



GRANT PROFESSIONALS  
CERTIFICATION INSTITUTE <sup>SM</sup>

*Providing a Standard of Excellence for the Grant Profession*

**GPCI Ambassador Program**  
**Promoting the GPC Credential**

**Chapter Manual**  
**& Tool Kit**

Grant Professionals Certification Institute, 2017

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# 1. GPCI Mission and Vision

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## Mission

GPCI<sup>SM</sup> is dedicated to measuring and promoting competency and ethical practices within the field of grantsmanship. GPCI<sup>SM</sup> accomplishes its mission through the identification of grant professionals who display outstanding expertise and ethical practices as measured by a psychometrically valid and reliable assessment tool.

## Vision

GPCI<sup>SM</sup> envisions excellence and accountability in grantsmanship. It seeks to support a philanthropic community assured of grant professionals who can successfully guide and shape the outcomes of their funding endeavors.

## 2. GPCI Ambassador Program

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Merriam-Webster's Dictionary defines the term **ambassador** in the following way:

**ambassador:** an **official envoy**; *especially*: a diplomatic agent of the highest rank accredited to a foreign government or sovereign as the resident representative of his or her own government or sovereign or appointed for a special and often temporary diplomatic assignment

**2 a:** an **authorized representative** or messenger **b:** an **unofficial representative** <traveling abroad as ambassador of goodwill>

### Why an Ambassador Program?

Strong psychometrics represents only one piece of the larger certification puzzle. How certification is perceived and received on the street plays a major role in the outcome of a successful certification program. A successful certification program is measured, in part, by the number of persons who sit for and maintain their certification; the greater the number of certified individuals, the bigger the impact on the field.

People seek professional certification when they believe there is merit and a benefit to themselves. GPCI recognizes that knowledge is a major factor in the forming of one's beliefs and that in order to be successful, GPCI must continually provide knowledge and information to our grant peers. GPCI also recognizes that it does not have the resources to do it alone. Rather, we must call upon our friends and stakeholders to help to inform and educate others about the importance of certification.

In response to this need, the GPCI Ambassador Program was created to recruit individuals and organizations to serve as authorized representatives of GPCI's certification outreach program. The GPCI Ambassador program is designed to provide those of us willing to go to "infinity and beyond" to spread the word about the importance of certification with a Tool Kit of information and tools.

### GPCI Ambassador Program Goals

The goals of the GPCI Ambassador Program are quite straightforward:

- to promote the grants field as a bona fide profession; and
- to provide tools and support to GPA Chapters and other stakeholders as they interact with their communities to promote the grants field and the importance of GPC certification to the field's growth and stature.

We hope you will join us to help “spread the word” about the good work of grant professionals and the role of certification. We’re providing you with a suggested approach and a full Tool Kit of materials to help you promote the GPC. Feel free to use them within the spirit in which they were developed, and to provide us with feedback so that we can continuously enhance them. Together we will advance the stature of our field, one certification at a time!

# 3. The Importance of Certification

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## Why a Certification?

The list of credentialing beneficiaries goes far beyond the grant professional who receives the credential: grant seeking organizations, the beneficiaries and clients of those organizations, the general public, government and would-be government regulators, all benefit.

More than 850,000 charities, 500,000 churches, 725,000 nonprofit organizations and 23,000 educational institutions exist in the United States today. The exchange of charitable dollars for goods and services represents a national gross product of more than \$1 billion annually. Further, experts posit that more than 100,000 individuals serve as “brokers” between grant seekers and grant funders. Often referred to as “grant writers,” these “brokers” legally require no special training or education. They are not regulated by an authoritative body nor held to ethical standards by their peers.

To the public, grant writing is viewed as a technical skill that can be acquired with a few days’ training. Only to the dedicated professional is the activity that occurs between seeker and funder understood as a well-defined but complex process with accountability to the funder, the fund seeker and the consumer. Good grant professionals work between grant seeker and funder, using their skills to ensure a match between the seeker’s capacity and the funder’s mission. Good grant professionals conduct research and needs assessments, engage in strategic planning, fiscal planning, technical writing and evaluation, all within an ethical framework.

