



International
Fundraising
Academy

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PLAYBOOK

International Certification
GRANT SPECIALIST



English

International Certification: Grant Specialist

Playbook

**Contents, Learning Objectives, and
Assessment Rubrics**

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To train professionals capable of identifying, analyzing, designing, and managing competitive proposals for international grants, using global methodologies, digital tools, and best practices in international cooperation. Upon completion, participants will be able to work as consultants specializing in grants, capable of working with NGOs, foundations, multilateral organizations, and cooperation agencies.....	4
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INTRODUCTION

Course Objective

To train professionals capable of identifying, analyzing, designing, and managing competitive proposals for international grants, using global methodologies, digital tools, and best practices in international cooperation. Upon completion, participants will be able to work as consultants specializing in grants, capable of working with NGOs, foundations, multilateral organizations, and cooperation agencies.

Target Audience

This course is aimed at:

- Professionals and consultants interested in specializing in grant writing and international fundraising.
- Technical and management staff of NGOs, foundations, and third sector organizations.
- Social entrepreneurs, project managers, and community leaders with an interest in international financing.
- Academics and research center staff seeking to transform ideas into fundable proposals.
- Public officials who manage international cooperation funds.

Results that Participants Will Obtain

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

1. Understand the global grant ecosystem and types of donors.
2. Analyze calls for proposals and determine eligibility criteria.
3. Design proposals aligned with international donor priorities.
4. Prepare clear and realistic budgets for fundable projects.
5. Develop monitoring, evaluation, and impact reporting systems.
6. Communicate proposals effectively and strategically to donors.
7. Integrate digital tools and donor intelligence to optimize fundraising.
8. Present a complete and defensible final project to a mock jury.

Recommended Prior Skills

Previous experience in grant writing is not required; however, participants are recommended to have:

- Basic knowledge of project management.
- Proficiency in digital office tools (Word, Excel, PowerPoint).
- Reading comprehension in English (intermediate level desirable).
- Writing and summarizing skills.
- Interest in international cooperation and social impact financing.

Module 1: Global Grant Ecosystem

Contents:

- The role of NGOs, foundations, multilateral organizations, and the private sector
- Grants vs. technical cooperation / donations / social investment
- What motivates donors? Criteria and interests

Specific Learning Objectives:

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

- **Describe** the role played by NGOs, foundations, multilateral organizations, and the private sector in grant financing.
- **Differentiate** between grants, technical cooperation, donations, and social investment schemes.
- **Identify** the criteria and interests that motivate different types of donors at the global and local levels.
- **Analyze** real-life examples of financing to recognize patterns in the selection and allocation of funds.
- **Develop** a map of the grant ecosystem in your country, identifying key actors and their relationships.

Activities:

- Mapping the grant ecosystem in your country
- Reading real-life financing cases

Materials:

- Infographic: types of cooperation
- Template: Mapping ecosystem actors

Assessment Rubric Module 1

Recommended scale

- Excellent: 90–100%
- Intermediate: 75–89%
- Basic: 60–74%
- Starter: <60%

Evaluation criteria	Excellent (4)	Intermediate (3)	Basic (2)	Starter (1)
Understanding the role of actors in the ecosystem	Explain in a comprehensive and accurate manner the role of NGOs, foundations, multilateral organizations, and the private sector, with examples.	Describes most roles with limited examples.	Can mention some roles without sufficient detail or examples.	Does not identify or confuses the roles of the actors.
Differentiation of financing modalities	Clearly differentiate between subsidies, technical cooperation, donations, and social investment, with at least two examples for each type.	Differentiate most modalities with at least one example per modality.	Partially disagree, with no clear examples.	It does not differentiate or confuse modalities.
Identification of donor criteria and interests	Identify criteria and interests for different types of donors, explaining their influence on decision-making.	Identify criteria and interests of some donors with a general explanation.	Mentions superficial criteria without analysis.	Does not identify criteria or confuse them.
Analysis of real cases	Analyze a real case in depth, identifying at least three key factors that explain the financing granted.	Analyze the case by identifying at least two relevant factors.	Analyze the case superficially with one relevant factor.	Does not analyze the case or identify relevant factors.
Grant ecosystem map	It presents a clear, well-structured map with all relevant actors and precise relationships.	It presents a map with most of the actors and relationships correct.	The map is incomplete or contains minor errors.	It presents a confusing map or one that lacks key actors.

