

**YOU CAN'T
SAVE THE
WORLD...**

**But your
grantmaking
dollars can.**



Be Bold.

An enterprise of:



ourcommunity.com.au

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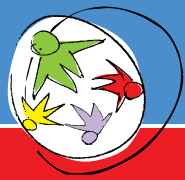
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ourcommunity.com.au

Building Stronger Communities

Through Stronger Community Organisations

**Our Community
Group of Enterprises:**



Australian Institute
of Grants Management



Dear Enlightened Grantmaker,

In the modern era, grants are big business - \$30 billion each year.

Our Grantmaking Manifesto highlighted the need to professionalise grantmaking. We are - and these tools are now available to all.

Each day, our staff are energised in the knowledge that the work they do helps you change the world, and possibly even save it.

The national government, our eight states and territories, 700 cities, towns, municipalities and shires, and their innumerable departments and agencies are almost all involved in grantmaking.

Philanthropic bodies add variety and independence, while local government authorities and community foundations provide the bulk of grassroots grants. Our Community's grants database is currently tracking around 2500 separate programs.

Grantmakers believe - in the main, correctly - that organisations with closer connections to the community will deliver desired outcomes more effectively than bureaucrats can; often with increased flexibility, stronger motivation, greater responsiveness, more sensitivity, deeper commitment, and lower overheads.

However, good outcomes are not guaranteed, and countless auditors' reports have shown that billions of grantmaker dollars have been wasted on projects that did not work or whose lessons were not heeded.

Common problems include poor program design, inadequate technical and administrative systems, and too much outside interference with grantmaker autonomy.

Facing all these challenges, grantmakers must be accountable, efficient, and effective. Good grantmaking requires professional grantmakers. It demands sharing of lessons and greater collegiality. It requires better systems.

The Australian Institute of Grants Management (AIGM), a division of the multi-award-winning social enterprise Our Community, has for the past decade been at the forefront of innovation in grantmaking in Australia. We accept increments but we're working towards revolution.

We look forward to working with you to achieve our common aims.

Denis Moriarty
Group Managing Director, Our Community

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Victoria Australia

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Mr Denis Moriarty
Group Managing Director
Ms Carol Schwartz AM
Chair

SERVICE 1

Grantmaking Values:

- A** Grantmaking Manifesto
- B** Code of Practice for Grantmaking Agencies
- C** Code of Practice for Professional Grantmakers

Manifesto: Clear and conspicuous declaration of intent, policy and aims

“In a sector that’s full of promising practices, guidelines, standards for excellence, and the like, it’s refreshing to read something as passionately (and sensibly) framed as this manifesto.”

Project Streamline, United States of America

A Grantmaking MANIFESTO

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 grants programs and systems. Grantmakers should maximise resources by sharing lessons, and seeking and learning from lessons 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 should listen to the communities they serve:**

Grantmakers should be driven by outcomes, not process. They should 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 should be ethical:**

Grantmakers should ensure that the process of grantmaking is fair, unbiased, and transparent.

*Full
Manifesto
16 pages*



www.grantsmanagement.com.au/manifesto

B Code of Practice for GRANTMAKING AGENCIES

For every grants program:

The program should arise from community needs.

- The objectives of the program should be based on continuing consultation with the target communities.
- The program should respect the contribution and consider the interests of all stakeholder communities.

The program should be properly resourced.

- The program should be adequately funded at a level sufficient to achieve its designated objectives.
- The program should take full advantage of computerised management systems such as SmartyGrants, and should have adequate technical support.
- The program should seek to employ standardised formats for grant submission, monitoring, reporting, and acquittal.

The program should be properly recorded.

- All aspects of the justification and rationale of every grants program should be articulated, documented, and made publicly available.
- Policies and processes covering all aspects of the grantmaking program should be documented and publicised.
- The risk profile of the grants program should be analysed, documented, and reviewed periodically.

The program should be just.

- The awarding of grants should be fair and free from bias, conflict of interest, or any influence inconsistent with the stated decision criteria.
- Recognised procedures should be in place to manage conflict of interest (and the appearance of conflict of interest).