However, with no regulation, midnight infomercials espousing that anyone can “get free money,” grant training programs advertising the opportunity to find a new profession and become a “certified” grant writer in a week, and “hired-gun” grant writers proclaiming 95% to 100% success rates, it is no wonder that unethical practices abound. With community organizations spending millions of dollars unsuccessfully seeking funds and funders receiving proposals with no merit, it is not surprising to hear, as in the words of one funder, that the relationship between funder and grant professional is “tenuous at best.” These practices have also caught the eye of government and as a result, the field has seen a move in the past few years toward government regulation as more individual state governments institute fund raising and grant writer registration and/or licensure.

In this environment, the field of grantsmanship has emerged as a profession. Rapid growth within GPA speaks to this tenet. GPA began in 1997 with six volunteers. By 2000, membership had grown to 104. Today, almost 2,500 individuals belong to GPA with no signs of slowing down. In 2000, 45 individuals attended GPA’s annual conference. Today, that number has swelled to nearly 700. The fact that government is seeking regulation is another litmus test to the professional direction of the field.

At the present time, there is no governmental body to assure grant seekers and funders of performance and ethical practices, leaving nonprofits at the mercy of any individual proclaiming to be a grant writer. GPCI is dedicated to the public good and so believes that it is imperative that as the field emerges, it does so with the consumer situated front and center.

GPCI believes that it is essential for the nonprofit community, as well as the community-at-large, to understand the role grant professionals play in the overall health of a nonprofit organization, and the power that a nonprofit has over the outcomes of its fund seeking.

Independently established credibility stands as one of the main benefits of a nationally-recognized certification/credential. For fields such as ours where there is no recognized academic degree, certification is the only authoritative, independent measure available by which to determine a person's experience, skill and knowledge base as defined by our peers.

Certification impacts potential job marketability. Through certification, employers can be more secure in their hiring practices. Established standards can be used by grants professionals to educate employers. Job descriptions will better reflect the true work we do. And equitable compensation will follow. Employers and funders will be more efficiently served by qualified grant developers rather than unqualified grant writers who may waste time and money producing unrealistic programs that do not meet funder goals. Certification offers a way to make this distinction.

In addition to the myriad benefits to us as individuals and to the beneficiaries whose lives we affect, certification is important as we track the movement by government to regulate and/or license the grants profession. With almost half of our nation's states already requiring some form of registration, the tenor of regulation is resonating louder each day. The question becomes "should the grants profession influence government by providing them with valid information and mechanisms that we, as grants professionals, have produced, or should government take the lead and define our profession?"

Certification should not be viewed as a policing agent or gatekeeper, nor should it be thought of as a noose around our necks. Certification allows us to stand out as a profession, increase our stature among other professions and influence authority.

## Who Benefits?

Everyone benefits!

**Grant writers and grant developers** will:

- have confidence in their mastery of the knowledge, skills, and ethical standards required to be a grant professional
- be recognized among their employers, clients, peers, and community with a sign of distinction;
- have a better understanding of the role they play within an organization and the larger community;
- enjoy enhanced marketability and job prospects;
- have potential for increased earnings; and
- be able to join and network with a distinguished group of peers.

**Private and public sector administrators/board members** will have the knowledge and tools to:

- better assess an individual's knowledge-base, performance abilities, integrity and ethical standards as they relate to the grant development process;

- make informed decisions regarding the relevance of funding opportunities to programming and the actual needs of their constituents;
- have an enhanced capacity to identify, develop, implement, accomplish, evaluate and report on its goals; and
- make optimum utilization of grantsmanship to further their organizations' mission.

**The funding community will:**

- be better assured that the goals and programming put forth by grant seekers are indeed in alignment with the funders' goals, attainable and responsive to the needs of the program beneficiaries; and
- see the relationship between funder, grant seeker and grant developer strengthened.

