



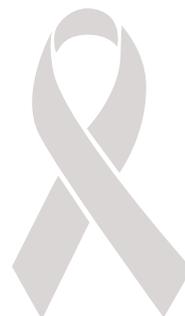
CASS
BUSINESS SCHOOL
CITY UNIVERSITY OF LONDON
— EST 1894 —

**Centre for Charity
Effectiveness**

Postgraduate Certificate:

**Grantmaking, Philanthropy and
Social Investment**

Course Overview April 2018



**Centre for Charity
Effectiveness**

Intellectual leadership:
developing talent,
enhancing performance

Centre for Charity Effectiveness

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PgCert in Grantmaking, Philanthropy and Social Investment

This unique course reflects the increasing interest in effective and transparent social funding in both the charitable trust and public sectors. The first course of its kind in the UK and Europe, it was developed in response to the demands of leading funding agencies.

The scope of the course is all types of social investment where the emphasis is on social benefit rather than financial return. The course examines the giving of grants and other forms of investment such as loans, endowments, contracts, social bonds and impact investing.

The course is aimed not only at those already working in some aspect of social funding but also those who want to find out more about the world of philanthropy and social investment, including those making a career shift. Though the course inevitably takes the majority of its examples from the UK it is designed to be international in scope and what you learn is transferable to any culture or jurisdiction.

As a student you will gain an understanding of:

- A broad knowledge and understanding of nonprofit organisations and the external context in which they operate
- The background (history and facts) of the grantmaking and philanthropy sector
- The different models and practices of the sector
- The strategic and tactical decisions that need to be made in philanthropic activity
- The theoretical tools that are critical for social investment including evaluation, impact measurement, risk and operations management
- A range of approaches to key issues presented by major practitioners
- How to design and operate a programme for social investment that will maximise social impact.

WHAT SETS THE CASS GRANTMAKING, PHILANTHROPY AND SOCIAL INVESTMENT COURSE APART

Practicality: The Cass programme in Grantmaking, Philanthropy and Social Investment is the only course in the world that give you a complete 'toolkit' for the construction of social investment programmes.

Future-facing: The course stays up-to-date with the rapidly changing world of philanthropy and social investment ensuring immediate applicability. It is revised annually and both the external and internal experts change to ensure we address both current and anticipated changes in the sector.

Both academic and applied: The course is a high-level academic qualification from one of the world's leading business schools and as such treats the subject as being embedded in wider finance and management studies.

A rich learning environment: Course lecturers are among the leading experts in their fields both nationally and internationally and the course has been awarded a teaching prize for excellence. The diversity of our student cohort ensures a rich and stimulating learning environment.

Our students

All students are highly motivated graduate-level people who bring a wide range of professional competencies, skills and experience from a wide range of backgrounds.

Typically, we ask for:

- a good first degree, normally a 2.1 Honours degree from a British university or an equivalent qualification from a leading overseas institution;
- and three or more years relevant experience at a senior level. In exceptional cases we will accept those without a degree, provided they have significant and relevant work experience

Cathy Elliot

Chief Executive, Community Foundations for Lancashire and Merseyside

I found the PGCert course a very good opportunity to debate and research the issues, trends and practices at this time in the social sector whether driven by legislation, funding or a wish to innovate. The course gave thorough instruction across the field of social sector work, especially grant making.

Ciorsdan Brown

Grants Officer, The Goldsmiths' Company

The course was invaluable to me in terms of: practical assignments applicable to my own working environment; access to a wide range of knowledge and teaching and; most importantly, a fantastic and diverse network of colleagues with whom I am still in touch today. I believe I would not have had the confidence to advise my Company on our Strategic Review, had it not been for the course.

Curriculum overview

Though the course provides a solid background in the history and theory of philanthropy and grantmaking (with examples both from the UK and abroad), a major component is the application of social investment practice as a business process. Students will develop a clear understanding of the principles and practice of philanthropy and grantmaking and the importance of all aspects of risk assessment, probity of applications, ethical frameworks and relationships with external communities and agencies.

It is intended that the award, given its uniqueness, will develop into the professional qualification for grant makers.

It is the only postgraduate course offered at Certificate level by Cass Business School's Centre for Charity Effectiveness (Cass CCE). Cass CCE inspires transformation and delivers positive change within the nonprofit sector through a mix of educational programmes, consultancy services and convening activities.

