

# GRANTMAKING IN AUSTRALIA

## CONFERENCE 2012

Friday 24 February - Melbourne, Australia

The AIGM's best/next practice conference  
for Australian Government grantmakers

PLUS (23 February): SmartyGrants Bootcamp &  
Masterclass for Local Government Grantmakers

*Vive la  
Grantmaking  
Revolution*

The Australian  
Institute of Grants  
Management



A division of

[ourcommunity.com.au](http://ourcommunity.com.au)

# KEYNOTE SPEAKERS



## ANDREW THOMAS

Andrew is the General Manager of Philanthropy at Perpetual, where he oversees over 450 trusts and funds, and The Perpetual Foundation. He is currently on the Board of Brisbane's Royal Children's Hospital Foundation.



## PAUL RONALDS

Paul is the First Assistant Secretary of the Office of Work & Family in the Department of Prime Minister & Cabinet (which houses the new Office for the Non-Profit Sector) where he is in the front line of the government's red tape reform agenda.



## STEPHEN MAYNE

Stephen is a City of Manningham councillor, governance expert, award-winning journalist, media contributor, and outspoken shareholder activist. He is perhaps best known for founding Crikey, Australia's groundbreaking independent news outlet.



## THE HON. JOAN KIRNER AM

A former Premier of Victoria, Joan is a veteran in the fight for equity and inclusion, women's rights, educational equality, community development and the environment. She is currently the Victorian Communities Ambassador.



## MIKE BOOTH

Mike teaches in the School of Accounting at QUT, where he is undertaking research into the financial viability of nonprofits. Previously, he was Assistant Commissioner at the ATO, and has worked in HR, IT, accounting, auditing and management roles.



## PATRICK MORIARTY

Patrick heads up Our Community's training team, each year going face-to-face with hundreds of grassroots grantseekers across the nation. Patrick is also a skilled grant assessor and consultant, board member and community volunteer.



## TONY SMITH

Tony began his career in welfare before moving to local government in the 1980s. He's worked in community development across four NSW councils and currently manages a large grants program at Bankstown City Council.



## JOANNE McNEILL

A 2009 Churchill Fellow, Joanne's role as Community Capacity Building Officer – Social Enterprise at Parramatta City Council is the first of its kind in Australia. She co-authored *Australian Stories of Social Enterprise*.



## GERARD AULD

Gerard is Grants and Recreation Officer at Moyné Shire Council. Around 20 years ago, he made a seachange and moved to Koroit in Victoria's southwest, swapping engineering roles for his current position in 2006.



## CORY BECKER

Cory has extensive experience in community development, partnership development, stakeholder management and community service delivery, as well as development of funding submissions and management of community grants programs.



## GREG DRAKE

Greg is Associate Director in the Public Policy practice at Urbis, where he has undertaken a number of local government grants program reviews. Before becoming a consultant, Greg worked in an array of community planning type roles.



## KATE CALDECOTT

Kate is a member of the founding team of Our Community and the Executive Director of the Australian Institute of Grants Management, where she is working to drive grantmaking reform in Australia.



## SIMON HERD

Simon is the Director of Grantmaking Reform at the AIGM, where he is working on the ongoing development and enhancement of the AIGM's best practice grants management system, SmartyGrants.



## FIONA DEMPSTER

Fiona is a Director of the Australian Institute of Grants Management, a grantmaking and social inclusion consultant, and a former Ministerial Adviser with more than 10 years experience in program management and delivery.



## BARRY SMITH

Barry is a Director of the Australian Institute of Grants Management, a grantmaking and social inclusion consultant and a former senior public servant with more than 30 years experience in government grantmaking.

# ABOUT THE CONFERENCE

Grantmaking will never be the same again. Right across Australia, we are witnessing a groundswell of enthusiasm for grantmaking reform. The AIGM is helping to drive this reform - but we know we're not alone.

Come to the Grantmaking in Australia Conference 2012 and add your voice to the emerging conversation about the future of grantmaking in Australia.

