



# FREQUENTLY ASKED QUESTIONS

## 2017 IMPACT PHILANTHROPY APPLICATION PROGRAM

Here we provide answers to some of the most commonly asked questions we receive during our IMPACT Philanthropy Application Program. [The 2017 IMPACT Philanthropy Application Program - Instructions and Guidelines](#) also include detailed information which you should read carefully before submitting your organisation's application. If you have questions that are not covered, please email [philanthropy@perpetual.com.au](mailto:philanthropy@perpetual.com.au) and we will respond to you directly.

### TIMELINES AND PROCESS

#### Q. Who can apply for funding in Perpetual's 2017 Impact Philanthropy Application Program?

**A.** To be eligible for funding from the trusts and endowments that are managed by Perpetual, your organisation must have at least one of the following:

- Be a registered charity on the ACNC register.
- Australian Taxation Office Deductible Gift Recipient (DGR1) endorsement and is covered by Item 1 of the table in section 30-15 of the Income Tax Assessment Act 1997.

#### Q. When does Perpetual accept applications for the 2017 IMPACT Philanthropy Application Program?

**A.** Applications open at **9am AEDT on Thursday 27 October 2016** and close **5pm AEDT on Friday, 2 December 2016**. We only accept applications during this period via our online system. No extensions will be granted.

#### Q. When will my organisation be notified of the outcome of our application?

**A.** If your application does not meet the minimum requirements to be recommended for funding, you will be notified of this outcome in February 2017. All other applicants will be notified of their outcome in the last week of June 2017.

#### Q. If my application is successful when will I receive funding?

**A.** All payments are made by the end of June 2017.

#### Q. What feedback can you give me on our organisation's application?

**A.** Due to the large number of applications we receive, we are unable to provide individual feedback.

#### Q. Can we meet with Perpetual during the assessment period?

**A.** Because we assess such a large number of applications, we are unable to meet with organisations during the application process.

#### Q. Can I contact Perpetual to find out how the application is progressing?

**A.** Due to the large number of applications we receive, we are unable to give individual updates on applications.

#### Q. What should I do if my organisation's circumstances or funding situation changes – for example if we secure funding from another source for the same activity as we have applied for?

**A.** Please email [philanthropy@perpetual.com.au](mailto:philanthropy@perpetual.com.au) with details of the change. We will consider the circumstances on a case-by-case basis.

## FUNDING RECOMMENDATIONS AND TRENDS

### Q. Our organisation has many funding needs. What should we apply for?

**A.** We manage hundreds of trusts and endowments that support a wide range of projects and interest areas. We therefore recommend that you apply for your organisation's greatest strategic need. Perpetual cannot provide advice regarding which type of activity or project you should apply for.

### Q. What do the trusts managed by Perpetual fund?

**A.** As a trustee it is our duty to ensure the funds from the charitable trusts and endowments we manage are distributed according to the terms of the founding document. Past funding has been provided for a wide range of projects at different developmental stages including; pilot and existing projects, capacity building requests, and support for early career researchers.

Perpetual recognises that for organisations to achieve their objectives, funds may need to be directed towards operational costs which are not necessarily project specific.

### Q. Can my organisation apply for general funding for a fundraising or capital appeal?

**A.** Applications for general funding for fundraising appeals and capital appeals are not eligible. Organisations may submit an application for a specific project or activity that requires funding as part of an appeal.

### Q. What sectors are funded?

**A.** The charitable trusts and endowments that we manage distribute to all sectors including Social Welfare, Health, Medical Research, Conservation and Environment, Education, and Arts and Culture.

### Q. How much should our organisation apply for?

**A.** You should apply for the amount required for your organisation's activity up to a maximum of \$200,000 per application. As a guide, grants generally range between \$10,000 and \$100,000. In 2016, the average grant was approximately \$60,000.

Please note that if your organisation has been invited to apply for a specific amount the \$200,000 limit does not apply.

### Q. I've received a number of invitations to apply for funding from specific trusts - how many applications can I make?