The full MSc is taught on a part-time basis over a period of three years if starting with the April intake for the PgCert. Some students complete solely the Postgraduate Certificate, others continue to complete the additional modules for the Postgraduate Diploma, and return to complete the MSc.

The PgCert concentrates on the key skills and knowledge in the area of grantmaking, philanthropy and social investment. The additional three core modules to be completed on the PgDip conversion are common to all of the Centre's postgraduate courses. These core modules provide the essential underpinning of management skills for the specialist modules.

To complete the full MSc, students are required to take the Research Methods for Managers module in the second year. They may then elect to conduct six months of personal supervised research and the presentation of a 15,000 word dissertation. Alternatively, they may choose to attend the Social Enterprise module and the two taught Specialist Pathway modules of one of the other courses as a Taught Masters.

All courses are taught at Cass Business School and will require attendance one weekend each month commencing on Friday afternoon from 13.00 to 21.00 and finishing on Saturday at 17.30.

Additional attendance will be required (first year only):

- On the Induction Day (the Friday of the April weekend of the course)
- For Action Learning Set meetings (usually alternate months, on Friday morning of the teaching weekend)
- The Principles and Practices of Grantmaking module exam.

Grantmaking, Philanthropy and Social Investment modules

Principles and Practices of Grantmaking

The aims of the module are to develop a clear understanding of principles of grantmaking and other types of social funding and how these are applied in different institutions in a UK context: public and quasi-public authorities, independent charitable trusts and foundations.

SYLLABUS

- The settings and context of grantmaking and other types of social funding
- The development of different types of funding institutions, with their income sources, legal structures, and governance
- The different styles and purposes of funding, and alternatives to it
- Key elements and dilemmas of funding: innovation/replication, outputs/outcomes, the funding cycle, evaluation, risk-taking, public/donor expectations.

Managing of Grantmaking

The aims of this module are to facilitate and enhance understanding of the importance of the management of grantmaking, and other social funding, in all its aspects, in a variety of funding organisations. Also to explore and critique alternative models and methods of funding management.

SYLLABUS

- Strategic and policy choices for funders
- Planning funding administration
- Promotion and publicity
- Processes
- Assessment and decision-making
- Grant management and monitoring
- Evaluation and strategic planning.

Shadowing/fieldwork exercise

This module provides a tailored learning experience centred on your learning contract and built around a four to five day negotiated shadowing experience where you will shadow a senior manager in a voluntary sector organisation or take a management consultancy type fieldwork exercise.

SYLLABUS

- Develop a wider perspective on their role by gaining a deeper understanding of the environment of philanthropy and grantmaking
- Consider the different ethical and environmental issues faced by Funders
- Gain an insight into the funder's role and working practices through observing or in other ways.
- Have the opportunity to extend the learning experience gained through the learning sets and the specialist modules.

These two pages provide a summary of the Grantmaking, Philanthropy and Social Investment Specialist Modules and the core module that students complete for the PgCert. The additional core modules for completion of the PgDip conversion are also noted. Further summaries for other courses' Specialist Modules can be found in their respective course brochures.

Core modules

Learning and Understanding the Voluntary Sector

This module aims to enable you to:

- Map out your learning and development needs
- Set these needs within the context of the programme
- Learn new learning and study skills
- Develop skills to research a field of study selecting relevant information whilst omitting irrelevant discourse
- Develop skills to analyse and synthesise complex information within a coherent framework
- Understand and grasp the skill of working in an Action Learning Set (ALS).

The additional core modules for the conversion to the PgDip are:

Resource Management

This module aims to enable you to:

- Understand the principles of resource management within the specialist context of charities.

Marketing and Fundraising

This module aims to enable you to:

- Recognise and use the concepts, underpinning knowledge, skills and techniques to plan and develop marketing and operations systems
- Analyse marketing needs, evaluate marketing plans, in the context of applying marketing concepts to your own organisation.

Strategy, Diversity and Governance

This module aims to enable you to:

- Develop a broad knowledge and conceptual base in the field of strategy development, diversity and governance.