## LEARNING OUTCOMES

- Hear what's new and what's next in the grantmaking reform agenda
- Discover new approaches to key grantmaking tasks
- Meet your peers and swap war stories, tips and tools
- Learn about the latest developments in grantmaking technology
- Contribute your expertise

## WHO WILL BENEFIT:

- **Local Government** grantmakers, grants administrators, assessment panel participants, councillors
- **State Government** grants officers, funding program managers and administrators
- **Federal Government** grants officers, funding program managers and administrators
- **Philanthropic, Corporate & Community Foundation** staff and board members with an interest in government grantmaking
- **Auditors and others** with an interest in grantmaking and government funding processes

“A very good conference, a lot of energy, passion and great ideas. Very well organised, great food.”

2011 Grantmaking in Australia Conference attendee

“Fantastic, this conference has provided a ‘light bulb’ of so many ideas.”

2011 Grantmaking in Australia Conference attendee

# THE PROGRAM

FRIDAY, FEBRUARY 24, 2012, 9AM-4PM

8.30 - 9.00 AM

COFFEE/TEA & REGISTRATION

9.00 - 9.15 AM

INTRODUCTION

## VIVE LA REVOLUTION: Why the time for grantmaking reform is NOW

**Fiona Dempster**, Director, Australian Institute of Grants Management (AIGM)

*The AIGM this year released a Grantmaking Toolkit, complete with 20 best practice policy-building templates, and a Grantmaking Manifesto, which includes a template Code of Practice for Professional Grantmakers, and a Code of Practice for Grantmaking Agencies. Hear how these initiatives (and the many more to come) can help you to achieve best practice in your own grantmaking program.*

9.15 - 10.00 AM

KEYNOTE  
PRESENTATION

## SLICING THE RED TAPE: A bold new agenda

**Paul Ronalds**, First Assistant Secretary, Office of Work and Family, Department of Prime Minister & Cabinet

*The Federal Government is powering towards a red tape reform agenda that will see the introduction of common funding agreements, global budgets, and cross-department contracts. In this session you'll learn what's ahead and what all other grantmakers, whatever their size or complexity, can learn from these game-changing reforms.*

10.00 - 10.30 AM

Q&A SESSION

## NEXT PRACTICE: This year's best ideas in grantmaking

**The Hon. Joan Kirner AM**, Former Victorian Premier

*Applications for the AIGM's 2012 Grantmaker of the Year Award came from all parts of Australia, from philanthropic, government and community grantmaking sectors, and from grantmakers of vastly varying sizes. Applicants were asked to put forward their ideas for taking grantmaking forward into a new era. Join Former Victorian Premier Joan Kirner for the announcement of the winner of the 2012 Grantmaker of the Year Award, and hear the winner's ideas for transforming grantmaking in Australia.*

10.30 - 11.00 AM

MORNING TEA

11.00 - 11.45 AM

KEYNOTE  
PRESENTATION

## A BIRD'S EYE VIEW: Moving grantmaking forward

**Andrew Thomas**, General Manager - Philanthropy, Perpetual

*As the manager of more than 450 charitable trusts, distributing more than \$45 million each year, Perpetual knows a thing or two about bringing grantmakers with specific social aims together with not-for-profit organisations that can help to breathe life into those aims. Perpetual's assessment of potential grantees is centred on the organisation, rather than the individual project. In this session, Perpetual's general manager of philanthropy, Andrew Thomas, will provide his lessons for other grantmakers considering taking that approach, and detail the key changes that he believes need to happen to take strategic grantmaking forward.*

11.45 - 1.00 PM

CONCURRENT  
SESSIONS  
(CHOOSE YOUR  
FIRST SESSION)

## CONCURRENT SESSIONS

### 1. RISKY BUSINESS: How far will you go?

**Barry Smith**, Director, Australian Institute of Grants Management

*As the AIGM Grantmaking Manifesto states, grantmakers should be prepared to take risks. That's not to say they should be reckless - grantmakers should understand, and be comfortable with, the risks they're taking. In this session, you'll learn the key things you need to consider when assessing the financial, ethical and reputational implications of your grantmaking.*

### 2. FEEDBACK: Balancing what's possible with what's fair

**Patrick Moriarty**, Executive Director, Institute of Community Directors Australia (ICDA)

*The possibilities for feedback start from the moment an organisation submits an application for a grant, and doesn't end until well after the whole thing's done and dusted. In reality, though, few grantmakers can afford the time to provide detailed feedback to every grantseeker at every point in the process. How much is enough? In this session, you'll learn the 10 things you **must do** to fulfil your obligations as a responsible, responsive grantmaker.*