The program should be a partnership.

- Program funding should cover the full cost of the project, including overheads.

- Where necessary and possible, the grantmaking agency should provide non-monetary assistance to the grantee.
- Program funding should consider the long-term sustainability of the grantee organisation.

The program should generate knowledge.

- The program should be monitored and evaluated at a level of detail appropriate to the resources employed.
- The program evaluation should cover the degree to which the program has achieved its stated objectives, any advances achieved in the grantmaking processes, any other significant gains or detriments of the program, and any other significant findings emerging in the course of the evaluation.
- Lessons learned by grantees should be collected and disseminated in an appropriate format to the appropriate audiences.
- Evaluations should be honest, direct, and free of bias.
- Evaluation outcomes should be made publicly available through appropriate media and open and available repositories such as data warehouses or knowledge bases such as Grants Management Quarterly.

The program should be staffed by professionals.

- Adequately qualified and compensated professional grants program officers should be nominated to be responsible for all aspects of grantmaking, including policymaking, governance, the application process, the decision-making process, grant monitoring, and review and evaluation.
- The grantmaker/s entrusted with overseeing the program should at the conclusion of the process be required to sign a certificate certifying that due process had been observed throughout all aspects of the grants program.
- The agency should support adequate professional development programs for its grants officers.

Code of Practice for **PROFESSIONAL GRANTMAKERS**

RESPONSIVENESS

A grantmaker shall respect the work and expertise of their grantees, partners and stakeholders, and shall strive for relationships based on candor, understanding and respect.

A grantmaker shall take into account the interests of the wider community and the grantmaking profession in designing and executing a grants program.

OBJECTIVITY

A grantmaker shall observe policies to address conflicts of interest and do all in their power to ensure that others do the same.

A grantmaker shall ensure that grantee assessment and selection is based purely on published criteria and is without personal or institutional bias.

A grantmaker shall not intentionally mislead prospective grantees.

EFFICIENCY

A grantmaker shall continuously seek to improve the performance of their grantmaking operation based on previous experience and outside information.

A grantmaker shall remember that administration is a cost, not an outcome.

A grantmaker shall not place their own interests above those of the grants project.

EFFECTIVENESS

A grantmaker shall always provide honest and accurate information and advice to their organisation.

A grantmaker shall, to the maximum extent possible, freely share the learnings from their work with the grantmaking profession, the not-for-profit sector, and the wider society.



www.grantsmanagement.com.au/codesofpractice

SERVICE 2

Education & Professionalism:

- A** Annual National Grantmaking Conference
- B** Grants Management Quarterly
- C** Grantmaking Toolkit
- D** Grantmaking Knowledge Bank
- E** Training and Networking
- F** Grants in Australia Survey and Benchmarking
- G** Grantmaker of the Year Award

“You can never be overdressed or overeducated.”

Oscar Wilde

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

AIMM conference attendee

A Annual National GRANTMAKING CONFERENCE

Since 2006, the AIGM's National Grantmaking Conference has been bringing together grantmakers of all types to hear about best practices and next practices and explore common aims and challenges.

Once a year, Australian grantmakers get the opportunity to break out of the endless cycle of applications, assessments and acquittals so they can reflect, meet their peers, hear some great ideas and get the knowledge and inspiration they need to do their job as a grantmaker better.

The conference also includes special interest sessions for local government grantmakers and SmartyGrants users.



www.grantsmanagement.com.au/conference

B GRANTS MANAGEMENT QUARTERLY (GMQ)

Since its launch in 2002, GMQ has become the must-have source of information for every Australian grantmaker.

The official publication of the Australian Institute of Grants Management, GMQ is designed to boost the efficiency and effectiveness of Australian grants programs. Each quarter, GMQ brings you grantmaking news, views, innovations, resources, trends, issues and best practice examples from Australia and overseas.