Year 1 – 2018

POSTGRADUATE CERTIFICATE

Module	Date
Induction	13 April 2018
Learning and Understanding the Voluntary Sector	13 – 14 April 2018
Principles and Practices of Grantmaking	18 – 19 May 2018 08 June 2018
Exam*	06 July 2018
Management of Grantmaking	09 June 2018 13 – 14 July 2018
Fieldwork exercise	Process to be completed by early August 2018
Course Review Day	07 September 2018

*All other modules are assessed by coursework

Teaching normally takes place between 13.00 and 21.00 on Friday, and 09.15 to 17.30 on Saturday.

An Action Learning Set session will take place on the Friday morning of each alternate teaching module.

Year 2 – 2018/19

**POSTGRADUATE DIPLOMA CONVERSION
(DATES TO BE CONFIRMED APRIL 2018)**

Module	Date
Strategy, Diversity and Governance	09 – 10 November 2018 07 – 08 December 2018
Marketing and Fundraising	11 – 12 January 2019
Resource Management	15 – 16 February 2019 15 – 16 March 2019 05 – 06 April 2019
Exam*	03 May 2019

*All other modules are assessed by coursework

Year 3 – 2019/20

**MSC CONVERSION FROM JANUARY 2020
(DATES TO BE CONFIRMED NOVEMBER 2019)**

Module	Date
Research Methods for Managers	January 2020
Masters by Dissertation	
Dissertation submission	September 2020
Taught Masters	
All options	
Social Enterprise	February 2020 March 2020
Specialist module 1	May/June 2020
Exam on Charity Accounting and Financial Management or Charity Marketing and Fundraising options only	Early July 2020
Specialist module 2	July 2020

The Faculty

Grantmaking, Philanthropy and Social Investment Faculty

Peter Grant

Dr Peter Grant is one of the UK's leading practitioners in public and charitable funding. After working in the arts, he was Director of an inner-city youth charity for eight years. On the commencement of the National Lottery he moved to Sport England where he devised the first Lottery programme to favour areas of deprivation and was one of the architects of Awards for All. As Director of Operations at the New Opportunities Fund between 1999 and 2005, he developed and delivered over £4.5 billion of funding programmes.

Peter then devised the world's first full masters-level programme in grantmaking and philanthropy at Cass Business School. He has published widely on philanthropy, CSR, and history (notably the period of the First World War). His definitive book 'The Business of Giving: The theory and practice of philanthropy, grantmaking and social investment' was published in 2011. Peter has also written the definitive study of charity during the Great War, 'Philanthropy and Voluntary Action in the First World War' which was published in 2014. His latest book is 'National Myth and the First World War in Popular Music' came out in 2016.

Guest Lecturers include:

Dr Beth Breeze: Director, Centre for Philanthropy, University of Kent

David Cutler: Director, Baring Foundation

George Gosling: Teaching fellow in Modern History, King's College London (with particular interest in the relationship between business and charity)

Margo Horsley: Chief Executive, Fixers

Gerald Oppenheim: Head of Policy, Fundraising Regulator

Elisabeth Paulson: Investment Director, Impetus Private Equity Foundation

Sarah Ridley: Chief Executive, London Marathon Trust

Michelle Russell: Director of Investigations, Monitoring and Enforcement, Charity Commission

Jane Steele: Head of Impact and Evaluation, Paul Hamlyn Foundation

Paul Streets: Chief Executive, Lloyds Bank Foundation



Core Faculty

The faculty represents a combination of leading academics and practitioners.

Justin Davis Smith is a Senior Research Fellow at the Centre for Charity Effectiveness, Cass Business School. He was previously Chief Executive of Volunteering England, Director of the Institute for Volunteering Research and Executive Director of Volunteering at NCVO. He has over 20 years researching and leading in the volunteering movement and has advised the UK Government and the United Nations on the development of volunteering policy.

Professor John Hailey is a Senior Teaching Fellow at Cass Business School and the academic leader on the MSc NGO Management. He is also an independent consultant. Formerly, he was Professor of International Management and Deputy Director of Oxford Brookes University Business School, Director of the International Development Centre at Cranfield School of Management, and a Research Fellow at the East West Center in Hawaii. He was also one of the founders of the Oxford-based International NGO Training and Research Centre (INTRAC), and was the first Director of INTRAC's Praxis Programme which was established to inform the development of new approaches to capacity building and managing change.

