limited examples	Partially sorted	Incorrect or incomplete classification
Links with focus sectors	Strategically link projects to priority sectors	Connect with most people but lacks a clear strategy	Partial or superficial relationship	Does not link properly
Integration of SDGs and ESG/IMP	Consistently and comprehensively integrates SDGs and ESG/IMP criteria	Partially or incompletely integrated	Mention without applying in practice	Does not integrate
Selection of grant type for real case	Selection justified by sound strategic criteria	Partially justified selection	Unjustified selection	Does not justify or chooses inappropriately

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Unit IV – Preparatory Checklist

Specific Learning Objectives – Unit IV

Upon completion of this unit, participants will be able to:

1. **Evaluate** the preparedness of an organization or individual in a structured manner before applying for a grant.
2. **Differentiate** the requirements and preliminary considerations for NGOs, startups, agencies, and individuals.
3. **Identify** and apply intangible aspects (inclusive language, gender perspective, cultural respect) in the design of proposals.
4. **Use** a preparation checklist as a self-diagnostic tool prior to writing.
5. **Apply** a rapid AI-assisted diagnosis to measure the maturity of a proposal and identify areas for improvement.

Contents:

Assess whether the organization or individual is ready to apply.

- Differences for NGOs, startups, agencies, and individuals.
- Intangibles: inclusive language, gender perspective, cultural respect.
- Workshop: preparation checklist before starting to write.

New 2025 Edition: rapid diagnosis with AI to assess proposal maturity.

Assessment Rubric – Unit IV

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Organizational/individual readiness assessment	Conduct a thorough assessment with clear criteria and evidence.	Evaluate using the majority of criteria and evidence.	Partial or incomplete evaluation	Does not perform evaluation or is very superficial
Differentiation of requirements by type of organization	Clearly identify the differences and specific requirements.	Identify the majority with examples.	Partial identification or without examples	Does not identify differences
Application of intangibles	Consistently and strategically integrates intangible aspects	Partially or generally integrated	Mention without applying in a practical way	Does not consider intangibles
Using the preparation checklist	Apply the checklist accurately and strategically.	Apply the checklist with minor errors	Partial use of the checklist	Does not use or uses incorrectly
AI-powered diagnostic application	Use AI tools accurately, generating a useful report	Uses AI with partially useful results	Uses AI in a limited or non-strategic manner	Does not use AI tools

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Unit V – High-Impact Storytelling

Specific Learning Objectives – Unit V

Upon completion of this unit, participants will be able to:

1. **Identify** key narrative elements that generate emotional connection and mobilize evaluators and donors.
2. **Design** a comprehensive storytelling plan that integrates the proposal's narrative with institutional digital communication.
3. **Critically** compare proposals with and without storytelling, evaluating their impact on persuasion and clarity.
4. **Apply** AI tools (such as ChatGPT) to create, optimize, and adapt narratives to different audiences and formats.
5. **Integrate** coherent stories that support the organization's mission, vision, and strategic approach.

Contents:

- Narrative elements to mobilize evaluators and donors.
- Comprehensive storytelling plan: proposal + digital communication.
- Comparative exercise: proposal with vs. without storytelling.

New 2025 Edition: use of ChatGPT and AI tools to generate and refine narratives.

Assessment Rubric – Unit v

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Identification of narrative elements	Recognize all key elements with applied examples	Recognize the majority with general examples.	Partial recognition	Does not identify relevant elements
Design of a comprehensive storytelling plan	Present a coherent, creative plan that is aligned with the strategy.	It presents a clear plan but with areas for improvement.	It presents a basic outline without full integration.	Does not present a plan
Comparison of proposals with/without storytelling	Analyze differences critically and with solid evidence.	Analyze differences but with general arguments.	Limited observations	Does not make comparisons or is superficial

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Using AI for storytelling	Use AI strategically, optimizing clarity and persuasion	Uses AI with acceptable but improvable results	Limited use of AI	Does not use AI tools
Narrative coherence	Story fully aligned with mission and strategy	Story mostly aligned	Partially aligned story	Story inconsistent with strategy

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Unit VI – Proposals for Federal and International Agencies

Specific Learning Objectives – Unit VI

Upon completion of this unit, participants will be able to:

1. **Design** a **Theory of Change** and a **Logic Model** adapted to the formats and criteria of different donors (USGov, EU, multilateral, and private foundations).
2. **Interpret** application documents (RFA, NOFU, RFP) correctly and extract the key requirements for the proposal.
3. **Integrate** the budget as a narrative element that reinforces the logic and feasibility of the project.
4. **Develop** a solid evaluation plan as a differentiating factor in the competition for funds.
5. **Adapt** the same project to different funding frameworks, adjusting language, indicators, and presentation.