GMQ caters to the needs of people involved in all aspects of the grants management function, from grants and funding program officers and administrators through to auditors, managers and even councillors and policy makers.



www.grantsmanagement.com.au/gmq

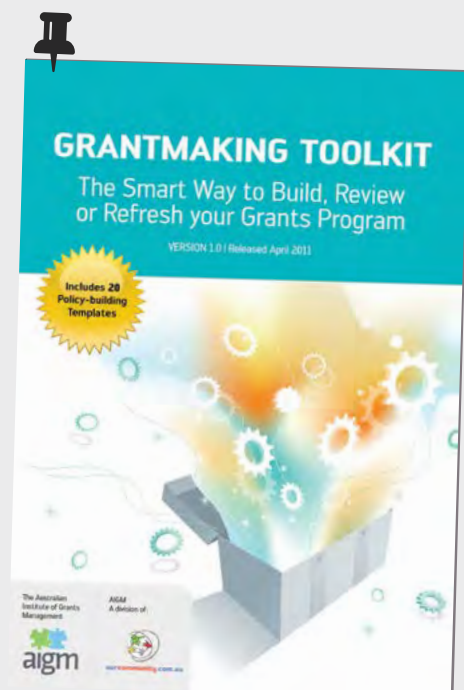
© GRANTMAKING TOOLKIT

The Grantmaking Toolkit is an all-in-one decision-making framework, workbook (with templates), and check-up tool designed to walk you through the process of building, reviewing or refreshing a grants program.

The Toolkit identifies the five key pillars that are necessary to support a well-designed and successful grants program:

- **PILLAR 1: Governance and Structure**
- **PILLAR 2: The Application Process**
- **PILLAR 3: Awarding Grants**
- **PILLAR 4: Managing Grants**
- **PILLAR 5: Review and Evaluation**

The five pillars are broken down further into 18 key components. Templates are provided for each element to help you easily move from the “thinking” to the “doing”.



“It’s the first of its kind in Australia. There have been other attempts to chart the grantmaking process, but never before has there been a tool that not only provides the roadmap, but also the engine that will move you along the road. While the decision-making framework gets you thinking, the templates will get you doing.”



www.grantsmanagement.com.au/toolkit

D GRANTMAKING KNOWLEDGE BANK

The AIGM's Grants Management Knowledge Bank is your window into the world of best practice grantmaking.

Articles, speeches, presentations and publications – plain English, searchable online help, when you need it.

Topics include:

- Governance
- Managing Applications
- Assessing Applications
- Monitoring & Reporting
- Managing Performance Issues
- Acquittals
- Review & Evaluation
- Communications
- Sharing Lessons Learned



www.grantsmanagement.com.au/knowledgebank

E TRAINING AND NETWORKING

Membership of the AIGM gives you access to online and face-to-face training and networking opportunities.

We convene a range of special interest networking groups, as well as holding topic-based grantmaking training on a range of subjects. Past workshop topics have included social inclusion in grantmaking, real-world grantmaking evaluation, online grantmaking, and grantmaking health check.

Regular online and face-to-face SmartyGrants training opportunities are also available.



www.grantsmanagement.com.au/membership

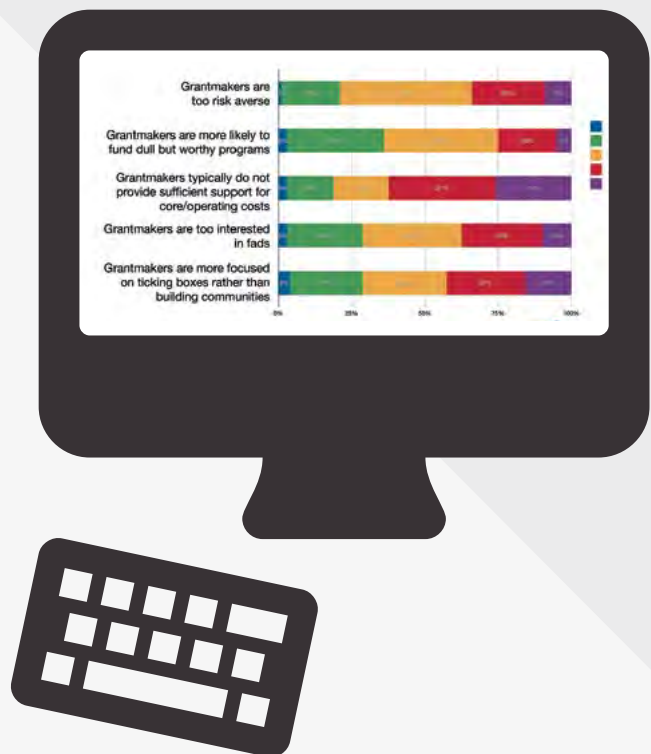
F GRANTS IN AUSTRALIA SURVEY AND BENCHMARKING