Professor Andrew Hind is a Visiting Professor in Charity Governance and Finance. He is the joint Module Leader for Resource Management and Voluntary Sector Financial Management with Professor Paul Palmer. He was previously the Chief Executive of the Charity Commission and is formerly Editor of the Charity Finance Magazine.

Professor Stephen Lee is Academic Leader for the Charity Marketing and Fundraising programme. He is an active researcher and leading commentator on strategy development, marketing, fundraising, ethics and nonprofit governance issues. He entered the nonprofit sector in 1982 as Deputy Chief Executive at the Charities Advisory Trust and Directory of Social Change. Following further senior appointments in the sector, he held the post of Director of the Institute of Fundraising (IOF) for a period of eleven years.

Professor Paul Palmer is the Associate Dean for Ethics, Sustainability and Community Engagement at Cass Business School as well as the Centre's Course Director for the Charity Masters programmes. As the author of several books on charity finance and governance, he also contributes to NCVO's web-based helpline and is a member of the Charity Commission's SORP committee. Previously he worked in senior positions in the nonprofit sector.

Atul Patel is a Senior Teaching Fellow and the Academic Leader on the MSc Voluntary Sector Management. Qualified in social work, he has spent more than 15 years working in the nonprofit and statutory sectors. His particular interests are in management development, strategy development, diversity development, assessment of complex staffing situations and advising trustees.



Course fees

The fees for the programme are:

Year 1 (Postgraduate Certificate):
£3,000

Year 2 (Postgraduate Diploma Conversion):
£3,000

Year 3 (MSc Conversion):
£3,500

First year fees are paid in two instalments. The deposit of £400 must be paid in order to accept the offer, and secure the place on the course. The remainder of the fee must be paid in order to complete registration. If sponsored, the sponsoring charity will be invoiced around the start date of the course. Any deposit paid to secure your place will be deducted from the first instalment.

For those converting to the Postgraduate Diploma the fee of £3,000 is payable on re-registration in January 2019.

For those converting the diploma to MSc the fee of £3,500 is payable as a single payment in the second year.

For any further enquiries, please contact the Charity Programmes Office charityapps@city.ac.uk

Application

Apply for the course by completing the online application form, using the Apply Now button on the following page:

www.cass.city.ac.uk/courses/masters/charity-courses/grantmaking-philanthropy-and-social-investment/2017/applications

Please attach a current CV and a personal statement to your application to show the breadth and relevance of your experience which it may not be possible to detail on the online form.

Please provide details for one academic and one professional reference or two professional references, depending on which is more relevant to your background in the past 3 - 5 years.

In order to participate fully in the collaborative learning process, all students who have not previously studied in English must sit an IELTS exam. The required IELTS level is an average of 7.0 with a minimum of 6.5 in writing.

If you are not a native English speaker but have been studying in the UK for the last three years it is unlikely you will need to take the test. Please submit a copy of your most recent English language test/qualification along with your application and a decision will be made by the Admissions Panel.

Cass Centre for Charity Effectiveness

- Our enduring mission is to drive transformation in the sector. We will continue to innovate, enable outstanding leadership, and deliver sustainable change through applied research, professional development programmes and consultancy to both support the sector in the UK and internationally.
- We are the sector's academic convenor. We are the place where students can gain world class Masters degrees, where charity leaders come for cutting-edge professional development and to meet and network with peers and share their experiences and ideas.
- Our inspirational alumni lead some of the UK's most successful charities and return regularly for professional development, consultancy services and networking. They are core to delivering our ongoing mission to drive transformation within the sector and society.

Find out more about us: www.cass.city.ac.uk/cce

Celebrating over 10 years
inspiring transformation
within the nonprofit sector

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Cass Business School

In 2002, the School was renamed Sir John Cass Business School following a generous donation towards the development of its new Bunhill Row premises.

Sir John Cass's Foundation

Sir John Cass's Foundation has supported education in London since the 18th century and takes its name from its founder, Sir John Cass, who established a school in Aldgate in 1710. Born in the City of London in 1661, Sir John served as an MP for the City and was knighted in 1713.



City, University of London is an independent member of the University of London which was established by Royal Charter in 1836. It consists of 18 independent member institutions of outstanding global reputation and several prestigious central academic bodies and activities.



UNIVERSITY OF LONDON



Disclaimer: All the information contained within this brochure was correct at the time of going to print. Published November 2016.