Contents:

- Theory of Change and Logical Framework adapted to different formats.
- Responding to RFAs, NOFUs, and RFPs.
- Budget as part of the story.
- Evaluation plan as a tool for differentiation.

New 2025 Edition: how to adapt the same project for the USGov, EU, and private foundations.

Assessment Rubric – Unit VI

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Adapted ToC and Logical Model design	Develops comprehensive ToCs and Logframes tailored to each format	Develops ToC and Logframe with partial adaptations	Design generic ToC and Logframe without adaptation	Does not develop adequate ToC or Logframe
Interpretation of RFA, NOFU, RFP	Identify all key requirements and criteria accurately	Identify most criteria with some minor errors	Partial identification of requirements	Does not identify relevant requirements
Budget as narrative	Integrate a budget that is perfectly aligned with activities and results	Budget aligned but with minor adjustments needed	Partially aligned budget	Budget with no clear connection to the project

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Evaluation plan	Define robust and consistent indicators, methods, and timelines	Plan with adequate but limited indicators	Basic plan with few clear indicators	No evaluation plan
Adaptation of the project to different donors	Optimally adapt language, format, and approach for each donor	Partially adapted with some repeated elements	Minimal adaptation without strategic adjustments	Does not adapt the project

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Unit VII – Proposals for NGOs

Specific Learning Objectives – Unit VII

Upon completion of this unit, participants will be able to:

1. **Conduct** an internal assessment to evaluate the NGO's technical, operational, and financial capacity to execute a funded project.
2. **Identify** the degree of strategic alignment between the organization and target donors.
3. **Differentiate** between evergreen proposals and customized proposals and define in which contexts to use each one.
4. **Analyze** cases in which a grant is not the most appropriate solution and propose alternatives.
5. **Apply** the Canvas model for rapid proposal design, integrating key elements visually and strategically.

Contents:

- Internal diagnosis and implementation capacity.
- Strategic alignment with donors.
- Evergreen proposals vs. customized proposals.
- Cases in which a grant is not the solution.

New 2025 Edition: Canvas model for rapid proposal design.

Assessment Rubric – Unit VII

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Internal diagnosis	Presents a comprehensive diagnosis with an analysis of capabilities and gaps	Accurate diagnosis with minor gaps	Superficial diagnosis with limited data	No diagnosis or irrelevant data
Strategic alignment	Demonstrate clear alignment with solid justification	Partial alignment with acceptable justification	Unclear or erroneous alignment	Does not identify alignment with donors
Use of evergreen proposals vs. personalized proposals	Clearly define when and how to use each type with examples.	Define uses with limited examples	Explain concepts without applied examples	Confuses or does not differentiate between concepts

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Analysis of alternatives to the grant	Proposing viable alternatives with evaluation of pros and cons	Proposes alternatives without detailed analysis	Proposes few alternatives without justification	Does not propose alternatives
Application of the Canvas model	Complete a clear, strategic, and visually coherent Canvas	Complete Canvas with minor details to improve	Incomplete or unclear canvas	Does not apply Canvas or does so incorrectly

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Unit VIII – Proposals by Project Type

Specific Learning Objectives – Unit VIII

Upon completion of this unit, participants will be able to:

1. **Identify** the ideal type of donor based on the nature, scope, and objectives of the project.
2. **Distinguish** clearly between a program and a project, understanding their implications for management and presentation to donors.
3. **Integrate** co-financing strategies, including matching funds and in-kind donations, into the proposal design.
4. **Develop** a budget and financial projections that support the project's viability and meet donor requirements.
5. **Analyze** the consistency between the resources requested, the scope of the project, and the expected results.