Our annual survey helps us to understand how grantmakers are performing, based on the experiences of their most important stakeholders: grantseekers.

More than 500 respondents typically take part in the survey, which has been conducted annually since 2006.

Each year's survey focuses on one particular aspect of grantmaking (e.g. technology, red tape reduction). Results are used to provide benchmarking assistance to grantmakers across the country.

In 2013, we added a grantmaker component to the survey and entered into a partnership with a leading research company, Empirica Research, to provide added rigour.



www.grantsmanagement.com.au/survey

GRANTMAKER OF THE YEAR

Professional grantmakers make Australia's vast money-giving machine run smoothly.

They know how to identify the challenges and the opportunities, how to weigh up the outcomes, and how to get the word out about their success or failure.

That's important work. And it deserves recognition.

The AIGM's annual Grantmaker of the Year Award is designed to unearth the people leading the field of grantmaking in Australia.

Importantly, through this annual competition we also seek to draw out and share our country's leading grantmakers' vision for where we should go next.



www.grantsmanagement.com.au/award

SERVICE 3.

Reform, Red Tape Reduction & Productivity Improvement

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**“The system is
absolutley brilliant.
Easy to use,
comprehensive,
tells you off when
you do something
wrong - congrats
to the team!”**

SmartyGrants user

A SMARTYGRANTS

Australia's most used grants management system



SmartyGrants is Australia's most widely used online grants management system.

SmartyGrants is not just a tech solution – it's a grantmaking solution, shaped by grantmakers, and built just for grantmakers.

We have worked with, observed and listened to thousands of grantmakers and grantseekers over the years. It is through their input, and our own vast experience in grantmaking, that we have been able to create the most intuitive, practical and useful grantmaking system available anywhere.

And it's not over yet. Working shoulder to shoulder with our growing community of SmartyGrants users, we're continuing to drive grantmaking innovation and development of best practices.

FIVE KEY FACTS ABOUT SMARTYGRANTS:

1. Smartygrants is australia's most-used grants management system.

SmartyGrants has been used to manage more than 3300 grants programs across the country, and that figure is growing dramatically every year. SmartyGrants is suitable for all grantmakers, from the smallest local government outfit to mid-sized philanthropic and corporate foundations, to the very biggest state and federal government funders. See who else uses us:

www.smartygrants.com.au/why/why-whouses.html

2. Smartygrants has a solution for every problem.

SmartyGrants has been designed with the problems of grantmakers firmly at front and centre. We can free you from technical issues (while giving you access to the very latest in technology), we can help you slice and dice your data quickly and more

meaningfully, we can reduce your paperwork and administration costs dramatically, we can improve your compliance credentials. Find out more: www.smartygrants.com.au/why.html

3. Smartygrants will never go out of date.

We are constantly improving and upgrading SmartyGrants to take advantage of what's new and useful. When you purchase a SmartyGrants subscription, you're not buying a "version" that is going to need replacing sometime in the future. You get access to a constantly evolving product. Current features:

www.smartygrants.com.au/features/features-overview.html

4. Smartygrants is affordable.

Ask around and you'll find a smorgasbord of stories about expensive IT grants management systems that cost way more than the budget, didn't work properly and had to be replaced a year or two later. SmartyGrants' tiered annual subscription model allows you to avoid being stuck on that very expensive and frustrating path. You're not locked in – you can leave and take your data with you whenever you like. Find out more:

