

Grant Writing Workshop

August 2018

Presented by: Sarah Thompson

Executive Officer

Into Our Hands Community Foundation



Philanthropy following disaster

- Donations to charities and foundations surge as television coverage increases.
- Black Saturday \$430M ++ Nepal earthquake is another example.
- However coordination and effective spending of donor dollars is a particular challenge, not just while the disaster is underway, but also in the long-term, as rebuilding begins.
- Community and local foundations are best placed to be strategic but agile in how money is spent locally and can support the recovery effort over the long term

Our Story

- Established 2012/3
- Victorian Bushfire appeals fund entrusted funds
- Focus has been rebuild, recovery, community resilience and wellbeing
- Continued support and legacy for bushfire affected communities with new focus on strategic grants and wider regional impact
- Granted over \$626,000 in the North East

Key attributes of a community foundation

- It is an accessible vehicle to connect donors with areas or issues of concern to bring about positive social action and giving.
- It is a prudent investor.
- It is a grant maker.
- Serve geographically defined communities – a city, state, region, district.
- Boards reflect the local community
- Build capital endowment as a resource base for the community to access funds long term
- Community development vehicle
- Leader and convener in the community. An effective, independent arena for addressing difficult issues and advocating for needed projects.

Our Trusts

PuAF- Public Ancillary Fund
DGR- Deductible Gift Recipient
TCC- Tax Concession Charity



**Into Our Hands Community
Foundation Limited**
(TCC)
ABN 14160630491
Open Fund

Tax exempt charitable
fund for public and private
donations and holding
community grants



Public and
private
donations
Tax deductible

Trustee IOH Public Fund
(PuAF) (DGR 2 & TCC)
ABN 74193767461

Wind up 2022 or
earlier. Balance
to be transferred
to general
charitable fund

**Trustee for IOH Community
Foundation**
(VBAF Funds) (TCC) Exp2022
ABN 2533990070

**Granting
abilities**

Grants to DGR item 1 charities
with income tax exemption

Activities and/ or grants to
individuals or organisations for
charitable purposes.

Grants to individuals or
organisations in line with IOH CF
Trust Deed. (Bushfire affected)

Make a Difference!
DONATE

The model



Pooled donations from individuals, families and businesses within the community



Community giving and grants



Community ownership and shared assets



Community wealth building, strengthened resource base and social capital

COLLECTIVE IMPACT



Sustainable collective impact

How we work



Identify community priorities, projects, challenges and opportunities



Harness community goodwill and resources, leverage donations and investment



Link to local community organisations with capacity to deliver change



Invest in local projects, initiatives and organisations through grants and other support



Connect local community organisations with resources, donors and networks that can support project development and success



Create partnerships to strengthen community leadership and capacity across North East Victoria

What's covered today

- Our application process and funding streams
- Grant assessment and timeline for decisions
- Grant application fundamentals
- Budgets
- Successful grants: Your obligations
- Further resources and philanthropy networks
- How to use the foundation for alternative support



Applying for Grants - The Fundamentals

Philanthropic grants enable you to:

- Effect change
- Build community capacity
- Purchase things for your community
- Create opportunities for people
- Do what you need to do
- Drive forward community priorities
- Trial and pilot innovative ideas and projects



Funding available

Funding available is at the Trustee/ Board discretion

Stream 1 Small Commemorative Grants

Limited number of small commemorative and community wellbeing grants to mark Black Saturday and continue to support ongoing themes of the bushfire appeal fund. This stream will support activities that :

- Improve community connectedness and social wellbeing
- Build community capacity for future disasters
- Support community events and arts programs
- Reconnect community with nature

Stream 2 Regional Transition and transformations (strategic grants program)

- Expressions of interest from potential partner organisations that have ready projects or concepts that can support community strengthening, resilience and positive transformation for our region and communities.
- We are interested in visionary projects that have a whole-of-region impact approach and can demonstrate broad and multiple benefits for bushfire affected communities and the broader community.