**The field of grant development and management will:**

- obtain a nationally recognized credential attesting to experience and qualification, affording it the same benefits that the Certified Fund Raising Executive (CFRE) credential affords the fund raising field;
- be recognized as a distinct accountable profession with its own skill sets and knowledge base; and
- be positioned to guide the direction government takes toward regulation. Most importantly, **the**

**Beneficiaries or constituents of philanthropy will:**

- have more funds available to respond to their needs; and
- have those programs and services more accurately reflect their needs.

We hope the GPCI Ambassador Program and this Tool Kit will provide you with the tools to help you share the need and importance of certification with your grants community.

# 4. Tools for Sharing Information about the GPC

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Sections 1 through 3 share GPCI's view of certification and the role certification plays in moving our "skills" into a bona fide, well-respected profession. We recognize that without some measure of professional oversight and accountability, of which certification provides, our field will continue to be viewed as only one skill set of a larger profession.

Section 4 provides you with information and the tools you can use to engage in dialogue, share information, and conduct presentations to raise the visibility of the GPC credential in your chapter community.

The Attachments for this Section provides you with the following Ambassador tools:

## Handout (Why Certify?)

The "Why Certify?" handout is a short, informative "flier" about the GPC credential. Feel free to make as many copies as you may need for distribution. The handout can be distributed at your presentation, placed on your Chapter's website or other relevant sites, handed out at conferences and other magnet events, or sent as a teaser to entice prospective GPCs and others to your presentation. This handout also serves as a useful "talking points" tool for you and other GPCs to use in talking with potential GPCs about the benefits of pursuing the credential.

## PowerPoint Presentation

This attachment provides you with a comprehensive PowerPoint presentation of approximately 60 to 90 minutes including time for questions and discussion. The PowerPoint is divided into the following four categories:

- The role credentialing plays in advancing the field
- The benefits of certification
- The exam's development process
- The nuts and bolts of the exam and the exam process

The PowerPoint includes comments in the notes section to help you explain certain slides. You will also note that the presentation is in a .PDF format. If you wish to adapt the PowerPoint presentation, please contact a member of the GPCI Board of Directors.

Please review the PowerPoint at your earliest convenience and contact GPCI with any questions, clarifications, or concerns you might have regarding its content.

## □ Evaluation

In this attachment, you will find two evaluations, one for participants and one for yourself. The purpose of the evaluation is two-fold:

- To help you assess your community's interest in pursuing a GPC by surveying participants; and
- To help GPC evaluate the effectiveness of the PowerPoint, the GPC Tool Kit and the overall Ambassador Program.

With this understanding, please copy the evaluation form and distribute it to participants at the completion of your presentation, as well as complete your own presenter evaluation. As a courtesy, we ask that you send copies of the evaluation back to GPCI at the address located on the evaluation form. Of course, please do feel free to use your own evaluation form, in addition to this GPCI Ambassador Tool Kit evaluation, should you seek additional information.

# 5. Helping Chapter Members Prepare for Certification

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As a GPCI Ambassador you will be asked: “Does it help to study for the exam?” We surveyed a number of GPCs. Their short answer is “maybe.” One’s years of experience and his or her grants focus – public, private or a broad-base of both – will guide the depth and scope of study.

Many grant professionals prefer to study on their own and have successfully developed a self-study approach based on their own assessment of areas needed for study. However, several chapters throughout the country have found the concept of study groups not only beneficial but also enjoyable. There are many benefits to studying for the GPC exam with a group and to having study group members who represent different fields and backgrounds – consultants, those at large healthcare agencies, and those with nonprofit experience, to name a few. These people all bring multiple perspectives and various interpretations of the reading materials. Having study group members who specialize in grant applications to foundations, while others may be more accustomed to writing large, multi-year federal applications, adds to the learning potential. Group members from large organizations can share their knowledge of post-award federal grant management practices, while group members who serve as consultants to multiple agencies can share their experiences in working with different leadership structures. The gain from free and open sharing of experiences is often invaluable in preparing for a generalist exam.