www.smartygrants.com.au/pricing.html

5. Smartygrants allows you to benefit from the crowd.

How do you know that the way you are currently doing things is actually the best way to do things? With SmartyGrants you are joining an ever-growing network of grantmakers who share their methods, forms and solutions. Why keep reinventing the wheel? With SmartyGrants you'll always be on top of best practice. Find out more:

www.smartygrants.com.au/why/bestpractice.html



www.smartygrants.com.au

B DOCTOR IN RESIDENCE RESEARCH PROGRAM

As part of our continuing investment in research and innovation, the AIGM is partnering with a university to put in place a “Doctor in Residence” program.

Based in our national headquarters in Melbourne Australia, a PhD student will undertake research in the area of grantmaking innovation.

The Doctor in Residence program is an initiative of the AIGM’s Innovation Lab.



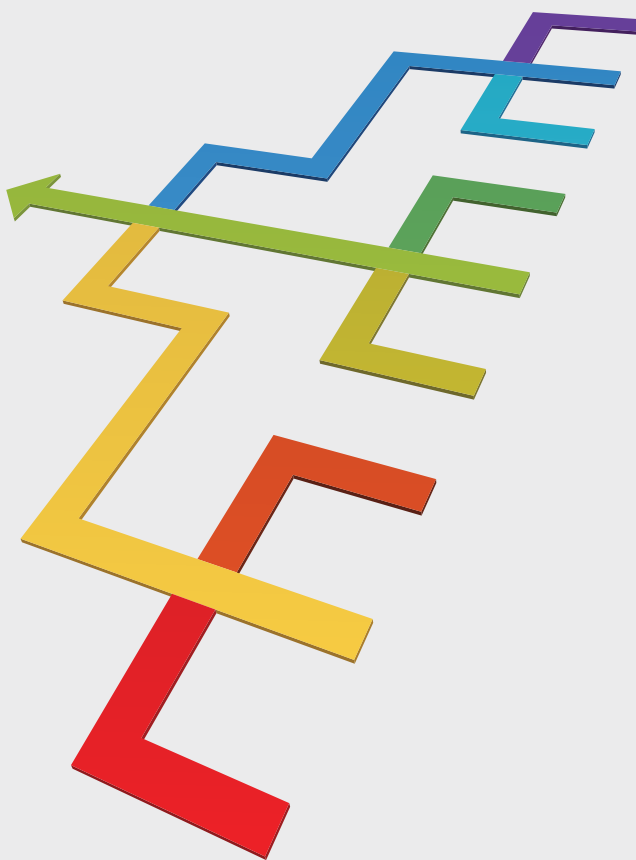
*Coming
Soon!*

© COMMON GRANTS CLASSIFICATION AND REPORTING SCHEMA

The AIGM is currently working on an Australian-first project to develop national standards and a taxonomy for the classification of grants, grant recipients and grantmaking bodies.

The project will also result in a common format for reporting on grants.

This will enable comparison of grants across different grantmaking organisations and allow grantseekers to discover other organisations doing similar work.



D SMARTYFILE, SMARTYBANK & GRANTSAFE

Coming
Soon!

Leveraging off the power and ubiquity of SmartyGrants, SmartyFile, SmartyBank and GrantSafe provide examples of how the AIGM is taking the “report once, use often” concept to new heights in Australia.

