

The grantmaking/social investment cycle

This process provides an overview of a grantmaking cycle for social investors

01	Determine the grantmaking/social investment opportunity <ul style="list-style-type: none">Assess local contexts and conditions through a community lens and research political, social, cultural, institutional and geographic aspects to understand local cultures, customs, risks and potential opportunities.Assess community needs, opportunities, priorities and resources.
02	Engagement – confirm the grantmaking/social investment opportunity <ul style="list-style-type: none">Engage with internal and external stakeholders to confirm investment opportunities and priorities, identify partners and collaborators, and confirm development and investment approaches.
03	Investor/grantmaker strategy <ul style="list-style-type: none">Determine investor objectives to ensure the creation of social capital and shared value.Identify development priorities where social investment can deliver the biggest contribution to achieve meaningful impact and return on investment.Determine budget and resource requirements to address social issues and systems coherently.
04	Due diligence <ul style="list-style-type: none">Determine development objectives.Determine grantmaking criteria and funding principles.Confirm strategic outcomes, roles and responsibilities.
05	Design <ul style="list-style-type: none">Design programmes/interventions based on research and identified community needs.Design indicators to measure progress, impact and return on investment.
06	Implementation and monitoring <ul style="list-style-type: none">Monitor programmes, activities, outputs and outcomes.Monitor implementation partners and processes.Obtain feedback and input from programme beneficiaries.
07	Evaluation and programme management <ul style="list-style-type: none">Conduct an evaluation to determine the effectiveness, efficiency, relevance, impact and sustainability of the programme and test whether strategic objectives were met.
08	Determining impact and return on investment <ul style="list-style-type: none">Conduct impact and return on investment assessment of development programmes, investment portfolios and strategic objectives.
09	Learning <ul style="list-style-type: none">Document lessons learned from the monitoring and evaluation process to ensure best practice and inform future grantmaking decisions.
10	Reporting <ul style="list-style-type: none">Share outcomes, impact and return on investment with internal and external stakeholders.



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