

# Grant Seeking Tips: 1



## Be smart about it!

*With Kerry Anderson*

Like most people I've done my fair share of fund-raising and grant seeking for community groups. In the 1990's I got my first taste of professional fundraising with a rural hospital going through a major redevelopment.

Over a six year period our community worked really hard to raise \$5 million for the hospital, a fabulous effort that resulted in a national award. More recently, as a grants manager of a national philanthropic organisation, I gave away \$5 million in a mere six months!

I'd like to say that it is easier giving away money than it is raising it but the sad truth is that it isn't. There are so many worthy causes to support and only so many slices of the pie to share.

Your group is competing with 600,000 not-for-profits (Australia wide) so it is in your interest to use your time wisely and properly plan projects before putting pen to paper for a grant submission.

Please don't apply for a grant just because it is there. Make sure it is for a well thought out project that is a high priority for your community. By planning carefully and consulting widely you can achieve greater benefit.

Of course, no matter how worthy the project and how well written the submission, there are no guarantees but by paying attention to a few golden rules, you can improve the odds.

Here are a few suggestions that may assist. Good luck!



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## 1: Be Organisation Ready

How well is your organisation conducted in accordance with its constitution or charter?

**ABN?** Almost without exception it will need one to qualify for a grant.

**Incorporated?** If yes, does it submit an annual financial statement to Consumer Affairs? This is one of the most overlooked community group tasks. Check out who your public officer is and make sure the statement is submitted annually.

**Tax status?** Most philanthropic grants require a level of charitable status in order for an organisation to be eligible. In some cases, a few simple amendments to your constitution can make your group eligible for TCC status. Or you can partner on a project with another organisation that has charitable status.

**TIP:** Scan or copy important certificates so they are readily available to executive members of your group.

[www.abr.gov.au](http://www.abr.gov.au)

[www.consumer.vic.gov.au](http://www.consumer.vic.gov.au)

[www.ato.gov.au](http://www.ato.gov.au)

## 2. Be Project Ready

Forward planning and partnerships help strengthen a project.

Apart from being good practice, collaboration is important to demonstrate in a grant submission so talk to the wider community and other groups in your region to include their thoughts, ensure they are supportive, and avoid duplication of similar activities.

Is your project listed on the Community Plan? If not, make sure it is so that it is clearly deemed to be of benefit to the wider community.

Have a project outline, timeline and budget prepared so everyone is clear on what the project is aiming for and how it will be achieved.

Please note that a project will NOT be funded retrospectively so don't start a project and hope for the best unless it can be progressed in stages.

**What:** does the project involve and how much will it cost?

**Why:** is it important to your group and the wider community?

**Who:** will (1) benefit (2) partner and (3) manage the project?

**When:** will it take place?

## 3. Be Grant Ready

Grants can be accessed through the Government, Philanthropic and Corporate sectors.

Here are some useful websites:

[www.grantslink.gov.au](http://www.grantslink.gov.au)

[www.philanthropy.org.au](http://www.philanthropy.org.au)

[www.ourcommunity.com.au](http://www.ourcommunity.com.au)

Keep the Community and Economic Development Officers at your local council informed on your project.

**When you have achieved everything that you possibly can under your own steam, then it is time to ask for a helping hand.**

Use a catchy title. Mirror the terminology in the questions. Don't waffle and get to the point. Be specific about what you need and how it is going to be of benefit to the wider community. Get your submission in on time!

**TIP:** Read the guidelines and answer these three questions to ensure you are eligible before starting to write your submission:

1. What **organizational** requirements are there? (ie. charitable status / geographic)
2. What **project** requirements are there? (ie. special interest / target audience / exclusions)
3. What **timing** is relevant to the grant? (ie. when is the earliest that the grant will be available and when does the project need to be completed by)

## 4. Be Acquittal Ready

A project is NOT complete until the grant acquittal is submitted. By not doing so, your group has very little hope of receiving future support.