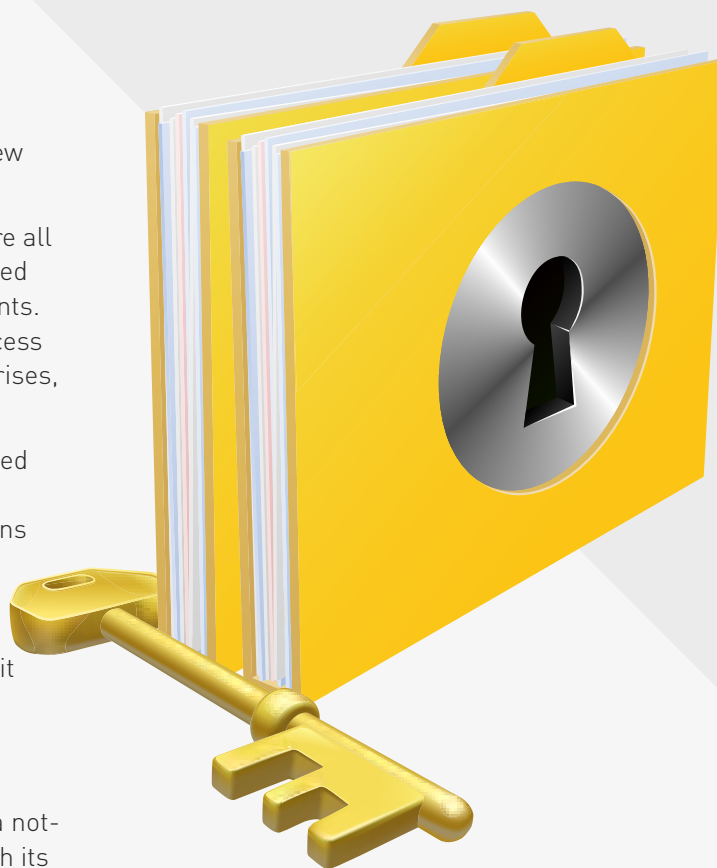
SmartyFile allows grantseekers to securely store all the key compliance documents and data they need to call on again and again when applying for grants. The cloud-based storage allows user to gain access to their data wherever and whenever the need arises, and share it with whomever they wish.

Collectively, all the documents and data submitted to individual SmartyFiles forms the AIGM’s **SmartyBank**. With more than 150,000 applications and reams of associated data having already been lodged using SmartyGrants, SmartyBank is already the largest single repository of information relating to not-for-profit organisations in the country.

The next link in this chain is GrantSafe, a due diligence certificate that allows grantmakers to quickly and easily confirm whether a charity or a not-for-profit organisation is currently up to date with its compliance obligations. With GrantSafe you can verify charitable status, insurance coverage and other vital compliance facts.

SmartyFile, SmartyBank and **GrantSafe** provide compliance and due diligence benefits for grantmakers, while reducing red tape for not-for-profits at the same time.

Not-for-profits supply their compliance credentials when applying for a grant through SmartyGrants. Any further application to any of the many hundreds of grantmakers using SmartyGrants can draw from the same material. Report once – use often!



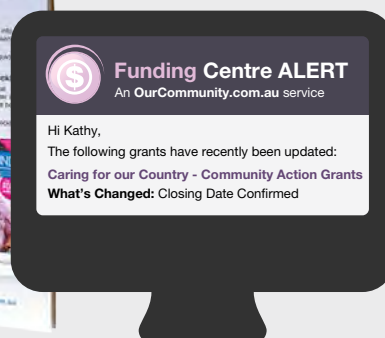
GRANTS DATABASE

The Funding Centre is an Our Community initiative that brings together Australia's best grants database and Australia's best fundraising information, tools and training.

More than 2500 live grants are listed on the Funding Centre grants database at any one time.

Grantmakers can list new grants and update existing program listings at any time by emailing **grants@ourcommunity.com.au**. Our bulletins go out to grantseekers daily.

Many grantmakers provide a Funding Centre gift certificate to unsuccessful grantseekers as a way of contributing to capacity-building of the not-for-profits they are not able to support through a grant. Bulk gift subscriptions can be arranged by emailing **service@ourcommunity.com.au**



www.fundingcentre.com.au

F CENTRE FOR WHAT WORKS

A good grant is a grant where the project is completed successfully as planned.

A **great** grant is one where everyone learns from what resulted, whether the project “succeeded” or not.

The Centre for What Works allow users to extract the lessons of others, or contribute their own. As the old adage goes, “None of us is as smart as all of us.”