Funding Process



- August 1 until September 10th 2018: Applications are open
- Application online via website links to formstack. EOI or application
- September 10th -October 1: Assessments and decision
- October: Trustee decisions advised. Successful and non successful grants notified
- Letters of offer and grant agreements issued
- October / November – Payment issued
- November 2019 reporting due.



Eligibility

- Must be not for profit
- Have an ABN or be Incorporated.
 - Statement
 - Partner with an appropriate Auspice
- We grant to both DGR and non DGR groups

The project must:

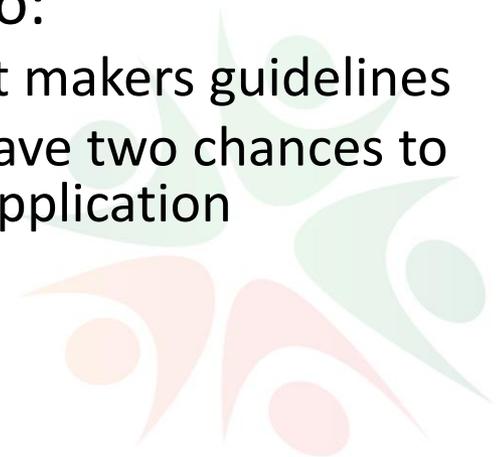
- Be located or implemented within the Alpine, Indigo or Wangaratta Shire;
- Be completed within the specified timeframe indicated in the application.
- The project must either involve funding of a community or part of a community that is or has been directly affected by the 2009 fires and involve the provision of services to or the carrying out of a project for the benefit of such communities.

What is Not Eligible

- Prizes, gifts, awards, or trophies
- Retrospective funding
- Projects that take place outside of Australia
- Political parties, lobby groups or religious promotion
- Sport, recreation and social activities unless there is a broader community benefit
- Federal or State Government core business - this doesn't exclude Government owned land but there are conditions
- Local government core business – this doesn't exclude Council owned facilities/land but there are conditions

Should I/ we apply?

- Read the program guidelines
- Why do you want the grant? Decide its purpose and impact goals
- Is the Foundation best placed to be the funder or could there be a better alternative?
- Develop your ideas/strategic plans prior to applying for grants
- Contact the grant maker before you begin to:
 - Assess eligibility of your project with the grant makers guidelines
 - To become known to the grant maker – you have two chances to pitch your project: personal contact and the application
- Know when the closing date is!



Completing the Application



Good grant writing is important!

Good grant applications clearly state:

- What is going to happen
- Where is it going to happen
- When is it going to happen
- Why does it need to happen
- Who will benefit
- How is it going to happen



Is it time to get your
ducks in a row?

You have to know this clearly in order to
communicate it.

What?

This question helps funders determine if the project and activities are eligible

Know your Project

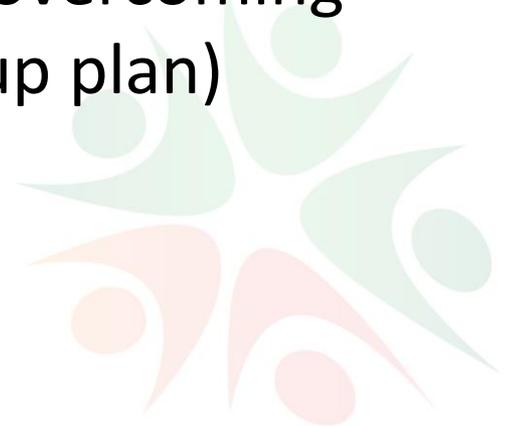
- What is the scope of the project (What is going to happen)?
- What will the project deliver (what is the foundation paying for/ buying)?
- What impact will it have/ what will the project contribute to our community?
- What is the purpose of the project (objectives/bigger picture)

e.g. community benefit, tourism development, economic development, employment creation, social or environmental benefit?

What?

What are the risks?

- What are the risks associated with the project?
(Financial, Social, Seasonal)
- Is there anything that will prevent the project from coming to fruition? (Likelihood)
- What are the mitigation strategies for overcoming these risks? (Risk Management, Back-up plan)



Why?

This questions helps funder prioritise projects and determine worthiness or it is a worthy cause.