Module 2: Classification of Donors and Programs

Contents:

- Classification of donors: multilateral, foundations, private sector, governments, NGOs.
- Comparison and structural analysis of programs and calls for proposals.
- Case studies to discern institutional priorities.
- Exercises to refine strategic selection.

Specific Learning Objectives:

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

1. **Identify** and classify types of donors and programs (bilateral cooperation, multilateral cooperation, private foundations, and philanthropy) according to their characteristics and scope.
2. **Describe** how grant programs are structured by different types of donors.
3. **Analyze** differences, requirements, and funding processes. Identify their priorities and thematic areas.
4. **Compare** calls for proposals from different donors to identify differences and similarities in requirements, criteria, and formats.
5. **Develop** a donor profile that includes key information on approach, eligibility, types of projects, and application process.

Activities:

- Comparative analysis of calls for proposals
- Preparation of a donor file

Materials:

- Template: Donor profile
- Matrix: Comparison of donor types

Assessment Rubric Module 1

Recommended scale

- Excellent: 90–100%
- Intermediate: 75–89%
- Basic: 60–74%
- Starter: <60%

Evaluation criteria	Excellent (4)	Intermediate (3)	Basic (2)	Starter (1)
Classification of donor types	Correctly classify all types and describe at least three characteristics of each with examples.	Classify most types and describe at least two characteristics of each.	Partially classified with limited or incomplete characteristics.	Incorrect or confusing classification.
Description of program structure	Explain in detail how programs for each type of donor are structured, including phases, amounts, and criteria.	Explain the structure of most types of donors, with partial examples.	Incomplete explanation, with key phases or criteria omitted.	Does not explain or confuse program structure.
Analysis of representative cases	Analyze at least four proposed cases in depth, identifying priorities and specific themes.	Correctly analyze at least 3 cases, mentioning general priorities.	Analyze superficially two cases with incomplete information.	Does not analyze cases or analyze them incorrectly.
Comparison of calls for applications	Present a clear and well-structured comparative analysis, identifying at least 4 key differences and 3 similarities.	It presents a comparative analysis with most of the differences and similarities identified.	It presents an incomplete or superficial analysis.	Does not perform comparative analysis.
Donor file	Complete, accurate, visually clear, and containing all the key information required.	Mostly complete and accurate records, with some details missing.	Incomplete file or unclear information.	Missing or incorrect file.

Module 3: Calls for Applications and Eligibility Criteria

Contents:

- Key components of a call for proposals
- Common mistakes when interpreting requirements
- To apply or not to apply? Decision-making strategy

Specific Learning Objectives:

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

1. Identify the key components of a call for proposals, distinguishing critical sections such as objectives, eligibility criteria, technical requirements, budget, and deadlines.
2. **Analyze** eligibility criteria to determine whether a project and its organization meet the donor's requirements.
3. **Detect** common errors in the interpretation of requirements and propose corrective actions.
4. **Apply** a strategic approach to decide whether or not to apply for a call for proposals, considering feasibility and available resources.
5. **Use** an eligibility checklist to systematically assess the relevance of applying for a specific fund.

Activities:

- Critical reading workshop on a real call for proposals
- Eligibility checklist

Materials:

- Guide: How to read a call for applications
- Eligibility checklist

Assessment Rubric Module 1

Recommended scale

- Excellent: 90–100%
- Intermediate: 75–89%
- Basic: 60–74%
- Starter: <60%

Evaluation criteria	Excellent (4)	Intermediate (3)	Basic (2)	Starter (1)
Identification of key components	Identify and accurately describe all the components of a call for proposals, with clear examples.	Identifies most components, with general descriptions.	Identify some components, with incomplete explanations.	It does not identify the components or confuses them.
Eligibility criteria analysis	Comprehensively analyze the criteria, clearly justifying the project's compliance or non-compliance.	Analyzes most criteria, with partial justification.	Analyzes few criteria, with minimal justification.	Does not analyze criteria or incorrect analysis.
Detecting common errors	Identify at least four common mistakes and suggest practical solutions for each one.	Identify at least 3 errors with general solutions.	Identify 1–2 errors, without proposing clear solutions.	It does not identify errors or propose solutions.
Decision strategy: “To apply or not to apply”	Apply clear strategic analysis, considering criteria, feasibility, and resources, and present a well-founded decision.	Applies a partial analysis, with reasonable judgment but without evaluating all criteria.	Presents a decision without in-depth analysis or limited justification.	Does not apply analysis or justify the decision.
Use of eligibility checklist	Complete the checklist accurately, consistently, and with justification.	Complete the checklist with few errors or omissions.	Complete the checklist partially or with incomplete information.	Does not complete the checklist or complete it incorrectly.