The Centre for What Works has three key resources for not-for-profit groups and government agencies, taking the hard-won knowledge of one organisation and sharing it with many:

1. **Lessons Bank:** Find out what projects others have worked on – what worked, what didn’t, and what could have been done differently – before you start a similar project/program.
2. **Plans and Tools Bank:** Download useful plans or handy tools (marketing plans, business plans, etc.) that will save you time and money when putting in place a new project/program.
3. **Policy Bank:** Find a range of template policies and procedures relevant to community organisations.



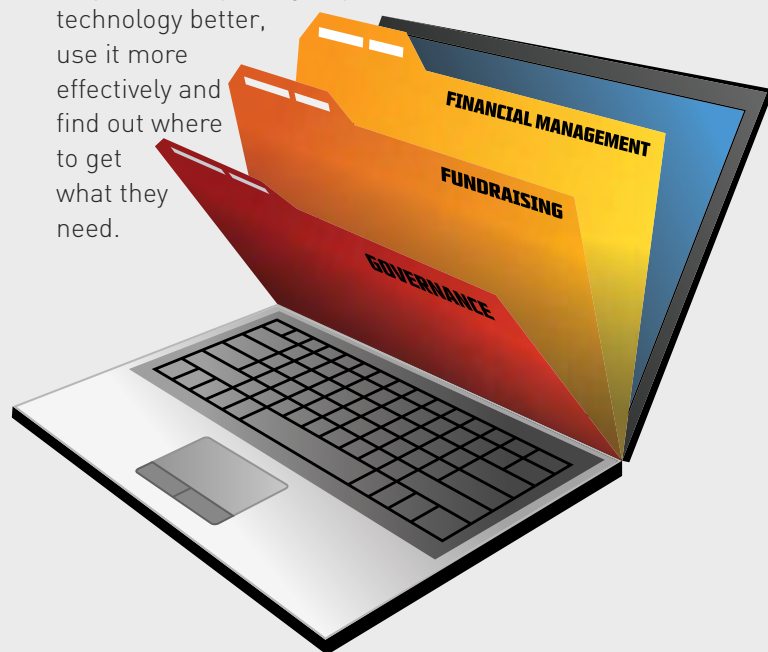
www.ourcommunity.com.au/whatworks

G CAPACITY-BUILDING FOR NOT-FOR-PROFITS

Grantmakers who join up as members of the Australian Institute of Grants Management benefit from the Institute's relationship with its parent company, Our Community – Australia's Centre for Excellence for the nation's 600,000 not-for-profits and schools.

Our Community is where not-for-profits go for help. It provides advice, tools, resources and training in a range of speciality areas:

- **Governance:** The Institute of Community Directors Australia provides accredited training, short courses, educational tools and peer support for members of Australian not-for-profit boards, committees and councils, and the staff who support them.
- **Fundraising:** The Funding Centre is Australia's best grants and fundraising hub, listing more than 2500 live grants, and providing information, tools and templates in all six areas of fundraising: grants, donations, memberships, events, sales and sponsorships.
- **Financial Management:** The Community Financial Centre has been established by Our Community with our alliance partner Commonwealth Bank to provide help with financial literacy and access to better and more cost effective banking services.
- **Marketing & Media:** The Marketing, Media & Post Centre provides resources and tools to help not-for-profits develop and spread their message to the wider community, and to build greater public awareness and support.
- **Insurance & Risk Management:** The Community Insurance & Risk Management Centre provides practical information, support and resources on risk management and sector-appropriate, affordable insurance.
- **Leadership:** The Community Leadership Centre helps community leaders, potential community leaders and not-for-profit groups to develop the skills they need to provide true community leadership.
- **Advocacy:** The Community Advocacy Centre helps equip and educate individuals and groups who wish to challenge the status quo and bring about change in our society.
- **Technology:** The Community Technology Centre helps not-for-profit groups to understand technology better, use it more effectively and find out where to get what they need.



www.grantsmanagement.com.au/community

OUR IDEAL ENVIRONMENT - THE EDGE OF CHAOS:

**“The estuary region
where rigid order and
random chaos meet
and generate high
levels of adaptation,
complexity and
creativity.”**

A THE OUR COMMUNITY GROUP OF ENTERPRISES

The Australian Institute of Grants Management (AIGM) is an enterprise of Our Community, a world-leading social enterprise that provides advice, tools and training for Australia's 600,000 not-for-profit groups.

