



# Grants strategies to increase fundraising success

Grant-Seeker Workshop: 20 April 2023

Venue: Hub Southern Cross

Presented by: Craig Hunter & Pasanna Mutha-Merrennege





Image credit : SG client  
Vision Australia

# About us

**Strategic Grants' mission** is to enable for-purpose organisations to establish sustainable, cost-effective grant-seeking strategies to deliver projects that fulfil their organisational missions.

**Our vision** is to build the capacity of for-purpose organisations to apply strategic thinking to their service delivery and fundraising programs.

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Image credit : SG client  
Graeme Dingle Foundation



**Grant-seeking is major gift fundraising that enables delivery of your organisation's mission.**

Professional fundraising practice fosters effective philanthropy and achieves positive outcomes for the community, your charity and the philanthropist or grant-maker.



A photograph of three white puppies sitting on a stone step outdoors. The puppy in the center is looking directly at the camera, while the two on either side are partially visible. The background is a blurred green garden.

# Agenda

1

## **Part one**

Industry standards – what does the grants & fundraising landscape look like right now?

2

## **Part two**

Grants program Best Practice Tracker – how does your organisation stack up to our best-practice key performance indicators?

3

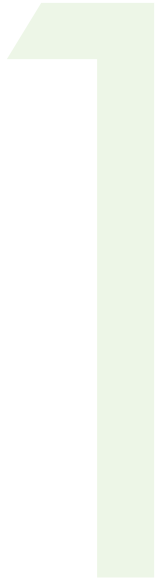
## **Part three**

Organisational best practices as they relate to grants health check and writing examples.

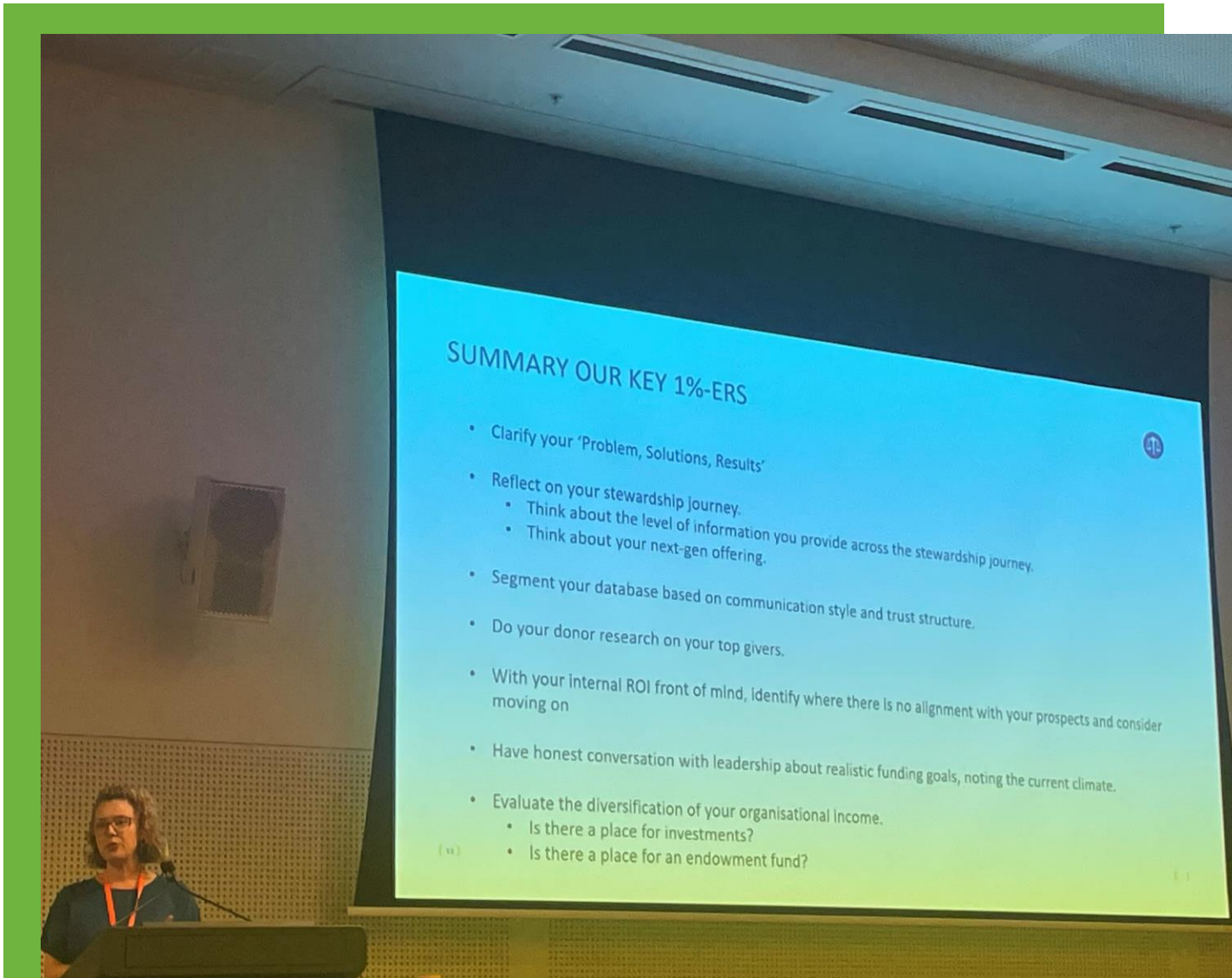
4

## **Part 4**

Revisit Best Practice Tracker, discussions and questions.



**Industry standards**



- Build trusted relationships and partnerships with your funding partners
- Engage them in a way that works for them
- Get your key messages clear and succinct
- Be able to demonstrate the impact of the funding

*Jodi Kennedy, GM Charitable Trusts and Philanthropy, Equity Trustees*

*Connecting Up Conference, 2022*



# Insights from the 2022 Philanthropy Australia Conference

- Trusted partnerships and creating impact together = strong conference themes
- Strong impact reporting = strong relationship with funders and is a critical element of any successful program.
- Accountability for impact: Funders and partners need to be accountable, adopting the mindset of “their impact is our impact”. If an organisation cannot clearly articulate what its impact is, then it should not be funded, simple as that. Resources need to flow efficiently to those who need them, that is all that matters.

**Read our PA 2022 conference  
highlight blogs here:**

<https://www.strategicgrants.com.au/2022/09/09/philanthropy-australia-2022/>



<https://www.strategicgrants.com.au/2022/09/15/impact-measurement-philanthropy-australia-conference/>



An aerial photograph of a landscaped area. The top and bottom portions of the image show green lawns separated by light-colored paved paths. The central portion is a large paved plaza containing numerous circular tree pits, each with a small, rounded tree. A green rectangular text box is overlaid on the right side of the plaza.

**How has the grants & fundraising landscape changed over recent years?**



# Sector trends

What we have learned

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“

*For all of us in the sector, the lesson from COVID-19 is that we need long-run funding and long-run thinking. To invest in programs that focus on underlying issues and prevention. And to create a more resilient community sector.*

Jane Magor, Perpetual Private's  
National Manager of Philanthropy

”

# Sector trends

Sector-wide call to “Pay what it takes”

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Call to action for grant-makers to fund indirect costs – that is, costs that cannot be directly attributed to a specific program or project – in order to create a long-term impact.

