

Grants Management Quarterly (GMO)

SNAPSHOT:

*Spreading the word
about your grant results p4*

TOUGH TIMES:

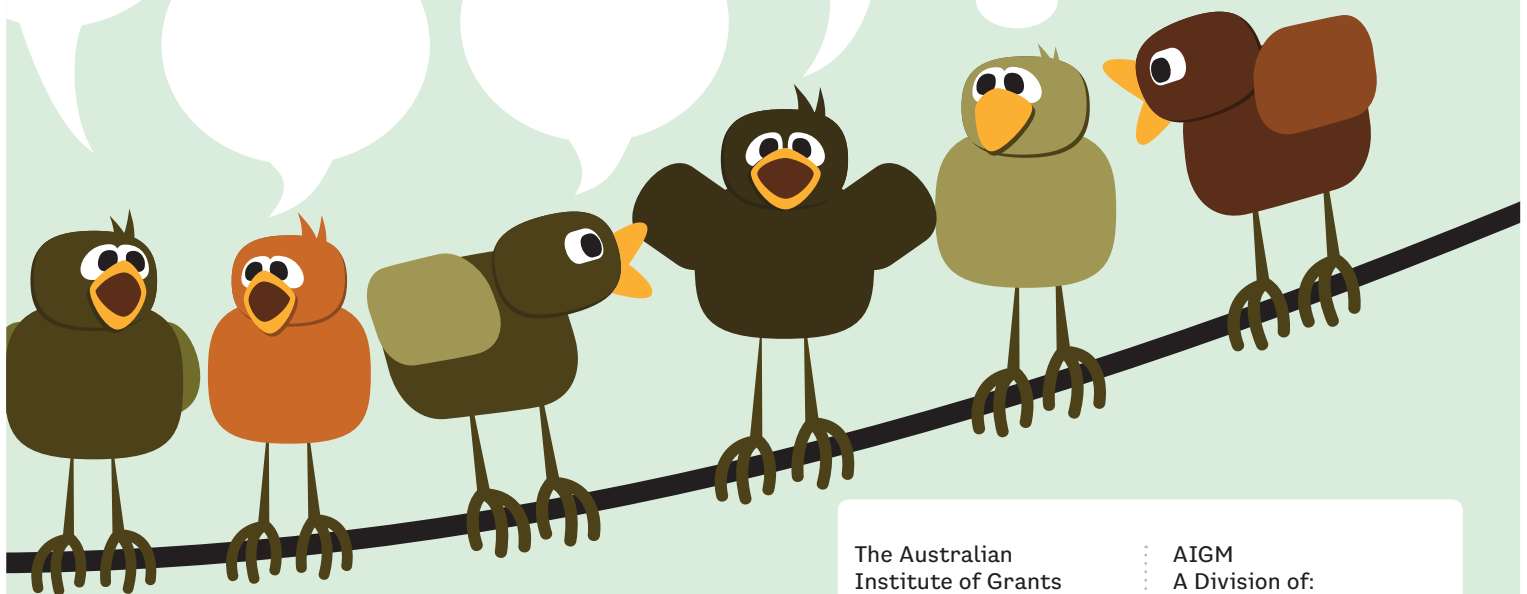
*Steering a path through
the GFC p8*

REVIEWING

GOVERNMENT GRANTS:

*Auditor-General highlights
key concerns p9*

So, what
went wrong?



The Australian
Institute of Grants
Management



AIGM
A Division of:



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Publisher:

Our Community Pty Ltd
National Headquarters
51 Stanley Street West Melbourne VIC 3003 Australia
(PO Box 354 North Melbourne VIC 3051 Australia)
Telephone (03) 9320 6800
Fax (03) 9326 6859
Email service@grantsmanagement.com.au
Website www.grantsmanagement.com.au
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We welcome your input

We welcome your article ideas, input and feedback.

Contact the Editor:

Kathy Richardson
kathyr@ourcommunity.com.au
(03) 9320 6815

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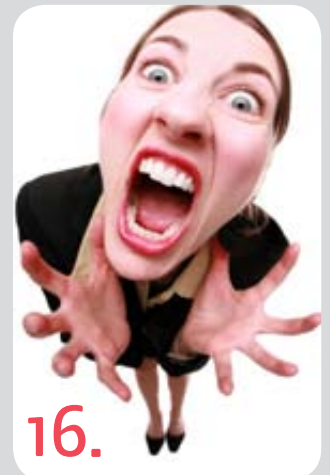
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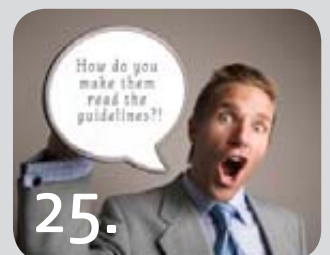
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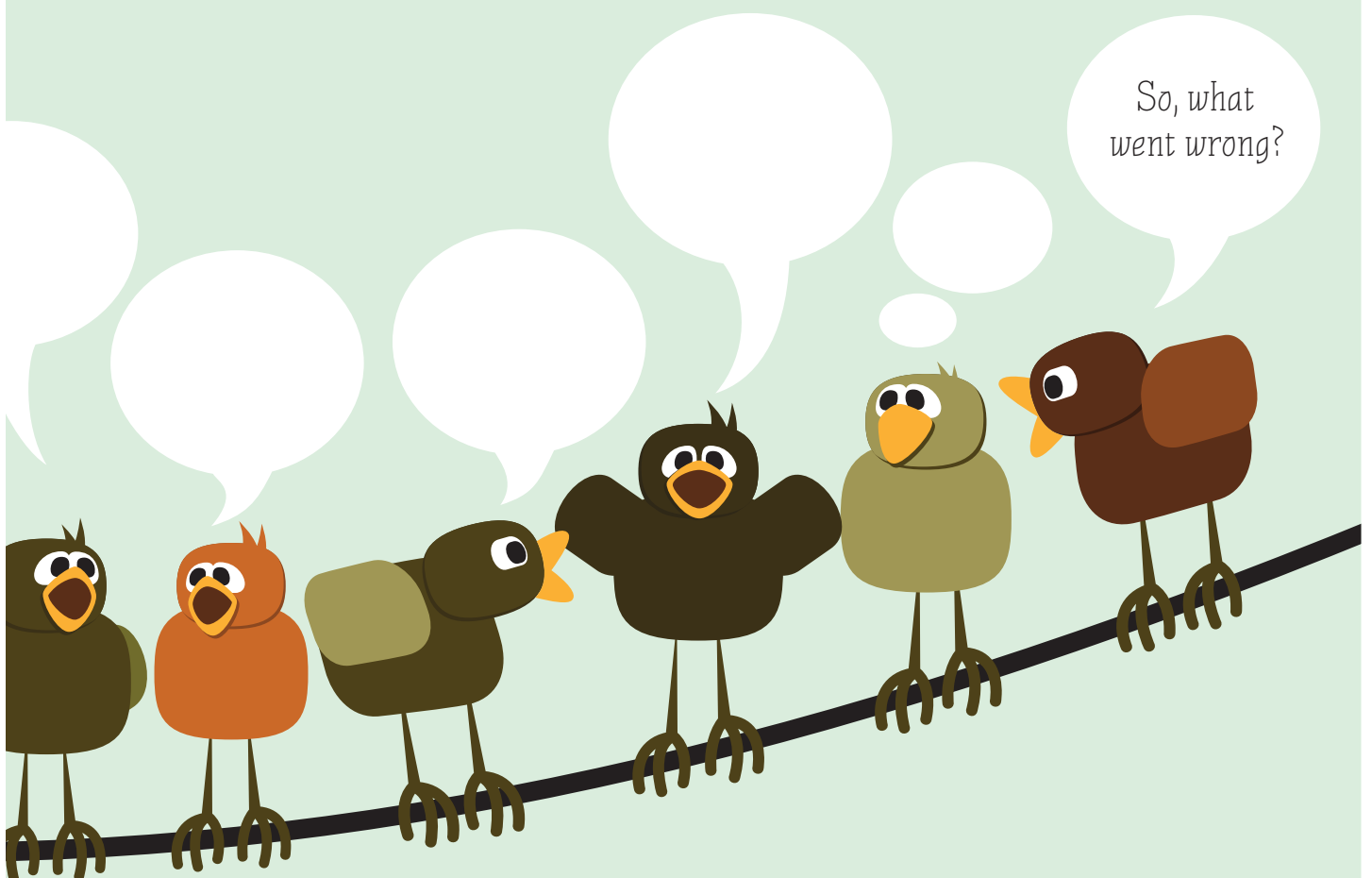


29.



Spreading the word about your grant results

If you're evaluating your funded projects properly, you know which ones worked and which ones didn't. You might even have some idea of why. That information may be as valuable as anything else that comes out of the project, and you want it to get into the hands of the people who need it. You can't count on that just happening; someone has to insist on it, and that person is probably you.



THERE ARE THREE situations in which a grantmaker will need to turn their attention towards the dissemination and diffusion of information.

1. Primary Outreach

Many funded projects – research studies, for example – are oriented towards producing information. Unless other people pick up that information and use it, you've wasted your money.

2. Secondary Outreach

Many funded projects are geared towards providing services. Apart from the value these provide to their target groups, though – the people who are housed or educated or counselled – these service projects also generate their own practical lessons, vital to the success of subsequent ventures in the same field.

3. Tertiary Outreach

Whatever kind of work your organisation funds, you yourself are in a privileged position with regard to the material they generate. You have a bird's eye overview, and you are able to compare and contrast the way different approaches to the project vision produce different effects. If that information is kept in your own hand, it's not worth much.

Dissemination

Information, like manure, is little use unless it's spread around widely.

For each of those categories of information outlined above, you want a report to be disseminated so that anybody who's interested in the topic gets to read about it. That's difficult, as difficult as any kind of getting the word out, but it's well worth writing it into your funding agreements.

Diffusion

Beyond that, you also want it to be diffused and put to use so that it affects the lives of the people who aren't ever going to read that report. That's more difficult, but it's still well worth keeping in mind as a goal. It's not simply a matter of putting the information where people can get it – you may have to sell it into a competitive market for people's attention.

PRIMARY: INFORMATION-ORIENTED PROJECTS

The experience you have gained as a grantmaker will help you decide what conditions to place on successful applicants (or, if you're more trusting, what advice to offer them).

Australia's National Health and Medical Research Council (NHMRC), for example, has as its policy

Dissemination Of Grant Outcomes

The Australian Government makes a major investment in research to support its essential role in improving the wellbeing of our society. To maximise the benefits from research, findings need to be disseminated as broadly as possible to allow access by other researchers and the wider community.

The NHMRC acknowledges that researchers take into account a wide range of factors in deciding on the best outlets for publications arising from their research. Such considerations include the status and reputation of a journal or publisher, the peer review process of evaluating their research outputs, access by other stakeholders to their work, the likely impact of their work on users of research and the further dissemination and production of

knowledge. Taking heed of these considerations, the NHMRC wants to ensure the widest possible dissemination of the research supported by NHMRC funding, in the most effective manner and at the earliest opportunity.

