



PHILANTHROPY
Australia

Getting to know Philanthropy

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What is Philanthropy?

The planned and structured giving of money, time, information, goods and services, influence and voice to improve the wellbeing of humanity and for community good.

- Philanthropy can be from charitable trusts and foundations, companies or individuals

- Generally grants will come from trusts/foundations and companies

So what are foundations?

- Independent, not-for-profit entities

- Generally endowed – have a large investment

- Managed by independent board of trustees

- Quite free from government control



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Philanthropic Foundations

- No public reporting requirement – we're just guessing
- Estimated over 5000 foundations in Australia and the number is growing
- Approximate total granting: \$600m - \$1b per annum
- Most foundations cannot fund individuals
- Most foundations must fund charitable organisations
- Some foundations must also fund organisations that are endorsed as DGRs (Deductible Gift Recipients)



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Target only appropriate funders

- Foundations are independent entities which don't need to please customers, voters or shareholders
- They are influenced by community benefit – not publicity or 'perks'
- Foundations are all different
- Most foundations do not and cannot frequently change their mission
- They like to know how their funds will be used
- Foundations like to co-fund
- Many will not fund what they regard as a government responsibility



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Finding the foundations

- Some foundations have websites where you can download their guidelines
- The Australian Directory of Philanthropy lists foundations
- Many foundations are very private and there is no requirement for them to be otherwise
- Creative Googling can help: “Looking for a grant”; “How to apply”; “In the community”



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Contacting the foundations

- Make sure you are only targeting the right foundations
 - Can fund your legal type of organisation
 - Can fund in your geographic area
- Contact them by phone if there is a phone number
- Be brief and polite (think soundbytes)
- Ask any questions that are not answered in their guidelines



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Know your tax status

- Most foundations legally must fund certain types of organisation
- Some must fund only TCC (tax concession charity) or DGR (deductible gift recipient) and some must fund organisations with both endorsements
- You must supply your notification(s) of endorsement
 - There are two types of DGR – DGR 1 and DGR 2, or “doing” and “giving” DGR – most foundations can only fund DGR 1
- Ensure your notifications are filed somewhere accessible



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Follow the Guidelines

- Guidelines are there to help you self-select and conserve resources
- Follow the suggested structure – and keep it short!
 - Keep it under 5 pages
 - Foundations are lean on staff, so be concise
 - Add attachments for further information & clarification
- When in doubt, ask!



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Evidence not emotion

- Research or statistics to back up your claims of need
- Provide the numbers – how many sessions, people, etc?
- Don't rely on emotion
 - The person reading the submission is not the sole decision-maker
 - Don't tug the heartstrings – the foundations base their decisions on community benefit not personal feelings



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Budget

- Approach several foundations if necessary
- Let them know who else you've approached for funding
- Inform them when full or partial funding comes through
- Always ask for a set amount and let them know how it will be spent
- Itemise the budget – who is being paid for under “salaries” and for how long?
- Attach quotes if applicable
- Don't ask for too much – or for too little!



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Focus on the impact

- The important thing to the foundations is that the work goes ahead and succeeds
- Show both numbers (how many helped) and less concrete results (changes in attitude or behaviour)
- How will you show you've made a difference?
- How will you share any knowledge that has come out of this project?
- Foundations need you to do the work as much as you need them to supply the money
- It's the community work you will carry out as a result that counts!



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