- Indirect, or overhead costs, make up an average of 33% of the total cost of the charity. Yet funding agreements typically account for indirect costs of just 10 to 20 %. [\(Pro Bono news\)](#)
- Paul Ramsay Foundation announced they are setting an interim 30 per cent standard for indirect costs across funding agreements, with the flexibility to shift that percentage higher or lower, depending on the specific need of the organisation.
- Many funders already ‘pay what it takes’ in their own way, e.g. Cages Foundation opts for a partner-led funding focus and building trust through shared due diligence and long-term relationships, and Westpac Foundation funds the business, not the program, and aims to understand, and help organisations understand, their costs and cost structure.



# Sector trends

An increase in capacity-building funding

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“Capacity building funding is obviously great but tends to widen the gap between funding and measuring impact. It is also expensive and diminishes the pool of funds available to grantees overall. How can you be sure you are backing the right horse?”

“Our grants database evaluates and measures impact (KPIs achieved and long-term outcomes achieved) – and suggests that **capacity building grants had the BEST results of all our grants** – so our move to more capacity building grant making is **evidence led**. So, our focus on this type of grant making is focused on impact and outcomes. And our due diligence has been adapted to allow for detailed organisational due diligence – and **we seek to support those organisations we know well, who screen well and whom we believe will benefit from such funding.**

**Our role is to back great organisations to scale their impact and benefit more people...not to spread our funding pool widely.”**

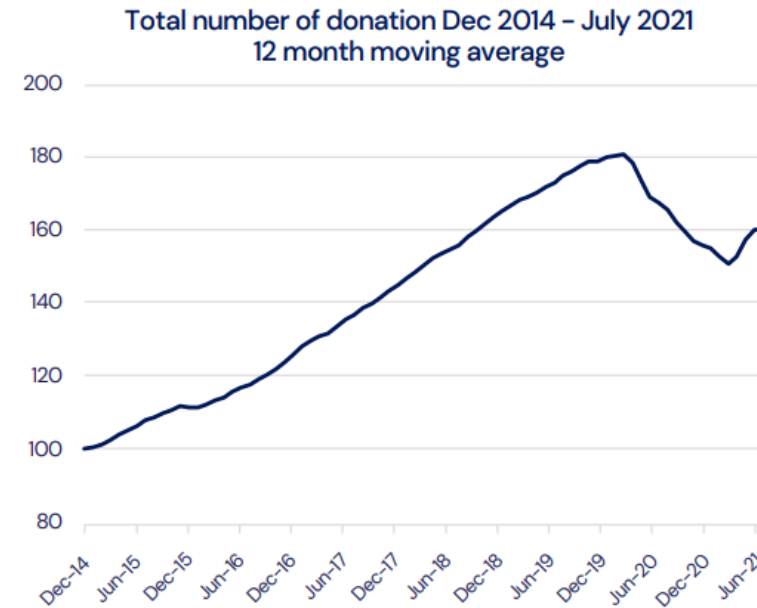
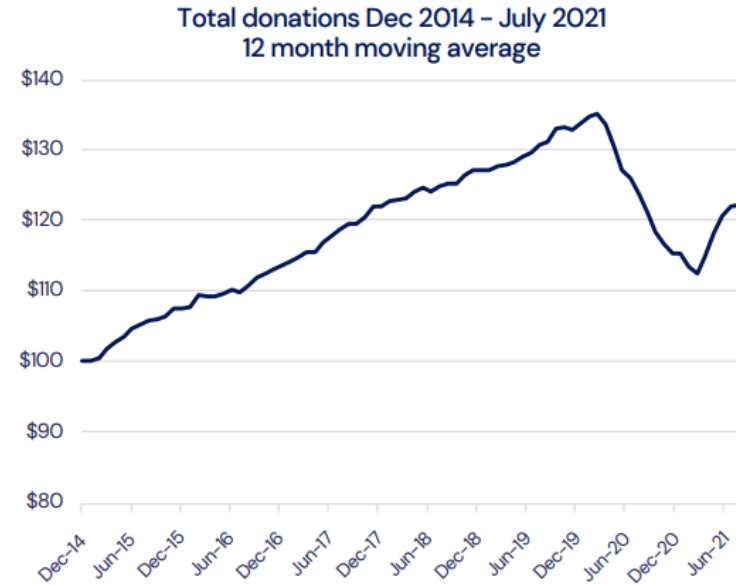
*Source: Craig Connolly, CEO, The Ian Potter Foundation on the 2022 Philanthropy Australia webinar COVID-19 and Beyond*

# Giving trends

## Corporate giving & community investment:

The fall in giving for 2019/20 and again in 2020/21 have been confirmed through the charitable giving index data but it has also now confirmed that a significant recovery commenced around December 2020 and should propel giving levels back to previous record levels for 2021/22.

Consistent with past major falls in giving during recessions or the global financial crisis, recovery tends to be fast. While donor numbers also recovered, they were more affected by the reintroduction of lockdowns in mid 2021. \*





# Positive changes from grant-makers

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“

*How you get there is no longer the focus.  
The end result is.*

Kirsty Allen, Myer Foundation

”

- Increased acknowledgement of the need for capacity building funding.
- Funders using part of their corpus to maintain grant-making levels.
- Interest free loans to the sector.
- The discussion focused on the increasing agreement between philanthropic bodies that untied grants should be allowed for capability building in NFPs – trusting the NFPs to use the funds wisely and where most needed.

## But...

- Funders still want to know the impact of their funding. So NFPs need to be able to go forward with a clear idea of how they will use the funding and then demonstrate how they will report back on the impact of that funding.

