

Australian Institute of Grants Management

# GRANTMAKER OF THE YEAR AWARD

2013 REPORT

Setting the Grantmaking Reform Agenda

good  
better

**BEST**



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# 2013 AWARD REPORT

The 2013 Grantmaker of the Year Award has seen some of Australia's leading lights in grantmaking share their thoughts on a number of issues facing grantmakers and grantmaking.

The purpose of this report is to share these thoughts and ideas. Unlike many other awards, the AIGM Grantmaker of the Year Award rewards future potential as much as past achievements, asking grantmakers not just what they have done, but what they think should be done to forward the practice and profession of grantmaking.

These thoughts and ideas are outlined in this report. We want to thank our award entrants for sharing their insights and helping to frame our thinking.

## **AT A GLANCE:**

### **Award entrants' ideas for reforming grantmaking in Australia:**

#### **Change the grants process:**

- Demystify the grants application process – be clear and transparent about every step, timelines, and decision-making criteria.
- Change the perceived culture that some grants processes are more about “the tricks you know” than “what you know”. Empower community groups and organisations in order to help them improve their grantseeking efforts. For example:
  - o Education and/or mentoring by those with knowledge and experience in grant writing.
  - o Provide ample opportunities to interact directly with potential grant applicants through workshops.
  - o Help them best articulate their needs and priorities.
- View grantees as partners through which grantmakers can help achieve positive outcomes

#### **Change grantseeker support:**

- Reduce the barriers grantseekers face when applying for grants – for example, supporting them by having skilled grant application writers mentor those less experienced at compiling applications.
- Provide more opportunities for grantseekers to communicate directly with grantmakers about their needs and priorities.
- Show trust in grantees by being more willing to invest in their core infrastructure for longer periods of time; building a real “partnership”.

#### **Change grants programs:**

- Consider setting aside part of the grants budget specifically for groups inexperienced in applying for funding.
- Use an Expression of Interest phase to provide a “starting point” for grant applications, reducing the amount of work applicants need to undertake and lessening “grants rage”.
- Ensure dedicated, resourced and skilled staff are ready to respond to inquiries and manage requests.
- Consider multi-year grants programs and provide support for grantees to chart where they want to be in five, 10 or 20 years, not just in 12 months.
- Reduce waste by having a process for collecting and applying knowledge gained through previous grant rounds.

#### **Change attitudes:**

- Don't automatically view smaller groups as unsuitable for grants due to doubts over their capacity to deliver. Recognise their strengths in efficiency, their organisational skills, their financial/personnel management and experience, or their ability to work collaboratively with other larger groups to successfully achieve outcomes.
- Work towards fostering a greater level of public recognition that those organisations receiving grants are the subject matter experts.
- Barriers between grantmakers and grantmaking sectors need to be broken down, possibly through online knowledge-sharing portals, more opportunities to collaborate, and stronger grantmaker networks.
- Develop an agreed-on set of “essential and desired skills for grantmakers” to further encourage professionalism in the sector.

# ABOUT THE AWARD

The Australian Institute of Grants Management's **Grantmaker of the Year Award** is designed to unearth the people leading the field of grantmaking in Australia, and draw out (and share) their vision for where we should go next.

It is our belief that none of us is as smart as all of us. We are using this award process to help guide us in our work to drive professionalisation of the sector – we hope others will find inspiration in it too.

The winner of the second annual award was announced at the Grantmaking in Australia conference in Melbourne on March 15, 2013.

For more information on the award, visit: [www.grantsmanagement.com.au/award](http://www.grantsmanagement.com.au/award).

## 2013 Winner: Lara Hook – The RE Ross Trust.

### Congratulations to the 2013 AIGM Grantmaker of the Year Award winner, Lara Hook.

Lara was announced as winner of the 2013 award at the Grantmaking in Australia Conference in Melbourne on March 15.

Lara is Program Manager at the RE Ross Trust, a position she has held for five years.

The RE Ross Trust is a perpetual charitable trust established in 1970 in Victoria by the will of the late Roy Everard Ross. Since its inception, the Ross Trust has distributed more than \$90 million in grants for charitable purposes in Victoria.

Lara has previously worked in a number of organisations in the not-for-profit sphere, including project management roles both nationally and internationally.

She has particular experience with developing communications, advocacy strategies and projects in capacity building, workers' rights and safety, human rights and media development for journalists and their organisations in the Asia Pacific region.

The Grantmaker of the Year Award does not seek to reward past works; rather, it calls for entrants to draw on their experience in grantmaking to offer ideas for taking the field of grantmaking forward.