The NHMRC therefore encourages researchers to consider the benefits of depositing their data and any publications arising from a research project in an appropriate subject and/or institutional repository wherever such a repository is available to the researcher(s). If a researcher is not intending to deposit the data from a project in a repository within a six month period, s/he should include the reasons in the project's Final Report. Any research outputs that have been or will be deposited in appropriate repositories should be identified in the Final Report.

The same considerations apply to all public research, and the same conclusion should be drawn – to maximise the benefits, findings need to be disseminated as broadly as possible.

Research projects do generally have a slot on the form where the grantseeker can say how they plan to publicise their results. These will vary with the circumstances, but might include

At the end of the funding period the research team will

- *Issue a media release and hold a media conference*
- *Produce an academic journal article and submit it to a recognised refereed journal in this field.*
- *Place details of the research on the researcher's website*
- *Place details of the research on a recognised searchable internet database.*

Your responsibility as a grantmaker is to weigh the applicant's commitment to and competence in dissemination against other factors when allocating grants. A proposal for an excellent study that shows no understanding of the need for publicising the outcomes may be ranked below a less academically strong one that has a believable dissemination strategy fully worked out.



SECONDARY: PERFORMANCE-ORIENTED PROJECTS

Even projects that are not oriented towards research still generate knowledge. A not-for-profit that's good at what it does – and you probably shouldn't be funding any other kind – has a lot of implicit expertise, and it's important to see that this knowledge isn't dissipated when somebody leaves or something changes.

The community sector does see an enormous amount of reinventing of wheels, and if you can forestall that by passing ideas along the chain that would be a very good thing indeed.

As the funder, you can

- ask grantees to fill out forms with a stream of numbers to fit into your preset evaluation pro forma ;
- ask for fuller reports that make special efforts to extract all the lessons of the project – the ones you planned for, and the others;

Or both, of course.

Remember, too, that valuable knowledge comes from both successes and failures, but project coordinators are not likely to be entirely frank about all the things that went wrong unless

- you know already (because you've been monitoring the project);
- they trust you not to hold it

against them in the next funding round; or

- there's some allowance in the budget for the time they spend filling out reporting forms for you.

Again, you want this information to be passed around to those that can benefit from it. Some organisations are reluctant to publicise instances where grantees have fallen short, fearing that this will be seen as reflecting badly on the funder. In practice, however, the gains in your credibility and your usefulness will outweigh any such carping criticisms.

The modes of dissemination and diffusion that are appropriate in these circumstances will be different from those appropriate to research projects. Practitioners tend not to read professional journals, and you may have to get your people to

- issue a media release and hold a media conference
- write for general interest papers or magazines
- circulate their own newsletter to stakeholders and interested readers
- submit reports to Our Community's Centre for What Works (see below)
- generate a strong website that attracts readers from across the field.

If, in your judgment, the project has produced truly enlightening findings,

either positive or negative, you may want to add more funding to the project to enable the full benefits of wide dissemination to be realised.

TERTIARY: METAPROJECTS

From your point of view as a grantmaker, the job's not done when the project is over.

You want the benefit to be sustainable – and the most sustainable thing of all is knowledge: there are pieces of knowledge around today that are 3000 years old and still punching above their weight.

Even where your project leaders are perceptive, frank, and forthcoming, they are still limited in their perspective. They are only able to try one approach at a time; you can take an overview, comparing one approach to another.

For this reason you should consider in any large project budgeting for a final report that not only sets out the numbers but also reviews how things might have been different (if you're looking for models, we've recently reported on several American reports of just this nature).

A report like this will take commitment and resources, but it will allow your organisation to say with more certainty what it should be funding and how, while providing spin-off benefits to society at large. The internet offers you the opportunity to have a national, or worldwide, influence, if you can use it well.

Your goal is to be a trusted source of reliable information, a voice that is sought out by those anxious to learn.

OVERVIEW

Taking an overview of the overviews, the most important characteristic of successful diffusion is the awareness at all levels of the enterprise that the filing cabinet is an information penitentiary.

As with currency, the effects of information are measured by the product of its value and the velocity of its circulation, and miserliness in its distribution impoverishes us all.

- CHRIS BORTHWICK

How are you getting on?

Report provides recommendations for communication of grant results – Page 13 ✕

DISSEMINATION THROUGH THE CENTRE FOR WHAT WORKS

The Centre for What Works, an Our Community project, is designed to provide learning exchange opportunities and help reduce duplication of effort.

The Centre has four key resources for community groups, government and communities, taking the hard-won knowledge of one organisation and sharing it with many.

Of particular interest to grantmakers is the **Lessons Bank**, which provides a template form designed to tease out what worked in a funded program, what didn't, and why.

Our Community, through its grants management division, the Australian Institute of Grants Management (AIGM), is seeking grantmaking partners to help kick-start population of the Lessons Bank.

For more information contact Kathy Richardson by emailing

kathyr@ourcommunity.com.au or visit www.grantsmanagement.com.au/whatworks

An American report provides some tips for grantmakers wanting to help their grantees weather the global economic crisis.

Tough times

[Steering a path through the GFC]

A NEW REPORT from the American Grantmakers for Effective Organisations (GEO) is an attempt to sum up what American philanthropic grantmakers feel about the global economic crisis – a crisis that has impressed itself upon the large foundations in the most direct possible way, in a precipitous drop in income.

Both the Ford Foundation and The Mott Foundation have had to lay off about 40% of their staff, a circumstance that concentrates the mind wonderfully. In circumstances like these any possible solutions or improvements are eagerly scrutinised.

In Australia, as in America, we are faced with the circumstance where the crisis is driving the need for community services up and the resources of philanthropy down.

Foundations have to decide whether to spend from their reserves; government grantmakers have to decide whether they should increase funding to their areas to cover falling income from philanthropy, or whether the pressure on grantees can be relieved by other means.

“

Foundations have to decide whether to spend from their reserves; government grantmakers have to decide whether they should increase funding to their areas to cover falling income from philanthropy, or whether the pressure on grantees can be relieved by other means.”

One recommendation from GEO, for example, is to increase the flexibility of grant money. The report points to grantmakers who are attempting to alleviate the woes of community sector agencies by

- increasing the proportion of grants allowed for general operating support
- releasing some restrictions on how current grants are spent
- diversifying funding methods to include cash flow loans and credit guarantees
- speeding up the renewal of recurring or continuing grants
- allowing an extension of project completion time for grantees who are under pressure.

The report also recommends reducing avoidable burdens on grantees – streamlining reporting requirements, for example, to free up their time and resources for other core activities – and working more closely with other stakeholders.

All of these fixes require close and personal contact between

grantmaker and grantee to enable real communication on needs and possible remedies, and this in itself may require significant changes in the way grantmakers work.

Of course, the trouble with a title like “Smarter grantmaking in challenging times” is that it suggests that you only need to be smart in challenging times, which is if anything backwards talk; after all, the more money you have, the more you can do with it, and the more important it therefore is not to act stupidly. As one might expect, therefore, the new report is actually an attempt to repackage its pre-existing principles into an attractive format for people who might otherwise have lacked incentives to consider them.

“The economic crisis hasn’t changed the answers to this question – it has only served to heighten the urgency of our response,” GEO says.

That said, the report does think that the pressure to produce results may force improvements in processes and principles.

“By showing bold, effective leadership at a time of such uncertainty, grantmakers have the potential to spark major breakthroughs on the issues we care about and entice others to join collaborative efforts to improve lives.”

That can’t be a bad thing, whenever we get around to it.

The full report is available here: <http://tiny.cc/ijlUx> ✕

The NSW Auditor-General has issued a scathing assessment of the administration of government grants in NSW, urging measures to improve transparency and evaluation. The findings and recommendations are essential reading for any government grantmaker.

Reviewing Government Grants

Auditor-General highlights key concerns

NSW GOVERNMENT departments need to review their administration of grants to improve transparency and show the public they are getting value for money, the NSW Auditor-General says.

In a performance audit report released in May, Auditor-General Peter Achterstraat said that in the current economic conditions it was important that grants were made wisely and achieved “the best value for the taxpayers’ dollar”.

Mr Achterstraat said the NSW Government spent \$5.5 billion on grants in 2007-08.

“Yet when recipients were interviewed they said that there was a lack of transparency in how these grants were administered,” he said.

“In fact, only one-third of recipients said that grants are directed to areas of highest need.”

Mr Achterstraat said the audit found it was hard to find out when a grant was available and where to go for that information.

“More importantly, the decision-making process of who receives a grant is not explained to those organisations that do apply,” he said.

“This lack of transparency alone means agencies need to have a look at how grants are administered.

“In addition to this, many agencies do little to show that the public get

value for money for the millions spent on grants. There are cases where grants have been given out with no follow up at all about how the grant was actually used. Clearly this is not a good way to hand out public money.”

Mr Achterstraat put forward a number of solutions to the problems identified in his report.

“What I am advocating is that all agencies review how they communicate what they do with their grant monies. Put simply, they need to make it easier for people to find when and where a grant is available, how the decision is made about who gets the money, and a consistent form of reporting on how it was used.

“

What I am advocating is that all agencies ... make it easier for people to find when and where a grant is available, how the decision is made about who gets the money, and a consistent form of reporting on how it was used.”

“The use of web-based technology to make it easier to find grants is one simple solution.”

Mr Achterstraat warned, however, that government departments avoid creating more bureaucracy.

“Red tape is hard to see through,” he said.

The audit examined the administration of grants by five government agencies over a five-year period. The audit team examined the distribution of grants by electorate and surveyed 65 councils and 101 non-government organisations about their view of NSW grants.

Key findings and recommendations are provided below.

KEY FINDINGS

What are grants?

Grants mean different things to different people. Traditionally, a grant was a gift where the grantmaker did not expect to receive a benefit.

More typically, a grant is funding for a specified purpose directed at achieving goals and objectives consistent with government policy.

Most NSW grant spending funds human, transport and other services to the community. A large number of smaller grants fund community activities and a range of other activities such as research and

environmental works.

The Department of Premier and Cabinet (DPC) issued a good practice guide (the Guide) in 2006 to improve grant management across government. This encourages agencies to manage grants with more transparency, less red-tape and greater evaluation and coordination.

More needs to be done to ensure grantmakers spend wisely and get value for money. There is a risk that agencies may not have the control they need. Where outcomes are important and substantial funds are involved, agencies should set up timely monitoring systems, tie payment to clear performance measures and require the recipient

to establish internal controls. At the same time agencies need to ensure that less risky funding is not tied up in red-tape and a one size fits all approach

We recommend that DPC review the Guide to provide more assistance to agencies planning, evaluating and reporting on programs, designing funding agreements and managing risk.

Where did the money go?

The Government does not have a centralised picture of overall grant distribution to inform resource allocation and help ensure that grants are well spent.

To get an indication of where

grants went, we followed the lead of the Australian National Audit Office and examined internal agency records to assess the electoral and geographic distribution of grants.

We looked at grants made by NSW Health, the Environmental Trust (ET), the Departments of Community Services (DoCS), Ageing, Disability and Home Care (DADHC) and Environment and Climate Change (DECC).

This consisted of 26,800 grants worth \$5.2 billion, or about 20% of government grants made between 2002-03 and 2006-07. Some agencies had concerns about analysing their data electorally and DADHC maintains that its grants cannot be accurately mapped to electorates.