Upon receiving a grant usually a contract or grant acquittal form is provided so you will know exactly what is expected of you.

Celebrate each milestone starting with the grant announcement. Acknowledge everyone who contributes.

Take photographs, keep copies of media clippings and gather information at every step of the way to make the acquittal process a simple one.

Be honest about things that don't go to plan and keep your funding partners and the wider community regularly informed on the progress of the project. Most important of all, keep a record for future reference.



# Grant Seeking Tips: 2



## Successful project planning

*With Kerry Anderson*

With grants being advertised every month it is tempting to jump in and have a go to fund whatever piece of equipment or activity that pops into your head at the time, but is this the best you can do for your community?

If you can demonstrate that your project has been well researched and planned it will have a much higher chance of success and, more importantly, it will have much greater benefit for the community.

As always, the devil is in the detail but this shouldn't be difficult. If your committee is functioning as it should, project planning should be constantly on the agenda with lots of lead time provided.

The worst possible case scenario is that you DO get a grant for something that isn't the committee or community's highest priority!

While it is always nice to get that cheque in the mail, it may hinder the success of more important funding applications, either now or in the future. There are only so many slices of the pie to go around with 600,000 not-for-profits Australia wide all vying for their share. It is quite illogical for organisations from the same community to compete against each other.

I hope that these tips on project planning assist you to get the most effective funding for your community.

Kerry



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## 1: Research your project

### •Is this project your highest priority? •Will the community support this project?

At both an organizational and community level (Community Plan) there should be an agreed list of prioritized projects. What you may think is a good idea may not be supported by others so it is important to put your idea out there and test the market. The projects that are agreed on should receive your attention, NOT what might "best fit" the grant application.

### •Are you duplicating another project? •Does it link in with other projects?

Collaboration is important to demonstrate in any grant submission so talk to other groups in your area and region to get their support. Who can you involve as partners? Can the project design be improved for wider benefit? Will it compliment and build on other initiatives? Different organisations may be able to support different stages of the project. The possibilities are endless if you take the time to talk to each other.

### •Is it sustainable if there are ongoing costs?

What happens afterwards? All too often a great project becomes a "white elephant" because the ongoing expenses and resources required to keep it going have not been adequately thought through. Rates, insurances, electricity, water, and storage all need to be budgeted for.

**TIP:** Where possible, make sure you reference your project to relevant priorities in your Shire's Community Plan and the Regional Strategic Plan.

## 2. Project Outline

Picture yourself unexpectedly sitting next to a philanthropist at the Birchip races or at the Donald versus Charlton football match. They ask what your community group does. They're impressed. They may even ask for more detail about a project. They might have some surplus funds available!

Incredibly many people freeze at this point or blindly stumble into new territory that hasn't even been discussed at a committee meeting.

The best investment your committee will ever make is to sit down and write a **one page** "Case Study" or "Project Outline."

This document will ensure that everyone is in agreement, and everyone is clear on what is involved. It will also provide a quick reference for opportune conversations and determining if your project is eligible for a new round of funding.

Schedule a planning afternoon at least once a year. Brain storm projects over a cuppa, circulate the draft for comment to the whole club, and get some people outside your organisation to read it as well.

Then, when it is complete, make sure everyone has a copy including relevant council staff.

### What?

- Do you want to achieve?
- Will it cost?

### Why?

- Is it important to your group and the wider community?
- How will it make a difference?

### Who?

- Will manage the project?
- Support the project (partners)?
- Benefit from the project?

### When?

- Will it take start?
- Will it end?

**TIP:** If a project is dependent on a grant, use measures of months or weeks commencing with the scheduled date of funding being announced instead of specific dates that may need to be constantly revised.

## 3. Project Time-line & Plan

The next step is to plan your project out in more detail. Be realistic when setting your project time line. Rarely does much productive work takes place in December and January or during peak times for your organisation (ie. finals) and community (ie. harvest time). If you think it will take a week, best to allow two. I find it best to allocate one major task (or phase) per month. Some will run ahead of time and others a bit behind but in most instances it will even out. A project plan will help you keep track of what needs to be done, by whom, by when, and at what cost. It is also handy to include an outcomes column to record notes as your project progresses—it makes it so much easier when reporting at the project conclusion.