Lara's application presented a great range of ideas for addressing some long-standing issues to do with grantmaking, suggesting how fostering more opportunities for practical and ongoing collaboration can break down boundaries between different grantmaking sectors, as well as offering ideas on how to increase and promote professionalism in the sector.



2013 Grantmaker of the Year Lara Hook (right) is pictured receiving her award from AIGM Executive Director Kate Caldecott. The award was presented at the 2013 AIGM Grantmaking in Australia conference.

Lara received the 2013 Grantmaker of the Year Award at the AIGM's Grantmaking in Australia conference in Melbourne on March 15. Her prize included the award title, as well as \$5000 in cash and a complimentary 12-month membership of the AIGM.

# CHANGE THE GRANTS PROCESS

Finalists' main suggestions on what they would change about grantmaking in Australia included:

**Demystify the grants application process – be clear and transparent about every step, timelines, and decision-making criteria.**

According to finalists, the grants application process can be confusing, filled with jargon and can often feel like it is operating like an exclusive “club”.

One finalist lamented that there is a perception that some grants processes are more about “the tricks you know” than “what you know”.

**Change that perceived culture that some grants processes are more about “the tricks you know” than “what you know”.**

According to Grantmaker of the Year Award finalists, a key to changing this perception, as well as improving knowledge, is through empowering community groups and organisations applying for grants.

“Empowering and trusting organisations as subject matter experts means investing in an organisation’s objectives and not just supporting activities,” one said.

Grantmakers could also use successful and experienced grant writers to mentor inexperienced grant writers – “The mentor/mentee relationship could be based on topic, location, art form, grant size or government policy areas”.

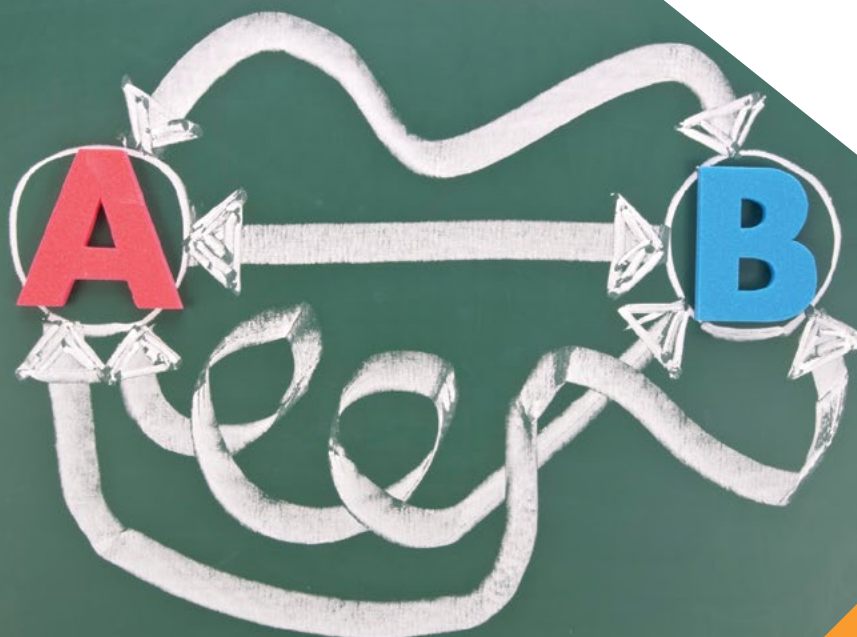
A further idea to empower grantees was to ensure they had ample access to grantmaking staff: “[This] empowers community organisations to more effectively communicate their needs and priorities ... personally and directly to grantmaking staff,” one entrant wrote.

“Also, make available data on how much grant money is available annually and how it is divided by the sector which receives it – for example, sport, arts, community, infrastructure, science, etc.”

**View grantees as partners through which grantmakers can help achieve positive outcomes**

Finalists identified the need for grantmakers to change how they view funding recipients, thinking of them as true partners, with both parties working together to achieve aims and reach into the community.

Grantmakers must also work at improving their own communication with grantees and fostering closer working relationships.





# CHANGE GRANTSEEKER SUPPORT

Grantmaker of the Year Award finalists felt that the way grantmakers supported grantseekers had to change.

## **Reduce the barriers grantseekers face when applying for grants**

The first and most basic way grantseeker support could be improved was to reduce the barriers many faced.

“(We need to) reduce the barriers that small volunteer organisations face when applying for grants,” one finalist said.