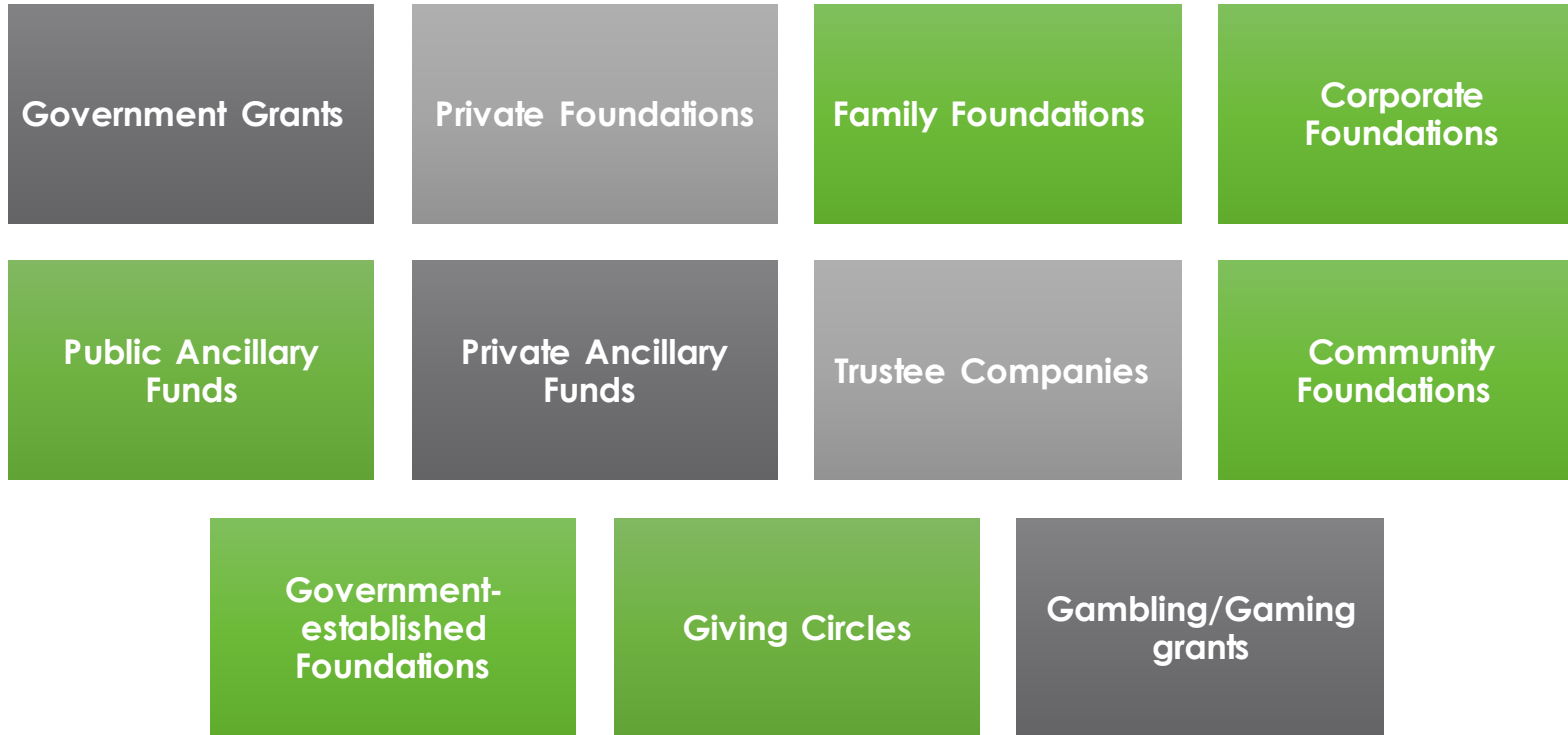




# Understanding (and meeting) funder expectations



# Types of grant-makers



# The common expectations from ALL funders

- ✓ Strong governance
- ✓ Proof of capability and track record
- ✓ Robust project / program plans
- ✓ Realistic budgets that are based on actual costs and quotes
- ✓ Demonstration of output, outcome and impact measurement
- ✓ On-time and accurate reporting, according to the terms of the application and agreement.

# Reasons for not being successful

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**REMEMBER:** Always read through the guidelines carefully and ensure your organisation meets them before applying.

- Feedback from all funders – large percentage of applications are poor.

- There are more applications being presented. It is HIGHLY competitive.

- Funders still get applications that just don't meet guidelines!**



# Reasons for not being successful

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Government grants and tenders

- Claims of the project's expected economic and social benefits were not clearly defined, quantified and backed up with recent evidence specific to the project.
- Could not demonstrate how the benefits would be sustained beyond the funded period.
- Cost Benefit Analysis was not sufficiently detailed or was not underpinned by independent data, including clear methodology, providing explanation of clear and specific assumptions, and detailing how the cost benefit analysis supported the applicant's case for return on investment.

# Reasons for not being successful

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Government grants and tenders



**REMEMBER:** Government grants are the same as other grants in that you need to plan ahead.

- Couldn't demonstrate the necessary level of commitment and support from government, community and/or the private sector for the project commensurate with scale of project.
- Did not supply sufficient rationale and evidence to support a need for funding. That is, why the project would not go ahead, or be diminished, without grant support, particularly when the applicant had sufficient funds to undertake the project without grant assistance.

# Some general 101 on seeking external grants

- We can't expect grant funds for last minute funding needs.
- Some deadlines are annual and then decisions can take up to six months (generally 1-3 months).
- We need a process that enables strategic, forward planning. Funders expect this!
- Funders expect all projects to be “on mission”.
- They expect strong social return on investment, want to know the difference their investment has made, what you have learned and what you will do next.
- They want to give the \$ away! We want to make it easy for them.



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# Grants Best Practice Tracker

# Grants Best Practice Tracker

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Assess your processes against the following questions to determine where the gaps are between your current strategies and grants success.

Please score yourself...

**1 - Never**

**2 - Seldom**

**3 - Sometimes**

**4 - Often**

**5 - Almost always**

# Best Practice Tracker

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*Assess your processes against the following questions to determine where the gaps are between your current strategies and grants success.*



## **1. Strong organizational governance & leadership**

- a. Is your CEO willing to talk to major donors?
- b. Is there strong internal collaboration between teams, for planning, performance measurement and donor engagement?

## **2. Internal project planning & development**

- a. Do you have an agreed process for internal project planning and development?
- b. Do you have monitoring and evaluation built into your projects?
- c. Is there a centralised, prioritised wish list of these projects?



# Best Practice Tracker

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*Assess your processes against the following questions to determine where the gaps are between your current strategies and grants success.*



### **3. Key messages**

- a. Do you have a Key Messages document that is a collation of all the key organisational information that donors and funders typically require to assess your organisation's capabilities?

### **4. Prospect identification & project matching**

- a. Do you have an efficient, regular and systematic approach to finding the right funding and grant opportunities for each of your projects?

# Best Practice Tracker

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*Assess your processes against the following questions to determine where the gaps are between your current strategies and grants success.*



## 5. Strong Donor Communications & Funding applications

- a. Do you have the writing experience and skills internally to prepare strong donor and funding submissions that:
- succinctly provide strong evidence
  - rate highly and leave no unanswered questions in funders' minds?

# Best Practice Tracker

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*Assess your processes against the following questions to determine where the gaps are between your current strategies and grants success.*



## **6. Funding success & reporting your outcomes**

- a. Do you deliver all donor and funder reports for funding you have received?
- b. Are they on time?
- c. Are you exceeding your partners' expectations?

## **7. Donor & funder engagement & stewardship**

- a. Do you spend time building relationships with funders prior to applying for grants and funding and provide robust outcomes reports to exceed their expectations?