Nevertheless on the best information available, we found no significant difference in the way these grants were distributed to government and opposition electorates. We did find that safe electorates held by the major parties got \$1.29 for every dollar received by marginal and independent seats. Regions also received different levels of funding.

Agencies can have good reasons for funding electorates differently. These vary depending on the specific program and can include socio-economic need or the particular population, resources, infrastructure or environmental and heritage features being addressed.

While agencies publish who gets grants and how much they get, most do not publish robust evaluations that explain what grant programs have achieved and how the distribution of funds has made good use of public money.

We recommend that agencies regularly evaluate their grant programs and publish the results. This would allow the public to assess for itself the integrity and effectiveness of NSW grants.

What do recipients think of the grant system?

This chapter presents the views of 65 councils and 101 non government organisations (NGOs) who volunteered to complete a survey on NSW grants. The respondents, who account for 40% of councils and less

AUDITOR-GENERAL'S REPORT PERFORMANCE AUDIT

Grants Administration



The Legislative Assembly
Parliament House
SYDNEY NSW 2000

The Legislative Council
Parliament House
SYDNEY NSW 2000

In accordance with section 38E of the *Public Finance and Audit Act 1983*, I present a report titled Grants Administration.

Peter Achterstraat

Peter Achterstraat
Auditor-General

Sydney
May 2009

than 4% of NGOs, raise a number of concerns about how grant managers manage and communicate their grant programs.

Some of the agencies, whose grants distribution we examined in the previous chapter, are concerned this chapter will be seen as all about them. It is not. We asked recipients about grants made by all NSW agencies. The findings in this chapter are general in nature except where reference is made to specific agencies.

Our respondents are very positive about what grants achieved,

but many have concerns about transparency and red-tape.

Transparency means citizens should be able to “see through” what goes on when public officials act. The NSW *communitybuilders* website is meant to be a single point of information about NSW grants, but agencies are not posting comprehensive information about funding that can be applied for. Only a minority of respondents agree that agencies provide timely information on available grants, advice on how applications are assessed and the reasons for rejection. Less than one

in five say decisions to approve or reject grant requests are fair and transparent or agree that grants are directed at the areas of highest need. There is a risk that some communities may miss out on worthwhile projects.

‘Red tape’ refers to inconvenient and unnecessary procedures.

It is proper for agencies to require applicants to document grant requests and for recipients to report on what they did with the money. Most respondents say reporting requirements are reasonable.

But respondents indicate that red tape can interrupt and frustrate their work. Less than a third agree that the amount of work to apply for grants is reasonable and that reporting requirements are consistent across programs. Fewer than one in four agree that decisions to approve grants are timely and only one in 10 say there is coordination between grantmaking agencies (including the Commonwealth). Some respondents indicate that agencies create unnecessary paperwork by requiring annual applications for recurrent funding.

Grantmakers need to balance efficient process, transparency, accountability and value for money. This balance will depend on the risks of the program, the amounts involved and the recipient.

The 2006 Department of Premier and Cabinet DPC Guide provides advice on good practice and provides templates for managing grants. We recommend that DPC review the Guide and that agencies:

- use consistent, standard terminology with grant recipients
- electronically publish a rolling calendar of funding expected to be available over the next 12 months
- increase the use of technology to streamline applications and reporting.

The full report is available from the Audit Office of New South Wales website: www.audit.nsw.gov.au

RELATED ARTICLE:

Victorian Auditor-General says clear objectives needed for drought funding – Page 24 ✕

RECOMMENDATIONS AT A GLANCE

Grantmaking agencies should:

1. Manage risk and streamline procedures to the minimum needed to ensure accountability and value for money.
2. Improve transparency by publishing in an accessible and timely way:
 - a rolling calendar of grants funding expected to be available in the next 12 months
 - their procedures for making grant decisions
 - Ministerial Directions to make or refuse grants outside of normal procedures
 - Evaluation of what grant programs achieved and how the distribution of funds has supported government objectives
3. Set up timely monitoring systems, tie payment to clear performance measures and require the recipient to establish internal controls.
4. Tell unsuccessful applicants why their proposal was rejected.
5. Reduce red-tape by using:
 - standard terminology when dealing with grant recipients
 - three or four year agreements for recurrent services and ongoing projects
 - targets to better manage the time taken to process grants
 - integrated funding and management of multiple grants.

The Department of Premier and Cabinet (DPC) should, by June 2010:

6. Review its Guide and amend it to provide:
 - more assistance for planning, evaluating and reporting on programs, designing funding agreements and managing risk
 - consistent standard terminology for agencies dealing with grant recipients.
7. Encourage agencies to regularly evaluate programs and publish the results.
8. Encourage agencies to use web-technology to:
 - make it easier to apply for grants
 - improve the information available to grantmakers and recipients
 - streamline interactions between grantmakers and recipients.

[Auditor-General of NSW]



Great Ideas

1 Hitting the Road

MANY AUSTRALIAN grants funders undertake roadshows to spread the word about their program and encourage more and better applications.

But few go to the lengths that Britain's Association of Chief Executives of Voluntary Organisations (ACEVO) has gone to.

The organisation undertook a roadshow during June, travelling from London to Leeds to Birmingham, taking with it a program that included

- a speech by the Third Sector Minister Kevin Brennan
- presentations by a range of key government funders on upcoming 2009-10 programs (with particular emphasis on recession support), and
- advice on grantseeking, fundraising and reporting on results.

The program did come with a catch, however – a £125 (\$260) attendance fee.

Find out more at www.actionplanning.co.uk/roadshow09.pdf

2 Email Updates

NOT ONLY DOES the Compassion Capital Fund send out emails letting subscribers know about funding opportunities – it sends pre-emptive emails so subscribers know what's coming up.

This device allows grantseekers to get prepared and is particularly useful if you're likely to have a short application period.

And, as this email shows, it also helps manage the expectations of repeat customers. Note the second paragraph: "Please note that CCF does not anticipate making any Communities Empowering Youth (CEY) grants or Targeted Capacity Building grants (mini-grants) in 2009."

CCF Announcement: CCF Funding in 2009

| | |
|--|---|
|  Print Forward | |
| <h2 style="margin: 0;">The Grassroots Special Announcement</h2> | |
| <p>Thursday, April 30, 2009 CCF Web Site Subscribe Unsubscribe</p> | |
| <p>In This Special Announcement</p> <ul style="list-style-type: none"> • CCF to Announce Funding Opportunities Soon | <p>CCF to Announce Funding Opportunities Soon</p> <p>CCF will soon post a program announcement for the CCF Demonstration (Intermediary) Program. Please visit the CCF Funding Opportunities page frequently if you are interested in this funding opportunity. You will also receive another special announcement after the program announcement has been posted online.</p> <p>Please note that CCF does not anticipate making any Communities Empowering Youth (CEY) grants or Targeted Capacity Building grants (mini-grants) in 2009.</p> <p>For more information, visit the FY 2009 CCF Funding page on the Compassion Capital Fund Web site.</p> |
| <p><small>If you have trouble reading this e-newsletter due to formatting issues, or visible HTML code, or if you would like to discuss content-related issues, please contact the National Resource Center at 1-866-CCF-5129 or help@ccfgrantees.org.</small></p> <p><small>Hypertext links and other references to non-CCF products and services are provided for information only and do not constitute endorsement or warranty, express or implied, by the CCF, IHS, or U.S. Government, as to their suitability, content, usefulness, functioning, completeness, or accuracy.</small></p> | |

A new report sheds some light on some of the ways grantmakers and grantees can improve the process of communicating the results of their grant-funded programs.

How are you getting on?

Improving communication of grant results

MORE than a third of UK grantmaking trusts and foundations are not providing funding for grantees to monitor and evaluate their work, new research has found.

Those that do provide funding for monitoring and evaluation have higher expectations and are therefore more disappointed with the information they receive, according to the research by think-tank and consultancy, New Philanthropy Capital (NPC).

The research report, *How are you getting on?*, draws on data from surveys and interviews on the communication of results between grantmakers and grantees.

The findings show there is still plenty of room for improvement in the information requested and provided in relation to reporting.

While both parties are broadly satisfied with this type of communication, funders want greater compliance from grant applicants and grantees, and would like to see better data and more analysis in reporting.

On the other side of the desk, grantees want more proportionate reporting requirements and more resources for monitoring and evaluation of their work.

“Results-driven funding is becoming more and more common, which is great news,” said NPC research analyst and report author Gustaf Lofgren.

“But both funders and charities need to get much better at talking about what they need and expect. Charities

need support to move from just gathering data to analysing it, so that they can improve not just reporting but their work for beneficiaries as well.”

The report makes a series of recommendations for funders, grant recipients and support providers, many of them drawn from their previous *Turning the Tables* report. For grantmakers, they recommend that you:

- **Consider introducing standard reports.**

Such reports can make funding more effective by reducing the reporting burden on grantees and freeing them to focus on beneficiaries. They also have the potential to increase the quality of reporting, something many funders clearly desire.

- **Be clear about what you want.**

Those funders who want more or less information from grant applicants and grantees need to make sure that they communicate this clearly. This means spelling out the number of pages expected for an application or grant report, and giving feedback to applicants or grantees who do not live up to expectations.

- **Fund monitoring and evaluation and help your grantees to improve.**

The quantity of information is not everything. Many of the grantmakers who responded to the NPC survey want more sophisticated monitoring and evaluation by grantees. Sometimes ‘more sophisticated’



The research report, *How are you getting on?*

actually means getting the basics – sometimes the jargon – right. At other times it truly means sophisticated: funders are hoping for more analysis and improvement from data, and many feel they are justified in expecting this after providing both financial assistance and other support for grantees. Better results information can help both charities and funders. This does not mean that funders can wait for charities to improve on their own. Their support for monitoring and evaluation needs to continue, and probably in many cases needs to increase. It is a problem for charities that many funders never fund monitoring and evaluation or give non-financial assistance to this work, especially when some of these funders consistently ask for results information from grantees. In survey answers and interviews, many funders mention individual grantees providing excellent results information. If such examples are showcased, grantees will be able to learn from them. A number of funders arrange sessions where this can happen, and many more could provide examples as part of application or reporting guidelines.

To read the full report, including the recommendations for grantees and support providers, go to the NPC website:

www.philanthropycapital.org

SROI (Social Return on Investment) systems are intended to make sure that in assessing our projects we measure what really matters. A Guide to Social Return on Investment, a useful manual issued by the UK Office of the Third Sector (OTS) and the Scottish Government, spells out what matters in SROI.

Many Happy Returns

Assessing social return on investment

WE'RE ALL BECOMING familiar with the concept of social return on investment (SROI).

It's an attempt to incorporate into our accounting all the values that don't normally get counted – ecological factors such as environmental degradation, human factors such as population health, organisational factors such as community empowerment.

In order to do this, these values have to be translated into a common metric so that different combinations of value can be compared. In practice, all factors are given a monetary value. At the end, you'll have an SROI – a number that says, for example, that for every dollar invested in your project you generate \$3.67 of social value.

"In the same way that a business plan contains much more information than the financial projections, SROI is much more than just a number," the OTS manual says. "It is a story about change, on which to base decisions, that includes case studies and qualitative, quantitative and financial information."