“(Issues like) insurance, audited financial statements, public liability ... often the capacity of small volunteer organisations to deliver projects that have great social outcomes is often questioned by grantmakers and assessors.”

Grantmakers suggested that support and mentoring (“beyond just the money”) were vital to helping grantseekers to overcome these barriers.

Such a support program might include:

- Mock grants assessment workshops.
- Practical grants writing training.
- Guidance on project management and evaluation.
- Support from community development team members allocated to successful applicants to assist with project implementation as required.

## **Provide more opportunities for community organisations to more effectively convey their needs and priorities**

The quality and level of communication between grantmakers and grantees came under the spotlight.

Grantmaker of the Year Award noted the need for more opportunities for direct communication between grantmakers and grantees, along with grantmaker availability.

“By genuinely being available to assist and mentor, and hopefully even become involved in grantseeker activities, grantmakers can contribute to the health and sustainability of their grantseekers beyond giving out money,” one said.

As a fellow entrant noted, better communication with grantseekers could sometimes emanate from better communication amongst grantmakers.

“Different grantmaking sectors in Australia already have a common interest and shared responsibility,” one said.

“Greater flexibility and effort on the part of grantmakers to get to know other supports of the organisations would ease an administrative burden on grantseekers and would give us as grantmakers a broader understanding of an organisation.”

## **Show trust in grantees by being more willing to invest in their core infrastructure for longer periods of time; building a real “partnership”.**

One key issue that Grantmaker of the Year Award finalists mentioned was the inclination among many funders to offer only short-term grants – something which had the potential to cause financial instability amongst grantees and stifle any hopes of a long-term relationship between grantmaker and grant recipient.



# CHANGE GRANTS PROGRAMS

Grantmaker of the Year Award finalists made a number of suggestions they felt would aid and improve grants programs.

Some of the suggestions dealt with structural issues, while others looked at associated elements such as support and accessibility.

**Consider setting aside part of the grants budget specifically for groups inexperienced in applying for funding.**

While a number of finalists emphasised the need for better relationships, they also saw a need for greater accessibility to grants funding for inexperienced applicants.

One finalist called for grantmakers to consider setting aside a portion of their grants budget for organisations with “marginalised experiences”, including those with “disability, mental health issues, acquired brain impairment, etc”.

“Do this to open up the field and to strengthen the capacity of communities.”

**Use an Expression of Interest phase to provide a “starting point” for grant applications, reducing the amount of work applicants need to undertake and lessening “grants rage”.**

Grantmakers were urged to make better use of an “expression of interest” phase in their grants application process, providing a starting point for submissions.

“Doing this reduces the amount of work undertaken by applicants, alleviating a degree of ‘grants rage’ and make applicants feel that their time is valued,” one entrant said.

“Make the EOI process fully accessible by using all the currently available technologies to get the message out there. Ensure there is accessible information sharing and equitable information dissemination.

“Face-to-face interview EOI processes should be encouraged.”

**Ensure dedicated, resourced and skilled staff are ready to respond to inquiries and manage requests.**

Making sure grants programs have adequate support is vital in ensuring a good quality of applications from a variety of potential grantees.

Such support is important not just for the grantseeker, but can also provide important ‘intelligence’ for the grantmaking body.

As one finalist said: “Dedicated, resourced and skilled staff (are) ... important for grantmaking bodies to be able to keep their finger on the pulse of emerging trends and community need.”

**Consider multi-year grants programs and provide support for grantees to chart where they want to be in five, 10 or 20 years, not just in 12 months.**

Grantmaker of the Year Award finalists saw the preference for favouring shorter, 12-month funding agreements as a real negative.



FRESH  
Ideas

One entrant explained:

“The continual funding of pilot projects and reluctance to make grants longer than 12 months leads to organisations being unable to recruit or retain quality staff due to short-term funding contracts, and restricts organisations’ capacity in time or resources to innovate.

“Innovation is possible when organisations are freed from the shackles of financial instability. Ongoing funding commitments and core operating support can give organisations the time, resources and breathing space to figure out what works and the resources to continue doing it.”

The grantmaker pointed out that financial stability would give organisations the freedom to take risks and think big.

“Longevity of program funding gives the opportunity to understand a problem and all its complexities and tackle it from multiple angles. Key operating support and trust in a CEO can give leadership the time and confidence to think and plan, it deemphasises activity and puts the focus back on outcomes.”

**Reduce waste by having a process for collecting and applying knowledge gained through previous grant rounds.**

Finalists pointed to a lack of knowledge-sharing amongst grantmaking organisations as a major contributor to waste and inefficiency.

