Zakat and Charitable Aid Distribution Training Course: Eligibility, Assessment and Case Management

12 – 16 April 2027
Paris - Right Bank business hotel



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Ref: 1604_25634 **Date:** 12 – 16 April 2027 **Location:** Paris - Right Bank business hotel **Fees:** 23500 SAR

Introduction:

Zakat and charitable aid distribution, with beneficiary eligibility, assessment and case management, is the subject of this 1-week course for zakat committee managers, case officers and charity distribution leads, ending with a Zakat Distribution and Case Management Plan. Many funds pay the wrong households, pay the same household twice or cannot show what the aid changed, because eligibility rules and files are informal. Nominees already receive and decide applications, and teaching is by case study on anonymised application files and scoring sheets. CoreConcept Training Center delivers this zakat distribution course.

Course Objectives:

- Apply the eight zakat recipient categories and the fund separation rules to decide which applicants a fund may serve
- Design an intake form and evidence checklist that supports consistent eligibility decisions
- Build a weighted eligibility scoring sheet with priority bands and a committee decision record
- Conduct home visits and household interviews that verify need while protecting applicant dignity
- Select cash, voucher, in-kind or debt settlement aid and set amount, duration and review dates for each case
- Control duplicate payments and misrepresentation, and track outcomes through follow-up visits and a beneficiary register

Target Audience:

- Zakat committee managers responsible for allocating funds across recipient categories
- Case officers who receive applications, interview households and prepare files for decision
- Distribution leads in charities accountable for aid payments and in-kind delivery
- Field team supervisors who plan and review home visits
- Registry and data officers who maintain beneficiary records and run duplicate checks

Course Outline:

Day 1: Zakat Distribution Foundations, Recipient Categories and Current-State Review

- Eight Zakat Recipient Categories and Their Definitions Compared
- Juristic Views on Dividing Funds Across Categories Mapped to Policy
- Zakat Fund Versus Charitable Aid Fund Separation and Ledger Rules
- Distribution Cycle Map from Collection to Aid Delivery
- Current-State Audit Sheet for Intake, Decision and Payment Practice

Day 2: Eligibility Rules, Scoring Models and Application Assessment

- Applicant Intake Form Design with Mandatory Evidence Checklist
- Need Indicator Matrix for Poor and Needy Household Status
- Weighted Eligibility Scoring Sheet with Priority Band Cut-Offs
- Debtor and Wayfarer Claim Verification Using Document Tests
- Committee Decision Record with Approval, Deferral and Rejection Reasons

Day 3: Home Visits, Case Files and Aid Type Selection

- Home Visit Protocol with Observation Checklist and Dignity Rules
- Household Interview Guide and Income Declaration Cross-Check
- Aid Type Selection Grid for Cash, Voucher, In-Kind and Debt Settlement
- Individual Aid Plan with Amount, Duration and Review Date
- Case File Structure, Case Notes and Applicant Consent Form

Day 4: Duplication Control, Misrepresentation Risk and Outcome Tracking

- Cross-Charity Duplicate Check Using Identity and Household Matching Rules
- Beneficiary Register Fields, Unique Reference and Update Cycle
- Misrepresentation Red Flag Checklist with Escalation Steps
- Appeal and Complaint Log with Response Stages
- Outcome Tracker with Self-Sufficiency Indicators and Follow-Up Visits

Day 5: Case Study Practice and the Zakat Distribution and Case Management Plan

- Case Organisation Briefing with Application Files and Fund Balances
- Eligibility Scoring and Category Allocation Applied to the Case
- Home Visit Plan and Aid Type Choices for Sampled Households
- Duplicate Check and Outcome Tracking Design for the Case
- Zakat Distribution and Case Management Plan Completion and Peer Review

Skills You Will Gain:

- Zakat Category Allocation
- Eligibility Scoring Design
- Applicant Evidence Review
- Home Visit Assessment
- Aid Type Matching
- Duplicate Payment Control
- Case File Management
- Aid Outcome Tracking

Why Attend This Course:

- Deliver a Zakat Distribution and Case Management Plan to the committee chair, the finance lead and the field supervisor
- Decide which category an applicant falls under and which aid type fits, using a scored and documented basis
- Avoid paying the same household twice, funding ineligible applicants and defending decisions without records
- Share scoring sheets, visit checklists and register templates with colleagues who handle applications and payments

Conclusion:

Back at work, the participant presents the Zakat Distribution and Case Management Plan to the committee chair, the finance lead and the field team supervisor, who use it to approve category budgets, scoring thresholds and home visit rules. Case officers use its duplicate check routine and closure criteria to keep files consistent. After the first distribution cycle, the unit should review exception decisions, repeat applicants and outcome results against the plan, then adjust weights and aid mixes.

Frequently Asked Questions FAQ:

What should participants know before a zakat and charitable aid distribution course?

Participants should already receive, assess or approve aid applications for a charity or zakat committee. Bringing an anonymised application form, a scoring sheet or a payment list from their own organisation lets them test the methods on real material.

How does a zakat and charitable aid distribution course differ from a social services management course?

It centres on fund rules, recipient categories, eligibility scoring and duplicate payment control for aid funds. A social services management course centres on casework supervision, service standards and programme evaluation for agencies, which this course touches only through case files.

Why does zakat distribution use eligibility scoring for applicants?

Scoring turns need indicators into a repeatable decision, so two officers reach the same result for similar households. It also leaves a written basis for approvals and rejections, which helps committees explain choices and answer appeals.

What do participants take back from a zakat and charitable aid distribution course?

Participants take back a Zakat Distribution and Case Management Plan, plus an intake checklist, a weighted scoring sheet, a home visit protocol and an outcome tracker that they can adapt for their own committee or charity.