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COURSE BROCHURE

Advanced Corporate Philanthropy and Foundation Governance Training Course

12 – 23 July 2027
Rome

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Advanced Corporate Philanthropy and Foundation Governance Training Course

Ref: 702_26277 **Date:** 12 – 23 July 2027 **Location:** Rome **Fees:** 11100 GBP

Corporate Philanthropy and Foundation Governance is a 2-week advanced training course for giving managers, foundation secretaries and corporate affairs leads who steward company donations, endowments and grant portfolios. Boards, auditors and grantees now expect the same discipline in a corporate foundation as in any regulated fund, so loose giving habits carry reputational and legal exposure. Participants draft a foundation grant-making charter with Jupiter Prime Training.

Why Corporate Philanthropy and Foundation Governance Matters Now

Three groups shape corporate giving today. Boards want donations tied to declared purposes and protected from conflicts of interest, auditors test whether grants reach the purposes approved, and grantees ask for multi-year, predictable funding rather than one-off cheques. A company that governs its foundation well earns trust, attracts capable partners and avoids the scandals that follow misdirected funds; one that does not faces reputational damage and frozen accounts. The course draws on the Global Reporting Initiative GRI Standards for disclosing donations and on recognised practice for trustee duties, endowment stewardship and grant due diligence.

Who Gains Most from Corporate Philanthropy and Foundation Governance

- Giving functions that decide which causes receive company donations and in-kind support
- Foundation secretariats that prepare trustee papers, grant files and annual returns
- Corporate affairs units that link donations with reputation and partner relations
- Finance and treasury staff who manage endowment assets, payout and grant disbursement
- Internal audit and assurance teams that test donation controls and grantee spending

The largest gain comes when a foundation secretary, a finance officer and an audit lead from the same group attend together and rebuild the grant cycle as one chain of decisions.

Corporate Philanthropy and Foundation Governance Capabilities

By the final day participants can take a donation request from first contact to closed grant file, with every approval, payment and check placed in the right hands.

- Design a foundation charter and trustee mandate — for the parent company board
- Weigh endowment, annual budget and hybrid funding models — for finance committees
- Apply grantee due diligence and anti-bribery screening — for trustees and auditors
- Build a grant agreement with milestones, reporting and clawback terms — for legal advisers
- Calculate a sustainable payout rate from endowment returns — for treasury officers

- Communicate giving decisions in donation disclosures — for investors and the public

Key Corporate Philanthropy and Foundation Governance Terms

- Corporate foundation — a separate charitable entity funded by a company that awards grants under its own trustees and charter
- Grant-making policy — the written rules on eligible causes, award sizes, approval limits and exclusions for donations
- Due diligence — the checks on a grantee's legal standing, ownership, finances and reputation before any funds are released
- Payout rate — the share of endowment assets a foundation distributes each year as grants and running costs
- Restricted grant — funding that the recipient may spend only on a named purpose, project or period
- Clawback clause — a grant agreement term allowing the donor to recover funds that were misused or left unspent

Corporate Philanthropy and Foundation Governance Day by Day

Day 1: Giving Landscape and Foundation Models

- Corporate Giving Models Compared — Choosing Direct Donations or Foundation
- Foundation Legal Forms — Trust, Company or Endowed Entity Choice
- Arm's-Length Principle — Separating Foundation Decisions from Commercial Interests
- Giving Purpose Statement — Defining Causes the Company Will Fund
- Peer Foundation Benchmarking — Lessons from Banking and Energy Donors

Day 2: Charter, Trustees and Board Oversight

- Foundation Charter Drafting — Fixing Objects, Powers and Limits
- Trustee Selection Matrix — Balancing Skills, Independence and Company Seats
- Committee Structure Design — Grants, Investment and Audit Committees
- Delegation of Authority Schedule — Approval Limits per Grant Size
- Board Reporting Calendar — What Trustees Receive and When

Day 3: Conflicts, Ethics and Donation Controls

- Conflict of Interest Register — Declaring Links with Grantees
- Anti-Bribery Screening — Spotting Donations Disguised as Inducements
- Political and Sponsorship Boundaries — Keeping Grants Apart from Marketing
- Gift and Hospitality Rules — Protecting Trustees and Staff
- Whistleblowing Channel — Handling Concerns about Misdirected Funds