Community groups that create social value can use SROI as a management tool to improve performance, inform

expenditure and highlight added value. Grantmakers that commission social value or invest in the creation of social value can use SROI initially as a way to help them decide where to invest, and later to assess performance and measure progress over time.

Preparing an SROI isn't remotely easy to do, and community groups can do with all the help they can get.

A Guide to Social Return on Investment is very helpful indeed. It is built around a draft Impact Map that can be worked through with the aid of a checklist.

"The purpose of this guide is to standardise practice, develop the methodology, and provide more clarity on the use of SROI," the authors say. "It has been written for people who want to measure and analyse the social, environmental and economic value being generated by their activities or by the activities they are funding or commissioning."

The manual doesn't pretend that it's easy, or unambiguous; all it can really do is urge you to record all the assumptions and calculations you make so they can be taken into consideration.

It doesn't pretend that the number

you come up with for your SROI is going to be entirely decisive – other factors will need to be taken into account.

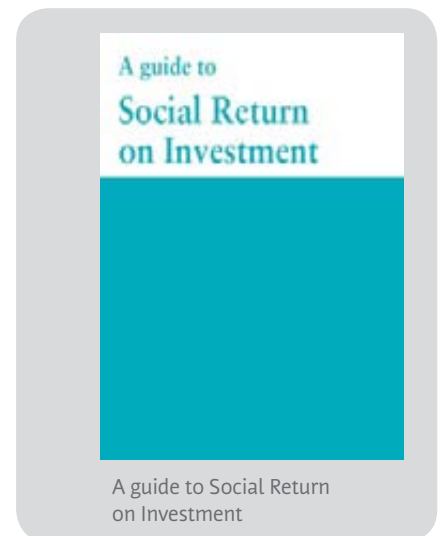
The Guide also draws attention to the need to cover both good and bad outcomes.

There is a tendency to focus on the positive outcomes that were intended ... However, intended and unintended outcomes and positive and negative outcomes are all relevant to SROI.

Some unintended outcomes can be positive ... However, some unintended outcomes can be negative. Say, for example, that a London-based charity flies young people from disadvantaged homes to Greece during the summer holidays, to give those children an educational experience and a holiday. Alongside the many positive outcomes for the young people, there is also an unintended negative consequence of carbon emissions from the flights.

Another issue is that almost no major changes are brought about by one organisation acting in complete isolation.

A calculation of SROI has to make an attempt to filter out the influence of the general economy, the actions of



other agencies, the historical trend line, and any other relevant influences. You have to allow for, among other things, deadweight and displacement.

Deadweight is a measure of the amount of outcome that would have happened even if the activity had not taken place. It is calculated as a percentage. For example, an evaluation of a regeneration program found that there has been a 7% increase in economic activity in the area since the program began. However, the national economy grew by 5% during this time. Researchers would need to investigate how much of the local economic growth was due to wider economic changes and how much to the specific intervention being analysed.

Displacement is another component of impact and is an assessment of how much of the outcome displaced other outcomes. For example, an evaluation of a state-funded street lighting program in one borough found a reduction in crime; however, the neighbouring borough reported an increase in crime during the same period. It is possible that the reduced crime was simply displaced.

From a community group's point of view, an SROI analysis of one of its projects projects can

- raise its profile;
- improve its case for further funding;
- make its tenders more persuasive.

From the grantmaker's point of view, this does rather seem to incentivise the group to highball its SROI estimates. Correspondingly, if a grantmaker is wondering how much weight to place on the figure provided, then a quick estimate of the honesty of the analysis can be made by asking whether it makes appropriate allowances for negative outcomes, deadweight, displacement, and the contribution of others.

The most important question is the weight that the group itself places on the analysis. As the Guide points out, though, if the analysis is being undertaken only to prove the value of a service, and there's no opportunity to use it to change the way things are done, then the process is in trouble.

"Always remember: the purpose of establishing impact is to help your organisation manage change," the Guide says.

Perhaps the most helpful part of the Guide is its chapter on 'Using the Results.'

"Unless you do something as a result of carrying out your SROI analysis there was not much point in undertaking it in the first place. To be useful, the SROI analysis needs to result in change," the Guide says.

"The results of a forecast SROI analysis may make you review your planned activities in order to try and maximise the social value you plan to create.

"An evaluative SROI analysis should result in changes in your organisation. Your organisation will need to respond to findings and think through implications for organisational objectives, governance, systems and working practices. Ensure that the organisation acts on the recommendations and that findings feed into your strategic planning process."

If you have to pick one publication to help you with understanding SROI, this is the best we've seen so far.

Download the guide here:
<http://tiny.cc/cr6zD> ✕



HAZARD ALERT:

Conflict of interest sparks repayment claim for grant staffer

AN EMPLOYEE of a UK grantmaking organisation has been forced to pay back grant money stolen from the organisation by his friend through a fraudulent grant submission, *Charity News Alert* has reported.

While the employee of the lottery-funded Big Lottery Fund (BIG) was not involved in the theft, the organisation asked him to repay the stolen grant money, saying he had breached the organisation's conflict of interest policy.

The employee's friend was sentenced to 18 months prison for stealing more than £9,000 from the Big Lottery Fund, for which she previously worked, and a further £9,500 from another employer.

She reportedly obtained the Lottery Fund money after applying for and receiving the grant, but siphoned the money off for herself and her mother.

The Big Lottery Fund employee who was asked to repay the money was also the chair of the organisation to which the grant money had been assigned.

A Fund spokeswoman said while the organisation was pleased the judge found the employee "an innocent party in the fraudulent acts," as the chair and signatory for the grant application, he had "accepted his legal responsibilities to repay the funds, which he is now doing".

The spokeswoman said that while the Fund supported staff volunteering for not-for-profit organisations, they should be mindful of conflict of interest concerns.

"BIG's conflict of interest policy means staff are not allowed to be named on any applications for funding and requires staff to declare interests in any organisations that are applying for funding."

In January 2009, the Australian Institute of Grants Management (a division of Our Community, which publishes this newsletter) sent out a survey to community groups across Australia asking them about their interactions with Australian grantmakers, focusing in particular on the area of communications. A total of 520 organisations responded to the 2009 Grants in Australia Survey, making this one of the largest surveys of its kind in Australia. In the last edition of GMQ we outlined some of the results of the 2009 Grants in Australia survey. Here's part two.

GRANTS RAGE

Go on, grantseekers, tell us what you **really** think (pt 2)



LOUIS XIV commented that “Every time I bestow a vacant office I make a hundred discontented people and one ingrate.”

Grantmakers, too, must sometimes feel like that – misunderstood, unappreciated, and endlessly criticised for other people’s mistakes and misapprehensions.

The only remedy is to remember that the people crowding you are pushing so hard because of their commitment to the goal you share – making the world a better place. You are attempting to harness that power.

Here we look at the suggestions grantseekers had to improve communications, a topic which formed the focus of the 2009 Grants in Australia survey. The observations of the grantseekers taking part in the survey are straightforward and valuable. They know exactly where the harness doesn’t fit.

Grantseekers aren’t particularly consistent in their suggestions. They want both greater flexibility and greater certainty, both shorter forms and more scope to explain their virtues, both instant decisions and careful consideration. You can’t please everybody (and shouldn’t try), but that’s no reason not to listen to why they’re not pleased.

Think carefully. Is there any way in which you could improve your performance to meet their needs without degrading your ability to meet your own goals?

Following are the responses from a selection of the 520 grantseekers who took part in the 2009 Grants in Australia Survey, when asked “What suggestions do you have for grantmakers who want to improve their communication with grantseekers?”

Highlights only.

ATTITUDE

“Be straight up, we can take it. Be consistent (very important). Be contactable. Be flexible. Be patient. Listen. Get to know us. Think like an applicant. Recognise that that not all wisdom lies within government departments.”

“Do unto others as you would have done unto you. Remember you’re a human being, not just a public servant. It’s NOT your money.”

“Simple manners would help.”

“See community organisations as equals in the relationship.”

“Reach out to organisations with smaller capacity, fewer resources, and higher levels of disadvantage to overcome: don’t just deal complacently with those you already feel comfortable with.”

RECOMMENDATION: DO AS YOU WOULD BE DONE BY

When you’re picking people to work on the reply desk, try to make sure

- they have good people skills
- they’re not overworked (do you need two people on during the pressure time?) or burned out
- they’re given all the necessary information so that they don’t have to bluff or fudge
- the duty isn’t passed on to new staff too often
- they know they have to return calls and emails – ASAP

It’s only reasonable: If you’re cranky with callers, that makes both of you feel bad.

SIMPLE ENGLISH/NO JARGON

“Stop using jargon and acronyms – it’s worse than talking to a teenage mobile phone salesperson.”

“When questions are difficult, give a sample of an answer.”

“Could grantmakers provide training for not-for-profit organizations on how to fill in forms and apply and acquit?”

“We need a liaison officer to assist us in the application process.”

“For small community organisations who don’t have the time to fill in great volumes of paperwork, maybe a person who can come out and help fill in the application to make it a bit easier on us.”

RECOMMENDATION: BUDGET FOR HELPING

Some people are going to need help. Some people are going to need quite a bit of help. Don’t fob them off on the grounds that if they can’t handle the form they won’t be able to handle the project; they can grow into it, with your help. And don’t just assume that you can give them the help they need in the gaps between your other work; ask yourself if you’re going to need to budget for some dedicated staff time for capacity building in the sector you’re grantmaking to.

FORMS

“Easy to use checklist of requirements. Clearly worded form and questions. Clearly identified contact details and submission dates.”

“Too often, the application form is not structured to find information but to fit the funding body’s administrative formula. They often ask the same questions in a different way.”

“Put the information about eligibility at the top of grant application, so you don’t have to read pages and pages and then find out at the bottom that you can’t apply.”

“Keep questions basic – e.g. what does the organisation want to do, how will they do it, information on structure, etc. Avoid micro questions and micro management.”

“Be specific about how often you can apply, if it’s once a year, specify financial year or calendar year.”

“Reduce the paperwork. Don’t expect excessive reporting for minimal dollars.”

“Have all pro formas professionally designed for paper and online access by someone who knows about forms and communications.”

“Commonwealth and State Governments should have a database for organisational information so the same information does not have to be provided every time funding is sought, with a facility for the applicant to be able update this information as necessary or at least on an annual basis.”

“Don’t try and design an application form that attempts to cater for every type of application. Give the applicant the freedom to apply in their own style.”

RECOMMENDATION: MAKE IT BETTER

Every time you ask for submissions is an opportunity to review your forms and your formalities.

- Check the suggestions above.
- Ask the help desk what bits of the form people most commonly need explained.
- Ask yourself what are the most common reasons for submissions being ruled ineligible.

Then see if you can think of a way of setting up the form that would avoid those problems. It takes two to make a mistake on a form.

FEEDBACK

“Give realistic feedback on our unsuccessful applications. We spend hours upon hours filling out applications and making them perfect, the least they can do is give us the courtesy of letting us know how to improve our applications for next time.”

“Inform applicants about the reasons for lack of success, so we know if it is worth applying a second time.”

“Have a feedback form to help identify the areas that require improvement.”

