CONCEPT

# Grant-Making Strategy for Philanthropic Foundations and Charity Funds

18 – 22 January 2027
London - Central London four-star



# Grant-Making Strategy for Philanthropic Foundations and Charity Funds

**Ref:** 840_20484 **Date:** 18 – 22 January 2027 **Location:** London - Central London four-star **Fees:** 23000 SAR

## Introduction:

Foundations, endowments, CSR funds and charity funds distribute large sums every year, yet many still award grants reactively, spread money thinly across unrelated causes and cannot show what their giving has changed. Grant-making without a clear theory of change, selection criteria and portfolio discipline leaves boards unable to judge value and grantees facing unpredictable demands. This Core Concept course equips funder-side staff to set philanthropic focus areas, choose grant-making models, select and fund grantees, and learn from results. Participants produce a Grant-Making Strategy and Grant Cycle Blueprint for a case foundation.

## Course Objectives:

- Assess a funder's mandate, giving history and position among other funders before setting a new strategy
- Build a funder theory of change and select focus areas using a weighted prioritisation matrix
- Choose between responsive, strategic, participatory and trust-based grant-making models for each funding stream
- Design calls for proposals, scoring rubrics, due diligence checks, award terms and disbursement tranches
- Oversee a grant portfolio through monitoring visits, learning, impact measurement, capacity building and exit planning
- Run grants committee decisions with conflict of interest controls and transparent reporting to trustees and donors

## Target Audience:

- Programme and grants staff who manage calls, assess proposals and oversee grantees at foundations and charity funds
- Grants directors responsible for a funder's giving strategy and annual grant budget
- Trustees and grants committee members who approve awards and set giving policy
- CSR and corporate giving fund managers who allocate company social investment budgets
- Endowment and charitable fund managers who turn investment income into grant programmes
- Learning and impact staff who evaluate what a funder's portfolio has achieved

## Course Outline:

### Day 1: The Philanthropic Funder Landscape and Giving Self-Assessment

- Funder Types: Private Foundations, Endowments, Corporate Giving Funds and Community Funds
- Relief Charity Versus Strategic Philanthropy: Immediate Aid and Root-Cause Funding
- Funder Mandate Review: Founding Deed, Mission Statement and Giving Policy
- Giving History Audit: Past Awards Mapped by Cause, Size and Duration
- Funder Collaboration Map: Pooled Funds, Co-Funding and Philanthropic Collaboratives

### Day 2: Philanthropic Strategy, Theory of Change and Grant-Making Models

- Funder Theory of Change: Long-Term Goal, Preconditions and Accountability Ceiling
- Focus Area Selection Matrix: Need, Neglect, Mission Fit and Funder Leverage
- Responsive Versus Strategic Grant-Making: Open Requests and Commissioned Initiatives
- Participatory Grantmaking: Community Panels and Shared Decision Rights
- Trust-Based Philanthropy: Unrestricted Multi-Year Funding and Light Reporting

### Day 3: Running the Grant Round from Call to Award

- Call for Proposals Design: Eligibility Rules, Selection Criteria and Application Forms
- Proposal Scoring Rubric and Merit Review Panel Procedure
- Grantee Due Diligence Checklist: Legal Standing, Finances, Governance and Track Record
- Award Letter and Grant Terms: Conditions, Deliverables and Reporting Schedule
- Disbursement Tranche Plan Linked to Milestones and Report Approval

### Day 4: Portfolio Oversight, Learning and Grants Committee Governance

- Grant Portfolio Dashboard: Spread by Focus Area, Risk Rating and Stage
- Funder Monitoring Visits and Learning Conversations With Grantees
- Funder Impact Measurement: Outcome Indicators and Contribution Claims
- Grants Committee Charter, Delegated Approval Limits and Conflict of Interest Register
- Grantee Capacity-Building Grants and Responsible Exit Planning

### Day 5: Case Foundation Exercise: Grant-Making Strategy and Grant Cycle Blueprint

- Case Foundation Data Pack: Endowment Income, Past Awards and Community Needs
- Focus Area and Grant-Making Model Choice for the Case Foundation
- Grant Cycle Blueprint: Call, Scoring, Due Diligence, Tranches and Close
- Annual Giving Report Draft for Trustees and Donors
- Blueprint Defence Before a Mock Grants Committee

## Skills You Will Gain:

- Philanthropic Strategy Design
- Focus Area Prioritisation
- Grant Model Selection
- Proposal Assessment
- Grantee Due Diligence
- Tranche Scheduling
- Grant Portfolio Analysis
- Funder Governance

## Why Attend This Course:

- Leave with a Grant-Making Strategy and Grant Cycle Blueprint for a case foundation, ready to adapt to your own fund
- Move board discussions from individual funding requests to a portfolio view of where grants go and what they change
- Cut grantee burden and funder risk together by matching conditions, tranches and reporting to grant size
- Compare giving practice with peers from private foundations, endowments and corporate social investment funds

## Conclusion:

Grant-making creates lasting change when a funder knows what it is trying to achieve, chooses the right way to give and learns from every award. The course moves from the funder landscape and giving self-assessment, through theory of change, focus areas and grant-making models, to calls, scoring, due diligence, award terms and tranches, then to portfolio oversight, impact measurement, committee governance and exit. The final day applies these methods to a case foundation and produces a Grant-Making Strategy and Grant Cycle Blueprint ready for committee review.