TASK	WHO	BY	BUDGET	OUTCOME
Conduct public survey outside super-market to determine preferred ...	Fred	31 March	\$30 cash \$100 inkind	33 people completed survey ...

## 4. Project Budget

### In-kind & Cash

- How much is your organisation contributing?
- How much are your partners contributing?
- How much do you require from the funding body to meet the shortfall?

The more specific you can be in your budgeting, the less surprises in store for your organisation and the more credibility your funding submission will have. This is where people with business experience will be of assistance. Use their expertise as it is easy to forget important expenses such as freight and permits, not to mention evaluation (important for funding bodies).

Cost out the TOTAL project including in-kind labour and support provided by committee members, sponsors and partners. Yes, this includes your meetings and working bees! \$20 per hour is a rule of thumb (check the relevant funding guidelines) or at the going rate for trade or professional services. Often these contributions play an important role in matching grant funds. \$ for \$.

Email Kerry if you would like more information on any of these discussion points—[kanderson@mmnet.com.au](mailto:kanderson@mmnet.com.au)

# Grant Seeking Tips: 3



## Applying for a grant

With Kerry Anderson

Once your project has been scoped and finely tuned it is much easier to translate this information into a grant submission.

I'd like to say that it is simply a matter of cutting and pasting (and to some extent it will be) but each grant submission needs careful consideration about how to approach it and this does take time.

Once again, it comes down to researching the funding provider and understanding exactly what **they** are seeking to support. Then you have to convince them that your project is relevant, timely and of maximum benefit to their (and your) target audiences.

Sometimes you may need to apply to more than one source of funding at a time and this is perfectly ok. Be open about this on your application as grant making people do talk to each other and often partnerships are forged for good projects.

It is perfectly acceptable to have a mix of government, corporate and philanthropic funding, especially in this very tight economy. The trick is to target what part of the project is eligible and most appealing to each body.

Hopefully these tips will assist. Kerry



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## 1: Sourcing a grant

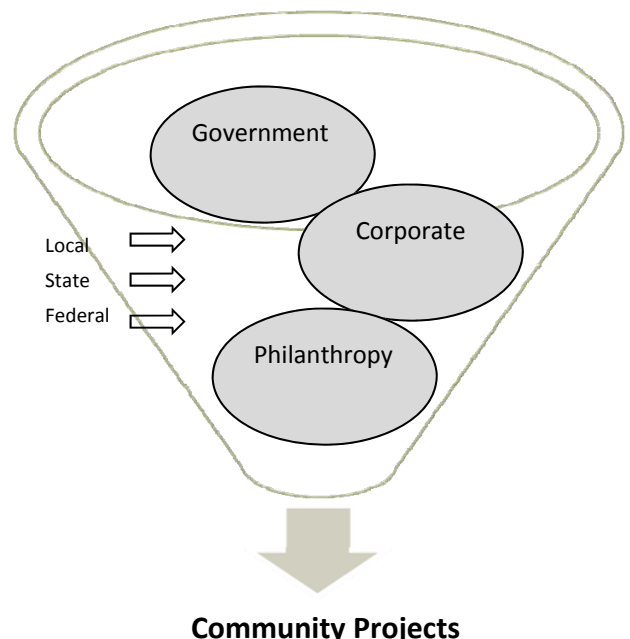
### •Government: [www.grantslink.gov.au](http://www.grantslink.gov.au)

Chat to your local representatives (local, state and federal) about your project to determine what department to make contact with. Each federal department has its own website and grants page. The Department of Planning & Community Development is good to talk to at a state level. [www.dpcd.gov.au](http://www.dpcd.gov.au) or Tel: 1300 366 356

### •Corporate / Philanthropic:

*Our Community* distributes a fantastic monthly grants newsletter listing the approaching grant deadlines for both corporate and philanthropic organisations. The Buloke Shire has a subscription to this newsletter so talk to Mark Remnant who can then direct you to the relevant websites.

