



**GRANTGURU**  
a GrantReady Service

# GRANT GUIDE

## HOW TO GET A GRANT

### THE GUIDE FOR COMMUNITY



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With the Australian Government alone offering over **\$20 billion dollars in grants to Not-For-Profit organisations annually**, in addition to over \$5 billion from trusts and foundations, the big questions are: where are they, and how do I access them?

#### Get Ready

With the Australian Government alone offering over \$20 billion dollars in grants to Not-For-Profit organisations annually, in addition to over \$5 billion from trusts and foundations, the big questions are: where are they, and how do I access them?

Organisations seldom have time and resources to search for these opportunities, least of all spend hours trawling through government websites or writing lengthy applications with no certainty of success. The challenge for any organisation is to easily find the right grant and to successfully apply for funding. At times, this can be a daunting and difficult task.

The grants space is one that is ever shifting. With government departments required to meet new and changing targets, their spending allocations vary accordingly. This is not to mention the changes brought by the State, Federal and Local Government annual budget fluctuations, which always have potential to bring drastic alterations into the grants space.

With these hurdles in mind, we bring to you "How to get a grant guide". This will equip you with the know-how to successfully navigate the grants space, and point you in all the right directions in regard to information sourcing, applications, grant writing, and other tips and pointers that you won't find elsewhere.

#### About GrantReady

GrantReady has worked with hundreds of organisations to find and apply for suitable grants. In the last 12 months alone, our team has directly helped access over \$230 million in grants and rebates. GrantReady is a leader in the grants space and seek to educate and support organisations to gain a competitive edge in the grants process. Our training programs, tools, kits and books have been delivered across Australia, adding value and helping to achieve success for individual organisations. Our website offers a free online grant database to community Not-For-Profit organisations boasting over 1,400 grants nationwide. For more information, visit

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

**GRANTREADY** 



# Introduction

## How can a grant help?

Grants are either awarded up front for a project that you have not yet commenced, or retrospectively, after you have done the work and spent the money.

Grants may be used to do that project you always wanted, allow growth or increase the effectiveness of privately invested funds. The grant space is packed with funds that vary in size, complexity and accessibility.

There are hundreds of grants available to help with projects and different aspects of organisation development and moving towards sustainability. In fact, getting through the difficult early years are typically the best times to seek grant funding.

The aim of many grant programs is to allow you to do a project you would not have been able to otherwise afford.

Grants typically range from \$5,000 to \$150,000 per year, some requiring your organisation to provide part-funding and others not requiring additional funds from the proponent. However the process is time consuming and most organisations simply cannot afford to spend valuable time and effort trawling through government, trusts and foundations websites or reading hundreds of pages of program information. But in some cases a grant may mean the difference between success and failure for many Not-For-Profits.

## Should I really bother?

It is certainly worth considering your eligibility for a grant. Organisations often make two common mistakes.

Firstly, some organisations don't consider their eligibility for a grant early enough; they discover too late that they were eligible, or even entitled to grant funds.

At the other extreme, some organisations spend every waking moment looking and hoping for grant funding. In fact, they become so distracted from running their organisation that the grant opportunity becomes an obsessive requirement, fatally linked to the success of the organisations future.

While the process of finding a suitable grant can be time consuming, most grants are restricted by specific criteria. Most projects are only ever eligible for a couple of grants. Grants are usually restricted by activities, applicant size and organisational structure. For instance, there are many grants for disability service projects, but fewer grants for core costs and infrastructure.

Grants are also often referred to as free money, because you don't have to repay the money. However, as already stated, the application process still takes considerable time and effort so there is an opportunity cost and impact on your organisation in the delivery process.

## Challenges facing organisations

Many organisations want to know about grants, but find the process too hard, they know they are missing out on grants that can build an effective community building organisation, but cannot find them.

Above all, many organisations often find out about a particular grant too late, and as a result, resources are put towards a rushed application, which are typically wasted resources. Our advice is: prepare early to give yourself the best possible chance of success. At the end of the day you can significantly increase your resources available by being successful with a government and/or philanthropic funding program.





# The Path to Success

There are four key steps in accessing grants:

## 1. Grant Awareness

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The entry point for most organisations into this space is trying to find a grant, or confirm eligibility. This is also the stage at which most organisations give up. GrantReady provides the GrantGuru Community Database for use by the Not-For-Profit community sector to assist you in finding the right grant program to meet your project needs; this can be viewed at <http://community.grantready.com.au/>. This database provides you with a synopsis of the grant criteria and deadlines.

## 2. Grant Matching

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There is a huge difference between being eligible for a grant program, and being competitive and ultimately successful. You need to have a critical eye when assessing whether or not to proceed with an application, as moving forward when you should have seen the 'red light', can waste a lot of precious resources.

Be aware that meeting only one or two of the assessment criteria is rarely good enough. Although a lot of organisations are doing many good things, this does not mean that the government or philanthropic funding bodies owe it to you to provide you with a grant. You must show that what you are doing aligns with the grant's intentions and objectives.



## 3. Grant Writing

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This can become a time consuming and arduous task. Forms must be filled in, budgets must be finalised and a whole raft of supporting documentation must be attached. It is important to maintain consistency across the project aims, themes and answers throughout the whole application and supporting documentation.

## 4. Ongoing reporting

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After you are successful with a grant often you are required to meet ongoing reporting regimes which can sometimes be onerous. This includes, but is not limited to, financial statements, and may also require liaising with government or the philanthropic funding body, in addition to providing detailed organisation and project information in order to acquit the grant.

You should be aware that this work may consume a large amount of time, and you may need to temporarily dedicate a part-time or full-time internal resource to this task. Alternatively, organisations may choose to seek external assistance which can be expensive, such as consultants. The decision to engage a consultant for ongoing reporting rather than divert internal resources is a resource vs. time decision. The additional cost of the consultant, is insignificant, and in some cases may mean you have to divert funds that have already been allocated. This can be a slippery slope, diverting funds from one operational function to complete a grant process. Take into consideration you are the expert, as you carried out the project, therefore keeping this process internal is likely to be best.



# Grant Awareness getting started

The best funding applications are based on projects which are genuinely important and reflect real need.