One of the best aspects of a study group is being able to divide and conquer! That is, the ability to divide the reading list, share books, and exchange pertinent journal articles. Below we share two examples of successful study groups for you to consider in the context of helping form a study group in your chapter.

## Two Successful Study Groups

### **Broward County Study Group:**

This study group consisted of seven grant professionals who were members of the Broward County, Florida Chapter. The study group members met once a week for three hours over a five-week period before the exam. The weekly study session required travel (25 miles was the maximum) for several members, and all took time away from work with the permission of employers. There was only one day when more than two members were not present. The members took this endeavor very seriously.

The group first developed a protocol for collecting information in a summary format and then entering the information into GPCI’s *Validated Competencies and Skills* table they had recreated in Microsoft Word format. Each week, the group focused on one or two content areas from the *Validated Competencies and Skills*. To prepare for the upcoming topic discussion, each member of the group completed independent reading and research. At the study session, group members shared information on the key points from each book and provided additional information for each content area. The experience of talking through the information was invaluable.

When GPCI mailed out a *Candidate Information Guide* to those registered for the exam, group members completed the sample test items individually, discussed selected answers, and supported one another. If

a group member did not understand or agree with an item, there was openness and freedom within the group for discussion and clarification. The process went very smoothly and each study group member gained confidence. The result was 100% success in passing the exam.

### **Central Indiana Chapter of GPA Study Group:**

This study group included eight individuals who sat for the GPC exam in Indianapolis, Indiana. A majority of the on-site attendees were members of the Central Indiana Chapter. However, there were other individuals who requested the study materials or attended the study sessions via teleconference. The comprehensive study session format consisted of six two-hour sessions over a six-week period directly before the exam. The weekly study sessions were held at a centrally located facility within a 10-15 mile radius for most attendees. All participants attended the study sessions in a timely manner and were pleased with the content and material presented at each session.

The Central Indiana Chapter utilized the expertise of its current GPCs to teach the six session courses, which went into detail on each of the GPC's *Validated Competencies and Skills*. The study sessions were presented in a PowerPoint format and each participant received a binder of the presentation handouts, resource materials, and additional content information. Each week, the presenter would cover two of the GPCI *Competencies and Skills* and provide resource materials and supplementary information to support the basic content areas. The presentation also included sample questions so that the attendees could understand the format of the questions and test themselves on each question.

At the last session, the speaker gave an overview of the information from previous sessions, test taking tips, and had the participants complete a one-hour writing prompt exercise. The purpose of the writing prompt exercise was to allow them to experience the pressure of creating a document in a specific period of time and to recreate the test experience. At the end, the attendees discussed the experience and shared their writing prompt with each other to gain insight and understanding of the experience.

The participants benefited from learning the new material and the writing prompt, but also from the interactive and participatory sessions. Most of the attendees indicated that the conversation and discussion generated in the meetings was more invaluable than just receiving the information and studying on their own.

## 6. Supporting Potential and Current GPCs

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Now that you have shared information about certification and study and preparation methods, how can you motivate and move individuals into actually becoming GPCs? And how can you support existing GPCs?

### Break down barriers to test registration

Many grant professionals are interested in taking the exam but experience barriers like eligibility, cost, and fear.

- Eligibility - If they are not yet eligible for the exam due to limited years of experience, keep them on your list of interested individuals with a tag of when they will become eligible. If they are not yet eligible due to number of grants written and awarded, check in with them every six months or annually to see if some grants they have written have been successfully funded, making them now eligible.
- Cost – Educate potential GPCs about available scholarships. Some chapters sponsor these, while other scholarships are available through the Grant Professionals Foundation ([www.grantprofessionalsfoundation.org/gpc-exam-scholarship-applications/](http://www.grantprofessionalsfoundation.org/gpc-exam-scholarship-applications/)). You can also encourage them to talk with their employer about covering all of the cost or even part of the cost. Some employers are more willing to reimburse you for some or all of the cost of the exam after you have passed it.
- Fear – For many potential GPCs, this is their greatest barrier. They are worried they will fail the exam. A study group is a great tool to break down this barrier as grant professionals can hear for themselves that they know the material just as well as their colleagues in the field. Share with GPCs your personal experience in handling any fear as part of your exam preparation process.