Some grants are annual, others quarterly, twice a year, and occasionally open all year round. Get to know when the closing dates are so you can prepare well in advance.



**TIP:** Think outside the box. Often a project has multiple benefits (think about the ripple effect of how many different community sectors it will benefit) and you may have success applying through a different fund.

## 2. Read the Guidelines

**TIP:** Outline your project schedule by weeks/months post receipt of the grant rather than specific dates that may need to be revised.

Read the guidelines BEFORE you start and answer three questions.

- Is your organisation eligible?
- Is your project eligible?
- Will the grant announcement suit your timeline?

I can't stress this enough as too many have made the fatal error of completing a lengthy application and submitting it only to discover that their organisation (ie. tax status) or the project (ie. geographic location or type of activity) is ineligible. If you are not sure, contact the relevant organisation and discuss it with them. They are there to help and can provide useful tips on how to approach your submission.

Another important consideration is timing, particularly for events. When will the grant announcement be made? If not specifically stated, it could be anywhere from 8—12 weeks from the closing date before a decision is made. Sometimes you will need to apply 12 months in advance.

### Organisation

- Types of groups eligible?
- Tax status required?

### Project

- Geographic limitations?
- Target audiences?
- Activity exclusions?

### Timing

- Closing date of grants?
- Announcement of grants?
- Projects completed by?

## 3. Be Relevant

**TIP:** Capture interest with a short and snappy project title. Ie. "Harvest Blues" rather than "Community Concert at Sea Lake".

Picture a huge pile of applications sitting on a grant maker's desk and, by contrast, a very small pile of money — you need to make sure that your key messages are clear and concise, not buried deep in a load of waffle. Get to the point and be creative to capture interest otherwise your application will be quickly relegated to the NO pile.

Mirror the funding provider's terminology and use their headlines, not yours. Answer every question even if it means duplication but try and vary it to make it interesting. Use it to emphasise a different point each time.

Focus on what is relevant to this application—what is the community's need, how you propose to address this need, and why your group is best placed to implement the project. Reference research as evidence.

Think about the benefits to the wider community. This project may initially benefit the members of your sporting club but it can also have wider benefits addressing social isolation, mental health, or obesity, as well as valuable promotion for your community as a desirable place to live and work etc.

Be specific, particularly when it comes to the budget. Demonstrate the community's contribution. If your fund-raising capacity is limited because of hardship, or you have already done as much as you can on your own, say so. Make it clear why you need a helping hand and demonstrate that you will use the grant wisely.

## 4. Be Timely

Writing an effective grant takes time so start well in advance and work to key dates allowing a buffer zone for delays. There is no excuse for a late application!

Identify the best person to write your application and free them up from other duties. Allocate other people to gather statistics, copies of any legal documents required, supporting letters etc.

Assume that the grant maker will have no knowledge of your community or organisation. Get an independent person to read the final draft ensuring that it makes sense to them. Edit and then edit again!

The Chair or President should sign all applications ensuring that it has full committee approval. Keep a copy for your records and, finally, follow up if an acknowledgement of your application is not received.



Email Kerry if you would like more information on any of these discussion points—[kanderson@mmnet.com.au](mailto:kanderson@mmnet.com.au)

# Grant Seeking Tips: 4



## Successful reporting & acquittal

*With Kerry Anderson*

Along with receiving a grant comes a huge responsibility to ensure that the funds are spent wisely and in accordance with the terms and conditions of that grant. Building the reporting and acquittal process into your project schedule will make this task a lot easier.

Plan right from the start how you are going to keep a record of everything that occurs along the way and you will have a great resource to draw on at the conclusion when you need all those facts and figures to report back to your funding and in-kind partners.