RECOMMENDATION: GIVE WHAT YOU CAN

Most of the reasons why a particular project proposal gets up or doesn’t get up are going to be the kind of thing that has to stay within the Committee, but there will be general observations – the number of submissions received, the premium, if any, placed on experience, the pressure on funding – that can be shared. Remember, feedback is the only way you have of thanking them for the days of unpaid work they put into fruitless exertions. In the evolutionary scheme of things, your successes are built on the work of the submissions that were rejected as much as on the ones that were funded.

TIMING

“Longer deadlines in recognition of complexity and time required to complete detailed submissions, especially when you have to chase quotes and consult with consumers.”

“Allow a reasonable time for grant applications. Not all applicants have dedicated staff to write funding

applications. Four-week deadlines are very difficult to meet.”

“Tell us immediately if our grant submission is not proceeding to the next step in the process, so that we can move on to next application.”

“It’s not unusual to get an email that says, in effect, that the grant program opened four months ago, and closes very soon – have you applied yet? So the five-month opportunity becomes a three to four-week opportunity.”

“Consult with us on appropriate timeframes and avoid peak periods in community agencies.”

RECOMMENDATION: TIME IS RELATIVE

Work out how long the average submission will take to prepare. Work out how many days that will take for those putting in an hour per night. Double that to allow for coordination and committee work. Add on a few days for mail. There’s your minimum. Close your applications on Monday morning, not Friday night; for many in the grantseeking world, weekends are the working week.

PROCESS

“Get the grant information out to as many people as possible who work with community groups so they can pass the word on.”

“Acknowledge receipt of grant applications – maybe a tear-off acknowledgement slip?”

“Commit sufficient staff hours and numbers to meet the expectations of enquirers. Pay these staff enough to reduce staff turnover. Train them before they’re put in positions where they’re required to have contact with the public.”

“Have knowledgeable people who know what’s going on regarding the grants give the advice – someone with whom you can build a relationship.”

“Have an ‘open’ line where people can be contacted out of hours.”

“The person put in charge must have the power to change the system to implement changes that improve the delivery system.”

“Discuss with the applicants any matters in their submissions that need clarification and give them the chance to improve their applications during the grant elimination process.”

“Ask enough questions to get the real feel for the gist of an application.”

“Make information available in other languages. In certain circumstances, accept applications in other languages.”

“I would prefer to see a two-stage process, with stage one being a one-page EOI letter only. This would prevent wasting time on grants that organisations do not have a chance of getting, and would improve the competitive edge of small organisations, who are able to write the one page letter easily.”

“Take a one-line ‘idea pitch’ instead of major applications – to ensure the idea suits.”

“Include grantseekers in the development and review of grant processes and practices. A lot of the processes are not user friendly.”

“Don’t have deadlines – operate ‘ongoing’ funding programs.”

RECOMMENDATION: STRIVE FOR BEST PRACTICE

Consider ways you can alter your processes to make life easier for your grantees:

- Could you introduce a two-stage application, including an expression of interest phase, or even a verbal pitching phase? Could you provide information (and accept applications) in languages other than English?
- Could you work with key peak organisations to get the word out about your program and/or help their members with the application and acquittal processes?
- How can you improve the flow of information to your applicants – do you have processes in place to acknowledge receipt of applications and advise on progress?
- Have you allocated enough staff time (and expertise) to deal with inquiries, particularly at peak times? What processes have you put in place to limit turnover of staff and provide for smooth succession between staff members?
- Do you need to open in “rounds”, or could you in fact have your program open all year round? Could you introduce a “quick response” component for

opportunities that arise and need to be filled quickly?

Work out what will and won’t work for your program. Be open to changes. Ask your constituents what options would work better for them. Ask your staff (including those on the front line, fielding inquiries and processing forms) for their input. Trial a new system before you commit to its introduction across the board. Keep up with new grantmaking practices (reading your GMQ each quarter is a good place to start).

ONLINE INFORMATION

“Improve electronic systems, and make all of the information accessible in one place online, with daily/weekly updates, including copies of funding agreements.”

“Have a Q&A section online on areas raised so organisations making submissions don’t all have to ring to ask the same questions.”

“Always be clear about the total funds offered by the grant program and not just the maximum an organisation can apply for.”

“Have an annual schedule on the grantmaking body’s website of which grants will be available throughout the year and the closing dates.”

“Provide a FMM (Frequently Made Mistakes) checklist!”

RECOMMENDATION: TAKE ANOTHER LOOK

You’ve had a website for many years now (at least you should have had). How long is it since you did some usability testing? Run through the checklist created after the 2008 Grants in Australia Survey (see [here](#)) and make sure your pages and systems are up to scratch.

ONLINE APPLICATION FORMS

“More thought needs to be put into compiling electronic and online applications. Maybe the person who writes the form should download a copy and try to fill it out before it is released.”

“Grantmakers should ensure that all forms are in editable html rather than PDF or MS Word with locked tables. This would benefit all grant applicants, not only those with disabilities.”

“Online applications that do not show the complete sequence of the form

are difficult to complete. And some applications are write-protected when you open them.”

“When sending applications via electronic format ensure it can be typed on in most software formats. Some smaller organisations only have Word.”

“Avoid online applications which can’t be saved until all questions are answered. If the form is not completed by the end of the day all information is lost when the computer is shut down.”

“Grants that require you to apply online do not work for isolated rural and regional people.”

“Put a copy of a successful application on the website, and under each section say why this was successful.”

RECOMMENDATION: LISTEN TO THE EXPERTS

Online forms are specialist jobs – get specialist help (and put that in the budget). Don’t just ask the office IT person; find someone who knows forms. Have a very good look at the suggestions above, too; when it comes to filling out forms, the real experts are the people who’ve been bitten in the ankle by them.

SHOW AND TELL

“Be direct. Say ‘Yes, a proposed project is what you are looking for’, or ‘No it isn’t’. If there are particular priorities – locations or issues or target groups – make them clear at the start.”

“Outline which areas of the tender are open for negotiation and which are not.”

“Be willing to deal with small groups, or state up front that small groups will

not be considered. Specify the types of organisations you will fund – e.g. individuals, small companies, or only registered charities (and understand the difference).”

“Give us advice on how to tweak the grant purpose to have a greater chance of receiving some funds.”

“Tell us what you want to hear!”

RECOMMENDATION: JUST THE FACTS

The great German statesman Bismark once said, “To retain respect for sausages and laws, one must not watch them in the making.” Unfortunately, the same often goes for grants. Consequently, there’s a limit on how transparent you really want to be – particularly as grantseekers have two reasons for wanting to know the criteria in detail; so they can meet them, or – and this is by no means unheard of – so they can fake them.

MISCELLANEOUS

“Ensure that it’s not just the large faith-based services or big NGOs who get the money – help the little people grow. There’s a shortage of small grants (\$1000 and under).”

“Increase grant limits to improve innovation in the country. Give organisations the time (five years?) and adequate funds to make a real difference.”

“Fund infrastructure development costs (e.g. information technology, payroll systems, HR systems, management structures).”

“Grant givers should hold focus groups with grantseekers, to obtain insight and empathy.”

“The grantmakers all want ‘sustainability’, but that’s a furphy. In some areas you will always need a person on the ground driving the process.”

“Take the time to talk to us – it’ll save time for everyone in the long run.”

“Bend over backwards to accommodate the ‘hard to reach’ groups.”

“Allow open communication and discussion of ideas.”

“Consider fitting the grant to the program rather than the program to the grant.”

“Stop moving the goal posts. The constant changes are tedious and very time-consuming.”

“Utilise local organisations, such as the Area Consultative Committees (now Regional Development Australia).”

“Embrace questions and phone calls from grantseekers. Don’t use knowledge as power and not give us the information that we need.”

RECOMMENDATION: KEEP LISTENING & ADAPTING

Treat your grantmaking as a collaborative process, where grantmaker and grantseeker are feeling their way together through the maze to the prize. Each of you has insights into strategies, and you’ll do better if you keep exchanging advice and encouragement.

For an overview of results from the 2009 Grants in Australia Survey, and previous years’ surveys, go to www.grantsmanagement.com.au/survey. ✕

Social inclusion is the new overarching policy agenda in Australia. This has implications for every aspect of government business, but particularly grants programs. FIONA DEMPSTER outlines what's at stake.

OPENING UP

Grantmaking and social inclusion

THE STARTING POINT for Australia's social inclusion responses is the recognition that social exclusion is a reality in Australia.

Despite a record period of economic growth some Australians still have poor outcomes in employment, income, housing, crime, health, disability, information access, and family breakdown.

The current economic climate is likely to impact even further on some localities' or groups' capacity to fully participate.

Dropping off the edge identified localities where disadvantage is significantly concentrated. However social exclusion and disadvantage are not just about individuals, families, and groups (people) who are spread across the nation or are concentrated in a place. Social exclusion is also about the locations themselves (place).

There are locations that not only have greater concentrations of disadvantaged people but are also disadvantaged as places. As population centres they do not have the necessary economic, social and community infrastructure and services (including business, employment, housing, education, training, transport, health services, justice and policing) to support and enable the full participation of their residents.

The UK's Social Exclusion Unit specifically recognises the role that geography plays in individuals' and

families' outcomes, and expressed the importance of intervening and making improvements in these localities with the aim of the National Strategy for Neighbourhood Renewal being that "no-one should be seriously disadvantaged by where they live".

Australia's work on social inclusion has begun and is developing. For example, the Australian Government and the Social Inclusion Board have identified social inclusion priorities and principles for action, and are undertaking several initiatives.

State and local governments across the country are also developing their responses. The Council of Australian Governments (COAG), the Australian Council of Local Government (ACLG) and the Australian Local Government Association (ALGA) are playing their parts in developing a coherent national approach to social inclusion.

“

There are locations that not only have greater concentrations of disadvantaged people but are also disadvantaged as places.”

For local governments and grantmakers, addressing social exclusion is a fundamental part of their business of creating vibrant and sustainable communities. It involves establishing a framework for understanding social inclusion that is directly applicable to their work; exploring how current and existing practices may perpetuate exclusion or limit inclusion; and creating a focus that enables programs and services to work towards a more inclusive society.

Building a socially inclusive society from the ground up is a real opportunity to make practical and lasting changes.

Fiona Dempster and Barry Smith will be delivering workshops on Social Inclusion and Local Government Grants in cooperation with the Australian Institute of Grants Management (publisher of GMQ) in locations across Australia in coming months. For more information or to book visit www.grantsmanagement.com.au/socialinclusion.

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¹ Vinson, T. 2007 *Dropping off the edge*, Jesuit Social Services, Richmond.

² Social Exclusion Unit, *A New Commitment to Neighbourhood Renewal; National Strategy Action Plan*, 2001

Research Australia

An alliance for discoveries in health

A Healthy Start

Boosting donations to health and medical research

While many people count health and medical research as among their top social priorities, few actually donate money to the cause. A Melbourne-based philanthropic program is working to shift the ratios, as REBECCA JAMES explains.

RESEARCH AUSTRALIA, a non-government health and medical research advocate, has developed a new service to help philanthropists make decisions about their giving to health research.

The program, developed with the support of the Department of Health and Ageing, aims to build confidence, dispel uncertainty and encourage more Australians to become involved in health and medical research.