**A.** You can submit one application per invitation relating to a specific trust. Your invitation to apply for a grant through invitation does not limit your ability to apply through our general process and does not count towards the number of submissions your organisation can make.

### Q. Can I apply for funding from a specific trust even though I have not received an invitation to do so?

**A.** No, you can only apply for funding from a specific trust if you have been invited.

### Q. What are my organisation's chances of receiving funding?

**A.** In 2016, we received over 1,400 applications, of which 222 applications (around 15%) were funded.

### Q. How are applications assessed?

**A.** Perpetual's Philanthropy Service Team assesses applications based on responses to questions within the application form. The assessment criteria focus on Strategy, Outcomes, Capability and Leadership.

### Q. Which questions within the application form are specific to the assessment criteria?

**A.** There are seven questions linked to the assessment criteria outlined above. They relate specifically to the organisation's:

- Efficiency, eg how efficiently it uses its resources (two questions)
- Effectiveness, eg how well it is tracking against its mission (two questions)
- Understanding of the external environment in which it operates
- Understanding of risks related to how it operates
- Measurement of outcomes related to activities

**Q. Do you have information available on past funding recipients?**

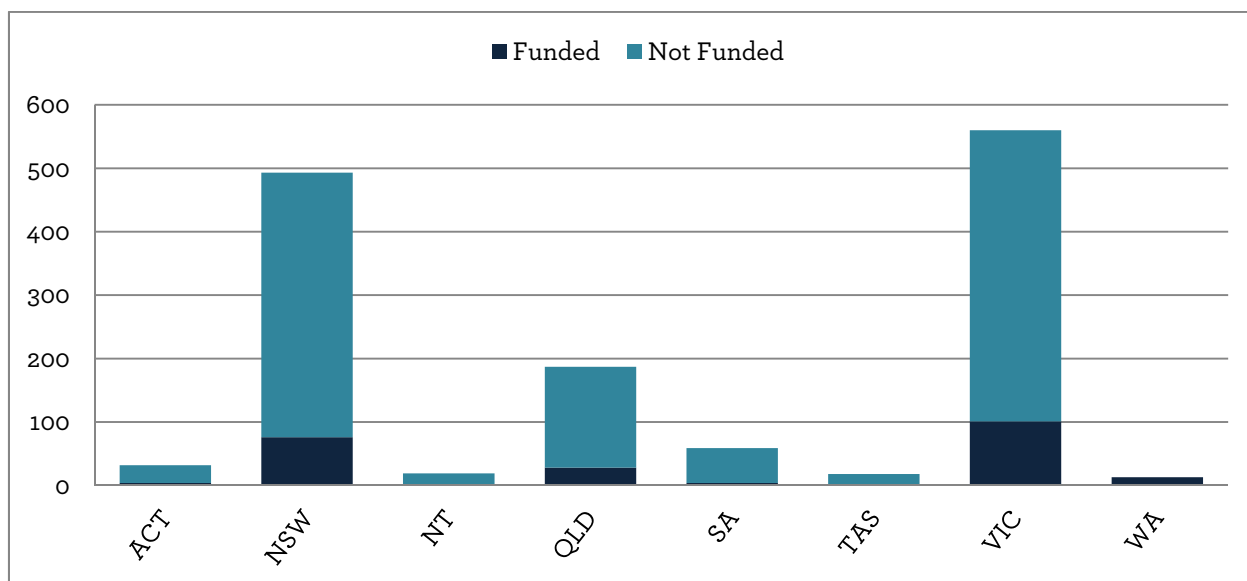
**A.** You can read about some of the organisations that have received funding in the past, in [IMPACT, our philanthropy newsletter](#).