*Why does the community **need** this project (want v need)*

- What evidence do you have that this project is needed?
- Is there evidence of community support?
- What benefits are to be achieved? Will the project enhance or strengthen you capacity to do more?
- Why is it important in the context of the area/ community or population?
- Why should this funder fund this project? Ie: why should philanthropic or VBAF funds be used to support it. Eg gaps in funding. Local government grant capacity is limited etc.

*Use **FACTS**: eg. economic dependency, population decline, insufficient employment opportunity and difficult socio-economic conditions*

- Is your organisation best placed to address this challenge/need?
 - (Primary Objective) Or are there others who are better placed?

Where?

- Where will the project take place – we have geographic limitations on our trust deed so it is important.
- If using land: Have you permission from the land owner to do this project – **provide evidence**
- If you want to make changes to a facility have you permission from the user groups & facility owner to go ahead with your project? – **provide evidence**

A note on Government owned land/facilities

- Infrastructure projects occurring on Government land or a Government owned asset, provide evidence of appropriate permission and support, including:
 - Letters of support from a Local Council where a project is on Council owned land or is the core responsibility of Local Government
 - Letter of support from State Government when a project is delivered on their grounds or facilities
- Government owned land or facilities for example Community Halls, Recreation Reserves, or where a project is considered the core business of government
 - Letters should clearly state the purpose and the permission provided and where no financial contribution is being made by the Government body, a reason as to why the Government body is not able to provide financial support.
 - why is the asset owner not supporting the project financially, need some indication of need and limitations on other local funding sources.

How

Failing to Plan is Planning to Fail

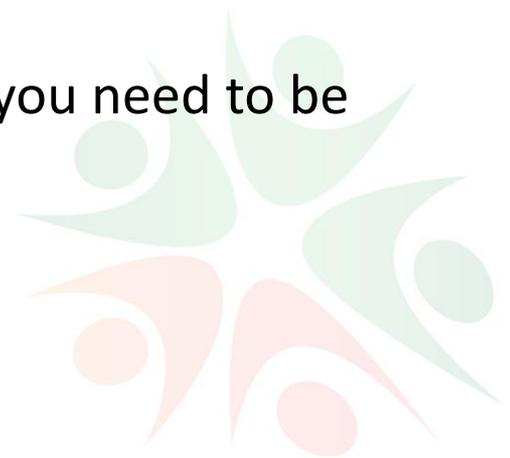
- How are you to deliver the project/ spend the money?
- How will it be implemented and/or operated? (e.g. Steering committees and management structures, internal or external)
- Are there any special skills or resources needed?
- How will you ensure accountability for the project? (define roles and responsibilities)
- How will you know when you have achieved what you set out to do and how will you measure the outcomes of the project?

Project Plan/Timeline

TASK DESCRIPTION (KEY MILESTONES)	WHO IS RESPONSIBLE ?	KEY DATES

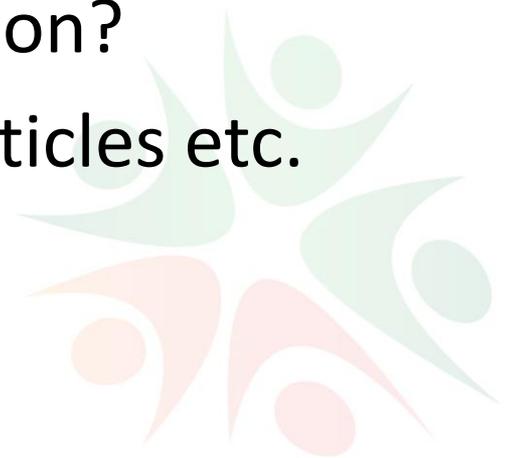
Who? (The Project)

- Who is delivering the project and what are their responsibilities
- Who are the beneficiaries? (Target Groups)
- Who are the major stakeholders and partners and what is their capacity to help with the project?
- Is anyone else doing something similar in your community or even elsewhere?
- Can you strengthen your application by partnering with another organisation?
- Is your organisation an incorporated body, or do you need to be sponsored by another body?