Strong and competitive applications should demonstrate firm commitment by all partners and be enthusiastically supported, both from within and outside the organisation. This should be clear in the application.

Start early. Plan ahead so your application is not rushed. Advance planning will save you time, effort, and energy and can help support a systematic and efficient grant-writing process. If you plan in advance you will be ready to pursue grant opportunities as some programs have short lead times, or may only open once a year; early preparation will be a competitive advantage.

Be careful not to grow so close to the project that you cannot see the whole - you need to be objective in the application process. Too many organisations become blinkered or enamoured with their project. Remember, it's not about you - it's about the requirements of the funding body - funders have a rationale to their funding pots and you will have to meet it.



The Lord Mayor's Charitable Foundation awarded Greenfleet with a grant of \$14,000 to complete a flora and fauna survey at one of their long-term planting sites. The Lord Mayor's Charitable Foundation currently provides financial assistance to over 350 charities each year, distributing 100% of donations received.



# Grant Matching

## Finding the right grant

There are literally hundreds of grant funding programs available which support an enormous range of activities. The challenge is to find the best one to match your project.

While we suggest you go to GrantGuru Community Database <http://community.grantready.com.au/>, if you want to look for a grant program yourself we suggest you undertake the following process:

- Go to each government department, trust or foundation's website as they usually provide detailed information for the programs they run. Some grantors produce e-bulletins or newsletters which detail funding opportunities. Ask to be placed on their mailing list for all future program announcements.
- Keep an eye in the media as most funding programs are advertised in the media, particularly when they are announced open for applications. State and Federal Members also provide a media release to announce new government programs.

When you find a grant program that you think meets your needs, skim read the available information, don't try to read all of the available information, unless it has already been summarised into the key eligibility criteria. If, at this first glance, you think it will meet your needs, put it aside and keep looking. Once you have finished your search you can read more details on the most promising ones to assist you with your assessment.

Whether you use the GrantReady website or go alone, review your list of grants to decide which ones seem most promising. Most funding programs will produce a Fact Sheet, Application Form, Program Guidelines, Previous Successful Applicants and a Contractual Agreement. Use these documents to help make your selections.

Look at the closing dates; some programs are always open but others operate in rounds and may only be open once or twice a year. Try to find out before a round is announced when it may open, because the closing dates are often short and favour those organisations that have pre-prepared.

### Double Dipping - Beware!

Some grants may preclude you from applying for others at the same time, or for the same activities. You may have to quarantine the grant amount received and an equivalent amount of your own expenditure (called clawback) and not use these funds to contribute towards further grant applications or other projects. If you don't plan for this, you may not be able to continue to trade solvent due to the quarantined money.

### How do you know if you can apply for a grant?

The answer to this question depends upon certain criteria, and is different across some grant programs, but the answer lies in the following.

**Organisation Classification** - The legal status of your organisation will play a part in determining what funding is available. For most grant programs, the grant-maker will require the applicant to be an incorporated body to apply. In practical terms, incorporation means that the organisation is a legal entity with an ABN or ACN.

**Industry type** - Funding schemes are often designed for the development of a particular industry. Government offices and regional development agencies may identify specific industry 'clusters', earmarked for support. It's well worth understanding these clusters and how your project may fit into them.

**Location** - Many grants are location specific. Some operate nationwide, while others are administered locally, and therefore the geographic or operating location of your project is crucial. Some grants require you to work across regions. The amount of funding available to you may be dependent on the area you plan to develop or implement your project.

**Grant purpose** - Grants are usually available for specific purposes. For example investment by you in new hard infrastructure for the organisation, or expansion of your organisation. A project shall be eligible for the grant only if the request matches the scope of the grant's intended purpose. Deviation from this rule will result in non eligibility.

**Specific projects** - Funding may relate to a specific project, such as the development of a new program to help physically disabled people to acquire jobs. Usually, the organisation must be seen as capable in this area and the project must be demonstrated as viable after a certain amount of time. The project plan will need to be well defined, with clearly identified deliverables.

**Tax Status** - As there are many different types of trusts and foundations, a lot will have restrictions on the entity type they are able to give money to. Generally, if a trust or foundation has Deductible Gift Recipient (DGR) status (see below), it is only able to donate to an organisation with DGR status. The same restriction applies for Tax Concession Charities (TCC). Your organisation's tax status will affect the number of philanthropic grants you can access. As a minimum, you should ensure you have DGR status before applying for grants from trusts and foundations.

### Some additional details...

#### Deductible Gift Recipient (DGR)

Certain organisations are eligible to receive income tax deductible gifts. They are called deductible gift recipients (DGRs). The income tax law determines which organisations qualify for DGR.

For organisations to be DGRs they must fall within a general category set out in the income tax law. From 1 July 2000, all DGR categories must be endorsed by the Australian Tax Office (ATO). If they are not endorsed, donors cannot claim income tax deductions for their gifts.

#### DGRs must also:

- Have an Australian Business Number (ABN)
- Maintain a gift fund, and
- Be in Australia (with some exceptions)

If you are entitled for DGR endorsement, you should apply to the ATO using the 'Application for Endorsement as a Deductible Gift Recipient.'

Endorsement as a DGR gives your organisation important income tax concessions and obligations. DGRs are not automatically exempt from income tax. DGRs that are charities need to apply for endorsement as an income tax exempt charity (ITEC).

#### Tax Concession Charities (TCC)

There is an endorsement process for charities to apply to the ATO for income tax exemption. Charities must meet certain requirements to be entitled to the endorsement. One of these requirements is the organisation has an ABN.

If you are entitled for endorsement, you should apply to the ATO using the 'Application for Endorsement as an Income Tax Exempt Charity. Being endorsed as an ITEC gives you important income tax concessions and obligations.



# Determine your eligibility

All grants differ in their requirements and eligibility criteria. To determine whether you are eligible for a grant, generally you will need to prepare answers to the following:

1

What is the structure of your organisation? For instance, are you incorporated, do you have DGR, TCC etc?

2

Has your organisation been established in Australia?

3

Has your organisation been established in Australia?

4

Are you part of a group of organisations? If yes, when making applications, ensure you correctly indicate who the lead applicant is? For instance, your parent organisation may have DGR and TCC where as you may not.

5

Where do you draw your income or funding from? For instance, do you sell products or services, or do you solely rely on donations and funding?

