

Great ideas

Finding, preparing and successfully securing a grant

FUNDS FOR EDUCATIONAL PURPOSES ARE OUT THERE, BUT HOW DO YOU FIND AND SECURE FUNDING THAT'S RIGHT FOR YOU? **MICHELLE ANDERSON** AND **EMMA CURTIN** OFFER SOME TIPS.

It's an uneven playing field when it comes to finding, preparing and successfully securing a grant. We started the Tender Bridge to help address this issue.

A key feature of the Tender Bridge is a comprehensive national database of funds, updated weekly, through which schools or schools in partnership with others can seek funding for educational purposes from Commonwealth, state or territory and local governments, and philanthropic and not-for-profit organisations, and businesses.

Finding a suitable funding source is only one step in the journey, which is why we also provide information, tools and workshop opportunities to help develop knowledge and skills in resourcing your great ideas.

Many factors – time, knowledge, skills, resources, confidence, networks, experience, funder priorities and tax status requirements – help explain why an uneven playing field exists for securing grants. Government schools, for example, don't have the required tax status to apply directly for many of the grants on offer from the philanthropic sector.

The whole area of philanthropic grants can be tricky. Jessica Bearman and Gin Kilgore's *Benchmarking 2009: Trends in education philanthropy* report provides educators in the United States with an overview of the characteristics, priorities, practices and concerns of education grantmakers, but here in Australia we lack a robust and focused knowledge of the role and impact of philanthropy in achieving educational outcomes. As Ros Black from the Foundation for Young Australians reports, much of the research about philanthropic engagement has been done by and for those in philanthropy.

Other issues include those relating to corporate funding, particularly in terms of sponsorship and how such sources of funding may require an assessment of your organisational values. Sponsorship is not a gift, so what will you need to offer in return?

What the Tender Bridge seeks to achieve is a better understanding of such complexities in finding funding. We provide our subscribers with the opportunity to explore a

TAX DEDUCTIBLE STATUS

Does your school have deductible gift recipient (DGR) status? In order to be a DGR, an educational organisation must be recognised by the Australian Tax Office in one of a number of DGR categories. These include:

- public universities
- other higher education institutions
- approved research institutes
- school building* and library funds
- education scholarship funds, and
- others.

** A school that does not have DGR status but does have a building fund can apply for grants, so long as the grants relate to buildings.*

For more on DGR status, see our story by Michael Kohn and Leneen Forde on page 48.

variety of avenues for getting their great idea off the ground: from knowing what's out there, taking the time to find the right fit and looking for potential partnerships through to developing a good proposal, and conducting your final acquittal and evaluation.

Let's say you've found a potential funding source through the Tender Bridge and have felt that first rush of excitement: now what should you do? For successful grant seeking and writing, this is where matching is crucial. No more is this the case than when seeking philanthropic grants.

Matching

Lawyer, management consultant and author of *Great Foundations: A 360° guide to building effective and resilient not-for-profit organisations* Catherine Brown has been on both sides of the funding table as the chief executive of a philanthropic foundation and as a seeker of grants. Over the last 18 months, she has worked closely with the Tender Bridge team on the complex and sometimes downright frustrating issue of eligibility. As a starting point, there are questions about matching you should ask before even putting pen to paper. Ask what is your organisation's legal status – for example, incorporated or state government entity. Also ask what is your organisation's tax status – for example, not-for-profit or charity.

According to Brown, it's fundamental that you know the answers to these questions. Know your organisation! There's no point applying for a grant that your organisation is simply not eligible to receive.

Thinking

On occasion, we'll have someone ask us, 'What grants might our school be able to get?' Our reply?

'Who are you trying to support? What's the issue you're trying to address?'

Sadly, there's a view going around that money is out there and it's a simple matter of schools getting your hands on some of it. Not so. The truth is, thinking is key. If you don't know what your great idea is for a proposal, how can others be expected to understand it? Finding a funder may sometimes be serendipitous, but generally speaking it happens when you're meeting a specific purpose.