Who? (Your Organisation)

- Who are you?
- What is your mission?
- Who is part of your organisation?
- What geographic area do you cover?
- How many people in your organisation?
- Provide evidence –photos, media articles etc.



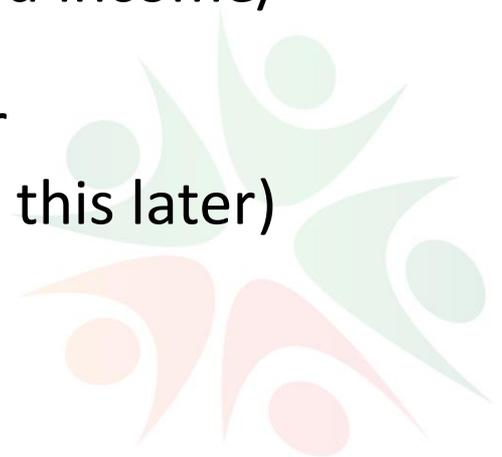
When

- Grants have a timeline in which they should be completed, money spent and accounted for
 - Planning for this should be included in the Project Plan/timeline template
- When will the project start and finish.
- Project dependencies, think about this.



Budget

- Show a total budget costs for the entire project
- Income & expenditure must be the same. (show example)
- Provide quotes if possible for infrastructure jobs and materials you want to purchase.
- Itemise the expenditure – describe how you reached the \$ listed.
- Include all other confirmed and unconfirmed income/ partner contributions etc.
- Calculate in-kind income & expenditure (for example volunteers @ \$25 per hour...more on this later)



Budget Do's & Don'ts

- If there are shortfalls in your budget, please explain this in the notes section
- Don't provide multiple quotes – give us the best price/value for money – we encourage the use of local suppliers.
- Don't inflate your budget
- Ask for what you need, not what you want or what you think we have to give.
- If in doubt have a discussion with the funder.

Budget Do's & Don'ts

- In-kind
 - In-kind may consist of volunteer hours, equipment or services.
 - Don't underestimate the amount of money your community is contributing to the project
 - Volunteer time should be calculated at \$25 per hour.
 - Include in both the income and expenditure to make sure your budget balances
- If there is a contribution of professional services, calculate using their usual charge out rate

Organisation Financials

- Attach audited statements (preferable)
OR Profit & Loss statement and bank statement
for most recent period
- Do you have an ABN?
- Are you incorporated?



Don't Forget!

- Think about your Timing
- Review your application
- Sign your application
- **SUBMIT ON TIME!**
 - There are no exceptions
 - Fairness to all



Tips For A Strong Application

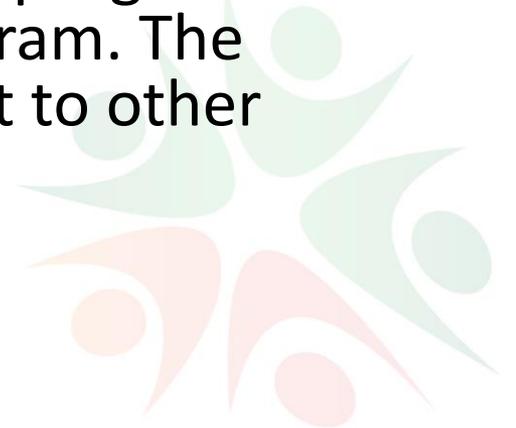
- **ANSWER ALL THE QUESTIONS**
- Gather your tools early!
- Use word sample applications to draft your application offline and copy and paste later
- Upload all documents requested
- Tell us **EXACTLY WHAT YOU NEED FUNDS FOR** – keep it simple, clear and logical
- List and attach **LETTERS OF SUPPORT** that are written in their own words.



Why this grant program?

- Know who you are talking to; what other projects has that grant provider funded?
- Can you demonstrate how this project serves fire affected areas/ communities or part there of?