6

Do you wish to recoup costs already spent, or would you like a grant for a project not yet commenced?

7

Where will your activities be undertaken?

8

Are your activities underpinned by innovation or technical challenge?

9

Does your organisation have the skills to best fulfil your projects objectives? Or will you need to partner with an organisation that does specialise in this area?

10

Are you able to contribute to the project, either through cash contributions or the donation of time, materials or effort (in-kind)?

11

Are you currently receiving any government, trust or foundation grants or funding?

12

Do you have financial statements from prior years and a current strategic/operational plan?





**Determine what the funding body is looking for from the grant as an outcome**

You should understand exactly what the funder is prepared to fund and why it set up the program. Many people think that grants will fund their organisations general operating activities, but this is not the case. Grants fund projects with a define start and end and specific activities. There is no point in getting locked into plans that don't fit within the guidelines. Most grant administrators will immediately eliminate those applications that don't fit within the specified guidelines, and you will have wasted your time and effort.

**Make a clear link between your aims and objectives and the guidelines for the specific grant.** Make sure that you have defined the need the grant program is addressing. You are then in the position to explain why your proposal is needed and demonstrate how the grant will make an improvement to your organisation, your region and/ or your sector. Be prepared to provide statistics, case studies and quotes from leading authorities supporting the need for your project. This will act as your basis from which to demonstrate to the funder how your proposal improves the situation.

**Once you know you are eligible, you will need to define the project**

Is your project viable? Just because it seems like a good idea, or someone said it should be done, does not mean it is a sound idea.

In planning your project, your organisation will need to come to an agreed position on the scope, purpose and outcomes for the project. Everyone involved should have a common understanding of what you are trying to achieve and should agree and be able to present the same idea.

Use the following questions to help translate your concept into tangible and hopefully achievable aims. In the simplest case, you should be able to show at least the following information:

**What you want to do**

Offer a detailed project description, including opportunities and problems that are present, as well as your key objectives.

**Why it's a good idea**

Detail the need for your project and the outcomes you are expecting to achieve. Consider localised, regional or national benefits that the completion of your project will bring.

**What the cost will be**

Show clearly your own cash contribution and that of your partners, as well as any in-kind contributions. This will allow funders to understand the value for money they will get out of supporting your project.

**Who will benefit from the project**

Include both direct and indirect beneficiaries here. Detail who is applying, whether collaboration is involved, and how the project will impact your industry.

**How you will make it work**

Detail project implementation, and whether you are equipped internally to manage the entire project or whether some work will be outsourced. Provide timeframes.

**How you will evaluate and monitor to show the project has been a success**

Outline project milestones, and how you will measure and assess their completion. Make sure the measures are defendable and timely, and that you can achieve them.

**Shoring-up support**

Your supporters may contribute with cash, in-kind or letters of recommendation and support. These contributions may take considerable time to secure and document, especially if once money has been secured agreements are required to be draw-up, or if they require internal sign-off. Therefore, as early as possible, secure your partner's willingness to participate and provide the supporting documentation required.

Ask yourself these questions: Is your project unique? Are other applicants who are trying to achieve the same goal likely to be also applying for a grant, and if so, are they like to support you?

Program administrators often find it frustrating if they receive multiple applications for funding from similar groups from the same region that do not coordinate or collaborate on their activities, especially when the project will serve the same demographic.

**Before you continue, do you have the right resources?**

- Do you have the right people available to write a successful grant application?
- Do you have the time to organise and write a successful grant application?
- Do you have the expertise to make your proposed project work?

If not, you need to augment your resources, and you need to do it before you are in a crisis position – OR don't apply at the moment, just wait until everything is ready to ensure success.

**How much can I apply for?**

Most programs have upper funding limits. You should always ask for the amount you need, but don't ask for more than you need assuming there will be cuts done by the assessors. It is not a good practice, and if you are caught out it will go against your application. Don't apply for less than you need assuming that you can make up the difference or somehow find additional funds later on. If you have the ability to be flexible, you may do well to seek less than the possible maximum amount. You can be guided by previously awarded grants as a good indication of what the grant provider is prepared to allocate. You can find this information on the website of the grant provider.

**Think broadly**

If you are seeking a grant to re-fit a community kitchen your organisation runs, don't just think of infrastructure grants. There may a grant available through a government department like NSW's Department of Environment, Climate Change and Water. Or if you are seeking grant funding to purchase a new generator for your rural and remote office, look at doubling the generator as a sustainability tool for the whole community. Most grant programs are delivered according to a region or service sector. However, some grants apply across regions or service sector. Think laterally so you do not miss an opportunity.

*Square peg, round hole*

While it has been said you need to ensure the integrity of your project, if you are going to be successful with the grant application you may need to slightly modify your project to meet the guidelines, but this should not affect the project structure as a whole. **Don't be tempted to find a grant program first and then form a project to fit into the guidelines.** A square peg doesn't fit into a round hole and most applications will reveal this and undermine the integrity of your project.



# Grant writing

Grant writing is a special art. Writing from the heart, or what you think an assessor wants to hear is not usually the best approach.

Your ability to write clearly and express your message well is most important. A good application is not defined by the volume of written material you submit. Most submissions are confusing and ambiguous. The easiest way to stand out and compete is with a well written proposal with a clear message, especially since government departments read hundreds of submissions every year.

When making your message clear, you should also consider the readability of your document – easy to read is not just words, but look and flow. The assessors will have a much better chance of understanding your message quickly and without confusion if they know the overall direction that the document takes.

Try to guide your reader through your submission by:

- Stating your main points upfront
- Setting background and introducing concepts early
- Establishing and maintaining consistent themes throughout
- Progressing from simple to complex aspects of your project
- Using a logical flow of thoughts

Create a clean and logical structure through the document. It may seem obvious but almost everyone struggles with this. A well-structured and well formatted document makes it easier for the reader to quickly understand your project which should assist your application being successful.

Shorter paragraphs help people to quickly find information; in fact having a sound structure with logical ordering of your points also makes it easier for people to go back to your document and locate information quickly. New paragraphs can help draw attention to important points. It is quite acceptable in this context to have shorter paragraphs more often to highlight text that is vital to your story.