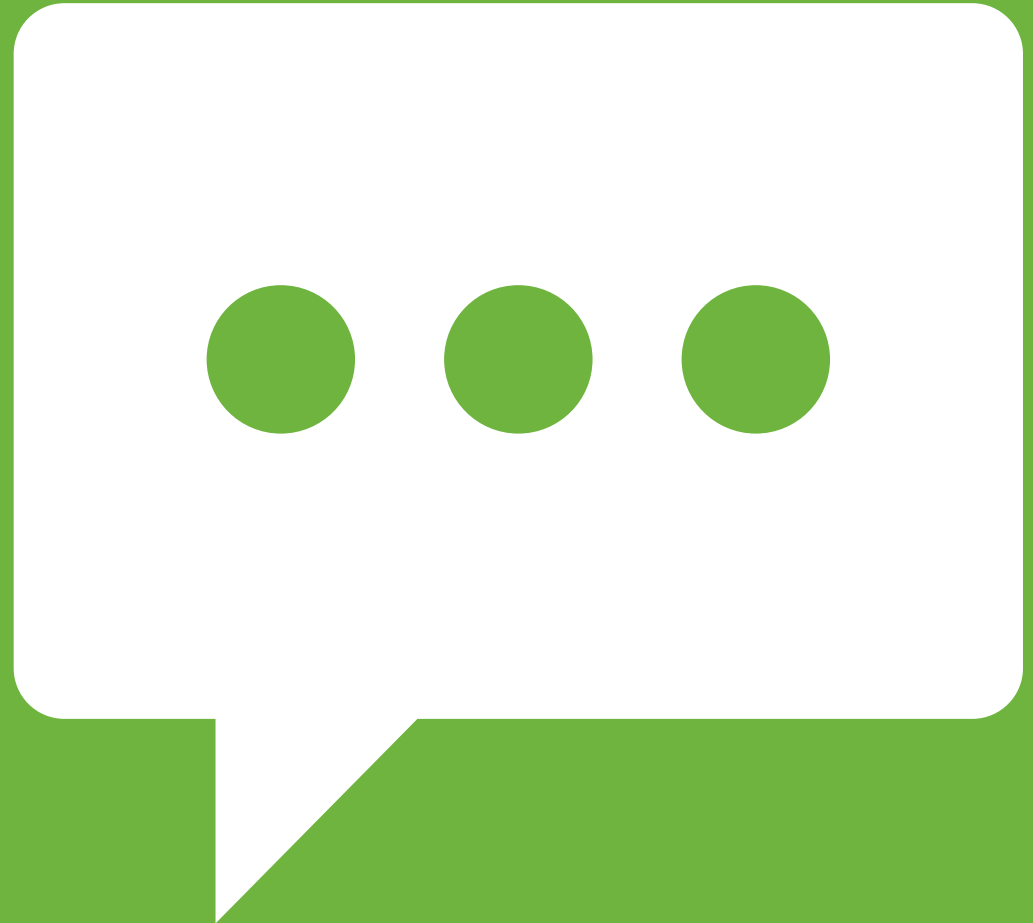


# Poll time: How did you score?

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Did you score 28-35? Great job if you did!

If you scored under 28, there is work to be done.



3

**Organisational best  
practice**

# What does best practice look like?

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- ✓ Strategic Plan and clear strategic objectives
- ✓ Operational plans that detail the work to achieve the objectives
- ✓ Budgets
- ✓ A centralised, prioritised project wish list
- ✓ Individual project / program plans
- ✓ An up to date, always current list of all the grant opportunities; government and philanthropic
- ✓ Strong Key Messages
- ✓ Excellent grant writer(s)
- ✓ Excellent communications – internal and external
- ✓ Ability to monitor and evaluate organisational and program performance and report outputs, outcomes and impact back to funders.
- ✓ A diversified fundraising stream





# Grants are only part of the revenue mix.

**Can you demonstrate sustainability?**

- Direct mail / regular giving
- Online campaigns / Crowdfunding
- Major donors (individuals and grants)
- Capital campaigns
- Lotteries / Art Unions
- Events
- Corporate partnerships and sponsorships
- Payroll giving
- Bequests
- Merchandise
- Social enterprise
- Payroll giving
- Community fundraising

**More on the importance of financial reserves and the importance of a diversified fundraising strategy here:**



<https://www.strategicgrants.com.au/2022/05/12/risky-business/>



# Internal project planning & development

# Project planning

Getting your projects grant-ready

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Follow these headings when creating your own project plans.

## Aim:

- **Goal?**
- Ensure alignment between **your mission** and **funder's mission**.



## Target group:

- **Who** is this project helping?
- **How many** people will be assisted?

# Project planning

NEED for your organisation and project

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Why is your organisation the best organisation to deliver this project?

**How can you evidence the need for your service...**

- What is the demand?
- Usage rates?
- What do local council statistics say about the need you are addressing?
- Is there global needs data that endorses what you are doing?

**How is what you are doing different to others?**

- It might come down to geography?
- Demographics
- Socio-economics
- Literature reviews
- What will happen if you don't exist?



# Project planning

Strategies, risks and collaborations

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## Strategies / Timeframes:

- Tasks implemented to achieve objectives.
- Confirm project is **ready to start** with funding agreement **but** that it won't have already started.

## Project risks:

- Mitigation strategies

## Collaborations:

- **Who** are you working with?
- Memorandums of Understanding?

## References / Letters of Support

Which organisations / individuals are relevant?

# Project planning

Outputs, outcomes and impact

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**Outputs?** The NUMBER of people you will reach, products or services you will purchase, deliver or distribute.

**Outcomes?** The changes that will occur as a result of the activities and outputs?

**Impact?** Likely sustained or systemic changes?

Can you **complete the project** in the required timeframe and report according to the funder requirements?

# Project planning

Evaluation

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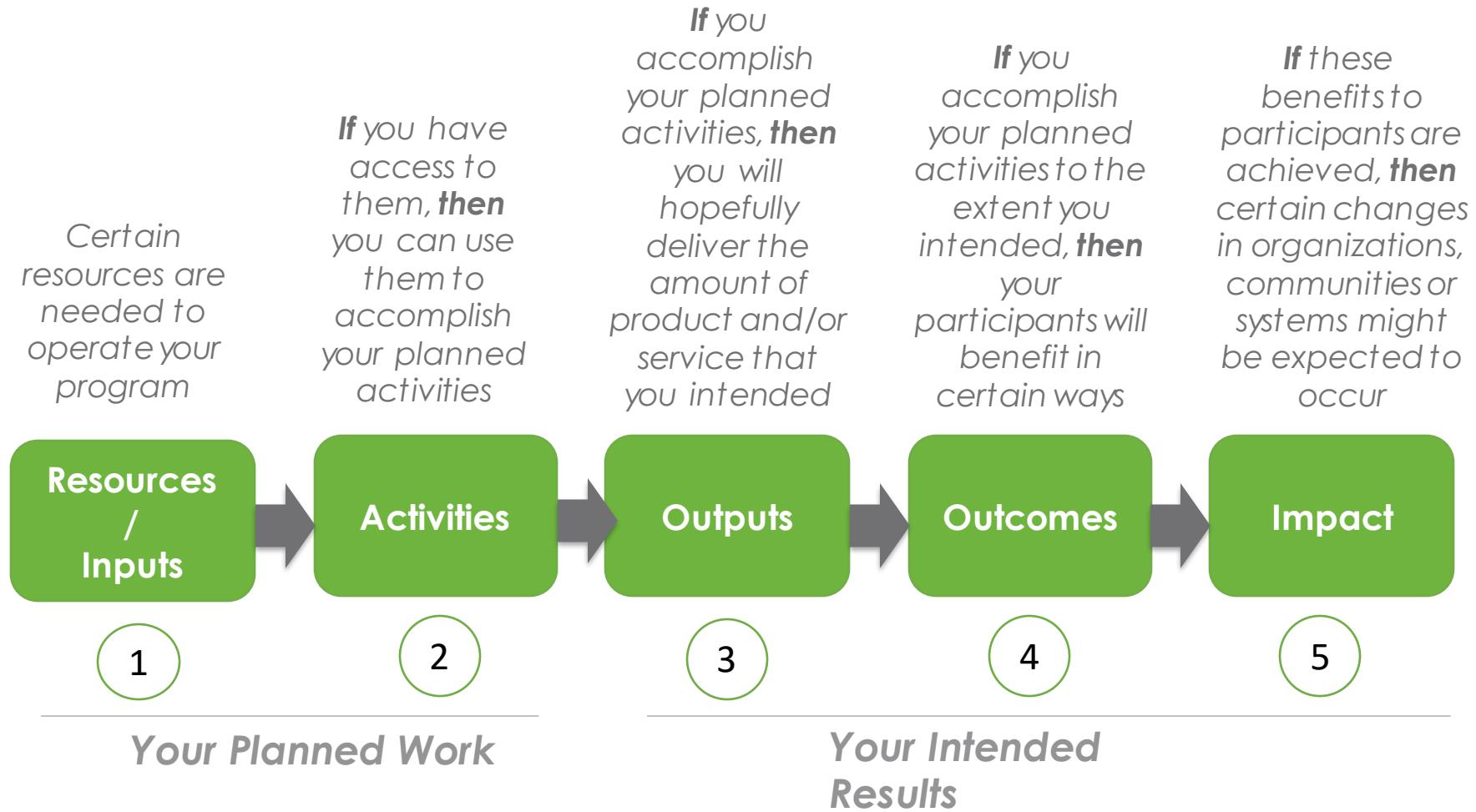
## Who is conducting the evaluation?