As one said: “One of the biggest contributors to waste in grantmaking is the infinite knowledge trapped in millions of grant files on what has worked and what didn’t in previously funded projects.

“Shared aggregated analysis of successes and learnings of completed projects would be an invaluable resource for decision making and strategic planning in grantmaking.”

**Grantmakers shouldn't automatically view smaller groups as unsuitable for grants due to doubts over their capacity to deliver.**

Grantmaker of the Year finalists felt it vital the industry's view of smaller potential grantees' capacity to deliver on projects was not clouded solely because their size.

There is a need to recognise that smaller groups have strengths in many areas which actually improve their capacity to deliver on projects, including strengths in efficiency, organisational skills, financial/personnel management and experience, or their ability to work collaboratively with other larger groups to successfully achieve outcomes.

As mentioned earlier in this report, working with grant applicants and building relationships with them are ways to increase grantmakers' knowledge and understanding of applicants.

**Work towards fostering a greater level of public recognition that those organisations receiving grants are the subject matter experts.**

"There needs to be a public recognition that the organisations we make grants to are the subject matter experts," one entrant said. "They know and understand their communities and the complexity of the challenges their communities are facing better than most grantmakers."

Grantmakers said a respect for grantees' knowledge could be reflected in "asking them what they actually need (and) listening to the responses".

Rather than providing short-term grants, grantmakers should push grantseekers to "think beyond 12-month cycles and plan for where they want to be many years into the future ... and help them get there."

**Barriers between grantmakers and grantmaking sectors need to be broken down.**

Building relationships and breaking down barriers and "silos" is a seemingly never-ending process for grantmakers.

Many Grantmaker of the Year finalists emphasised the importance of communication, and of having opportunities for different grantmaking sectors to collaborate or even just gather together with peers.

One suggested staging an annual three-day "Grant Sector Party", providing "an abundance of opportunities to hang out and chat".

Another echoed those sentiments: "A big idea for breaking down boundaries between the different grantmaking sectors in Australia is to create more opportunities for practical and ongoing collaboration.

"Increased networking opportunities would be a good jumping off point for those organisations that aren't currently aware of each other.

"We are currently co-funding thousands of organisations and in most cases we have limited knowledge or interaction of the others providing support to the organisations we fund. This is often because we don't take the time to find out who else is supporting a particular organisation, or if we are aware, we don't prioritise or are unwilling to be flexible around negotiating joint reporting or applications.





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A further suggestion was to make greater use of online facilities to build these relationships in the form of “an online space or portal with information sharing, file uploading, discussion and a blog space.

“Popularity and frequency of answers will be based on votes or ‘likes’,” the grantmaker suggested.

“There could be a kind of ‘Wikigrants’ site that allows for a free flowing exchange of information with the aim of demystifying the process.”

**Develop an agreed-on set of “essential and desired skills for grantmakers” to further encourage professionalism in the sector.**

Many Grantmaker of the Year award entrants highlighted the need for cultivation of greater professionalism among those distributing grants.

One entrant suggested the development of a list or charter of “essential and desired skills required of a grantmaker”.

Among the skills suggested were an ability to:

- Plan and communicate a shared vision
- Measure and innovate
- Make effective decisions
- Gain stakeholder support
- Inspire and develop people to achieve their potential
- Understand change management
- Analyse
- Influence and negotiate

- Adapt
- Manage upwards
- Understand the past (and) predict and plan for the future
- Communicate
- Build and maintain relationships
- Have empathy and curiosity.

These skills could be used to:

- Educate boards/philanthropists on the importance of professional grantmakers to achieve their grantmaking goals
- Recruit people into the sector who possess the essential and desired skills
- Identify existing training and opportunities to help make current grantmakers more effective
- Identify gaps where no training exists and work with relevant partners to develop courses and opportunities to support grantmakers to develop the desired and essential skills.

“There is no set career path to becoming a grantmaker. Grantmaking attracts people from a range of backgrounds, experiences and skill sets. This diversity, I believe, is one of the sector’s strengths as it brings a variety of experiences and ways of looking at the world,” one entrant said.

“However it means there is no agreement on the skill or potential value of paid grantmaking staff, beyond the administration of grants.

“If we agree, as a sector, on the essential and desired skills of an effective grantmaker, the sector as a whole can recognise the value professional grantmakers can bring to affecting change.”