## Know the rules

Every grant program is different and requires you to address specific criteria in a predetermined process. To produce the best possible and most successful grant application you must read the guidelines first to find out how the application will be assessed. Not only will this assist you in knowing whether you are eligible, but it will assist in you having a clear understanding of the judging process and what is required of you.



Concern Australia's Hand Brake Turn program is a life-transforming experience for disadvantaged young people, supported by grants from a range of philanthropic groups, including The Jack Brockhoff Foundation, Ian Potter Foundation, Newboys Foundation and the Shane Warne Foundation.

© Concern Australia. Photo by Casamento Photography.



# What do Government departments, Trusts and Foundations need from the grant applicant?

Because government departments are dealing with public funds, they need the comfort and assurance that you know what you are doing.

This is also the case with trusts and foundations, only their funds are private and often have an emotive and sentimental aspect to them. This is due to the donor(s) wishes being carried out according to their Will or Trust Deed, stipulating where the granting funds be invested.

Overlooking risks and potential failures in grant applications is not a wise move on your part – administrators would prefer to see the risks and understand that you are working to minimise them, rather than see a glossed up overview that's a 'guaranteed success!' To build confidence with the assessor in your organisation, be upfront and tell the whole story, proactively dealing with the negatives in your application. Don't worry, all applications can have negatives - defining and dealing with them simply opens a doorway to gain trust.

Providers also want to see that you are serious about delivering your service in your sector. Government departments, trusts and foundations all have an honest intention to see that their funds are used in a productive, fruitful and effective organisation that will achieve a successful outcome for the community.

A key in winning grants is to build relationships. Getting to know the grant providers really helps you to understand the aims of the program. For example, if you are working in the environmental space, make an effort to meet representatives from State Government departments and agencies, appropriate Trusts and Foundations, as well as the federal Department of Climate Change and the Department of Environment, Water, Heritage and the Arts. Not only will you have an advantage in your application, you may also hear about programs before they are launched, alongside other 'off-the-record' information relevant to your organisation. A significant advantage is to have received grant funding in the past, assuming you have managed it well.

In writing your actual application, take a moment to consider the work of those who assess your proposal. A tired project manager will have an overflowing in-tray filled with similar projects, similar promises, and similar potential. Make every effort in your writing to stand out - very rarely do you have an opportunity to present verbally or impress with a face-to-face meeting, so your writing skills will need to be exceptional. Consider getting someone with marketing or communications expertise on board with the application process, even if you have to coopt in a friend. They will often have the ability to see from an outsider's perspective which positives and negatives should be highlighted or toned down in your proposal.

Finally, remember that government departments, trusts and foundations are all held highly accountable for where their funds end up. Government departments are required to meet certain targets relevant to their field, and trustees for trusts and foundations are required by law to act in the best interests of the donor, in addition to the trust or foundations financial interests. So to be successful, aim to address and meet grant providers aims and objectives rather than purely pursuing the aims of your individual organisation.





Phone the grant program administrators

Speaking with the grant assessors is a great chance to find out key information that is not published. Some basic questions can be really helpful to you when you are preparing your documentation.

- Try asking these questions as a start:
- What type of projects are you really seeking?
  - What size grants do you expect to award?
  - How many applications have been lodged? They may not be able to tell you the answer to this.
  - What don't they want?
  - Is it possible for someone in the agency to review the draft application?
  - Can I have some feedback on my project/idea?

Make note of the name of the person you spoke with in case you need to call them again.

Get an edge

There are usually more applications received than money available so you need to show there is a match between your project and their funding aims.

You need to demonstrate how your project has an edge on everyone else. This sounds easy but most people forget and wax lyrical about how good they are, and forget to link the project to the criteria of the grant program. Just because you love your project doesn't mean the assessor will. Think about it from their perspective, if you were to assess all of the applications, what would make your project standout?

Let's start writing

Make sure you have the correct and up-to-date application form. An old version may not be accepted, or relevant!

Remember that the project title sets the first impression, and the tone for your project. Provide a positive, punchy description. Capture the imagination and inspire the assessor to read on.

Follow these tips:

1. **Organise your thoughts.** Many people cannot explain their project in less than half an hour - you must be able to explain your project to a stranger in 2 minutes - especially the 'reason for the project' and its aim. Practise your elevator pitch. Having said that the application must be written in business language and not conversational language, so don't get too cute!
  - Read each question first and think about your answer before responding
  - Write you response in a word document before transferring it to the application form to allow you to manipulate it, check the spelling and review the grammar.
  - Always have your draft and final copy read by another person.
2. **Keep your answers simple and concise.** Make the reading of your application easy and use familiar words rather than jargon, and never use acronyms.
  - Write your application as though the person reading it knows nothing about your organisation or your project. Never assume anything is obvious to the reader.
3. **Use simple and consistent formatting.** Assessors find it helpful to see headings, bullets points and diagrams.They make it easier to navigate through your document.
4. Where appropriate, **include photos, maps and diagrams** to portray key information.
5. **Be clear and consistent in your responses.** Sometimes a question seems to appear twice, or an answer you are giving to two different questions is the same. The assessors won't want the same information twice, so check the guidelines for clarification or call your program contact for help.
6. **Don't leave anything blank.** Complete all boxes and write N/A if a question doesn't apply to you.
7. **Don't overwrite.** If the application has a word limit – stick to it! Remember, someone has to read it quickly, so don't write a thesis. Some assessors will eliminate you on this breach alone.

Design

1. Use informative headings to break-up the text so that important points stand out. Headings can be used to summarise the main point of the text or to create expectation. Used well, they create flow and establish the logical arguments you are presenting. A reader should be able to navigate through the document just using the headings and grasp the general project concepts. Even better, they can allow an assessor to anticipate your next point in a way that they start to own and grasp the concept. Once this happens, an assessor may change from being critical to becoming your advocate. It will also allow a reader to be faster in reviewing an application and acts as handy references or marker points, which are easy to find later on.