Contents:

- Ideal donor type according to project.
- Differences between programs and projects.
- Matching funds and in-kind donations.
- Practical exercise: budget and financial projections

Assessment Rubric – Unit VIII

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Identification of the ideal donor	Selects ideal donor with solid justification based on clear criteria	Choose an ideal donor for a good reason.	Selection with little justification or weak criteria	Unjustified or incorrect selection
Differentiation between program and project	Explain differences with clear and precise examples.	Explain differences with limited examples.	Explain differences without examples.	Does not adequately distinguish between concepts
Integration of matching funds and in-kind donations	Incorporate clear and quantified strategies into the proposal.	Integrate strategies but with limited details	Mention strategies without applying them	Does not integrate strategies
Budget and financial projection	Submit a detailed budget that is consistent and aligned with objectives.	Adequate budget but with minor areas for improvement	Incomplete or unclear budget	Inconsistent or missing budget

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Overall consistency between proposal, resources, and results	Total consistency and alignment	Partial consistency	Limited consistency	Obvious inconsistency

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Unit IX – Reporting and Impact Measurement

Specific Learning Objectives – Unit IX

Upon completion of this unit, participants will be able to:

1. **Design** a basic monitoring and data collection system aligned with the project's objectives and indicators.
2. **Differentiate** between a narrative report and an impact report, applying best practices for each type.
3. **Define** verifiable and measurable indicators that reflect the progress and results of the project.
4. **Integrate** quantitative and qualitative data to demonstrate achievements and lessons learned.
5. **Report** unplanned changes strategically, preserving credibility and the relationship with the donor.

Contents:

- Monitoring and data collection.
- Narrative report vs. impact report.
- Verifiable and measurable indicators.

New 2025 Edition: how to report unplanned changes without losing credibility

Assessment Rubric – Unit IX

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Design of monitoring and data collection system	Comprehensive design, aligned with objectives and indicators, with a clear methodology	Appropriate design but with minor areas for improvement	Partial or poorly detailed design	Absent or not aligned
Differentiation of report types	Clearly differentiate between narrative and impact with specific examples.	Appropriate difference but without clear examples	Unclear difference	Does not distinguish between types
Definition of verifiable and measurable indicators	Clear, measurable, relevant indicators with sources of verification	Adequate indicators, but room for improvement	Vague or incomplete indicators	No indicators or inadequate indicators
Integration of quantitative and qualitative data	Balanced and relevant use of both types of data	Appropriate but limited use of one of the types	Superficial or incomplete use	No data integration

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Report of unplanned changes	Clear and transparent strategy that preserves donor confidence	Appropriate strategy but with areas for improvement	Superficial or unclear strategy	Without strategy or with loss of credibility

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Unit X – Grant Management

Specific Learning Objectives – Unit X

Upon completion of this unit, participants will be able to:

1. **Apply** the SCRUM methodology for the efficient management of grant-funded projects.
2. **Implement** budget control and disbursement tracking mechanisms.
3. **Analyze** real-life success and failure cases to identify lessons learned.
4. **Design** a grant dashboard using digital tools such as Airtable or Asana.
5. **Integrate** technical and financial management to ensure compliance with donor commitments.

Contents:

- SCRUM applied to grant management.
- Budget and expenditure control.
- Real stories of success and failure.

New 2025 Edition: control panel with tools such as Airtable or Asana.

Assessment Rubric – Unit X

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Application of SCRUM in grant management	Implement a comprehensive SCRUM plan tailored to grants	SCRUM plan adequate but with areas for improvement	Partial or poorly adapted plan	No clear application of SCRUM
Budgetary control and disbursements	Detailed and accurate system, aligned with donor rules	Adequate system but with minor gaps	Incomplete or unclear system	No system or with serious errors
Analysis of real cases	Presents in-depth analysis with applicable lessons	Appropriate but superficial analysis	Limited analysis or few lessons	No analysis or not applicable
Digital control panel design	Functional, visual dashboard tailored to the needs of the project	Functional dashboard but with limitations	Basic or unclear dashboard	No board or inadequate board
Technical and financial integration	Clear and consistent strategy between technical execution and financial control	Appropriate strategy, but room for improvement	Unclear or incomplete strategy	No evident integration

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

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Unit XI – EU and International Donors *(new)*

Specific Learning Objectives – Unit XI

Upon completion of this unit, participants will be able to:

1. Identify key European Union programs and their thematic focus (Horizon Europe, NDICI, Erasmus+, LIFE).
2. Analyze and understand the structure of a Work Program and a Topic to extract requirements and priorities.
3. Design strategies for building strong and competitive international consortia.
4. Apply the EU proposal format following the official criteria: Excellence, Impact, Implementation.
5. Prepare an EU budget considering lump sum, direct and indirect costs, and their justification.
6. Evaluate a simulated proposal using the official EU rubric to identify strengths and weaknesses.