Day 4: Funding Models and Endowment Stewardship

- Endowment Investment Policy — Risk Appetite and Asset Mix
- Payout Rate Calculation — Linking Distributions to Asset Returns
- Annual Budget Funding — Profit-Linked Donations and Volatility
- Hybrid Funding Design — Combining Endowment and Annual Contributions
- Reserves Policy — Protecting Grant Promises in Lean Years

Day 5: Grant Portfolio Design

- Thematic Focus Areas — Health, Education and Environment Choices
- Grant Size Bands — Small, Core and Flagship Awards
- Multi-Year Core Funding — Weighing Flexibility against Control
- In-Kind and Employee Giving — Matching Gifts and Volunteer Hours
- Portfolio Balance Review — Spread across Causes and Grantee Types

Day 6: Calls, Applications and Due Diligence

- Open Calls versus Invited Proposals — Reach and Workload Trade-Offs
- Application Form Design — Asking Only What Decisions Need
- Grantee Due Diligence Checklist — Legal, Financial and Reputation Checks
- Sanctions and Ownership Screening — Clearing Recipients before Award
- Scoring Rubric and Panel Moderation — Consistent Award Decisions

Day 7: Grant Agreements and Disbursement

- Grant Agreement Structure — Purpose, Budget and Reporting Terms
- Restricted and Unrestricted Funds — Choosing the Right Grant Type
- Milestone-Based Tranches — Releasing Funds against Evidence
- Clawback and Termination Clauses — Protecting Donated Funds
- Disbursement Controls — Bank Verification and Segregated Approvals

Day 8: Monitoring, Learning and Grantee Relations

- Grantee Progress Reports — Proportionate Narrative and Financial Returns
- Site Visits and Spot Checks — Verifying Spending on the Ground
- Outcome Indicators for Grants — Tracking Change Grantees Report
- Grantee Feedback Surveys — Improving the Donor Relationship
- Grant Closure Files — Recording Lessons and Unspent Balances

Day 9: Disclosure, Audit and Trust

- Donation Disclosure under GRI Standards — Reporting Giving Transparently
- Foundation Annual Report — Trustee Statement and Grants List
- Internal Audit of Giving — Testing Controls across the Grant Cycle
- Reputation Incident Playbook — Responding to a Questioned Grant
- Media and Partner Messaging — Explaining Giving Choices Plainly

Day 10: Practising the Foundation Grant-Making Charter

- Applying Charter and Trustee Design — Drafting Objects and Powers
- Applying Conflict and Screening Rules — Building the Control Section
- Applying Payout and Reserves Policy — Setting the Funding Clause
- Applying Agreement and Monitoring Terms — Fixing the Grant Cycle
- Foundation Grant-Making Charter — Presenting the Final Draft to Peers

Applying Corporate Philanthropy and Foundation Governance After the Course

- Run a conflict of interest declaration round for all trustees and grants committee members using the register built during the course
- Test the last ten grant files against the due diligence checklist and close any gaps in screening or disbursement records

Corporate Philanthropy and Foundation Governance Questions FAQ

What is Corporate Philanthropy and Foundation Governance and why does it matter now?

Corporate philanthropy and foundation governance is the set of rules, roles and controls that decide how a company gives. It matters now because boards, auditors and grantees expect donations to follow declared purposes, transparent approval and documented checks.

Which roles gain most from Corporate Philanthropy and Foundation Governance training?

Foundation secretaries, giving managers, corporate affairs leads, finance officers who handle endowments and internal auditors gain most. Each owns part of the grant cycle, from approving a donation to verifying how a grantee spends it.

How does Corporate Philanthropy and Foundation Governance differ from a broad corporate sustainability course?

It narrows to grant-making, trustee oversight, endowment payout and donation controls. A broad sustainability course covers emissions, supply chains and reporting at company level, while this course works inside the giving function and the foundation itself.

What do you bring back from Corporate Philanthropy and Foundation Governance training?

You bring back a draft grant-making charter covering foundation objects, trustee powers, conflict rules, payout policy and grant agreement terms, ready for review by your board or trustees.

Corporate Philanthropy and Foundation Governance: The Way Forward

The foundation grant-making charter first informs the trustees' decision on approval limits and conflict rules. Foundation secretaries use it to run each grant round, finance officers to set payout, and auditors to test controls. After the first full grant cycle, revisit the balance between restricted and unrestricted funding, since grantee feedback often shows where flexibility would serve donated funds better.