For example, consider the impact of these different headings for the same content:

Plain heading	'Background'
Descriptive heading	'Our Credentials'
Engaging heading	'We are world famous'

2. **Break-up the text** with white space.
  - Resist the temptation to use a tiny font, no margins and no spacing. The benefit of additional information included this way will be lost. Densely packaged content is fatiguing to read and easy to lose your place on the page.
  - Try to avoid using centre justification. It spaces the text awkwardly and makes it difficult to create a natural flow for the text.
3. Where appropriate, use **lists** as a way of summarising points, being concise and providing visual cues to important information. Lists stand out from the rest of the text. Tables, graphs, charts and diagrams can also summarise information well. And they draw attention to themselves.
4. **Include an activity schedule.** List the activities required to achieve your goal. Add a timeframe to each step and group them into major milestones. Set a realistic timeframe and include provision for delays.

Proof Read

Take the time to read the application with fresh eyes, when you can focus without distraction. Check for the following:

- Poor grammar or typing errors
- Use of clear and consistent fonts
- Page numbers
- Labels on tables, graphs and pictures
- Footnote or references for figures, statistics etc.
- Contents page numbers are consistent with actual page numbers

If appropriate, you may also wish to:

- Include a glossary for jargon or acronyms
- Omit unnecessary words

Do not...

Tempting as it may seem, never break the rules set out in the application.

For instance:

1. If the guidelines request a specific font, size and page margin – stick to it.
2. If the final document must only be stapled, do not use fancy binding, sleeves or presentation.
3. Where a template is provided – do not change it. Keep headings, tables and layout as provided.
4. Consider how well colour images or graphs will appear in black and white. Often an application will be photocopied in black and white and distributed to the assessors.



Attach supporting documentation

Most grant bodies will want to see supporting documentation for you project, such as financials, letters of support, strategic/organisation plans etc. Start as early as possible since these may take some time. Documents that may need to be collected or created include:

- Annual reports
- Tax exemption certificates, eg. DGR, TCC etc.
- A strategic plan or organisation plan
- A diagram of your organisational structure
- CVs of the people who will be employed or who will be involved in the project
- Letters of support from other organisations
- Photographs or detailed technical diagrams
- Financial reports and a detailed budget

The budget

So you are now ready to ask for money in your application. At this point, many applicants start to feel a bit giddy and begin dreaming about pots of gold at the end of the rainbow.

However, getting the budget right is critical; there is no room for sentiment. A logical and well supported budget must be prepared. Unfortunately this is the section that most often goes wrong.

Getting it right will demonstrate your professionalism and strengthens the assessor’s belief in your capacity to execute the project. So, where do you start?

Include the whole budget

Start by working through your activity list to determine which activities will have costs attached to them.

The whole budget includes both your contribution to the project, the grant amount and any other contributions from your project partners. The budget should show both cash (eg. personal investment, donations and sponsorship) and in-kind (eg. volunteer time, borrowed equipment) contributions to the project.

Show how the value of in-kind items has been calculated. Donated materials and equipment can be valued at the cost to buy items new, or hire costs. Labour should be valued at the going hourly rate.

Remember to also consider including (if eligible):

- Insurance
- IP protection
- Travel

Show value for money

Grant-funders want the biggest bang for their buck. This means they want to see great results, cost-efficiency and your cash contribution.

Contributions from other sources (including your organisation) are generally expected. Sometimes minimum co-contributions are stated. If you fail to meet minimum co-contribution requirements your application will be rejected. Even where minimums are not stated it is good practice to show at least some contribution from other sources as this demonstrates commitment to the project. This gives confidence that you have some skin in the game, and indicates that you will work hard to make the project a success.

For instance, if the grant offered is \$4,000 and you to put in \$4,000 and your project partner contributes \$4,000, then they are getting \$12,000 worth of project for their \$4,000 investment. Value for money can also be demonstrated by ongoing and sustainable project work, beyond the project application. Indicate in your application the ongoing plans for your project, and the long-term benefits to the region.

Be realistic

Make sure that you don’t overstate or understate the size of the budget. Avoid making up an amount to look impressive. Some people ask for less than they need, in the hope that they can just get started. This strategy will get you into trouble when you cannot finish a project, or do a second-rate job.

Some ask for more than they need in the hope that they can use a Ferrari or Lear Jet for transport. Or they expect the costs to be negotiated down. However, applying for funding is not a negotiation. Grant funders know if your quotes are realistic. If you inflate the budget, they will see through it, and it could cause you to be unsuccessful.

All items in the budget should be justified and quotes should be obtained. You should indicate in your budget how costs were calculated, such as wages, travel and accommodation.

Tax

Grants may be taxable. If you are concerned about this, then talk to your accountant.

You should also be clear on your GST status. Some grants are increased to compensate for the GST. The guidelines will indicate whether you should include GST in the budget. If you are unsure, then do not include GST.

Submitting your application

It is so obvious, but we have to mention it - make sure you submit your application in time! Late applications are not accepted. Read all the details about lodgement because they do vary. Allow time for final signatures and approvals; printing and binding of multiple copies; and posting or couriering.

Confidentiality

Any application that you submit will be confidential, but if confidentiality is an issue, you should be aware of any limits to confidentiality by talking to the grant-making body, particularly when intellectual property issues are involved.

Grantors will often release details of the project to the media as a promotion for the funding program. They will usually consult with you regarding this. With government funding, very rarely, if funds are approved and a problem arises with the project, the project may be discussed in a Senate Estimates Committee hearing or before a Senate Inquiry.

Do’s and don’ts

Mistakes in the budget can cause your application to fail. Here are some common issues:

- Check funding limits: stay within the minimum and maximum
- Eligible items: read the guidelines to make sure your costs are allowed
- Include all costs: if you don’t, you may not be able to complete the project
- Make sure the budget is accurate and adds up
- Factor in administrative overheads.



# Almost there!

So, you have lodged your grant application and are now sitting by the phone, anxiously waiting to hear news of your success. This isn't the end of the line. There is still a lot more you need to know.

First you should receive a letter acknowledging receipt of your application. If not, contact the grant administrator to ensure that your application has not gone astray.

You may be contacted during the assessment of your application for more information or to discuss aspects of your application. Try to be helpful and responsive, some organisations have had their applications rejected at this point with the wrong answer! After all that hard work, this would be disappointing.

## Waiting

Whether it is a short or long assessment processes, there are usually multiple layers of processing for administrators to work through. Be prepared to wait anywhere from one to six months depending on the complexity of the project and the amount of money requested. Try to be patient and understanding and don't become a serial pest by calling every day; most other applicants won't, so this will not reflect well on you.