As indicated in Grant Seeking Tips 2 it is useful to include an outcomes column in your project plan to record how many people attended a working bee and what the actual cost of an item was. Trust me, it will take the headache out of doing your final report which has to be done no matter how cumbersome the task.

If you don't acquit a grant your organisation will not receive the final payment and future funding will definitely be out of the question.

When accepting a grant on behalf of an organisation your moral obligation is not complete until that grant acquittal is lodged. Hopefully these tips will assist you in this task.

Kerry



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## 1: Celebrate the Milestones

### •Announcement of the Grant

Tell your community the good news and what you plan to do with the funds.

### •Start of project

Turning that first sod, hammering in that first nail or getting that first artist or entrant are great photo opportunities. Invite your sponsors and partners along as well as the local newspaper and radio station.

### •Completion of stages

Every achievement should be celebrated and contributions acknowledged in a newsletter or media release.

### Completion of project

Hammering in the last nail or the actual event itself is essential to be recorded.

### Overview of project outcomes

After tallying the figures and evaluating the feedback, make sure you share that information with your community as well as funding partners on what went well and what could be done better next time. Don't try and gloss it over, be factual and include comments from participants to add a personal element.

**TIP:** Put out a monthly email update on the project's progress to keep all your partners informed.



## 2. Evaluation

How do you know that you achieved what you set out to do unless you ask? This includes the funding partners, volunteers and participants, and sometimes even the wider community depending on the type of project.

No project is perfect so don't try and pretend otherwise. Sometimes the outcomes are far less than expected. On the other hand, sometimes projects exceed expectations. Why? Regardless of whether it was good or bad, funding bodies want you to capture that information, understand what factors most influenced the outcomes, and learn from the process.

Numbers are relatively easy but don't forget that the qualitative feedback is just as important as this can help measure the effectiveness of your project objectives as stated in your initial proposal.

Did it meet their expectations, what emotions did it inspire, what knowledge was gained and, most importantly, did it influence any changed behaviour. For instance your event may be aimed at reducing social isolation or increasing physical exercise. Invite people to comment and, with their permission, use these as quotes with photographs. By recording reactions and comments during the actual event you can gather lots of supporting evidence.

Evaluate using simple surveys at the event and/or send it out post event to capture changed behaviours. SurveyMonkey (google it) is a free online tool if your target audience is technology savvy.

## 3. Grant Acquittal

Most funding bodies will provide a copy of the acquittal template upon confirmation of the grant. If not, please ask for a copy and make sure you take the time to read it and understand what information you have to provide BEFORE the project even starts.

A report is usually due within one year of the project commencing unless otherwise stated. No project is complete until the acquittal is lodged.

- List the acquittal as a task in your project plan / note on the agenda.
- Schedule an acquittal due date in your diary.
- Complete the acquittal immediately your project ends OR ask for an extension if required.

## 4. Acknowledge your partners

The most effective projects are the result of team work so it is important to acknowledge your volunteers and contributing partners at every step along the way otherwise you may find yourself doing all the work alone!

Determine at the start of your project what your partners' expectations are regarding acknowledgement. For example a funding partner might expect their logo on all literature, a plaque to be erected, or a representative to speak at an event. Find out and then exceed those expectations!

Invite them to every milestone celebration. Include them in media releases, notices and newsletters. Distribute a monthly project update to keep them informed and avoid last minute surprises.

### Numbers?

- Assisted
- Participated
- Benefitted

### Expectations met?

- Volunteers
- Participants & Community
- Partners

### Emotions inspired?

- Positive
- Negative

### Knowledge gained?

- What did they learn?
- What do they still want to learn?

### Changed behaviour?

- Will they do something differently as a result?

**TIP:** Simple evaluation techniques can include getting participants to indicate a response by putting a small item (ie. lolly) in one of a series of labeled containers OR a red dot in a labeled circle drawn on butcher's paper. Position these at the exit door to capture their thoughts as they depart.