*continued...*

# THE PROGRAM

FRIDAY, FEBRUARY 24, 2012, 9AM-4PM

**11.45 - 1.00 PM**

CONCURRENT  
SESSIONS CONT...  
(CHOOSE YOUR  
FIRST SESSION)

### **3. THE STANDARD CHART OF ACCOUNTS: Why and how you must get on board**

**Mike Booth**, School of Accounting, QUT

*The National Standard Chart of Accounts (SCOA) came into effect on July 1, 2011. Find out what this means for your organisation, and how you can and should go about introducing it into your grantmaking.*

### **4. SMARTYGRANTS: Latest developments in the AIGM's best practice grants management system**

**Kate Caldecott**, Executive Director, Australian Institute of Grants Management

*SmartyGrants is the Australian Institute of Grants Management's best practice online grants management system, providing a solution for every grantmaking problem, from application to evaluation. SmartyGrants is now being used by hundreds of trusts, foundations, and local, state and federal government grants programs across Australia, as well as in New Zealand and other parts of the world. Find out how SmartyGrants can set your program free.*

**1.00 - 2.00 PM**

**LUNCH**

**2.00 - 3.15 PM**

CONCURRENT  
SESSIONS CONT...  
(CHOOSE YOUR  
SECOND SESSION)

### **CONCURRENT SESSIONS**

*Attend your second chosen concurrent session*

1. *Risky Business*
2. *Feedback*
3. *The Standard Chart of Accounts*
4. *SmartyGrants*

**3.15 - 3.25 PM**

**CUPPA ON THE RUN (GRAB A DRINK TO BRING TO THE NEXT SESSION)**

**3.25 - 4.00 PM**

KEYNOTE  
PRESENTATION

### **THE NAKED TRUTH: Surviving and thriving in the real world of grantmaking**

**Stephen Mayne**, Councillor, shareholder activist and governance expert

*Amidst all the talk about transparency, access, equity and good governance, we must not forget the seedier side of grantmaking: politics, lobbyists, conflicts. Stephen Mayne is a councillor and governance expert who is not afraid to tell it like it is. Hear his take on how to survive in the real world of grantmaking.*

“Probably the best conference in any sector I’ve been to ever. Professional, practical, interactive, good venue and well catered.”

2011 Grantmaking in Australia Conference attendee

# SMARTYGRANTS BOOTCAMP

THURSDAY, FEBRUARY 23, 2012, 10AM-12PM

## **SmartyGrants Bootcamp** **Training for new & existing SmartyGrants users**

*Thursday, February 23, 2012: 10am – 12pm*  
*Registration opens at 9.30am*

**PRESENTERS:** Kate Caldecott (Executive Director), Simon Herd (Director of Grantmaking Reform), Australian Institute of Grants Management (AIGM)

### **PLEASE CHOOSE ONE STREAM TO ATTEND:**

#### **STREAM 1: SMARTYGRANTS REFRESHER**

For current SmartyGrants users who want to refresh their skills, or those with new/additional staff.

*Suits new and basic SmartyGrants users.*

- **Getting Started:** Recapping the fundamentals
- **System Navigation:** Tips and tricks for quickly moving around the system
- **Support:** Where is it and how to make the most of it
- **Tasks and Milestones:** How to make the most of tasks and milestones
- **Applications and Acquittals:** What you can do with applications and acquittals
- **Reports:** How to run a simple template report
- **Contacts:** Finding, editing and recording your history with a contact
- **What's New:** Latest releases

#### **STREAM 2: SMARTER FORM DESIGN**

Learn how to design forms that capture all the information you need (and only what you need) and are easy to complete from the grant applicant's perspective.

*Suits more experienced SmartyGrants users.*

- **Tech Developments:** Learn about recent changes to the SmartyGrants form designer
- **Right Sizing:** Not too much and not too little
- **Instructions:** What to tell your applicants, be they urban hipsters, seniors, or small/emerging groups
- **What Works:** Tens of thousands of applications later, we have some stories to share
- **Assessment and Administration:** Options for designing and capturing essential data

“Energy great and sends us all off with ideas and positive hope of achievement.”