If you do call, remember to be pleasant and not aggressive.

Don't count on commencing your new project immediately. Even if you're successful, it may take a while for the money to come through. Importantly, you are unlikely to be reimbursed for any payments you make in advance of the grant being paid.

## The bad news

Unsuccessful applicants are usually advised by mail. If you are unsuccessful, I suggest you phone the administrator and ask for specific feedback. Don't be aggressive or rude.

Ask questions such as:

- Did our project meet the guidelines or not? In what ways?
- If our project met the guidelines, but was unsuccessful, was our application deficient? In what ways?
- Was the competition better than us? In what ways?

Determine how you could have strengthened your application and whether there is an opportunity to resubmit your application now, or in a later round.

## The money call

Successful applicants are usually contacted by phone. Funding may also be announced publicly. You will usually be consulted regarding the press release – so make sure you are satisfied with the level of detail for confidentiality reasons, as well as for accuracy.

Send a letter of thanks. Not many people think to do this but it will be really appreciated by the grant maker.

## The fine print

Read the contract. All of it. You need to know rules, especially the frequency of payments, project reports, compliance and auditing requirements. The rules are not negotiable and if you do not comply, you may have to pay the grant back.

## The hard work begins

Now you have to do everything you said!

Payments are usually linked to the completion of milestones and submission of reports. Keep good records of project expenditure and make sure you provide the reports by their due date.

Also ensure you notify the grant provider to any delays or changes in the project, such as:

- Change of contact details for your organisation – including any changes to key staff who have been nominated on the contract
- Delay in commencing or completing activities, any alterations to timelines, milestones etc. Consideration can often be found if you give the funding body plenty of notice
- Delay in providing project reports. There must be a good reason for a delay so an extension should not be applied for lightly
- Changes to prices or quotes that will affect the budget for the project







# Ongoing reporting

Monitor your progress with data, statistics, feedback from users etc. Fulfil your obligations to the funding body - send in reports and audits complete and on time.

An audit is a review of spending, carried out by a specially-trained accountant, to demonstrate that the project funds have been spent in the way agreed in the project contract. Audits can be expensive if the project is complex, and it is important to budget for this early.

Consider inviting the grant maker to site for the launch of your program, or to see the results and success of your project. If you can't, keep them informed, even send some photos!

## **Be positive!**

It might sound harsh but the funding body does not owe you anything. Sometimes in the grant process you will not find a grant that is relevant for you. Other times you will commit a lot of work, time and effort without success. Try not to blame them and be critical. As in your normal business practices, if you treat a funding body well, they are more likely to treat you with respect in return. Don't get reputation for being rude or demanding. Writing letters of complaint to the relevant Minister or your local newspaper will not likely change your situation as in most cases due process will have been followed and you will be made to look like a sore loser, which is not good for anyone.

Each time you seek a grant you will learn new things, tricks and skills; each application you submit will get better and you will learn how to approach the process better. Don't be disheartened, applying for a grant is a wonderful way to build or consolidate your organisation, but it is not the only way. Good planning and practice will also assist you in making your organisation more sustainable.





# Case Studies

## The Big Issue

An idea so simple, it was funded by the Australian Government

Australia's first and only street paper, The Big Issue received a \$1.2 million cash injection to support the start up of a groundbreaking new initiative providing employment, training and pathways opportunities for disadvantaged women to positively change their lives.

In March 2010, the Australian Government announced it would kick start The Women's Subscription Enterprise after an application was made by The Big Issue to Round 2 of the Government's *Get Communities Working* projects under the *Jobs Fund*.

And while the money has assisted The Big Issue to launch the program including the hiring of staff and opening of three distribution centers in Melbourne, Sydney and Adelaide the ongoing success of The Women's Subscription Enterprise is reliant on subscription sales to The Big Issue magazine. For every 100 subscriptions sold one homeless woman will be employed to work as a Dispatch Assistant; sorting, collating and inserting magazines for distribution to subscribers every fortnight. As well as paid employment, the women also receive ongoing training and pathways opportunities, and the chance to develop their skills in a safe, secure and rewarding environment.

Subscriptions are sold commercially, so there is no pressure on the women to make sales and revenue is directed straight back into the pockets of disadvantaged women, through the provision of wages, training, mentoring and support.



By purchasing an annual subscription for just \$155 to The Big Issue magazine subscribers provide homeless and disadvantaged women with paid work in a safe, secure and rewarding environment.

For every 100 subscriptions sold, the Enterprise can employ one woman. The more subscriptions sold, the more women can be employed. **Will you join them and help The Big Issue reach its goal?**

**Subscribe today at:**  
**[www.thebigissue.org.au/womens](http://www.thebigissue.org.au/womens)**



# Case Studies

## Edmund Rice Camps

### Kids at Risk Gain Funding for Holiday Camps

Each year Edmund Rice Camps (ERC) relies on grant funding and fundraising for more than a third of their annual budget. Executive Officer, Melanie Tate said “without receiving grant funding we simply would not be able to provide services as we do”.

Therefore being successful in gaining a \$20,000 grant from the Mazda Foundation is a real boost going into a new year. The funding goes towards the running of two camps, each running four days and three nights, for children aged 5-12 years with disadvantaged and/or at risk backgrounds, alongside approximately 50-60 young adult volunteer leaders (primarily 17-30 years). These camps focus on providing an environment that fosters positive self-esteem and personal development, whilst setting and completed achievable challenges and goals.

Receiving funding like the grant from the Mazda Foundation also helps to encourage potential volunteers, in addition to lifting the profile of the organisation. Melanie agreed, “The grant funding we receive for next year dictates how many children, young people and families are able to experience our camps. Throughout the year, we were able to provide services to over 400 children (and families) through providing 23 camps, and saw over \$1 million dollars worth of volunteer hours contributed to ensure our services were successful”.

Young people who attend the camps may do so for a number of reasons. Socio-economic disadvantage often restricts the access that families and children have to recreational services and social outings. Edmund Rice Camps are unique in that all participants are matched with a leader, who gives their ‘buddy’ (participant) their full and undivided attention for the duration of the camp. The impact of this on the participants cannot be over-estimated. Many children with behavioural issues have only experienced negative feedback from adults/carers, so the



impact of having the undivided attention of the same adult who is committed to identifying and reinforcing the young person’s strengths, is often life-changing. The camps also provide welcome respite for parents and families.