The 2005 “Giving Australia” report revealed that while the level of philanthropic giving in Australia is steadily rising, generous philanthropists are few and far between when it comes to health and medical research.

While three in five donating Australians support health and medical research, the average gift is comparatively low: just \$77 per annum (pa) compared with \$529 pa to religion, \$234 pa to international aid, and \$220 pa to arts and culture.

By contrast, in the US, the average gift to health causes by the most modest households is US\$173, ranging to US\$92,289 in households with incomes over a million dollars.¹

These findings appeared to be at odds with Research Australia’s understanding of community attitudes towards health and medical research. Six years of annual opinion polling showed that improvements to health

care and medical research rated at the top, or close to the top, of a list of social policy priorities.

Why, then, is Australia’s passion for medical science not reflected in a higher level of average individual giving?

Further surveys identified a widely shared view that health and medical research should be funded by the government. Those who give to medical research point to the complexity of medical science, the plethora of research and charitable agencies, and a sense of “what difference could my small contribution make?”

While it may be easy to decide to give to health and medical research, it is hard to know how to give appropriately, to make a real difference.

Research Australia invites trusts and foundations, companies and major donors to identify suitable research options in conjunction with Research



The virtuous cycle... benefits for all Australians

¹ Center on Philanthropy at Indiana University. Giving USA. The annual report on philanthropy for the year 2006. Indianapolis: The Center, for the Giving USA Foundation, 2007

Australia and a confidential Research Register of research opportunities.

These projects are drawn from Research Australia's broad membership base of universities, research institutes, not-for-profit foundations, hospitals and health industry and government members. Possible projects include scholarships, equipment, and research projects in a range of areas.

In addition, Research Australia is providing an expert advisory service to trusts and foundations, companies and individuals looking for assistance to improve existing research funding programs or guidance to help set up new philanthropic programs.

It will also provide web-based information resources and help connect researchers with appropriate philanthropic partners. The development of these services is timely given Australia's economic downturn and the need for philanthropic organisations to carefully review the level of resources spent on administration.

Research Australia's approach has been carefully developed. It builds on an understanding of the shifts currently taking place in the philanthropic landscape. It reflects the need to provide philanthropic supporters with a broad range of information about the nature of the research, the track record of the researcher, how it will address a gap in knowledge, and its relevance to building community health. It aims to provide a structured approach to selecting projects that reflect the aims and objectives of the donor.

The *New York Times* recently reported a comment by Vanessa Kirsch, Founder and President of New Profit Inc, a venture philanthropy fund based in Boston, which echoes other comments by mega-philanthropists in the US and in Australia. He said: "Every philanthropist has their own motivation, and what they give to has to be tied to that motivation or they're not going to stay in it. Because the reality is, it's hard work to give away money. Most of our investors discover it's harder to give it away than it was to make it."²

Research Australia's hope is that making a decision and developing a support program for health and medical research will now be much easier. The reality should be that the development of specific philanthropic partnerships should not hinge on the ease with which we can identify projects that are appropriate to meet the goals of the giver.

With the philanthropist in mind, Research Australia aims to act as a third party facilitator which will ultimately meet the aims of those who give as well as help Australia's excellent researchers focus their energies on doing what they do best.

The Hunter Medical Research Institute's "Impact of HMRI Philanthropic Funding 1998-2008" report shows that in the period from 1998-2008, \$1 dollar of HMRI grants funded by charitable donations led to an average return of \$21 from external competitive grants, 74% of which were from the National Health and Medical Research Council (NHMRC).

The Return on Investment was even greater (34:1) when HMRI grants were awarded through their annual peer-review process.

² www.nytimes.com/2008/03/09/magazine/09

RESEARCH AUSTRALIA PHILANTHROPY (RAP) – HELPING GRANTMAKERS MAKE INFORMED DECISIONS

There are always opportunities to make a philanthropic gift to health and medical research – opportunities that make a real difference to the health of the communities in which we live and work.

The most common types of philanthropic support currently provided for health and medical research in Australia include:

- Funding for capacity-building and career development through research fellowships, PhD scholarships, and professorial chairs.
- Top-ups for government grants, perhaps to buy research-related equipment or to employ support staff.
- Funding for major initiatives, such as seed funding for a new research institute or construction costs for a new laboratory or building.
- Long-term funding to ensure continuity and certainty for leading researchers.
- Funding for innovative research or research in areas that have specific interest or low community impact, such as rare diseases.

RAP LINKAGE PROGRAM

Research Australia Philanthropy provides assistance to grantmakers to implement best practice in their giving process using the Research Australia Philanthropy Linkage Program. By using this independent and transparent service, and the governance and quality systems the linkage program brings to giving practices, grantmakers can gain significant advantage.

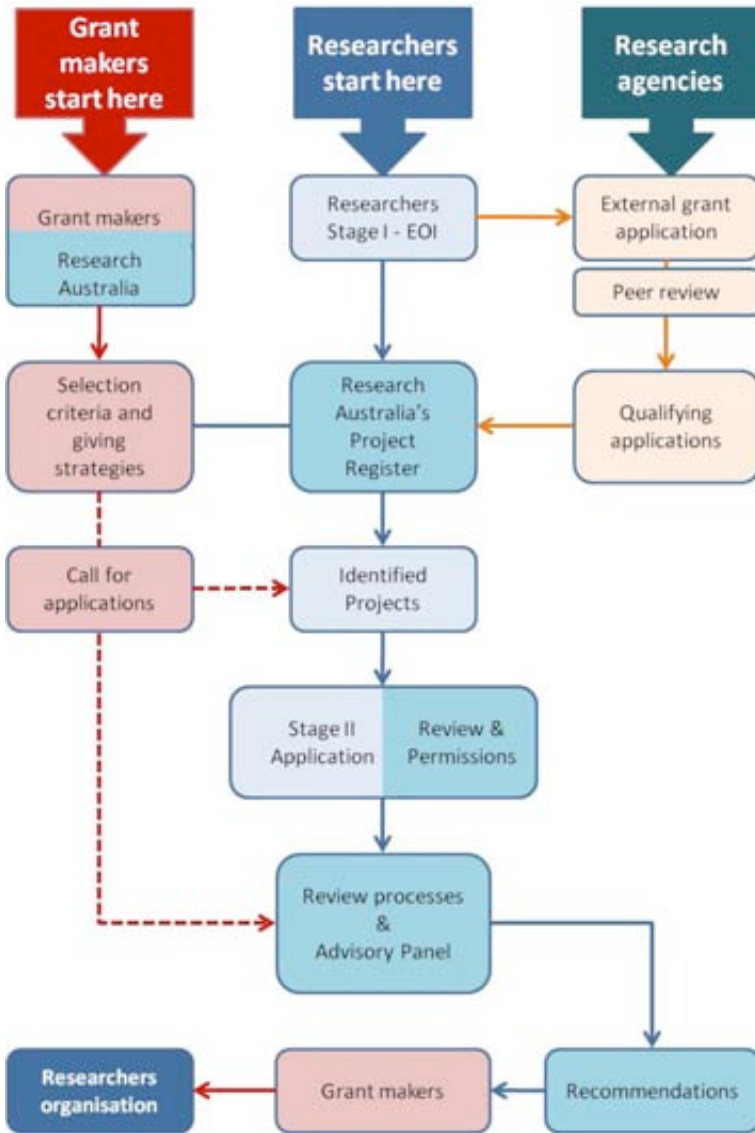
Philanthropists may also be affected by the release of the draft legislation to enable the Treasurer to make legally enforceable guidelines for PPFs, and to increase the Australian Taxation Office's regulatory power over PPFs.

Our RAP linkage program is operated through a centrally coordinated unit within Research Australia, preserving anonymity for philanthropists and researchers. As part of our linkage program, Research Australia provides strategic guidance, tools and resources to support effective partnerships between health and medical researchers and philanthropists.

Our linkage services can help you to:

- Identify research projects that meet your giving needs.
- Review research projects using our advisory panel, whose considerations include scientific merit and community benefits.
- Provide recommendations to the grantmaker who will make final decisions.
- Deliver administrative efficiencies to giving programs.
- Provide independent and transparent processes to assist in delivering best practice solutions.

RAP LINKAGE PROGRAM FLOW CHART



ADVISORY PANEL

Research Australia has established an advisory panel to provide expert review of research projects, including an assessment of scientific merit and community benefit. This service is part of the linkage program but may be accessed separately where a grantmaker has independently identified a short list of projects for potential funding.

The program was successfully trialed in 2008 with the State Trustees Australia Foundation.

“Research Australia’s services make program selection easier for us and promotes more effective grantmaking,” said State Trustees managing director Tony Fitzgerald.

RESEARCH REGISTER

The Research Register is managed by Research Australia to facilitate linkages between grantseekers, grantmakers and philanthropic service providers. The register is not publicly available. It assists Research Australia to identify potential research programs that match the criteria provided by grantmakers.

ADMINISTRATION

Research Australia can assist organisations with the management of their giving administration by undertaking this role in a contractual capacity. In particular, this service provides efficiencies to smaller organisations where the size of gifts may not justify the resources to manage them in-house.

Rebecca James is CEO of Research Australia Philanthropy. For further information please visit our website www.researchaustralia.org or call (03) 9662 9366. ✘



HAZARD ALERT:

Grants managers trained to spot potential insolvencies

ONE OF THE UK’S biggest government funders has devised a training course for its staff to help them identify potential insolvency cases, a UK magazine has reported.

Professional Fundraising says the Big Lottery Fund hopes its new course will help reduce the number of grants that need to be written off due to the insolvency of grantees.

The magazine reports that the number of Big Lottery Fund grant recipients that have become insolvent has risen from 12 three years ago to 20 in 2007-08 and 19 last year.

“There are many different reasons why insolvencies occur and often these will have little or nothing to do with the grant the Big Lottery Fund has made,” said a spokesperson.

“However when these unfortunate events happen, as a public body, BIG has to act to protect public money. (The Fund) assesses the position on a case-by-case basis.”

The ‘Indicators of Potential Insolvency’ course is being piloted in Newcastle and London, with philanthropic trusts and foundations also invited to attend.

Accountability Drought

Auditor-General says clear objectives are needed to account for spending

The Victorian Auditor-General's criticism of two drought-assistance programs highlights the importance of working to clear grantmaking objectives and being able to account for funds having been well spent.

A VICTORIAN Auditor-General's report on the *Effectiveness of Drought Assistance Measures* has criticised the water rebate and the municipal rate subsidy for not having documented objectives and for a lack of accountability.

The audit's objective was to assess how well the two programs had achieved their objectives, but found there were no "documented objectives or intended outcomes ... apart from the high-level strategic objectives of the drought assistance package."

Acting Auditor-General Dr Peter Frost said in the report's forward that schemes should be designed to meet specific needs, given that government funds were limited.

"Although helping the rural community through this crisis has been an overriding concern, it should not overshadow the need for accountability mechanisms that demonstrate whether public funds have been well spent," Dr Frost said.

He said the Department of Sustainability and Environment needed to develop better controls for payments that water authorities made on the department's behalf.

The report found further clarification was needed on the application of eligibility criteria for the water rebate.

"Aspects of Goulburn-Murray Water's administration of the rebate for fixed water charges warrant improved risk management, payment checking and data security."