## Australian Institute of Grants Management (AIGM):

The Australian Institute of Grants Management (AIGM) is a best practice network for grants managers and grantmakers. The AIGM works to help grantmakers review and improve their grants programs, and keep abreast of best practices both within Australia and internationally.

The AIGM is a division of Our Community, a world-leading social enterprise that provides advice, tools and training for Australia's 600,000 community groups and schools, and practical linkages between the community sector and the general public, business and government.

As well as overseeing a number of grantmaking affinity groups, the AIGM's major offerings include:

- **SmartyGrants** – Australia's best practice online grantmaking system, used by more than almost 3000 grants programs of all types and sizes across Australia and New Zealand.
- **Grants Management Quarterly (GMQ)** – The AIGM's member publication tracking best practices in grantmaking across Australia and from all over the world.
- **Grantmaking Toolkit** – An all-in-one decision-making framework, workbook (including policy building templates), and check-up tool designed to walk grantmakers through the process of building, reviewing or refreshing a grants program.
- **Grantmaking Manifesto** – Framing the drive for reform and professionalisation of grantmaking in Australia.
- **Code of Practice for Professional Grantmakers and Code of Practice for Grantmaking Agencies** – Setting performance and practice standards for leading grantmaking organisations and individuals.
- **Grantmaking Knowledge Bank** – Searchable, topic-based listing of best practice thinking and case studies.
- **Grantmaking in Australia Conference and other training and events** – Generalised and topic-based conferences, networking events and training for government, philanthropic and corporate grantmakers.
- **Grants in Australia Survey** – Annual survey of grantseekers tracking the performance of grantmakers throughout Australia.

For more information about the AIGM, or to join, visit [www.grantsmanagement.com.au](http://www.grantsmanagement.com.au), or email [service@grantsmanagement.com.au](mailto:service@grantsmanagement.com.au).

## Acknowledgements:

The Australian Institute of Grants Management (AIGM) would like to thank all those who entered the 2013 Grantmaker of the Year Awards.

In particular we appreciate the contribution of those who made the final shortlist, and their willingness to share their knowledge, viewpoints and insights with us.

The AIGM would also like to congratulate the 2013 Grantmaker of the Year, the RE Ross Trust's Lara Hook.



## **AIGM GRANTMAKER OF THE YEAR AWARD 2012 REPORT:**

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### **Special thanks:**

Our sincere thanks go to all those who entered the 2013 AIGM Grantmaker of the Year Awards, and particularly the winning nominee: Lara Hook, from the RE Ross Trust

We thank all nominees for giving us access to their expertise and ideas. None of us is as smart as all of us – we look forward to drawing on these ideas and more as we push forward in our grantmaking reform agenda in the months and years to come.

## **WE WELCOME YOUR FEEDBACK:**

**We are always keen to hear from you. Send your feedback to [service@grantsmanagement.com.au](mailto:service@grantsmanagement.com.au)**

## **THE AUSTRALIAN INSTITUTE OF GRANTS MANAGEMENT: LEADING GRANTMAKING REFORM**

The Australian Institute of Grants Management, a division of the award-winning social enterprise Our Community, has for the past decade been at the forefront of innovation in grantmaking in Australia.

As well as producing the country's only cross-sector best practice grantmaking publication, we also convene and coordinate a number of grantmaking affinity groups and cross-sector grantmaking events.

We are active in seeking and documenting best practice lessons and examples, are codifying what we are learning through our dynamic website and Grantmaking Toolkit, and embedding all of that knowledge in SmartyGrants, our best practice online grants management system, which is streamlining and standardising grantmaking across the country.

## **WE BELIEVE:**

1. Grantmaking is an absolutely central element in the Australian economic system.  
Not one dollar should be wasted on poorly designed, poorly articulated, poorly evaluated, or inefficient systems. Grantmakers must maximise resources by sharing lessons, and seeking and learning from those shared by others.
2. Australia needs more and better professional grantmakers.  
The job of grantmaking should be afforded appropriate professional status, training and recompense.
3. Grantmakers must listen to the communities they serve.  
Grantmakers should be driven by outcomes, not process. They must trust and respect their grantees and offer programs, systems and processes appropriate to their needs and capacities.
4. Grantmakers should be efficient.  
Wastage is indefensible. Skimping on systems, technology and professional staff is equally wicked.
5. Grantmakers must be ethical.  
Grantmakers must ensure that the process of grantmaking is fair, unbiased, and open.

You can read more about our values and beliefs in our grantmaking manifesto: [www.grantsmanagement.com.au/manifesto](http://www.grantsmanagement.com.au/manifesto)



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