*“On our camps, the children we work with experience for the first time simple things that we take for granted, like going to the beach, patting animals, hearing encouragement, tasting different foods and experiencing a camping holiday. The objective of ERC is to provide a safe environment where children are given new and exciting opportunities based on building trust and friendships in an inclusive and supportive environment. The Camp Leaders and volunteers are crucial role models and mentors who inspire children to develop and recognise their self worth. Without these camps, these children would not get to see the positive choices they could make for themselves and their lives”.*

## Julia Creek - Dirt and Dust Festival

### A case study in accessing funds and growing an event

Grant applications and bulldust don’t generally belong in the same sentence.

But in the case of Julia Creek’s Dirt and Dust Festival, grants have played a critical part in making it one of Queensland’s “must-go” events.

It all began in 1994 with the unlikely idea of running a triathlon in one of Queensland’s hottest and harshest climates. Each year has seen the addition of new and novel attractions like bull riding, cowpat tossing, tobacco-rolling and a “best butt” competition, as well as more conventional concerts and cultural events.

“Getting this far would have been a huge challenge without Grants money,” says Events Manager Margie Ryder. “A struggle to improve, a struggle to grow, a struggle to attract tourists.”

Dirt and Dust has been able to attract ongoing assistance from sources ranging from the Gambling Commission to the Department of Families to sports development bodies. But its major benefactor has been the Queensland Events Regional Development Program, which supported the Festival for nine consecutive years with grants building up to \$50,000. These funds allowed the Festival to implement professional skills-based training for its army of volunteers, and embrace the technology that now spreads the dirt to a worldwide web of potential visitors through the likes of YouTube, FaceBook and many other social media sites.

A deliberate aim of QERDP’s assistance has been to make “Dirt and Dust” self-sufficient. That goal was achieved in 2010 when it went “grant-free” for the first time.

So what advice does Margie have for other Grant applicants?

“Talk in depth to the body providing the funding; the more you understand what they’re looking for, the better you can frame your application,” Margie explains. “Get a second opinion from colleagues and friends. Value-add every day. Ask the funding body to read and comment on your submission before you lodge it.”

Margie has found them more than willing to help. She has also seen great value in joining with other local attractions and events to promote their region as a whole, receiving ready assistance from Tourism Queensland both financially and in kind, such as providing photographic resources.

As the dust settles after another successful Festival, Margie Ryder knows that funding has been instrumental part of making this award-winning Festival secure and sustainable for the at least the next 50 years.



## CanTeen and nib foundation

### Supporting young people affected by their parent's cancer

CanTeen, the Australian organisation for young people living with cancer, and nib foundation, launched a new comprehensive support program for young people living with the diagnosis of a parent with cancer, or who are dealing with the loss of a parent to the disease.

The first of its kind in Australia, the Offspring Support Program has been enabled courtesy of a very generous \$1.5 million grant from nib foundation. The program provides a range of support services for young people aged 12 to 24 years.

Terry Lawler, nib foundation Chairman, said "the program will make a demonstrable difference to the health and wellbeing of young people having a parent with cancer."

The nib foundation was established by nib heath funds in 2008 to support programs aimed at improving the health and wellbeing of all Australians. The foundation is funded by an initial \$25 million donation from nib, which was raised through the issue of new shares at the time of listing nib on the Australian Securities Exchange in November 2007. Since its establishment in October 2008, nib foundation has allocated \$5.5 million in funding of health and wellbeing initiatives.

The process began when CanTeen submitted an expression of interest to nib foundation in December 2009, to be later shortlisted through to the next stage. This involved supplying the nib foundation board with a comprehensive project proposal by February 2010 and presenting to the board in March 2010. In April 2010, CanTeen received the tremendous news that they had been selected to receive a grant.

"The Offspring Support Program represents a commitment from both organisations to address severe psychological distress among young people and provide age-appropriate responses," Mr Lawler said.



CanTeen is extremely thankful for nib foundation's support for this very important initiative which will make a real and positive difference to the lives of so many young Australians. Over the next three years the program will provide support to 8,000 young people through the provision of a multifaceted program i.e. specialised counselling service (face-to-face, telephone and online/email counselling), information resource/books and practical skills development, respite, recreation and peer support. Upon success of the program, CanTeen will look to expand the program to offer a national service at the end of the three years.

Mr Lawler added "nib foundation is delighted to be able to partner with CanTeen to roll-out this outstanding program that will assist young people during their time of need".





# Jargon Buster

<b>Acknowledgement Letter</b>	A letter from the funding body confirming receipt of an application; it may also include information about the assessment process, date when you will be informed of the outcome and contacts for further information.
<b>Acquittal Report</b>	Formal statement by applicant at the conclusion of the project. This report deals with the financial management of a project and in particular how grant funds have been expended on the project. Acquittal Reports may need to be submitted during the implementation of the project with Progress Reports (where satisfactory outcomes are often a condition for the supply of remaining funds) or, more commonly, at the completion of the project with the Final Report.
<b>Administrative Costs</b>	All direct and indirect costs associated with the management of grant programs. Often capped by the funding body at a certain percentage of the grant.
<b>Applicant/Proponent</b>	Organisation requesting a grant and submitting the application.
<b>Boilerplate</b>	A form or section of a document that is used as a standard.
<b>Cocktail Funding</b>	Cocktail funding involves mixing a number of grant programs to fund a project. It involves making applications to different grant funding programs for parts of the same project. It increases the complexity of the funding task considerably, but can be the only solution when no single funding program satisfies the funding requirement for a project.
<b>Collaboration (or Consortium)</b>	Some grant programs aim to foster cooperation between organisations. Collaboration is a formal link between entities where key personnel from different institutions or organisations are substantially involved in developing and undertaking the project. This relationship goes beyond the level of involvement under a traditional fee-for-service association, such as that which exists with contractors.
<b>Deadline Date</b>	The receipt date by the funder for an application to be considered for funding. Some deadline dates are mailing dates and need to be confirmed by a postmark or private shipping company date.
<b>Direct Costs</b>	Specific and identifiable costs of project operation.
<b>Discretionary Grant (Competitive Grant)</b>	Competitive grant program in which the applicants compete for money. Criteria are set for organisations that are eligible to apply. Those organisations must develop their own proposals and submit them directly to the funding agent for review.
<b>Eligibility</b>	Eligibility requirements are normally stated in the Guidelines. Funding Programs often limit eligibility to certain types of applicants, such as incorporated associations, not-for-profit organisations or government organisations. If you do not fit within the allowed categories you are ineligible to apply. Eligibility considerations also relate to the type of project, activities and related expenditure. Also note the tax status requirements, whether you need DGR or TCC statuses.
<b>Final Report</b>	A type of report submitted to the funding agency. A Final Report may be the only report required or may be the last of several Progress Reports. A Final Report is nearly always accompanied by an Acquittal Report.
<b>For-profit (organisation)</b>	An organisation is for-profit if it carries on activities for the profit or gain of its individual members. This applies to both direct and indirect gains.
<b>Funding Agency (or Grant Provider)</b>	The organisation awarding and administering the funding program.