- Project leader or external reviewer?

## Evaluation measures:

- **How?**
  - quantitative = data counting.
  - qualitative (simple surveys that capture changes in behaviour and thinking) .
- Use pre and post tests to capture changes.
- Logic models measure cause and effect, demonstrating a theory of change.

# W.K. Kellogg Foundation Logic Model Development Guide



<http://www.wkkf.org/knowledge-center/resources/2006/02/wk-kellogg-foundation-logic-model-development-guide.aspx>



# Evaluation plan / methodology

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When does evaluation start?

Evaluation should be built into the project design right from the start!

## **Monitoring plan to provide mid-project insights**

- ✓ What kinds of data and analysis can be used to assess how the program is working along the way?

## **Plan for how to answer evaluation questions**

- ✓ Data collection methods and activities
- ✓ Budget
- ✓ Resources Required
- ✓ Sample / target population
- ✓ Who is responsible for data collection and analysis?
- ✓ Timeframes

## **How will the data be used and by whom?**

## **Plan for analysis and reporting**

# Project budgets

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Funders like to see co-contributions to your projects. Include volunteer time as personnel 'cost' (e.g. the cost to your organisation if you had to pay someone to do their work) as well as an 'in-kind' contribution to the project on the income side!

## Total cost to your organisation to implement?

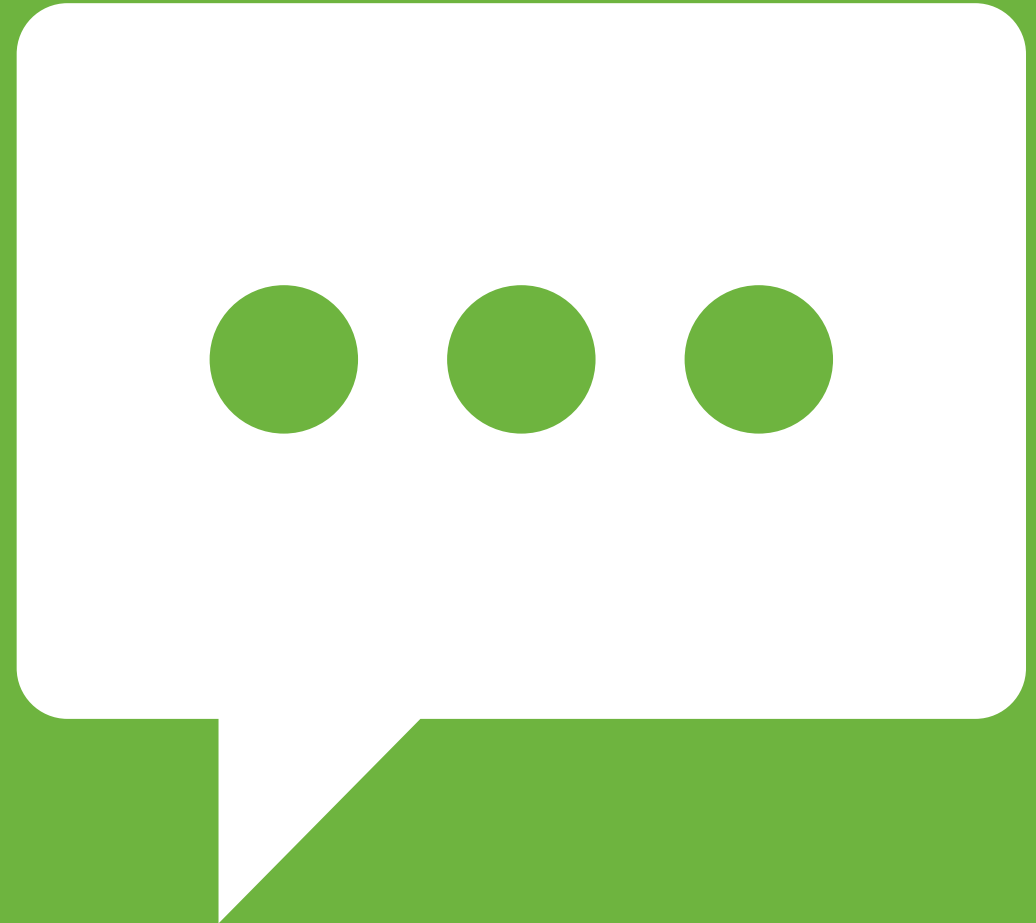
- How to incorporate Administration / Salary costs?
- Include **all** costs – we don't want to under-value what's required and then run out of \$
- Use current quotes.
- Funding from other sources?
- Include M&E expenses when eligible.
- Finance team should be involved!
- Make sure your budget and the rest of your project information **tell the same story!**



# Poll time: Who now thinks they have robust project plans?

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- Yes - Our project plans are strong
- No - Our project plans need more work





## Project wish list & key messages



# Wish list

Benefits of a centralised wish list process

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The most important point in grant readiness is a central project pipeline and seamless wish list process.

- ✓ All projects being presented to funders are organisational priorities and are on mission.
- ✓ Smaller projects of the same type across multiple locations, can be packaged and presented to funders who give larger grants.
- ✓ Planning your projects ahead enables you to respond to short-notice grants in a time-efficient way.
- ✓ We are ensuring that the most relevant organisational priority project is being presented to the right funder at the right time in the right way.

# Key messages

What your template should include

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Your key messages clearly define:

- What your organisation is all about
- Your POINT of DIFFERENCE

- Vision, mission and purpose
- Organisation description
  - short version (100 words)
  - long version (250 words)
- Organisational history
- Need for your organisation – what will happen if you don't exist?
- Niche offering
- Scope
  - Size and nature of target group(s), geographical coverage
- Key achievements
- Number of staff and volunteers and profiles of key staff
- Partnerships - who do you collaborate with?

# Key messages

What your template should include

---



Your key messages clearly define:

- What your organisation is all about
- Your POINT of DIFFERENCE

- Top strategic priorities for next 12 months and three years
- Organisational efficiency and effectiveness Key Performance Indicators – how do you measure performance?
- How you measure project/program performance? What evaluation processes and tools do you use?
- Examples of successful projects/case studies
- Funding breakdown
- Financial Reserves policy
- What is your Business Continuity and Recovery Plan to get through COVID-19 (and other natural disasters etc. that affect fundraising and business operations)
- A summary of all your admin details



# Grants prospect identification & matching

# A little about GEMS

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The Strategic Grants GEM Portal provides a customised grants calendar and grants management system

- ❑ Contains all local, state, federal gov't grant opportunities, including tenders. Plus, PAFs, philanthropic and corporate foundations.
- ❑ Grants data is fueled by an 80-90 hour per week in-house research team.
- ❑ It's the **only online end to end grants management platform** containing all the different funder types and delivering:
  - An always current, customised Grants Calendar finding JUST the grants relevant to your organisation
  - Full access to grant and funder records
  - Ability to track the progress of applications including when funder reports are due
  - Integrations with BlackBaud Raiser's Edge NXT and Salesforce to allow easy data migration
  - Additional email alerts on upcoming application and reporting deadlines
  - Monthly one-hour Grants Chat & GEM Portal Refresher Webinars with our team of experts and other GEMS users



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## Calendar Download

 Showing 1 to 10 of 1,307 entries
 Show  entries
 Font Size: 
Search: 
 Previous [1](#) [2](#) [3](#) [4](#) [5](#) ...