Module 4: Designing Fundable Proposals

Contents:

- Problem, target population, objectives, results
- Theory of change / Logical framework
- Principles of strategic alignment

Specific Learning Objectives:

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

1. **Clearly** define the problem, target population, objectives, and expected results of a fundable project.
2. **Apply** the Theory of Change and Logical Framework to structure the intervention logic of a proposal.
3. **Analyze** a donor's priorities and strategic lines to align the proposal with their interests.
4. **Draft** a basic version of the proposal that includes the essential elements of a fundable project.
5. **Transform** an initial idea into a structured project ready to be adapted to different calls for proposals.

Activities:

- Writing a Theory of change
- Guided exercise: turning an idea into a project

Materials:

- Editable template: basic proposal
- Theory of Change model

Assessment Rubric Module 1

Recommended scale

- Excellent: 90–100%
- Intermediate: 75–89%
- Basic: 60–74%
- Starter: <60%

Evaluation criteria	Excellent (4)	Intermediate (3)	Basic (2)	Starter (1)
Problem definition, target population, objectives, and results	Present all elements accurately, coherently, and backed up with relevant data.	It presents most elements clearly, although with limited data.	It contains incomplete or unclear elements.	Omit key elements or provide incorrect definitions.
Application of the Theory of Change / Logical Framework	Develop a comprehensive theory of change and/or logical framework, with clear relationships between activities, outcomes, and impact.	Develops most elements with general logical connections.	Develop elements partially or with unclear relationships.	Does not develop or incorrectly develops the intervention logic.
Strategic alignment with donor priorities	Clearly identify and link the proposal to the priorities of a specific donor.	Partially links the proposal to donor priorities.	Mention priorities but without demonstrating any real connection.	Does not identify or link donor priorities.
Drafting of basic proposal	Write a complete, clear, and coherent basic proposal using the format and requirements provided.	Writes mostly complete and clear proposals, with minor formatting errors.	Writes proposals that are incomplete or contain significant errors.	Does not draft a proposal or does not follow the format.
Transforming an idea into a project	Turn an initial idea into a structured project with all the essential components.	Turn your idea into a project with most of the components.	Turn your idea into a project with just a few developed components.	It fails to transform the idea into a coherent project.

Module 5: Budgeting and Financial Planning

Contents:

- Budget structure: standard categories
- Direct costs, indirect costs, contributions in kind
- Financial justification

Specific Learning Objectives:

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

1. **Identify** the standard categories of a project budget and their function.
2. **Differentiate** between direct, indirect, and in-kind costs.
3. **Design** a comprehensive and realistic budget aligned with the activities and indicators of the proposal.
4. **Prepare** a financial justification that explains and supports each budget item.
5. **Analyze** approved budgets to extract best practices and presentation criteria.

Activities:

- Budget simulation with editable template
- Analysis of approved budgets

Materials:

- Editable budget template
- Standard cost table

Assessment Rubric Module 1

Recommended scale

- Excellent: 90–100%
- Intermediate: 75–89%
- Basic: 60–74%
- Starter: <60%

Evaluation criteria	Excellent (4)	Intermediate (3)	Basic (2)	Starter (1)
Identification of standard categories	Identify all standard categories, describing their function and examples of their application.	Identify most categories with general descriptions.	Identify some categories without clear details.	Does not identify or confuses categories.
Cost differentiation	Accurately differentiate between direct and indirect costs and contributions in kind, with clear examples.	Differentiate most types of costs with limited examples.	Establishes a partial difference without clear examples.	It does not differentiate or confuse types of costs.
Budget design	Submit a complete, realistic budget aligned with activities and indicators, free of errors.	It presents a mostly complete and aligned budget, with minimal errors.	The budget is incomplete or contains significant errors.	Does not present a coherent budget or does so incorrectly..
Financial justification	Justify each item clearly, logically, and based on the actual needs of the project.	Justify most entries with general logic.	Partially justified, with vague explanations.	Does not justify entries or does so inconsistently.
Analysis of approved budgets	Identify at least three good practices and criteria that strengthen an approved budget.	Identify two general best practices.	Identify 1 good practice in a general way.	It does not identify good practices or criteria.

Module 6: Monitoring, Evaluation, and Reporting

Contents:

- Types and levels of indicators with concrete examples.
- M&E plans with activities, results, and targets.
- Report writing practices and use of digital systems.
- Simulations with data for practical evaluation.
- Structure of narrative and financial reports.