Contents:

- Key programs: Horizon Europe, NDICI, Erasmus+, LIFE.
- How to read a Work Program and a Topic.
- Building international consortia.
- EU proposal format: Excellence, Impact, Implementation.
- EU budget: lump sum, direct and indirect costs.
- Workshop: mini simulation of an EU call.

New 2025 Edition: official EU evaluation rubric applied to a practical case study.

Assessment Rubric – Unit XI

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Identification of key EU programs	Recognize all key programs and their main objectives	Recognizes most programs with general objectives	Recognizes few programs or only superficially	Does not recognize key programs
Analysis of the Work Program and Topic	Accurately extract requirements, priorities, and conditions	Extracts of most requirements with acceptable accuracy	Partially identifies requirements and priorities	Unable to identify key elements

Evaluation Criteria	Excellent (5)	Good (4)	Acceptable (3)	Deficient (1-2)
Construction of an international consortium	Design a balanced consortium with strategic partners	Designs functional consortium but with gaps	Designs basic or poorly diversified consortium	Does not propose a coherent consortium
Application of the EU format (Excellence, Impact, Implementation)	Write complete, aligned, and competitive sections.	Write appropriate sections that can be improved	Write incomplete or poorly aligned sections.	Does not comply with EU format
Preparation of the EU budget	Detailed budget, justified and in accordance with EU rules	Adequate budget but with room for improvement	Basic or partially correct budget	Incorrect or non-compliant budget
Assessment of official EU rubric	Apply rubric with critical analysis and clear recommendations	Applies rubric correctly but without depth	Apply rubric in a basic way	Does not apply the rubric or does so incorrectly

Total score: 100%

Grading scale:

- **90-100%:** Excellent – Competence fully achieved
- **75-89%:** Good – Competence achieved with areas for improvement
- **60-74%:** Acceptable – Competence partially achieved
- **<60%:** Insufficient – Competence not achieved

Appendices and Final Resources

- Editable templates for all formats covered.
- International technical glossary (EU, UN, USGov).
- Real examples (anonymized sections).
- Mini AI guide for grant writing.

Comparison of Proposal Evaluation Criteria

Criteria	European Union (EU)	USGov	Multilateral (UN, IDB, World Bank, etc.)
Relevance / Fit with the call for proposals	Approach aligned with the <i>Work Programme</i> and specific topics. Alignment with political and cross-cutting priorities (gender, climate, digital) is valued.	Alignment with strategic objectives of the federal agency (e.g., State Department, HHS, NED). Priorities of security, democracy, health, development.	Alignment with institutional mandate and country or regional strategy. Contribution to SDGs.
Technical excellence	Innovation, methodological soundness, quality of the consortium, internal consistency.	Solid methodology, technical support, evidence-based justification.	Technical quality, replicability, integration of international best practices.
Expected impact	Magnitude of change, sustainability, replicability, contribution to EU policies.	Tangible benefits, measurable change, sustainability after funding.	Socioeconomic impact, scalability, contribution to inclusive development.
Implementation / Management	Clarity in work packages, schedule, roles, and responsibilities of the consortium.	Detailed work plan, risk management, qualified key personnel.	Implementation plan, governance, institutional capacities.
Organizational capacity	Previous experience, track record in EU-funded projects, technical team.	Experience in federal projects, compliance, certifications (SAM.gov, NICRA).	Experience in managing international cooperation projects, compliance with fiduciary standards.
Budget and cost-effectiveness	Adjustment to lump sum or direct/indirect costs allowed; cost/benefit ratio.	Realistic, justified budget with eligible costs according to the agency.	Detailed, efficient budget consistent with activities.
Cross-cutting approaches	Gender, environmental sustainability, digitalization, human rights.	Equal opportunities, community participation, inclusion.	SDGs, social and environmental safeguards, participation of vulnerable groups.

Criteria	European Union (EU)	USGov	Multilateral (UN, IDB, World Bank, etc.)
Evaluation and monitoring	Monitoring plan with clear indicators, metrics, and evaluation methods.	Detailed M&E plan, with SMART indicators, tools, and responsible parties.	Monitoring systems aligned with institutional and development indicators.

💡 **Uses in the course:**

- **As a self-assessment** guide before submitting a proposal.
- **In an adaptation workshop:** take the same idea and adjust it to each of these three frameworks.
- **To explain** why a winning proposal in one system will not necessarily win in another.