**Q. I have been unsuccessful in the past, should I apply again?**

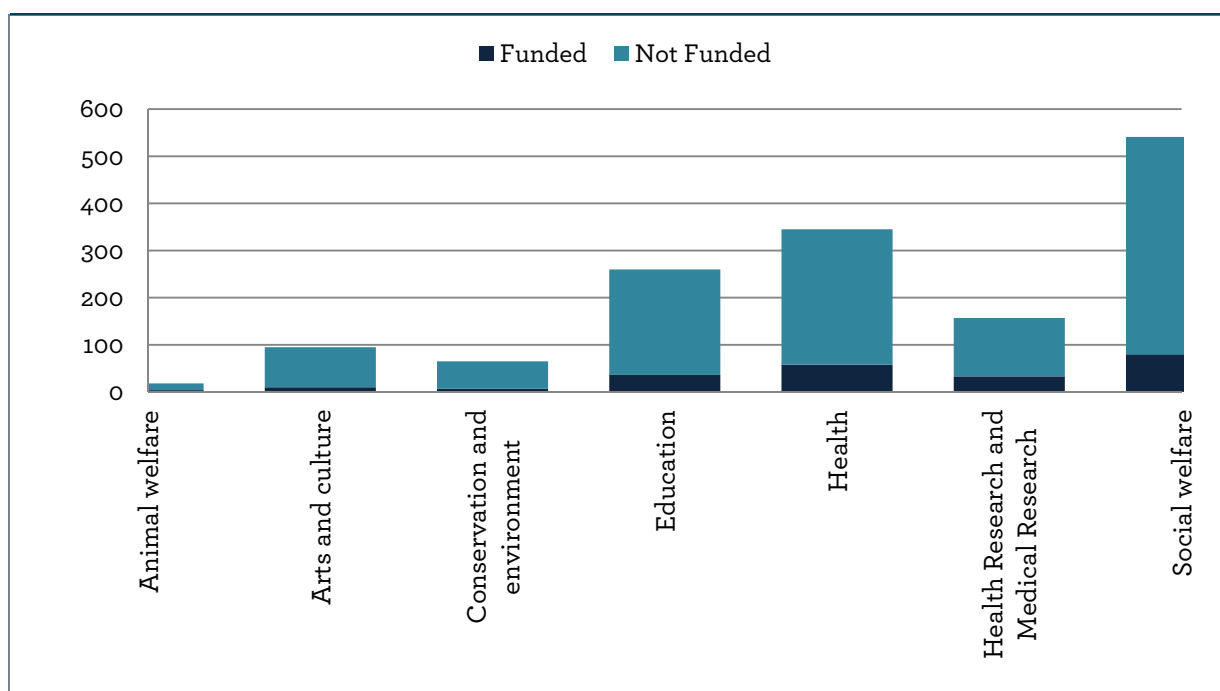
**A.** There are two key reasons why organisations did not receive funding in 2016

1. The number of applications received far exceeded available funding, as shown in the graphs below.

**Number of applications received – by state**

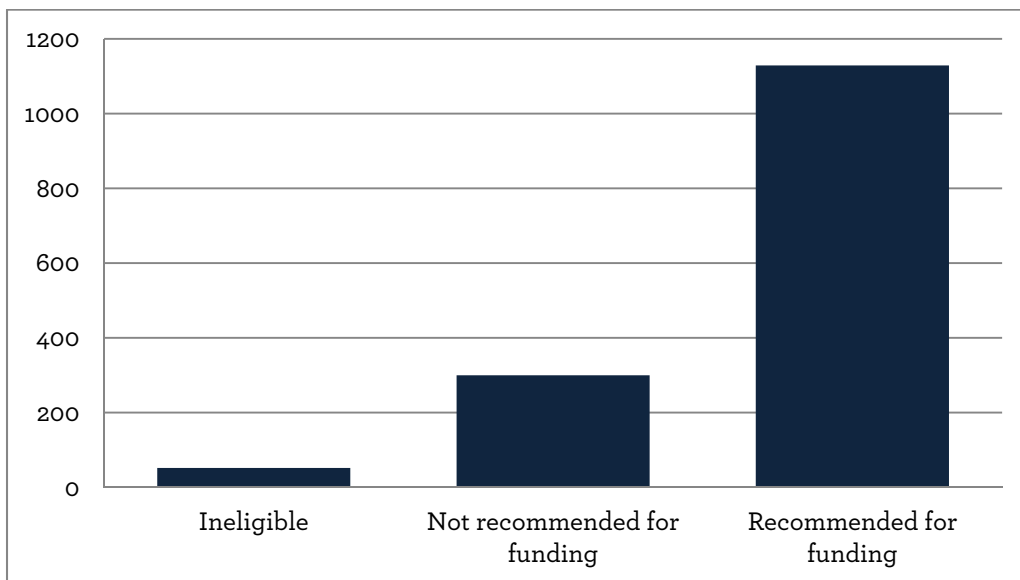


**Number of applications received – by sector**



2. The application did not rate highly enough against the assessment criteria set out in the [2017 Guidelines](#) to be recommended for funding by our clients.