Specific Learning Objectives:

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

1. **Define** clear and measurable project indicators, identifying their type, source of verification, and method of collection.
2. **Design** a basic monitoring and evaluation (M&E) plan covering activities, results, and impact.
3. **Identify** the structure and minimum content of narrative and financial reports requested by donors.
4. **Implement** a simple system for tracking indicators and collecting data.
5. **Write** a brief narrative report that presents results and lessons learned in a clear and coherent manner.

Activities:

- Design a simple monitoring system
- Simulation of donor report

Materials:

- Template: indicator framework
- Example donor report

Assessment Rubric Module 1

Recommended scale

- Excellent: 90–100%
- Intermediate: 75–89%
- Basic: 60–74%
- Starter: <60%

Evaluation criteria	Excellent (4)	Intermediate (3)	Basic (2)	Starter (1)
Definition of indicators	Define comprehensive, accurate, and relevant SMART indicators, including type, source, and method of collection.	Define most indicators in sufficient detail.	Define some indicators without all the required elements.	Does not define indicators or does so incorrectly.
Design of the M&E plan	Present a clear and coherent M&E plan covering activities, results, and impact.	It presents a mostly comprehensive plan with minor gaps.	It presents a partial or inconsistent plan.	Does not present a plan or is inconsistent.
Identification of report structure	Describe in detail the structure and content of narrative and financial reports, with examples.	Describe the general structure of the reports.	Mention the structure incompletely or superficially.	It does not describe the structure of the reports.
Tracking system application	Design and implement a simple tracking system with clear and organized simulated data.	Designs and implements the system with some incomplete or poorly organized data.	Designs an incomplete or non-functional system.	It does not design or implement a monitoring system.
Narrative report writing	Writes a brief, clear, structured, and coherent narrative report using simulated data.	Writes a mostly clear and structured report with minor errors.	Writes an incomplete report or one with consistency issues.	Does not write a report or is incoherent.

Module 7: Pitching and Communicating with Donors

Contents:

- Your project's "elevator pitch"
- Professional email/letter of intent
- How to prepare for meetings or panels

Specific Learning Objectives:

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

1. **Design** a clear, persuasive *elevator pitch* tailored to the profile of a specific donor.
2. **Write** a professional email or letter of intent (LOI) following standards of courtesy, structure, and clarity.
3. **Prepare** key arguments and materials for presentations at meetings or panels with donors.
4. **Deliver** a short presentation (pitch) demonstrating confidence, clarity, and time management.
5. **Simulate** initial contact with a donor, applying effective communication and trust-building strategies.

Activities:

- Pitch recording
- Simulated contact with donors

Materials:

- Template: Letter of Intent (LOI)
- Guide: How to put together your pitch

Assessment Rubric Module 1

Recommended scale

- Excellent: 90–100%
- Intermediate: 75–89%
- Basic: 60–74%
- Starter: <60%

Evaluation criteria	Excellent (4)	Intermediate (3)	Basic (2)	Starter (1)
Elevator pitch design	A perfectly structured pitch (introduction, problem, solution, value), persuasive and tailored to the donor, delivered within the allotted time.	Clear and structured pitch, well adapted, although minor adjustments are necessary.	Pitch understandable but with weak structure or poorly adapted to the donor.	Unclear pitch, unstructured or poorly adapted.
Drafting of LOI or professional email	Well-structured, professional letter/email, free of writing errors, with a clear and convincing proposal.	Clear letter/email, with a general structure and minimal errors.	Incomplete letter/email or with significant errors in writing.	Unprofessional or incoherent letter/email.
Preparation for meetings or panels	Presents solid arguments and comprehensive materials, demonstrating prior research by the donor.	Presents adequate arguments and sufficient material, although there is room for improvement.	Presents limited arguments or incomplete material.	Does not prepare appropriate arguments or materials.
Performance of the pitch	Presentation that is confident, clear, with appropriate body language, on time, and connecting with the audience.	Clear presentation, with minor timing or body language errors.	Presentation understandable but with significant shortcomings.	Presentation unclear, unsure, or untimely.
Simulation of contact with donors	Applies effective communication techniques, establishes rapport, and generates donor interest.	Apply basic communication techniques with acceptable results.	Apply limited communication without generating a connection.	Inadequate communication or lack of strategic focus.

