

## Terms of Reference

### Independent Learning Review of the Joffe Trust Legacy Grants

**Issued by:** Joffe Trust

**Budget:** £6,000 (including expenses and excluding VAT)

**Deadline:** 8<sup>th</sup> May 2026

**Payment schedule:** 50% on inception and 50% on completion

**Project timeline:** May to October (negotiable)

#### 1. Background

The Joffe Trust is in the process of spending out and we expect to close in around 2030. As part of our planning for closure, we redesigned our grant-making approach for our *'strengthening high-potential non-profit organisations'* programme. As a result, we closed the programme to new applications and [awarded final legacy grants](#) to eight organisations that we had previously funded. The aim of these grants is *'to help civil society leaders build sustainable and successful non-profit organisations that advance global justice and equality, particularly with impact in low-income countries'*. Each grant is for £200k over four years and runs from January 2025 to December 2028.

We continue to make new grants under our programme on tackling illicit finance.

#### 2. Partner-led approach

At the end of 2025, we asked our eight legacy grantee partners for their views on whether to undertake a learning exercise. They told us they:

- supported the principle of capturing and sharing learning, provided it does not duplicate impact assessments that they already do themselves;
- thought the primary audience should be other funders, with a particular focus on informing grant-making practice;
- felt that learning should focus on the impact of the Trust's grant-making approach on partner organisational health, sustainability and resilience, and leadership capacity and wellbeing;
- valued the importance of capturing and sharing learning sooner rather than later, and noted that it could be shared beyond UK funder networks;
- would be happy to participate, particularly if the approach is proportionate, relational and conversation-led.

#### 3. Learning questions

This review will form part of our ongoing commitment to contribute meaningfully, during our final phase of operation, to learning for the wider grant-making and philanthropy sector, particularly in the UK. We expect that the review will generate insights relating to trust-based and time-bound grant-making and how these approaches impact the organisational resilience and capacity of partners. We propose that the core learning questions should include:

- How has the approach to the design and implementation of the legacy grants (including size, duration, flexibility, reporting and relationship management) impacted partners' organisational development and resilience?
- In what ways has this approach influenced the capacity, resilience and wellbeing of leaders and their teams, particularly in light of growing external pressures and challenges in the sector?
- What key themes and / or consequences (positive or negative) of this approach have emerged?
- What aspects are most relevant or transferable for other funders?
- Are there particular insights that could help to guide 'good endings' for time-limited grant-making and / or organisations operating in a spend out context or considering closing established grant programmes?

#### 4. Scope and methodology

We expect the consultant(s) will:

1. Conduct a light-touch desk-based exercise and consult with Trust staff to develop a detailed understanding of the background, decision-making and design and approach to the development and implementation of the legacy grants.
2. Design and deliver up to ten interviews, to be held in person, where possible and feasible within the budget (this will likely comprise eight grantee partner interviews and two Joffe representative interviews).
3. Use appropriate interview techniques that are conversation-led to best capture qualitative insights and learning.
4. Produce high-quality, accessible outputs suitable for the key audience:
  - Synthesis report with recommendations for funders (up to 5 pages)
  - Individual case studies on each participating grantee organisation for their use as well as ours (1 page per case study)
  - Dissemination and engagement plan to ensure effective reach to our key audience (2 pages)
5. Propose creative suggestions for formats and channels to increase reach and influence (e.g. articles in sector publications, blogs, presentations to funder networks, roundtables or webinars etc).
6. Ensure appropriate consent processes and confidentiality protections for participating partners and clarify whether findings and quotations will be anonymised, attributed, or co-approved with partners (e.g. case studies).

We expect the review methodology to reflect the following principles:

- **Relational:** engaging partners through, where practical, in-person interviews.
- **Analytical:** synthesising findings to identify trends, insights, and lessons.
- **Accessible:** outputs should be clear, practical, and tailored.

The review will not assess the programmatic impact of grantee partners' work.

#### 5. Deliverables and indicative timeline (indicative)

- Delivery plan and methodology agreed (May/June)
- Interviews and analysis (June-August)

- Interim findings reported (August)
- Present findings to the Joffe Trust board (25 September)
- Final outputs signed off (October)

## **6. Governance and oversight**

- The Trust Manager will provide management and oversight. We anticipate brief, regular check-ins between the Trust Manager and consultant(s) to ensure the review remains aligned with expectations and timelines.
- While the Trust Manager will provide oversight, the consultant(s) will operate independently in analysing findings and drawing conclusions. The Trust is open to constructive challenge and critical reflection.
- All outputs must be approved by the Trust prior to dissemination.

## **7. Consultancy requirements**

The successful consultant(s) will have demonstrable knowledge and capabilities in:

- Current discourse on UK grant-making approaches and the funder landscape.
- Designing and delivering relational, conversation-led interviews that recognise and navigate inherent power dynamics.
- Excellent written and verbal communications skills, able to synthesise analysis into actionable recommendations for audiences, particularly UK funders.
- Track record of engaging with UK funders, including to amplify and position learning outputs for sector influence.
- Commitment to the work and values of the Joffe Trust.

We welcome enquiries from consultants from diverse backgrounds.

## **8. How to apply**

- If you would like to discuss this opportunity, please contact Abigail Prabhakar (Trust Manager): [abigail@joffetrust.org](mailto:abigail@joffetrust.org).
- Expressions of interest (EOI) should be maximum 2 pages, plus CV. It should outline your proposed approach and methodology, indicative timeline, and budget (including number of days and total cost). Please let us know if you think a significantly different budget is required with an accompanying rationale.
- EOIs will be assessed based on relevant experience, quality and suitability of the proposed approach, understanding of the brief, and value for money.
- EOIs will be reviewed on a rolling basis, so we may close to applications earlier than the stated deadline (8<sup>th</sup> May) if a suitable consultant is appointed.
- Shortlisted candidates may be invited to a brief online follow-up discussion (date TBA).
- There may be scope to extend the consultancy to support delivery of the dissemination and engagement plan.