### Support test registration, study groups, and taking the exam

As a GPCI Ambassador, there are many simple things you can do to support grant professionals as they move forward toward taking and passing the exam.

- Make a plan with them to register for the exam in a particular week and check in with them at the end of the week to see if they registered or had any questions.
  - *Jane – Just dropping you a note to see if you had time to register for the exam this week. If you didn't, no worries. Just let me know if you have any questions or ready to start with a study group!*
- Facilitate a study group – Gather the names and email addresses of individuals who are interested in taking the exam in the next six months. Work with them to set a series of dates

they can meet together to study for the exam. Recommend materials you or others you know have personally found helpful.

- *Future GPCs – All of you have expressed interest in taking the GPC exam in the next six months and participating in a study group. This group will meet in-person (or via Skype) for the next six weeks for 90 minutes. I recommend you look over the recommended material in advance, but even if you don't, remember you and many of the colleagues you are studying with are content experts in many of these areas already. Come and absorb the energy and expertise of our local grants network!*
- Send encouraging messages – Gather the dates each person plans to take the exam. On the morning before the exam, send them a supportive text or if they don't use text messaging, send them an email the day before the exam, if they plan on taking it first thing in the morning without going to their office. Then, at the end of each day they take a portion of the exam, send them an additional supportive text.
  - *John – Good luck on your multiple choice/writing test today. I'm sure you will do great!*
  - *John – I hope your test went wonderfully today! I was thinking about you!*

#### Celebrate

Whether the grant professionals have studied or just walked into the test cold, celebrate with them when they pass their exam! This could be as simple as taking their call and listening while they are excited they passed, making sure the chapter announces it via email, Facebook, and at their next meeting, or even going out with them for a celebratory drink or meal.

#### Encourage

Unfortunately, not everyone passes the exam. For those who may not have passed the multiple choice and/or written parts of the exam, listen and empathize with them, and encourage them to consider this just one, not insurmountable, challenge in their eventual attainment of the GPC credential. Work with them to identify any GPCI competencies in which they felt less well-versed or any test-taking challenges, and encourage them to develop strategies to prepare themselves to re-take the exam. If any existing GPCs in your chapter had not passed the exam the first time, encourage them to talk with candidates about how they addressed this initial disappointment and went on to successfully attain their GPC.

#### Support Current GPCs and Recertification

You can also support the current GPCs in your chapter by hosting an event just for them. This event could be an opportunity for everyone to just socialize, or you could gather to strategize how to encourage more chapter members to pursue the GPC, learn what impact the GPC has had on everyone's career, or gather to fill out your recertification paperwork together! It is good for GPCs to feel valued by the community, especially if they work somewhere where their hard work to pass the exam has not been recognized.