The report recommended current performance reporting of drought assistance programs be improved to include the reporting of outcomes and the extent to which they align with program aims and objectives.

“

Good program design should include clearly defined objectives and outcomes, alignment with drought policy and targeting of those in greatest need.”

"Good program design should include clearly defined objectives and outcomes, alignment with drought policy and targeting of those in greatest need," the report said.

The water rebate and municipal rate subsidy are part of the government's drought assistance package.

The objectives of the package are to provide short-term support to help communities deal with temporary impacts and longer-term assistance for structural adjustment to cope with ongoing threats to viability.

Almost half of Victorian drought response funding was allocated to the water and municipal rate programs in 2005-2006 and 2008-2009. The other half was spread across 50 different programs.

The Auditor-General's report observed that the water rebate and municipal rate subsidies were costly but short-term measures, and said it was "not evident they address(ed) the longer-term drought situation by better preparing farmers for the future, which (was) the key focus of drought policy".

The report also recommended the Drought Interdepartmental Coordination Group consider the impact of the National Reform Agenda and "establish a consistent approach to sound program design and development" and "re-evaluate existing initiatives for consistency with these principles". ✕



Groan & Grumble

Grantmakers turn the tables on Grants Rage

This edition we continue to lift the lid on all the things that drive grantmakers nuts. Through an open forum during the 2009 Best Practice in Grants Management Conference, as well as a pre-conference survey, we got to hear about grantmakers' chief grumbles. Here is some of what was said.

What drives you nuts about grantmaking?

Tell us your (anonymous) grumbles at www.ourcommunity.com.au/ragesurvey09 or email to service@grantsmanagement.com.au

In an effort to push forward improvements to the grantmaking process, parts of the information collected through this forum will be fed back to grantseekers through Our Community's EasyGrants and Our Community Matters newsletters.

"How do you make them read the guidelines? I have kept mine short and succinct. I have included, in a flash form, information directly from the guidelines so that they can compare their eligibility as they are filling it in. Yet, still ineligible applicants with ineligible projects besiege me."

"Grantseekers set it as 'us' and 'them'. We're seen as the bureaucrats. It's always going to be an unequal relationship because I've got the money and you don't, but that doesn't mean that I don't want to hear what you would like to do with the money."

"The assumption that these organisations have the right to the same amount of money year in and year out, without the realisation that community needs change and also our particular directions from Government will also change. The assumption that the parameters of the grants will remain the same year in, year out, which they won't, because the Government's priorities change and therefore our priorities change."

"We have distinct roles and perhaps people don't want to understand what they are – we have responsibilities, we have to always reconcile the money, we have to justify the money given to people, and to make sure that they provide to the community what we're giving the money for."

"We are a really important channel of communication about policy directions. What we try to do is inform the sector. But one of my gripes is the sector sometimes doesn't want to hear. They want things to remain the same as they always were."

"We call them grant stalkers – organisations that simply apply for everything and just put a little twist on the tale in the introduction and the end bit and use innovation in a different paragraph."

MORE NEXT EDITION ...

Grantmakers are used to assessing their grantees – a UK website is turning the tables.



HAZARD WARNING

Rating government grantmakers

GOVERNMENT grantmakers are used to being assessed and judged by both their grantees and their political masters.

As if that wasn't enough – now there's a website that is adding its two-cents-worth, providing a rating of nearly 200 government grantmakers.

Happily for Australian grantmakers, the site is in the UK and rates only UK Government and European funders, but it may well be a portent of things to come in this country.

The rating results are available at www.governmentfunding.org.uk, a site administered by the not-for-profit group Directory of Social Change.

The site's primary function is to provide a subscriber-based online grants information portal.

"We've rated nearly 200 of the funders featured on the website, covering European, national, regional and local government funding," says the Directory of Social Change.

"Through researching and running the website for nearly six years, we've learnt a lot about the way government funds the voluntary sector – some good, some bad.

"Either way, we've got plenty to share about what to expect, how to get the right information and the best way to approach funders."

Ratings are awarded based on five indicators:

1. **Availability** – does the funder make available all the information you expect and need to know?
2. **Contacts** – is there typically an appropriate person to talk to, with knowledge of the funding you're interested in?
3. **Clarity** – is their information of funding digestible to the average reader?
4. **Relevance** – is it clear who the funding is aimed at and how the funder decides who receives the funding?
5. **Applications** – is the application procedure fair and clear?

The Directory of Social Change cautions that its ratings should not be considered a final verdict on a funder, "just a starting point to begin discussions about the voluntary sector's experience of government funders".

Subscribers are invited to submit their own findings.✘

FaHCSIA is introducing changes with its 2009-2010 grants, opening up lines of communication with service providers and simplifying processes. CHRISTY DOWLING takes a look at what's in store.

FaHCSIA

Reducing the administrative burden

THE DEPARTMENT of Families, Housing, Community Services and Indigenous Affairs (FaHCSIA) is making some big changes to its grantmaking program in an attempt to reduce the administrative burden on grant recipients.

Feedback from grantees inspired the changes, and better communication and engagement with them is one of the planned reforms.

FaHCSIA program frameworks branch manager Deborah Winkler said about 50 grantee organisations, including some peak bodies, responded to a call for feedback on the existing program.

Changes include the introduction of standard terms and conditions for grants, and a set of 10 generic performance indicators.

Ms Winkler said FaHCSIA wanted to make the terms and conditions easier to understand and to ensure the agency was taking a risk-based approach to applications.

She said FaHCSIA had recognised it should be working from minimum rather than maximum requirements, and building on those minimum requirements where necessary. In the past, when an issue of concern was identified, the response was applied to applicants across the board. The new approach would apply controls only to the organisations of concern.

The most significant changes concern alterations to the terms and conditions for funding agreements in

THE TEN STANDARD PERFORMANCE INDICATORS FAHCSIA IS INTRODUCING FOR ITS FUNDING AGREEMENTS:

| | Project Logic | Generic Funding Agreement Pls |
|-------------------------|---|--|
| PROJECT RESULTS | <i>Did it make a difference – Delivered services & products achieve the agreed objectives stated in the Funding Agreement</i> | X1 Rating of achievement of the service / project goals [as per the criteria for the achievement of goals specified in the Funding Agreement] X2 Proportion of participants / community members / stakeholders satisfied with the services / completed project X3 Rating of satisfactory completion of agreed service / infrastructure development [as per the completion criteria specified in the Funding Agreement] |
| SERVICE DELIVERY | <i>How well did we do it – Services / products are delivered in ways that meet the contracted delivery requirements</i> | Y1 Rating of compliance with contracted delivery requirements [as per the priority delivery requirements specified in the Funding Agreement] Y2 Proportion of eligible target population assisted/ target locations covered Y3 Proportion of participants from priority target groups Y4 Cost of providing services per participant/ site/ event |
| PROJECT OUTPUTS | <i>How much did we do - Funded projects deliver services & products in line with the contracted project scope</i> | Z1 Number of service / project participants Z2 Number of service / project sites Z3 Number of service / project events [where 'events' could refer to service instances; duration of service; or specific project deliverables / milestones] |

relation to issues such as insurance and assets, and the inclusion of 'vulnerable persons' in broader terms and conditions, rather than in schedules.

"When we looked across the board at the business, a lot of our ongoing service delivery, where there's lots of dollars going in, whether that be CDEP (Community Development Employment Projects) or disability or family relationships, for example, they're all dealing with vulnerable persons," Ms Winkler said.

There is now a clause in the *Terms and Conditions – Standard Funding Agreement* specific to vulnerable persons.

Ms Winkler said FaHCSIA was recognising that some organisations had been contractors for a long time and did not need to be so closely managed.

"We're doing business with them because we think they can manage their business, so we should be less proscriptive in some of those spaces.

"Unless, of course, it's a high-risk organisation, and there might need to be some other requirements placed on them to give greater assurance to government."

A document called *What's New, What's Different?*, which explains the changed terms and conditions, is

expected to be available soon at www.fahcsia.gov.au.

Whereas previously FaHCSIA had to report against four desired 'outcomes', there are now seven outcomes, one for each grant program (see break-out box, previous page).

FaHCSIA outcomes are met not only through grantmaking but also payments to individuals and to the states.

Ms Winkler said the new outcomes were intended to provide greater transparency, and to enable a clear link to be seen between activities funded and the broad outcomes the department was working to achieve.

Also in the pipeline is a pre-registration process trial. Organisations likely to apply to several different funding programs would register key information once, and then later – when necessary – address criteria specific to particular programs.

Ms Winkler said the idea was to minimise the number of times organisations had to provide the same documentation.

"We're not proposing that these (organisations) would get preferential treatment in any way," she said.

A trial later in the year will involve about 15 organisations who currently receive funding across multiple program streams, with a

view to implementing the program more broadly next year if it proves successful.

A new-format 10 standard performance indicators will be a refreshing change from the several hundred that were previously used.

Ms Winkler said there was still some work to do around ensuring that an excessive amount of information was not sought through other data elements now that the performance indicators had been narrowed down.

FaHCSIA is developing training resources and workshops for staff to educate them on the new processes.

"There's quite a bit of change for our staff in terms of the way that we're going to do business with organisations, so for some staff that's exciting and for others of our staff ... any major change can be quite challenging."

In May, FaHCSIA published the first edition of the *FaHCSIA Community Grants Update*, to keep stakeholders apprised of changes as they are introduced.

To begin with, the newsletter is expected to appear bi-monthly, which may change to quarterly depending on how much information there is to convey.

Ms Winkler said information would also be published on the FaHCSIA website.

"We wanted to come up with an avenue where we could make some information available to both current grant recipients, but also ... ensure that those organisations that might want to do business with us at some point in time also had some sense of what was happening in the space."

FaHCSIA is eager for GMQ readers to raise any issues of concern in relation to their grantmaking program. If you have feedback to offer, you can email it to helpdesk.servicedelivery@fahcsia.gov.au. ✖

FEDERAL POLICY FRAMEWORK DUE SOON

The Federal Government will introduce a comprehensive policy framework for grants administration on July 1.

Federal Finance Minister Lindsay Tanner's office says the Commonwealth Grant Guidelines will be underpinned by a package of regulatory changes.

"The new regulations will make it a requirement to act in accordance with the guidelines when administering grants and will require ministers and officials to record the basis on which they are satisfied that approving particular grants is an efficient and effective use of public money," Mr Tanner's office says.

More details in the September edition of *GMQ*.

If your grantmaking program aims to tackle disadvantage, a new report from New Philanthropy Capital is well worth a look. The report focuses on how funders can help prisoners and ex-prisoners break out of the cycle of re-offending, and while it's rooted in the UK context, the principles are every bit as relevant for Australian programs.

Breaking the Cycle

Improving the lot of ex-prisoners

BRITISH THINK-TANK New Philanthropy Capital has released a new report aimed at helping guide funders who want to create lasting change in the lives of people who have been to prison.

Breaking the Cycle is an update of an earlier report on people in prison and on release, *Inside and Out*.

"Prisons should be about rehabilitation, not just punishment," NPC says. "Yet two-thirds of people

re-offended within two years of leaving prison, committing at least one million crimes and costing the taxpayer £13 billion a year.