<b>Funding Deed (or Funding Agreement)</b>	A funding agreement is a document setting out the terms and conditions under which the funding agency agrees to provide funding to a project. It is a legally binding contract between the funding agency and the recipient of the grant. The terms are not usually negotiable and you will generally have 30 days to sign. No funding will be provided prior to signing. Due to the significant detail contained in these documents, they are often available at the time you start the application. This is a good opportunity to read and review the clauses that you will be bound by if successful.
<b>Funding Limit</b>	The maximum amount or percentage of funding provided under a given Funding Program. Funding Programs usually have an upper limit on the total value of funding that will be provided to any single application.
<b>Funding Priorities</b>	Priorities take the form of specific kinds of activities that applicants are asked to include in an application to receive preference in the review process.
<b>Funding Program</b>	A formal scheme which provides funding for projects under certain terms or conditions that applications can be made seeking a grant of funding.
<b>Grant Seeker</b>	The organisation applying for a grant.
<b>Grantee</b>	The organisation that has been awarded financial assistance for a project.
<b>Guidelines</b>	Also called Program or Application Guidelines. They contain instructions for the completion of an application for a particular grant funding program. They normally also include key information about the program criteria.
<b>In-kind contributions</b>	In-kind contributions are the money/time or resources the applicant may be asked to contribute to the project. Applicants may be asked to match dollar-for-dollar the amount requested from the funding body. However, some programs, especially collaborative projects, will ask you to value the products or services provided to the project that have an intrinsic value, but are not provided as direct cash or financial support. Examples include volunteer labour and the use of an office at no charge (the value of the rent would be an in-kind contribution). In kind contributions should be valued at normal purchase rates (or fair-market value) and you should be able to provide justification for the values you place on these items.
<b>Indirect Costs</b>	Cover general administrative costs of a project, including such items as rent, utilities and maintenance.
<b>IP</b>	Intellectual Property. Applicants are sometimes required to demonstrate that it owns, or has beneficial use of, any existing IP needed to carry out the project. Sometimes it is expected that the grantee will own, or share any IP resulting from the project.
<b>Letter-of-Commitment</b>	Specifically lists services, money or other inputs promised to the project by supporting organisations.
<b>Letter-of-Support</b>	Written endorsement of an application by organisations or individuals who are familiar with the applicant's ability.
<b>Matching Funds</b>	Funds required by a grant program to pay the percentage of project costs not covered by the grant.
<b>Memorandum of Understanding</b>	A Memorandum of Understanding or MOU is a document describing an agreement between two or more parties. It expresses a collaboration of partners, indicating an intended common line of action.
<b>Milestones</b>	A key achievement at a specific stage in the project. You may be required to report on the success of a project milestone, outline slippage or change of direction. Payments of grant instalments are generally tied to the achievement of milestones, usually at dates set out in the funding agreement schedule.



<b>Objectives</b>	These are your targets or success indicators. Results should be specific, measurable and timebound and directly contribute toward accomplishing the overall purpose.
<b>On-Costs</b>	Labour on-costs may include workers compensation insurance (for example, WorkCover), employer contributions to superannuation, payroll tax etc.
<b>Operating expenses</b>	The costs of keeping an organisation open such as expenses related to internal or administrative operations, rather than to specific programs or services.
<b>Outcomes</b>	An outcome is the result, impact or consequence of the project. Projects should have a positive outcome. Outcomes should address the stated priorities of the program.
<b>Progress Report</b>	A type of report submitted to the agency supplying grant funds to a project. Progress reports refer to the periodic reporting of the status of the project, normally in reference to agreed Project Milestones.
<b>Project Period</b>	The amount of time during which a grantee is required to complete the approved work of a project.
<b>Recipient</b>	An organisation that receives funding.
<b>Request for Proposals (RFP)</b>	Is a formal announcement issued by a grant provider letting agencies know that it is looking for proposals for funding in specific topic or program areas. The RFP will usually include complete details for the grant provider to consider, such as what the proposal needs to contain, deadline, evaluation and other guidelines.
<b>Retrospective costs or funding</b>	This refers to funding for items which have already been purchased prior to a funding decision. Most programs do not allow this expenditure to be claimed. Before commencing a project, if you are considering applying for a grant, check the rules before you incur any project expenditure, to avoid disappointment of not being able to claim those costs. You may also be disqualified in applying for funding if you appear to be committed to undertake the project irrespective of whether you receive any funding.
<b>Seed Money</b>	Grant or contribution used to start a new project or organisation.
<b>Statutory Approvals</b>	Include approvals and permits for building, excavation, environmental or heritage approvals obtained through the relevant authorising body.
<b>Steering Committee</b>	A committee that oversees a project to make sure that it progresses and achieves its milestones and outcomes.
<b>Sustainability</b>	The continuation of the project outcomes beyond the period of funding. The purpose of assessing project sustainability is to ensure that projects funded will not need further funding to enable the outcomes to be completed or sustained.

## Useful Links

**GrantGuru Community Database**  
<http://community.grantready.com.au/>  
**NAB**  
<http://www.nab.com.au>  
**NAB Templates**  
<http://www.nab.com.au/smallbusiness>





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