## GPC Presentation: Presenter Evaluation

<b>Name:</b>	<b>Date:</b>	<b>Venue &amp; Location:</b>			
<b>Total # of Participants:</b>	Of total, those with GPC:	Of total, those without GPC:			
<b>Was the presentation:</b>	<input type="checkbox"/> Stand-alone event specific to GPC certification <input type="checkbox"/> Part of a larger conference or event (please specify the type of event) _____				
<b>What Tools did you use in preparing for and during your presentation:</b>	<input type="checkbox"/> General flyer <input type="checkbox"/> General interest survey <input type="checkbox"/> "Why Certify?" handout <input type="checkbox"/> PowerPoint presentation <input type="checkbox"/> Information from the GPCI website <input type="checkbox"/> Other _____				
<b>On a scale of 1-5 below, how helpful was the Ambassador Tool Kit?</b>					
<b>Ambassador Tool</b>	<b>Invaluable</b>	<b>Very Helpful</b>	<b>Somewhat Helpful</b>	<b>Not Helpful</b>	<b>Did Not Use</b>
General flyer					
General interest survey					
"Why Certify?" handout					
PowerPoint Presentation					
Information from Website					
Other					
<b>Overall, how effective was your presentation in informing the participants about the importance of certification and the GPC exam?</b>					
	<b>Highly Effective</b>	<b>Effective</b>	<b>Somewhat Effective</b>	<b>Barely Effective</b>	<b>Would Not Use Again</b>
Effectiveness					
<b>Would you recommend the Ambassador Tool Kit or this Presentation to other Chapters?</b>					
<input type="checkbox"/> Yes <input type="checkbox"/> No Why or why not? _____					
<b>Additional Comments regarding strengths and/or weaknesses of Tools:</b>					
<b>Send Evaluation forms to: GPCI Ambassador Program</b>					

Thank you for taking the time to complete and mail this important evaluation data.

# GPC Presentation: Participant Evaluation



<b>Date:</b>		<b>Venue and Location:</b>						
<b>About You: (Name, optional)</b>								
<b>GPC Certified?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No		<b>Job Title:</b> <b>Percentage of overall job that is:</b> _____ grant development _____ grant management						
<b>Years primarily in the grants field:</b>	<input type="checkbox"/> 1-5	<input type="checkbox"/> 6-10	<input type="checkbox"/> 11-15	<input type="checkbox"/> 15-20				
	<input type="checkbox"/> 21-25	<input type="checkbox"/> 26-30	<input type="checkbox"/> 31-35	<input type="checkbox"/> Over 35				
<b>Number of grants awarded in the last 7 years:</b>	<input type="checkbox"/> 1-3	<input type="checkbox"/> 4-7	<input type="checkbox"/> 7-15	<input type="checkbox"/> Over 15				
<b>How did you learn of this presentation?</b>								
<b>Before coming to this presentation:</b>	<input type="checkbox"/> I was not aware of the GPC. <input type="checkbox"/> I did not know anything about the GPC. <input type="checkbox"/> I did not feel qualified to sit for the GPC exam. <input type="checkbox"/> I had thought about sitting for the GPC exam but sought additional information. <input type="checkbox"/> I did not intend to sit for certification but was curious. <input type="checkbox"/> I sought information about how to help others sit for the GPC exam. <input type="checkbox"/> Other _____							
	<b>After the presentation:</b>	<input type="checkbox"/> I know I am eligible for the GPC exam. <input type="checkbox"/> I am interested in being a part of a study group. <input type="checkbox"/> I am interested in sitting for the GPC exam. <input type="checkbox"/> I am interested in sharing information about certification with others. <input type="checkbox"/> I continue to not feel qualified to sit for the GPC exam. <input type="checkbox"/> I continue to be ambivalent about certification. <input type="checkbox"/> I do not intend to sit for certification. <input type="checkbox"/> Other _____						
		<b>Barriers to certification/recertification:</b>	<input type="checkbox"/> Qualifications (knowledge, experience, grant awards) <input type="checkbox"/> Cost <input type="checkbox"/> Time to study <input type="checkbox"/> Personal fear <input type="checkbox"/> Employer Support <input type="checkbox"/> Knowledge or planning about continuing education <input type="checkbox"/> Time for continuing education or involvement activities					
			<b>On a scale of 1-5, below, please share your thoughts regarding the presentation:</b>					
				<b>Strongly Agree</b>	<b>Agree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>N/A Don't Know</b>
			The material presented was clear.	○	○	○	○	○
			The presenter was knowledgeable regarding the GPC.	○	○	○	○	○
The handouts & audio visual presentations were helpful.			○	○	○	○	○	