	Grant Name	Funder Name	Contact Organisation	Closing Date	Closing Date Status	Closing Date Notes	Priority	Notes	Fund Type	\$ Range	Grant Range Notes	Opening Da
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<a href="#">Create New Application</a>	Innovation Districts Challenges - Challenge Three: Entrepreneurship	NSW Government	NSWBuy Client Support Centre	31/01/2022	EOI Anytime	The Innovation Districts Challenges are now closed.	<input type="text" value="Consider"/>		General	\$100,001 - \$250,000	Highest ranked application \$250,000; second-highest ranked application \$100,000; third-highest ranked applicant \$30,000; highest-ranked in each district (not state winners) receive \$10,000 each	
<a href="#">Create New Application</a>	MRFF - Clinical Trials Activity Initiative - 2021 International Clinical Trial Collaborations Grant Opportunity, Round 2	National Health and Medical Research Council (NHMRC)	National Health and Medical Research Council (NHMRC)	16/02/2022		Applications open 26 August 2021. Minimum data due 5pm ACT local time on 2 February 2022; applications close 5pm ACT local time on 16 February 2022.	<input type="text" value="Consider"/>		Equipment, General	Over \$5m	No maximum grant amount but grants cannot exceed the amount of available funds of \$5M per year.	26/08/2021
<a href="#">Create New Application</a>	NHRMC Medical Research Future Fund (MRFF) Genomics Health Futures Mission 2021 Genomics Health Futures Mission Grant Opportunity	National Health and Medical Research Council (NHMRC)	National Health and Medical Research Council (NHMRC)	16/02/2022		Applications close 16 February 2022 at 5:00 pm (ACT Local Time). Minimum data are due by 5pm on 2 February 2022.	<input type="text" value="Consider"/>		General	Over \$5m	Stream 1: up to \$3M; Stream 2: up to \$3M; Stream 3: up to \$5M; Stream 4: up to \$5M; Stream 5: up to \$10M; Stream 6: \$200,000 - \$1M	28/09/2021
<a href="#">Create New Application</a>	Supporting Agricultural Shows and Field Days – AgShows and Field Days	Australian Government Department of Agriculture, Water and the Environment	Australian Government Department of Agriculture and Water Resources	17/02/2022		Closing Date & Time: 17 February 2022 - 9:00pm AEDT	<input type="text" value="Consider"/>		General	\$50,001 - \$100,000	Small up to \$10,000; medium up to \$15,000; large up to \$70,000	



# Grants prospect identification and matching

Grants history

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Have you captured past grants history?

- Past grants? **Existing donors are your best prospects!**
- Have all reports been provided on time?
  - any multi-year grants in place?
- Relationship status with current and previous grant-makers?
- Who makes prospect calls and manages relationships?

# Grants prospect identification and matching

Funder research

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Research your prospective funders. Before you make contact with a funder, learn about their motivations for funding and their funding principles.

- **Synergies between your organisation's needs and funder's charitable purpose?**
  - is your project on mission?
  - does your project fulfill their funding objectives?
- **Look at what they have funded in the past.**
  - previous funding in your geographic area?
  - are they interested in the type of model you propose?
- **Grant amounts** = your \$ needs?
- **Timing** in sync with your \$ needs?

# Grants prospect identification and matching

Initiating a Funder Relationship

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Communication with funders must be coordinated!

- Do your **research**.
- Attend **briefing sessions** where possible.
- Rule of thumb – **ring before writing**.
- Nurture **relationship** with key individuals.
- Keep them abreast of organisational changes.





# What do you say when you phone a funder?

- Intro yourself and your organisation
- “I have read your guidelines and web-site and just have a couple of questions with regards to an application we are wanting to submit. Do you have a few minutes now?”
- Be concise in project name, outcomes, geo location and amount needed. Ask any questions where clarity is needed.
- Finish with – do you think this is something that the Trustees would be interested in hearing more about?

# Poll time: Who rings their funders before applying?

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- As much as possible
- Sometimes
- Rarely / never



The background of the slide is a dense, overlapping collage of numerous small, rectangular sticky notes in various colors including yellow, pink, blue, green, and purple. The notes are scattered across the entire frame, creating a vibrant and textured backdrop.

# Application writing





**In-depth donor knowledge also informs the style of writing and communication channels that are most appropriate and relevant to the particular funder.**

# Writing winning grant applications

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USE THE FUNDER'S language back to them.

1. Talk the funder's language
2. **READ** the questions carefully and **ANSWER** them!
3. Tell them **HOW** your project addresses their criteria within the responses.
4. Have you got the most **up-to-date** project information from the project managers?
5. Include any research and results to date.
6. Use **demonstrable evidence** and cite your sources.
7. Ensure you have someone who **writes well** to put the application together.
8. Illustrate the **need** WELL! Grants are highly competitive.





**So, where do we  
start writing?**

# Telling your story.....



1. Brain dump



2. Organising & Refining

3. Building the Story

4. Polish the story



It's at this stage that we will identify any information gaps. So start early so you have time to collate the missing information!

## Engage me

- Hook/Intro
- Aim
- Who you are & what you want

## Explain the problem

- Project need

## Tell me the solution

- What are you going to do ?
- Objectives & strategies
- Who will benefit
- Timeframe/Budget

## Show me the impact

- Outputs
- Expected outcomes
- Evaluation Measures

## Prove I can trust you

- Experience
- Track record
- Collaborations

## Motivate me

- Summary
- Call to action

# For example...

## *What does your organisation do?*

MyPlay-ce is a membership organisation made up of health professionals, social workers, psychologists, art therapists, teachers. Our PBI status includes DGR. Our mission is to support refugee preschool children from 0-5. Our projects are small models of excellence researched, analysed and able to be replicated by us and other health professionals, particularly preschool teachers. We work in 30 preschools working directly with newly arrived children, using art therapy and other means as mediums through which to heal trauma in the preschool child from severely distressed backgrounds. Our main goal is to break the trans-generational traumas created by poverty, conflict and dislocation created by loss of culture and family. Our program at the interface of healing trauma and education for children around (i) health and hygiene (ii) nutrition (iii) identity (iv) facing difficulties at home (v) care of our environment.





# OR ...

*MyPlay-ce* works to enable refugee children to grow to their full, rightful place in society as resilient, empowered adults having had the kind of early childhood which allows them to develop their full potential.



We do this by working in 30 pre-schools throughout Victoria with children from newly settled families to:

- promote best possible developmental outcomes for children under 5 years.
- empower their parents to break their own cycle of suffering caused by loss of culture, family, community, and country.
- support preschool teachers to deal with the trauma. This is critical to enhancing personal and professional effectiveness.

We maintain a strong theoretical base in psychoanalytic thinking, attachment theory, early emotional, cognitive and healthy physical development of children.

*MyPlay-ce* is committed to research, evaluation, measuring and sharing outcomes so our work can reach other refugee families.