2011 Grantmaking in Australia Conference attendee

# LOCAL GOVERNMENT MASTERCLASS

THURSDAY, FEBRUARY 23, 2012, 1.30-4.30PM

## Masterclass for Local Government Grantmakers Insight, war stories, peer support & practical solutions

Thursday, February 23, 2012

1.30pm - 4.30pm (followed by networking drinks 4.30pm-5.30pm)

Registration opens at 1pm - light lunch available

**FACILITATORS:** Barry Smith & Fiona Dempster, AIGM Directors

**1.00 - 1.30 PM**

**COFFEE/TEA & REGISTRATION (LIGHT LUNCH AVAILABLE)**

**1.30 - 1.40 PM**

**INTRODUCTION**

**1.40 - 2.20 PM**

**GRANTS FOR SOCIAL ENTERPRISE**

**Joanne McNeill**, Community Capacity Building Officer – Social Enterprise, Parramatta City Council

*Are you providing funds for social enterprise in your community? Should you be? What exactly is 'social enterprise' anyway? In this session you will find out the whats, whys and hows of funding these new kids on the block.*

**2.20 - 3.00 PM**

**GRANTMAKING: REVOLUTION OR EVOLUTION?**

**Gerard Auld**, Grants and Recreation Officer, Moyne Shire Council

*No grants program ever stands still (and nor should it). In this session, community grantmaker Gerard Auld will lead a discussion about what factors are most important in the shaping of a program's evolution, and how to manage the inevitable growing pains of a program in flux.*

**3.00 - 3.15 PM**

**CUPPA ON THE RUN**

**3.15 - 3.50 PM**

**GRANTMAKING IN PARTNERSHIP - THE JOYS AND THE PITFALLS**

**Tony Smith**, Team Leader Community Planning & Development, Bankstown City Council

*Collaboration is the name of the game when it comes to managing Bankstown's large community grants program. In this session you'll hear about the ups and the downs, the pleasures and the pain, of collaborative grantmaking.*

**3.50 - 4.25 PM**

**UNDERTAKING A STRATEGIC REVIEW OF YOUR GRANTS PROGRAM**

**Cory Becker**, Community Development Co-ordinator, Wyndham City Council

**Greg Drake**, Associate Director, Public Policy, Urbis

*In early 2011, Wyndham City Council took a step back and engaged consulting firm Urbis to undertake a comprehensive review of the strategic direction of the council's community grants program. In this session, you'll find out what, why and how they took the path they did – and where they're going next.*

**4.25 - 4.30 PM**

**SUMMING UP AND NEXT STEPS**

**4.30 - 5.30 PM**

**INFORMAL NETWORKING & DRINKS**

# CONFERENCE INFO

## GRANTMAKING IN AUSTRALIA 2012

### DATE & TIME

**Conference:** Friday, February 24, 2012, 9am-4pm

**SmartyGrants Bootcamp:** Thursday, February 23, 2012, 10.00am-12pm

**Masterclass for Local Government:** Thursday, February 23, 2012, 1.30pm-4.30pm  
(networking drinks from 4.30pm-5.30pm)

### VENUE

RACV City Club, 501 Bourke St, Melbourne

**Conference** (February 24): Level 17

**SmartyGrants Bootcamp** (February 23): Level 2 (Bourke Rooms 1 & 2)

**Masterclass for Local Government** (February 23): Level 2 (Bourke Rooms 1 & 2)

### PARKING

Driving is not recommended. Car parking at the RACV City Club costs \$52 for full day (\$13 per hour) and is extremely limited. Nearby parking also fills early so please allow enough time to find an alternative parking space if required.

### PUBLIC TRANSPORT

**By Foot/Taxi:** RACV City Club, 501 Bourke St, Melbourne, between Queen St and William St

**By Tram:** Trams #86, #95 and #96 all stop on Bourke St near the RACV City Club

**By Train:** Get off at Southern Cross Station (Spencer St) and walk or tram down Bourke St.

### PRICE

**Conference Only:** \$445 (AIGM Members: \$400)

**Local Government Masterclass:** \$120 (AIGM Members: \$99)

**SmartyGrants Bootcamp:** \$120 (AIGM Members & SmartyGrants Users: \$99)

### ACCOMMODATION

We recommend [www.lastminute.com.au](http://www.lastminute.com.au) or [www.wotif.com](http://www.wotif.com)

### TAKEAWAY REFERENCE MATERIAL

In line with our sustainability objectives, conference presentations will not be distributed during the conference but will instead be available via a blind weblink that will be advised via email following the conference.