Module 8: Digital Fundraising and Donor Intelligence

Contents:

- Optimal profiles on key digital platforms in the sector.
- Practical application of AI for managing calls for proposals and proposals.
- Digital positioning plans and success metrics.
- Examples and exercises in AI-assisted search.
- Use of AI and automation
- Digital positioning strategies

Specific Learning Objectives:

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

1. **Identify** and **register** on digital platforms specializing in grant searches, evaluating their features and advantages.
2. **Apply** artificial intelligence and automation tools to optimize the search and analysis of funding opportunities.
3. **Design** a basic digital positioning strategy to improve visibility and credibility with donors.
4. **Execute** assisted searches to filter relevant calls for proposals aligned with the profile of the project or organization.
5. **Integrate** AI-powered prompts and workflows to generate drafts, summaries, and quick adaptations of proposals.

Activities:

- Profile creation on funding platforms
- Assisted search for calls for proposals

Materials:

- List of digital platforms
- Prompt Pack: use of AI in grant writing

Assessment Rubric Module 1

Recommended scale

- Excellent: 90–100%
- Intermediate: 75–89%
- Basic: 60–74%
- Starter: <60%

Evaluation criteria	Excellent (4)	Intermediate (3)	Basic (2)	Starter (1)
Use of digital platforms	Create a complete and optimized profile on at least two platforms, describing relevant search criteria.	Create a functional profile on at least one platform with general criteria.	Create a basic profile with incomplete information.	Do not create a profile or create it incorrectly.
AI application and automation	It uses AI for opportunity search and analysis, integrating effective prompts and complementary tools.	Uses AI for basic search, with general prompts.	Uses AI in a limited way and without tool integration.	Does not apply AI or does so inadequately.
Digital positioning strategy	Design a clear strategy with objectives, channels, messages, and metrics to improve visibility among donors.	Design a basic strategy with objectives and main channels.	Design an incomplete or inconsistent strategy.	Does not design digital positioning strategies.
Assisted search for calls for proposals	Conduct a filtered and relevant search, justifying the selection of at least three aligned calls for proposals.	Perform a search with two partially aligned calls.	Performs search with irrelevant results.	No search performed or results not aligned.
Integration of AI in writing and analysis	Integrates AI to produce drafts, summaries, and accurate adaptations of proposals, optimizing time and quality.	Integrates AI to produce basic drafts or general summaries.	Integrates AI in a minimal and ineffective way.	Does not integrate AI into writing or analysis.

Module 9: Final Project + Feedback

Contents:

- Integration of previous modules
- Presentation before a mock jury

Specific Learning Objectives:

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

1. **Integrate** the knowledge and skills acquired in the previous modules to develop a comprehensive and coherent technical proposal.
2. **Apply** eligibility criteria, strategic alignment, intervention logic, budgeting, and storytelling in a final document.
3. **Design** and deliver an effective pitch tailored to a mock jury or donor.
4. **Receive** and analyze feedback from mentors and peers to identify areas for improvement in the proposal and presentation.
5. **Refine** the final proposal by incorporating recommendations, with a view to submitting it to a real call for proposals.

Activities:

- Submission of complete proposal
- Presentation simulation
- Feedback from mentors

Materials:

- Assessment rubric
- Downloadable certificate + digital badge

Assessment Rubric Module 1

Recommended scale

- Excellent: 90–100%
- Intermediate: 75–89%
- Basic: 60–74%
- Starter: <60%

Evaluation criteria	Excellent (4)	Intermediate (3)	Basic (2)	Starter (1)
Complete technical proposal	Submit a complete proposal that is coherent and aligned with donor criteria; includes all elements covered in the course.	Presents a mostly complete proposal, with minor omissions or improvements needed.	Submits partial proposal, with several elements incomplete.	Incomplete or inconsistent proposal.
Learning Application	Apply knowledge of eligibility, alignment, intervention logic, budgeting, and storytelling in a precise and articulate manner.	Apply most elements with overall consistency.	Applies some elements partially or weakly.	Does not apply what has been learned or does so incorrectly.
Delivering the pitch	Clear, persuasive, structured pitch, tailored to the jury and within the time limit.	Clear pitch with overall structure and minor adjustments needed.	Pitch understandable but with weak structure or poorly adapted.	Unclear pitch, unstructured or out of time.
Feedback analysis	Listen to and analyze feedback, identifying at least three specific improvements and applying them to the final version.	Analyze feedback and implement at least two improvements.	Receives feedback but implements only one improvement or does so superficially.	Does not analyze or apply feedback received.
Refining the proposal	The final version, ready for submission to actual call for papers.	Final version with partial improvements and some pending adjustments.	Final version with minimal or superficial changes.	No final version or no noticeable improvements.