We also work with business, government and the general public to help improve their interactions with the not-for-profit sector.

Our other key offerings include:



ourcommunity.com.au

OURCOMMUNITY.COM.AU:

Plain-language help sheets, tools and books on everything you need to know about running a not-for-profit organisation



GIVENOW.COM.AU:

Commission-free donations for Australian not-for-profits; simple, tracked, safe donations for members of the public



INSTITUTE OF COMMUNITY DIRECTORS AUSTRALIA:

Practical and accessible governance training and resources for not-for-profit board members, and those who support them



Funding Centre
fundingcentre.com.au

FUNDING CENTRE:

Australia's best grants and fundraising hub



AUSTRALIAN INSTITUTE FOR CORPORATE RESPONSIBILITY:

Cutting edge community engagement help for businesses



AUSTRALIAN INSTITUTE OF GRANTS MANAGEMENT:

The best practice network for government and local government grants managers and grantmakers.



SMARTYGRANTS:

Australia's only grants management software developed to meet the specific needs of Australian grantmakers, both big and small.

B OUR COMMUNITY MANIFESTO

WHAT WE BELIEVE:

- We believe in the power of the community sector
- We believe in human capital
- We believe in equality
- We believe women have equal rights to leadership roles
- We believe technology is a key to accelerating our reform agenda
- We believe laughter is good
- We believe work can be a place to make friends for life
- We believe business is good and can do good
- We believe treating people with respect gains respect
- We believe mayhem is not only healthy but critical

WHAT WE DO:

- We build stronger communities
- We create, curate and share knowledge and experiences
- We listen, then we act
- We revolutionise markets
- We ignite and accelerate
- We convene and connect
- We put back into the community that we work with

HOW WE WORK:

- We strive for fairness
- We are failure tolerant
- We take risks
- We question authority
- We use our balance sheet to create social change
- We believe in a work environment that allows for an authentic life balance
- We accept increments, but strive for revolution
- Ethics, inspiration and innovation are at our core
- We value our flat structure: we share the cleaning as well as the decision-making
- We celebrate success and learn from our mistakes
- We are dogmatic and passionate

OUR IDEAL ENVIRONMENT - THE EDGE OF CHAOS:

“The estuary region where rigid order and random chaos meet and generate high levels of adaptation, complexity and creativity.”

READY, FIRE, AIM



© THE AIGM TEAM

DEVELOPMENT AND SALES

Executive Director: Kate Caldecott

Sales: Charles Rignall

Telephone and Email Support: Lily Fraser

Training: Jodie Shanks

INNOVATION LAB

Simon Herd

Charles Gutjahr

Doctor in Residence: to be appointed

CONSULTING AND ADVISORY SERVICES

Executive Director: Barry Smith

Executive Director: Fiona Dempster

KNOWLEDGE CURATOR

Chris Riches

TECH SERVICE & CONTINUOUS IMPROVEMENT

Clint Finnigan

Mark Mehza

Jon Moyles

OUR COMMUNITY OVERSIGHT AND INTEGRATION

Denis Moriarty

Kathy Richardson

GROUP BOARD OF DIRECTORS

Chair: Carol Schwartz AM

Dr Simon Longstaff AO

Denis Moriarty







GRANTMAKER OF
THE YEAR AWARD

GRANTS IN AUSTRALIA
SURVEY & BENCHMARKING

TRAINING & NETWORKING

GRANTMAKING
KNOWLEDGE BANK

GRANTMAKING TOOLKIT

GRANTS MANAGEMENT
QUARTERLY

ANNUAL NATIONAL
GRANTMAKING
CONFERENCE

CODE OF PRACTICE FOR
PROFESSIONAL GRANTMAKERS

EDUCATION &
PROFESSIONALISM

***“The status
quo **is not**
an option.”***