### BOOKINGS, CANCELLATION & REFUND POLICY

Registrations must be paid no later than 10 working days prior to the event. 50% of the registration fee is refundable if notice of cancellation is received more than 10 working days prior to the event; NO REFUND is available where notice of cancellation is received less than 10 working days prior to the event. Substitution of attendees is allowed, but written notice is required for all cancellations and substitutions. It is not possible to transfer registration between events.

### COMMITMENT TO ACCESS & EQUITY

We are committed to access and equity and everything in our power will be done to meet the needs of all delegates. Alan Matic will be delighted to assist any individual or organisation who requires assistance. Contact Alan on (03) 9320 6805 or email [alanm@ourcommunity.com.au](mailto:alanm@ourcommunity.com.au). In order to ensure that all needs can be met, please note that we require four weeks' notice for most special needs requests.

# REGISTRATION

## GRANTMAKING IN AUSTRALIA 2012

WHY NOT REGISTER ONLINE? (by credit card, cheque or EFT)

[www.grantsmanagement.com.au/conference2012](http://www.grantsmanagement.com.au/conference2012)

### REGISTRATION: ATTENDEE ONE

Name	<input type="text"/>		
Job Title	<input type="text"/>		
Org	<input type="text"/>		
Address	<input type="text"/>		Post Code
Email	<input type="text"/>		
Phone	<input type="text"/>	Fax	<input type="text"/>
Special needs (wheelchair access, dietary requirements etc)	<input type="text"/>		

Yes, I am an AIGM Member (discounted price applies)

Yes, I am a SmartyGrants user

**CONFERENCE**  
February 24, 2011 - 9am-4pm

Please select two preferred sessions

- Risky Business  Feedback  
 Standard Chart of Accounts  SmartyGrants

AIGM members \$400 pp

Non-members \$445 pp

**SMARTYGRANTS BOOTCAMP**  
February 23, 2011 - 10am-12pm

Please select one preferred session:

- SmartyGrants Refresher (new & basic SmartyGrants users)  
 Smarter Form Design (more experienced SmartyGrants users)

AIGM members/SG users \$ 99 pp

Non members/users \$120 pp

**MASTERCLASS FOR LOCAL GOVERNMENT**  
February 23, 2011 - 1.30pm-4.30pm

Masterclass starts at 1.30pm. A light lunch will be available from 1pm (no charge).  Yes, I require lunch

Networking drinks will take place from 4.30pm to 5.30pm. An optional dinner in the city (pay as you go) may be organised if there is enough interest.  Yes, I'm interested in dinner after the Masterclass

AIGM members/SG users \$ 99 pp

Non members/users \$120 pp

**TOTAL:**

(Please transfer total to the payment page)

# REGISTRATION

## GRANTMAKING IN AUSTRALIA 2012

✧ Please photocopy this form if there are more than 2 attendees from your organisation

### REGISTRATION: ATTENDEE TWO

Name	<input type="text"/>		
Job Title	<input type="text"/>		
Org	<input type="text"/>		
Address	<input type="text"/>		Post Code
Email	<input type="text"/>		
Phone	<input type="text"/>	Fax	<input type="text"/>
Special needs (wheelchair access, dietary requirements etc)	<input type="text"/>		

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Non members/users \$120 pp

**TOTAL:**

(Please transfer total to the payment page)



## ABOUT THE CONFERENCE ORGANISERS

This conference is an initiative of the Australian Institute of Grants Management (AIGM), the best practice network for government and local government grants managers and grantmakers.

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 is a division on 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, currently used by hundreds of grants program of all types and sizes across the country and internationally.
- **Grants Management Quarterly (GMQ)** – plain language 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 Knowledge Bank** – searchable listing of best practice thinking and case studies.
- **Grants in Australia Survey** – annual survey of grantseekers tracking the performance of the field of grantmaking throughout Australia.
- **Grantmaking Manifesto** – including Codes of Practice for Professional Grantmakers and Grantmaking Organisations.

While every attempt will be made to deliver this conference as advertised, please be aware that sometimes events beyond our control may cause changes to the program or schedule.



A division of:



[ourcommunity.com.au](http://ourcommunity.com.au)