## Briefly describe your project and explain the need:

Two funders *Foundation1*, *Foundation2* and possibly *Foundation3* are funding an Art therapy project for *MyPlay-ce*. This is based on a previously tested project - a book about which is now published. **Your Foundation** is acknowledged. In this new project we will send child psychotherapists and Art psychotherapists to country preschools (in Shepparton, Greater Geelong, Ballarat, Mildura, Swan Hill, South Gippsland and Benalla) to work with children from traumatised backgrounds on a ten week once a fortnight sessional basis and then follow up with telephone and help for the preschool to support these children. All work results are researched.. *MyPlay-ce* has seminars for teachers to which all our preschools come. Travel is an enormous cost for *MyPlay-ce*. Our workers then got the idea they would go up for a week at a time if we owned a bus and move from centre to centre doing therapy. *MyPlay-ce* has fully trained and skilled workers available and interested in doing this. *MyPlay-ce* asks **Your Foundation** to provide a eight seater people mover which we could use literally all year round to access our centres. Air Fares and Car Hire would also not be necessary.



Explain  
Problem



Tell me  
the  
Solution



# OR ...

## Project Description

Preschools are designed to provide children with safe environments to learn, grow and develop. Unfortunately many children arrive carrying an overwhelming burden of trauma that can undermine their ability to learn, form relationships, and function appropriately in the classroom ([Literature Review - A trauma-sensitive approach for children aged 0-8years](#))



**Explain  
Problem**

Following extensive research and a pilot program, on which our recently published book XXXXX was based, *MyPlay-ce*'s new Art Psychotherapy program has recently been launched in several Melbourne centres with the support of *Foundation1* and *Foundation2*.



**Tell me  
the  
Solution**

Our specialist Child Psychotherapists work with children from traumatised backgrounds on a ten week once-a-fortnight sessional basis and then follow up with telephone support for the preschool to continue to support these children.

## The need

However, large numbers of refugee families have been resettled in regional cities, where there are even less resources to support their traumatised children ([Refugee Resettlement in Regional and Rural Victoria: Impacts and Policy Issues](#)).



Explain  
Problem

To address their needs *MyPlay-ce* would like to take our Art Psychotherapy program on the road to:

- Shepparton
- Greater Geelong
- Ballarat
- Mildura
- Swan Hill
- South Gippsland
- Benalla



Tell me  
the  
Solution

To achieve this we need a mini-bus, fitted out with the art equipment, special psychotherapy toys and books required for our work.

# Grant-writing checklist

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ALWAYS get someone to review your work for you

1. Strong project / funder match?
2. Relevant, up-to-date information?
3. Ensure the ask is at the top and focus on the need.
4. Clearly define the AIM of the project.
5. Demonstrate the need for the project, and qualify with data.
6. Define the strategies.
7. Outcomes? What will success look like?
8. How will the project be evaluated? WHO is going to evaluate?
9. Budget: adhere to guidelines; factor in other income; include in-kind support.
10. Spelling & grammar check – make it look professional.
11. Ensure formatting adheres to any funder guideline specifications.
12. Proofread - **get a third party to check the application with fresh eyes.**

A blue pen with a silver tip is positioned diagonally across the frame, resting on a document. The document features a bar chart with several blue bars of varying heights. The background is a light blue grid. A green rectangular box is overlaid on the right side of the image, containing the text 'Funding success & reports' in white.

# Funding success & reports



# Success!

What next?

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- Internal process for signing off on funding agreements?
- Ring to say thank you and seek clarity.
- How are funder reporting deadlines recorded?
- What are the internal systems to ensure project leader report information is obtained in time to meet funder's expectations?
- Who will be the main point of contact between your organisation and your funding partner?

# Data collation, analysis and reporting

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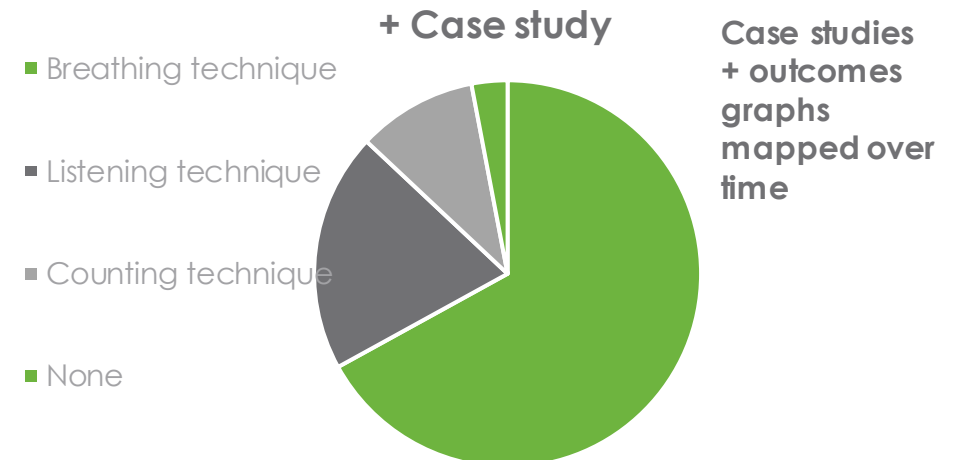
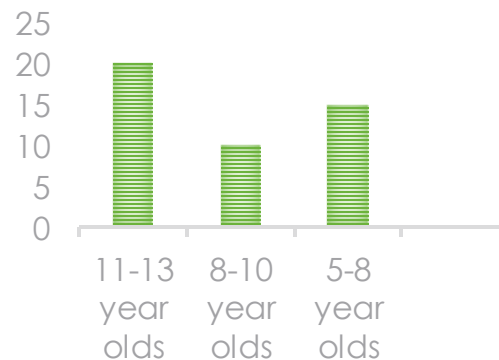
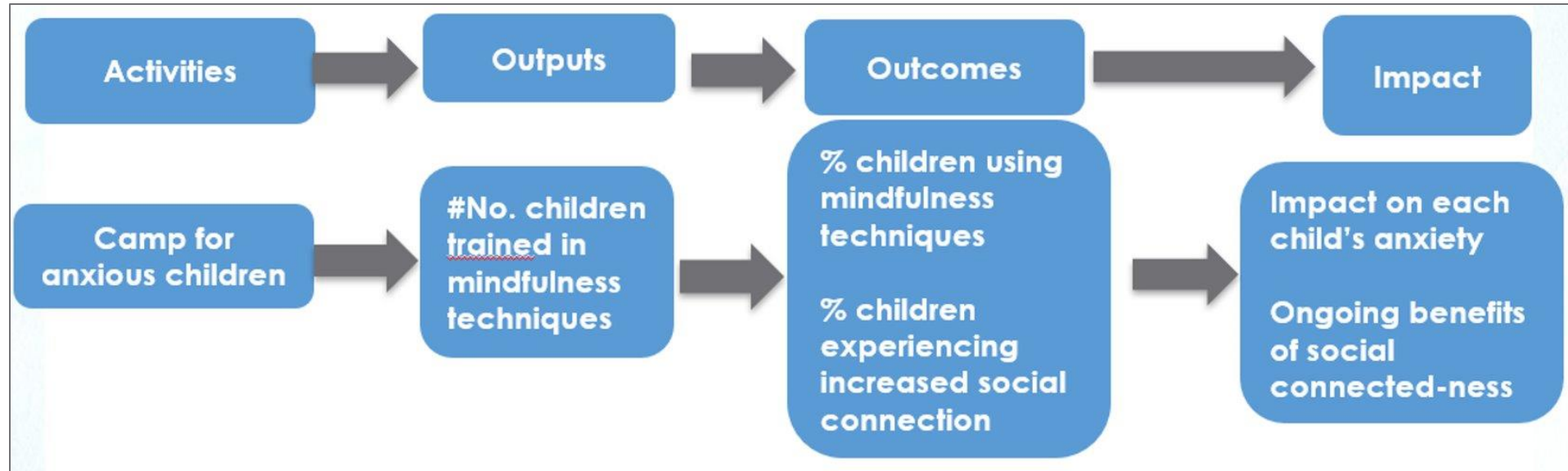


Go back to your key  
evaluation questions.