Meeting a specific purpose is one thing, but it's also important that your great idea is meeting an important need in your community. How do you find out what's an important need? Reading the available community development literature is a good way to crystallise your great idea – visit the Commonwealth Department of Families, Housing, Community Services

and Indigenous Affairs website at www.community.gov.au – and use more than one source of information to identify and make decisions about the needs in your community.

Once you've clarified the needs you're proposing to address, do some research to identify not only the specific need for your school but what the benefits will be, possibly even beyond your school, and identify any similar projects that yours might learn from. It might seem obvious but, next, talk with colleagues and others: the questions funders, colleagues, even family members ask can lead to better formed, more developed and even new ideas.

GRANTS AND SPONSORSHIPS: WHAT'S THE DIFFERENCE?

People sometimes use terms like 'sponsorship,' 'grant' and 'donation' loosely, but when you're applying for funding you need to understand their specific meaning. A grant is a non-commercial, once-only payment made for a specific purpose for which the successful applicant must account in full. A sponsorship is generally acknowledged as a marketing activity, in which the funder can see a tangible benefit in providing funds like, say, access to a niche market or support for the sponsor's image as a good citizen. A tax deductible donation must be a gift. Sponsorship is not a gift.

Another useful strategy to help you identify a possible need and learn from others is to look at funders' websites for examples of previously funded projects: you'll find a wealth of information in annual reports and newsletters on funders' websites.

Writing

The next, and often tricky, part is to write a proposal. The good news, as Robyn Haydon explains in the brilliantly titled *The Shredder Test*, is that, 'Like any skill, proposal writing can be learned. If you speak, you can write a good proposal. And the more often you do it, the better your proposals will be.'

We're regularly asked by delegates in our workshops, what makes for a good proposal? Consequently, we dedicate a considerable amount of time to proposal writing, using delegates' experiences of good and not-so-good proposals.

In addition to the issue of eligibility, a number of funders tell us that there are three issues in particular that can cause frustration and disappointment for both them and the prospective applicant.

- The first is a failure to read their guidelines properly. As we've mentioned, this is in part about matching – is the funder a good fit for your project? – but it's also about things like not using the correct template or ignoring the fact that the timing of funding allocation won't fit the timing of your project.
- The second is an apparent lack of passion for the project in the proposal. This may simply be because proposal writers find it difficult to express the passion that they actually feel – an issue of effective writing – but it could also be because they send a generic submission to all funders. Remember, every funder is different so always check the guidelines and application requirements to ensure a good fit before submitting an application.
- The third is providing a poorly presented, incomplete or unrealistic budget. Be sure that what you are proposing can be achieved with the human resourcing available, within any specified timeframe and with the funding being requested. As former Executive Officer of the Sydney Community Foundation Jane Kenny notes, 'No funder wants to make a grant to a project that falls over

part way through because of insufficient funds.' Remember that for-purpose grant seeking offers funding as a medium-term strategy, so you need to provide the potential funder with some idea of how your project will be sustained in the long-term after the grant money has been spent.

ELIGIBILITY

There are three key ways schools can work within funder eligibility requirements.

1. Directly meet the funding requirement. To do this, you might show how your organisation operates for charitable purposes – such as the advancement of education as a public benefit, which may be for an appreciable section of the public, if not for the whole community.
2. Indirectly meet the funding requirement by operating under the auspices of an eligible organisation, such as a parents and citizens' association.
3. Indirectly meet the funding requirement by partnering with an eligible organisation that has DGR status, where that organisation is the applicant.

Help from the Tender Bridge

The Tender Bridge, which celebrated its first birthday last month, began with a simple principle to bring more educators into contact with more education-specific fund opportunities. The Tender Bridge database lists about 600 funds, and is growing; we conduct workshops, offer a 'my alert' service, and provide answers to frequently asked questions and other tools on our website for subscribers in every state and territory.

All that will continue to grow, but our next steps are to better understand and improve how to grow and develop great ideas by, among other things, sharing cases of success, to walk our subscribers through the experience of seeking and securing funds and other resources, to evaluate success and to explore the lessons learned along the way.

Let's face it, writing a good proposal is a fundamental skill, but there's more to it than that for seekers and granters of funds. It's one thing to help a *great proposal writer* get funding; it's another to ensure that a *great idea* becomes a reality. **T**

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LINKS:

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