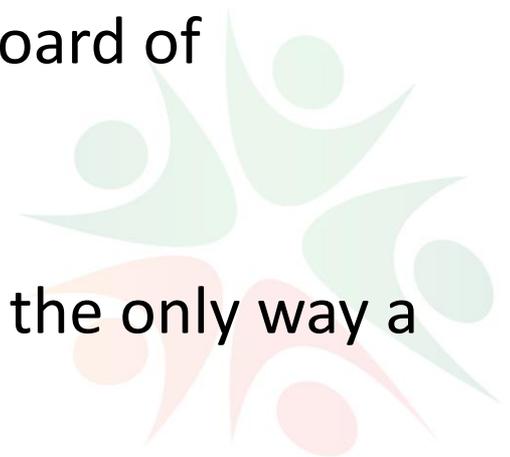
Tip: If you need to fundamentally change your project to suit the grant provider, it is the wrong grant program for you. Leave it for another time or grant program. The foundation may be able to help you connect to other funders



Assessment & Decision Making



- How are applications assessed?
 - Against program criteria
 - We look at the strength of the application and merit of the project also against other applications
 - We use a matrix for comparisons
- Who assesses applications?
 - Into Our Hands Foundation EO with Board of Directors
- Who makes decisions?
 - A quorum of the Board of Directors is the only way a grant can be approved for funding.



You got the grant! Your Responsibilities

- Each grant comes with a set of grant conditions
- Evaluate your project and provide a full report back on what it achieved, success, issues and beneficiary impact..

Look at what you want to achieve then ask yourself how you will know if it's working

- Reporting and Acquittal
 - Track your expenditure – keep an itemised record in your bookkeeping system
 - Keep all receipts and paid invoices
 - Report back on the outcome of the project – ON TIME
 - Never pay in cash unless you have receipts – must have a detailed money trail
- Make sure you complete an Acquittal

Other important stuff!

- Important to recognise the grant provider at events, on publications and in regards to your project.
- Provide us with a paragraph on what the project achieved and a photo.
- Promote and talk about the foundation's support of your organisation

Resources for grant writing



ourcommunity.com.au
Building Stronger Communities through Stronger Community Organisations

Community Resources FOR COMMUNITY GROUPS	Training FOR COMMUNITY GROUPS	Give Now FOR INDIVIDUALS	Join In Join Up FOR INDIVIDUALS	Corporate Responsibility FOR BUSINESS	Grants Management FOR GOVERNMENT
					
The 16 Community Knowledge Centres	Australian Institute for Community Practice & Governance	Donate Money, Time and Goods	Join a Community Group	Australian Institute for Corporate Responsibility	Australian Institute of Grants Management

Our Community is a world-leading social enterprise that provides advice and tools for Australia's 600,000 not-for-profit community groups and state, private and independent schools, as well as practical linkages between the community sector and the general public, business and government. [MORE INFO >](#)



Other ways we can help

- If appropriate, we can connect your project with other philanthropic funders
- Provide structures to help you fundraise
- Help you with fundraise ideas or crowd funding
- Convene and bring community together to move a project forward
- Partner with you to manage your grant funds or leverage more!



Our hopes and plans

- To start conversations locally about philanthropy
- Make this foundation sustainable over next five years
- Build an endowment that will be a financial resource for this community in perpetuity
- Bring this community together, (skills, knowledge and people as well as money) to enhance and strengthen the community foundation's capacity to give back.



*Communities giving to create,
connect and strengthen*

Giving and support

- Call us for a conversation about philanthropy for you, your family, business or group.
- Start a fund
- Make a one off or regular donation
- Talk to us about bequests
- Talk to us about supporting fundraising and community project efforts
- Spread the word about the foundation and help build awareness about possibility of philanthropy.

Sarah Thompson

 0466 252 866



Contact

Into Our Hands Community Foundation

PO BOX 586

Myrtleford Vic 3737

Office base – Wangaratta 3 days.

WEB: WWW.intoourhandsfoundation.com.au

EMAIL: info@intoourhandsfoundation.com.au

CONTACT: Sarah Thompson 0466252866



WWW.facebook.com/intoourhandsfoundation

Or subscribe to our mail list via the website.