- Go back to your evaluation plan and the application you submitted. Make sure you are presenting the data you said you were going to present!
- If there have been changes and learnings, note these.

# Presenting your data in a relevant way

## Go back to the Logic Model...



# Making an impact with your data

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## Video



## Social Media



## Annual Report





# Different outcomes to those you anticipated ≠ Project failure

**Instead, think:**

- What have I learnt?
- How will I share those learnings with the funder and other stakeholders?



# With funding comes responsibility...

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Develop ongoing relationships. Funders' expectations vary – ensure they are met.

## Throughout:

- Keep funder informed.
- Any deviations?
- Any exciting achievements?

## Reporting:

- Report on outcomes according to terms of funding agreement.
- Describe the impact of the project and also any issues and challenges and what you learnt.

# Straight from the funder

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An example of reporting instructions for grantees from the James Frizelle Charitable Foundation

## Instructions for Grantees

This form is designed to help us understand the challenges, triumphs and insights you experienced and gained while running your funded project/program. Please be frank – while we absolutely want to know about and celebrate your successes, it's just important to us that we understand what did not work so well. This will help us to learn what we and others could do differently next time.

You must complete and submit this form no later than the date stipulated in your funding agreement. If you fail to do so you may not be eligible to apply for further grants from James Frizelle Charitable Foundation.

The completion of this form should be overseen by someone with an intimate knowledge of the funded project/program.



# Donor stewardship

# Developing funder relationships... even if you aren't successful



Develop ongoing relationships. Funders' expectations vary – ensure they are met.

## **Pre-submission**

- Start the relationship early

## **Successful? Great!**

- Ring to say thank you and seek clarity

## **Unsuccessful?**

- Ring to ask for feedback

## **Mid-term reports and after funding has been acquitted**

- Report on outcomes according to terms of funding agreement.
- Not achieving expected outcomes is not a negative. Explaining what you have learnt and how you are disseminating those learnings is extremely positive!
- Offer explanations for any deviations.
- Describe the impact of the project and any issues and challenges and what you learnt.
- Always be thankful, honest, transparent and engaging!
- Keep funder update on any organisational updates

# How do you measure the success of your grants program?

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You know you are successful when funders approach you!

- New grant sources identified
- Number of conversations with grant makers
- Positive feedback
- Increased interest from funders
- Satisfactory cost-profit ratio
- 100% funder reports submitted on time
- Improved success rate
- Reach budget targets
- Repeat gifts

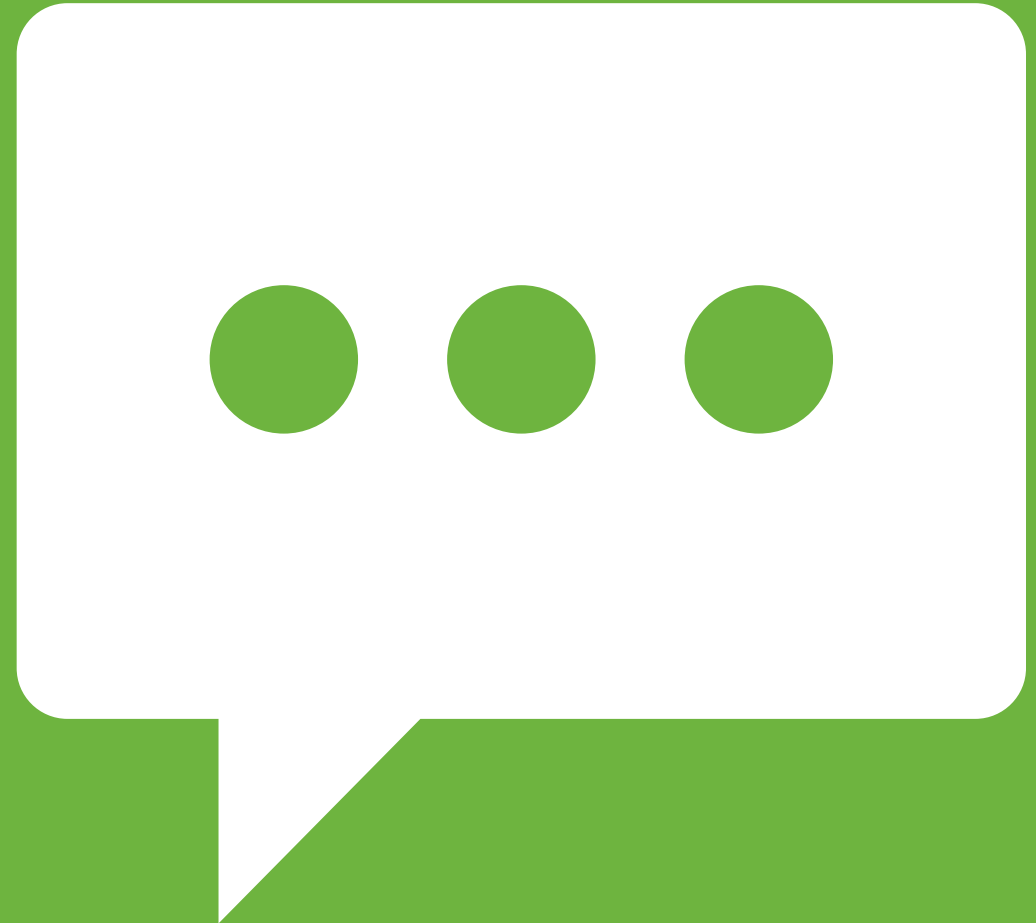


# Final Poll

Now that we've worked through best practice, are you clear on where you need to focus on moving forward, to implement or improve on your grant-seeking strategy?

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- Yes
- No



# Learnings

To summarise

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Grant makers of every type are your major donors – engage them and exceed their expectations



The focus by all funders is trust, outcomes and impact



Ensure your organisation has appropriate evaluation methodologies in place to capture and report



Be professional and always treat funders with respect



Grow your funding by demonstrating to funders you are delivering and learning

4

**Discussion and Q&A**

# Thank you!

Let's keep in touch

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[info@strategicgrants.com.au](mailto:info@strategicgrants.com.au)

@strategicgrants on socials

## Check out some additional resources



### Grants & fundraising blog

[www.strategicgrants.com.au/blog](http://www.strategicgrants.com.au/blog)



### Grants podcast

[www.strategicgrants.com.au/a-gem-of-a-podcast/](http://www.strategicgrants.com.au/a-gem-of-a-podcast/)



### Online training library

[www.strategicgrants.com.au/training/#webinarlibrary](http://www.strategicgrants.com.au/training/#webinarlibrary)



### Watch GEMS in action

<https://www.strategicgrants.com.au/gems/>