"People in prison need services and support to help them overcome their problems and lead a life free from crime. Charities often play a crucial role in helping them achieve this and in reducing re-offending rates amongst ex-prisoners."

NPC says the UK's prison population

has grown rapidly over the past five years as sentences get tougher and longer.

"Over 70% of prisoners experience mental health problems and half have no qualifications," the organisation says.

Breaking the Cycle says the case for donors to support people in prison and on release is "morally, socially and financially compelling".

Helping prisoners not only improves



their own lives, but decreases the risk of re-offending, which reduces crime and its burden on the taxpayer.

NPC says the most urgent priorities are clear.

“These include direct services – such as employment programs and housing advice projects – and second-tier work campaigning, building capacity and influencing public opinion.

“

Funding for non-project staff salaries, administration and infrastructure may seem mundane, but they are fundamental to organisations being effective and making the most of their resources.”

“Funding these areas provides donors with the opportunity to achieve lasting change; not only in an individual’s life, but also for the sector itself.”

NPC says supporting organisations working in this sector does involve risks – “funding successful pilot projects will not guarantee their adoption by an over-stretched prison service. Campaigning and lobbying work may not persuade a government that needs to look tough on law and order”.

But it says donors can still make a vital contribution to breaking the cycle of re-offending.

The NPC report provides a chapter on priorities for funders, saying there are opportunities to provide an input into

- core services;
- advice, advocacy and engagement efforts;
- pilot projects and evaluation;
- improving capacity within the sector;
- direct lobbying of government; and

- influencing wider public attitudes. “Where a donor has decided which charity to support, it is also important to think about how to fund that organisation,” NPC says.

“NPC is strongly of the view that donors should not restrict their funding to a particular project. This is damaging because charities end up unable to cover their overheads.

“Funding for non-project staff salaries, administration and infrastructure may seem mundane, but they are fundamental to organisations being effective and making the most of their resources. Charities should be given unrestricted funds (that is, not tied to specific projects) to counter this problem.”

NPC also urges funders provide longer-term funding and to consider funding organisations to evaluate the impact of their services.

The report can be downloaded from the NPC website: www.philanthropycapital.org ✕

Getting Exposure: NSW Grants Expo seeks exhibitors

WARRUMBUNGLÉ Shire Council will be conducting a Grants Expo in Coonabarabran in October.

Exhibitors, speakers, workshop presenters and delegates are being sought for the Expo, which will take place from Thursday, October 29 to Friday, October 30.

The event is designed to provide an opportunity for Federal and NSW funding agencies to talk directly to NSW local government representatives and the community about their funding priorities, programs and processes.

Three streams will operate at the Expo:

- Grant Giving
- Grant Seeking and
- Community Projects.

The program is will feature workshops and seminars, keynote presentations and opportunities to learn from successful models of submissions and grant-funded project management.

Potential exhibitors, speakers, workshop presenters and delegates are asked to lodge an expression of interest form, which is available for download from the Warrumbungle Shire Council website.

Visit www.warrumbungle.nsw.gov.au/council/1871.html

For more information contact the council’s community development officer, Procter Morris, by phoning (02) 6849 2180 or email to procterm@hwy.com.au.

GREAT IDEAS

Let them down nicely



ONE OF OUR spies in the grantseeking world forwarded us this rejection email, which he had received from a grantmaking foundation.

“This is a pretty good letter of rejection,” he said.

If you’re getting praise for your rejection letter, you must be doing something right.

Note the phrasing and then see how it measures up to your own letters to unsuccessful applicants. Better still would be to provide individualised feedback, but as standard rejections go (as our correspondent put it), this is a pretty good template.

Dear xxx,

We are writing in response to your request for funding of the above named project which was recently submitted to our Foundation for consideration. After reviewing your request, we regret to advise that we are unable to provide the support you seek.

Many factors are included in the evaluation of proposals submitted to our Foundation. The ‘program area’ and the cohort of the project’s beneficiaries play an important role in that we may have exceeded our funding budget in a given category. Some requests, while meritorious, do not fall into a targeted area of our giving priorities. We also hope that you understand that in the difficult economic times we are currently experiencing, the financial impact on the Foundation’s capacity to donate has been significant.

Your grant application adequately addressed the questions we raised. It was not declined because of failure on your part. Each year we must decline many meaningful requests for the simple but important reason that our funds are limited, while requests for those funds are not.

We wish you every success with this project and hope that you will be able to secure the funding you need to undertake this support of your clients.

Yours faithfully,

Xxxx Xxxx
Executive Officer

This time last year, GMQ reported on a US project designed to cut down on paperwork. Project Streamline has now followed up with a new section comprising feedback on its recommendations.

Project Streamline

Practitioners weigh in

LAST YEAR, GMQ profiled the Project Streamline report, *Drowning in paperwork, distracted from purpose*, and its recommendations to grantmakers on making life easier for applicants.

For example, the report said that despite funders' stated desire to use reporting and evaluation for monitoring compliance and measuring impact, results from a 2004 study of funders' attitudes and practices found that only about half used results strategically, "either to influence future grantmaking or to share with the field.

"Our research came to the same conclusion: grantmakers indicated that they use most of what they collect primarily to monitor compliance,"

As one grantee put it: "We assume that they feed everything to a giant fiery furnace."

This led to the report's recommendation that grantmakers "begin from zero".

"In a zero-based approach to information gathering, grantmakers begin with a rigorous assessment of what kind of information they really need to make decisions," the report said.

To implement the begin-from-zero approach, grantmakers might:

1. Begin by asking themselves a set of questions about the information they plan to request of grantseekers: Are we really going to use this? Is there another way

we can get it? Have we sufficiently explained to our grantees why we need it?

2. Separate basic due-diligence requirements (organisational documents and financial forms) from program and impact assessment and treat them differently.

Good advice, yes, but it would have been useful to know what the people who'd have to do the work to make it happen thought about it.

And now we can.

Project streamline has put feedback from grantmakers and grantseekers online.

On zero-base assessment, for example, the comments are (summarised)

- ...for many participants the idea of starting from zero seemed to be overwhelming, with comments ranging from "a huge undertaking" to "unrealistic" for reasons related mainly to a lack of time to conduct such an assessment and a feeling that many practices were working and didn't need to be changed.
- A hard look at grant requirements would probably face its toughest challenge against staff and boards entrenched in the status quo. While the time it would take to streamline would be a barrier to "changing the way we've always

worked", leadership within the bureaucracy would be helpful.

- Some outsized application requirements were largely in response to problem organisations in the past. Abuses of the system, including misuse of funds or poor to non-existent reporting, led to blanket requirements intended to cover risk. Some believed that such problems should be treated as exceptions, so that not all grantees are punished...
- Not everyone agreed that less is more. "Sometimes our 'hoops' are a way to build organisations' capacity," one grantmaker said. Their requirements helped grantseekers to think through their goals or uncovered issues with their application before it became a problem during the funding period. Others believed that a two-step approval process was an absolute must for larger foundations.

These comments do cast new light on the findings of the report, and are worth reading both for their own insights and as a demonstration of how to get the most out of the reports you commission.

The feedback is at http://www.projectstreamline.org/principles_zero.php ✕

TAKE FIVE

UK group releases principles for local governments



THE NATIONAL COUNCIL of Voluntary Organisations in Britain has released a list of five key principles to strengthen relationships between community organisations and local councils.

The organisation has called on all local councils to:

1. **Sign up to the Sustainable Communities Act***, giving local people and communities a real opportunity to shape their future.
2. **Provide fair and sustainable funding for local voluntary and community groups.** Good funding practice will maximise the contribution that these organisations can make.
3. **Respect and support the role of community organisations as advocates and campaigners for their local community,** creating links between people and politics, ensuring that a range of voices can be heard.
4. **Work with community organisations to ensure community assets are owned and managed in ways that benefit the community,** using assets to reinvigorate communities and provide a focus for action.
5. **Demonstrate commitment to their local community sector through the operation of their local compact.**

“Voluntary and community organisations share the same objective as local government: to improve the lives of local communities and local people,” said NCVO chief Stuart Etherington.

“We can only achieve this if we work effectively together.

“In the current economic climate – with increased demand for many local services at the same time that financial resources are decreasing – it is even more important that we work together to achieve better outcomes for local people and build stronger, more resilient communities.”

Download the NCVO’s *Working Together to Strengthen Local Communities* at www.ncvo-vol.org.uk

*The Sustainable Communities Act aims to promote the sustainability of local communities. It begins from the principle that local people know best what needs to be done to promote the sustainability of their area, but that sometimes they need central government to act to enable them to do so. It provides a channel for local people to ask central government to take such action. Visit this link to find out more: <http://tiny.cc/YPPKc>



What’s New: Online test released

THE NATIONAL committee for Responsive Philanthropy in the US has introduced an “online self-test” to allow grantmakers to assess how their current operations and grantmaking compare to its philanthropic benchmarks.

In an email to supporters, NCRP executive director Aaron Dorfman said the test was designed to encourage foundations to reflect on how they could be more strategic and effective in achieving their missions.

The benchmarking criteria are based on the NCRP’s recommendations in a recent report, *Criteria for Philanthropy at its Best*.

You can see the online tool in action at <http://www.ncrp.org/paib/self-test>

Become a Member of the AIGM

GMQ is the membership publication of the Australian Institute of Grants Management (AIGM), a division of Our Community.

The Australian Institute of Grants Management is an Australian-first – a home-grown professional network linking grantmakers, grants managers and grants administrators, providing support, advice, answers and inspiration.

MEMBERSHIP BENEFITS

Subscription to the acclaimed Grants Management Quarterly (GMQ) publication.

GMQ is a must-have tool for Australian grantmakers, grants managers and grants administrators, providing practical and achievable solutions for grants programs of all shapes and sizes. Each edition of GMQ brings you grantmaking news, views, innovations, resources, trends, issues and best practice examples from Australia and overseas.

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Option 2: Fax membership form complete with credit card details to: 03 9326 6859

Option 3: Send your cheque/money order payable to: Our Community, PO Box 354, North Melbourne VIC 3051

Pay by credit card, please tick: MasterCard Visa American Express

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What's Next?

Once payment is received we will activate your membership & send a confirmation to the email address you have provided above.

ABN 24 094 608 705

About AIGM



The Australian Institute of Grants Management (AIGM) is the best practice network for government and local government grants managers and grantmakers, and others working in the grantmaking space.

The AIGM is working to help grantmakers review and improve their grants programs, and keep abreast of best practices both within Australia and internationally.

The AIGM's unique membership service offers:

- A subscription to the ground-breaking best practice grantmaking publication, Grants Management Quarterly (GMQ)
- Exclusive access to a range of online resources
- Discounts to the annual Best Practice in Grants Management conference

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The essential grants management guide for state, federal and local government, philanthropic and corporate grants programs



Updated regularly, the online Knowledge Bank draws together the information and tools you need to make your job easier



Providing food for thought and a roadmap to efficiency and effectiveness for contemporary government grantmaking



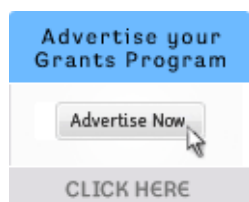
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Discover how Australian grantmakers are performing in all areas of their work – unedited, unsanitised, straight from the horse's mouth



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