Number of applications recommended for funding



## APPLICATION FORM

### Q. Can we submit multiple applications if we operate nationally or internationally?

**A.** Organisations may submit up to three applications in total, with no more than one application for any given state or territory.

For organisations with an international remit, you may submit up to three applications provided that each application relates to an activity in a different state, territory or country.

Universities, hospitals and medical research institutions may submit one application per department, up to a maximum of three applications per organisation.

Please refer to the [2017 IMPACT Philanthropy Application Program Instructions and Guidelines](#) for specific details. Any additional applications over the maximum limit will be ineligible.

### Q. What do I do if my organisation does not come under one of the sectors listed in the application form?

**A.** Please choose the sector that is most closely related to your organisation. Your answers to the other questions in the application will provide us with the required information.

### Q. How can my organisation secure multi-year funding?

**A.** Multi-year funding is by invitation only.

### Q. Our organisation does not yet have DGR status however we have applied. Would this make our application ineligible?

**A.** Your organisation will need to disclose their current status as at the time of submitting the application. If however, the status of the organisation does change by January 2017, please email to advise, otherwise your application will be deemed ineligible.

### Q. What happens if I make an error in the application form that has already been submitted?

**A.** The application you submit will be treated as your organisation's final application, no further applications or additional information will be accepted. If key fields are missing or blank in the application form, your organisation may be ineligible for funding. It is critical to ensure the application has been correctly completed before submitting.

### Q. I am applying on behalf of a University department. When completing the "Organisation information" section of the application form, should I respond at a University level or a Department level?

**A.** Responses in the "Organisation Information" section of the application form must relate to the University, not the Department.

### Q. Can I use the department name and address, instead of the university details on the application form under "Organisation information"?

**A.** Yes, as long as there is sufficient information on the department to enable us to contact you, and the university name is noted somewhere on the form.

### Q. Can I save a draft application and return later?

**A.** You can press 'save' at any point and log out. When you log back in your draft application will be saved and you can start where you left off.

### Q. Can more than one person work on an application?

**A.** A number of people can work on an application using the same log in details as long as only one person is working on the document at a time. Ensure you save as you go.

**Q. How will I know the application has been submitted?**

**A.** The submit button is on the final page. You will not be able to submit your application until all the mandatory questions (marked \*) are completed.

When you submit the application you will receive an automated email indicating that the application has been submitted. This will be sent to the email address you used to log in.

**Q. What should I do if I experience a technical difficulty with the application form?**

**A.** If an error occurs, please contact Perpetual Philanthropic Services on 1800 501 227 during business hours or email [philanthropy@perpetual.com.au](mailto:philanthropy@perpetual.com.au) and quote the application number.

## **REGISTRATION**

**Q. What should I do if my organisation is not applying for funding this year, but would like to receive updates about future funding or wishes to receive the IMPACT newsletter?**

**A.** You can register with us to receive updates about future funding by emailing [philanthropy@perpetual.com.au](mailto:philanthropy@perpetual.com.au) or can subscribe to IMPACT our philanthropy newsletter via [www.perpetual.com.au/IMPACT-Newsletter](http://www.perpetual.com.au/IMPACT-Newsletter).

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### **MORE INFORMATION**

**Perpetual Philanthropic Services**

**Phone:** 1800 501 227

**Email:** [philanthropy@perpetual.com.au](mailto:philanthropy@perpetual.com.au)

**[www.perpetual.com.au/impactphilanthropy](http://www.perpetual.com.au/impactphilanthropy)**

