



# FREQUENTLY ASKED QUESTIONS – 2020 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 2020 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 2020 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 and/or
- 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

Your application will be marked ineligible if your organisation is one of the following;

- Under administration
- Not a going concern
- Appears on the ACNC "[Double defaulters](#)" list published by the ACNC.

### **Q. When does Perpetual accept applications for the 2020 IMPACT Philanthropy Application Program?**

**A.** Applications open at 9am AEDT on Monday 28 October 2019 and close 5pm AEDT on Friday, 6 December 2019. 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 by March 2020. All other applicants will be notified of their outcome in the last week of June 2020. This information will come via an email to the CEO of the organisation and the activity contact who submitted the application in SmartyGrants.

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

**A.** All payments will be made by the end of June 2020.

**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. 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 applied for):**

**i) During the process of application/assessment:**

A. Please email [philanthropy@perpetual.com.au](mailto:philanthropy@perpetual.com.au) quoting your application number and outlining the change, you may wish to withdraw the application if funding has now been received by another source.

**ii) Following receipt of confirmed funding:**

A. Please submit a formal change request form – 'IPAP Change Request', which will be available in SmartyGrants once your funding has been confirmed. The form will appear under your application ID under 'My submissions' once you have logged on.

## **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. My organisation applied last year but was unsuccessful. Can we apply for funding for the same project again?**

A. Yes, you are welcome to apply for funding for the same project again. We recommend reviewing the guidelines, FAQs and webinar to assist you with your application.

**Q. My organisation was successful in receiving funding as part of a previous IMPACT Philanthropy Application Program. Is my organisation eligible to apply for IMPACT 2020?**

A. Yes, you may apply for further funding. Your success in previous years does not impact your eligibility for future years even if one or more of your projects is still underway. Please ensure you submit your acquittals as they fall due. Failure to submit your acquittals may result in your application being ineligible.

**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, Animal Welfare 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 2019, the average grant was approximately \$70,000.

Please note that if your organisation has been invited to apply for a specific amount, you must apply for that amount only.

**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 specific trust or grant does not limit your ability to apply through our general process and does not count towards the number of submissions your organisation can make under the IPAP guidelines.

**Q. The application form now asks for a reference number. What does this mean and where can I find it?**

Organisations who are invited to apply for funding from a specific trust or endowment will be allocated a reference number for this additional application. Please ensure that you enter the reference number provided in your invitation when completing the application, so that your organisation can be easily identified. The reference number is relevant to the invited application only and should not be included in any other applications that you submit.

**Q My organisation has been invited to apply for a specific amount, but the total project cost requires additional funds, what do I do?**

**A.** You can complete one application for the total amount. In the unconfirmed funding section, separate out the invited funding amount from the remaining funds required.

**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 2019, we received over 1,400 applications, of which 323 applications (around 22%) 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?**

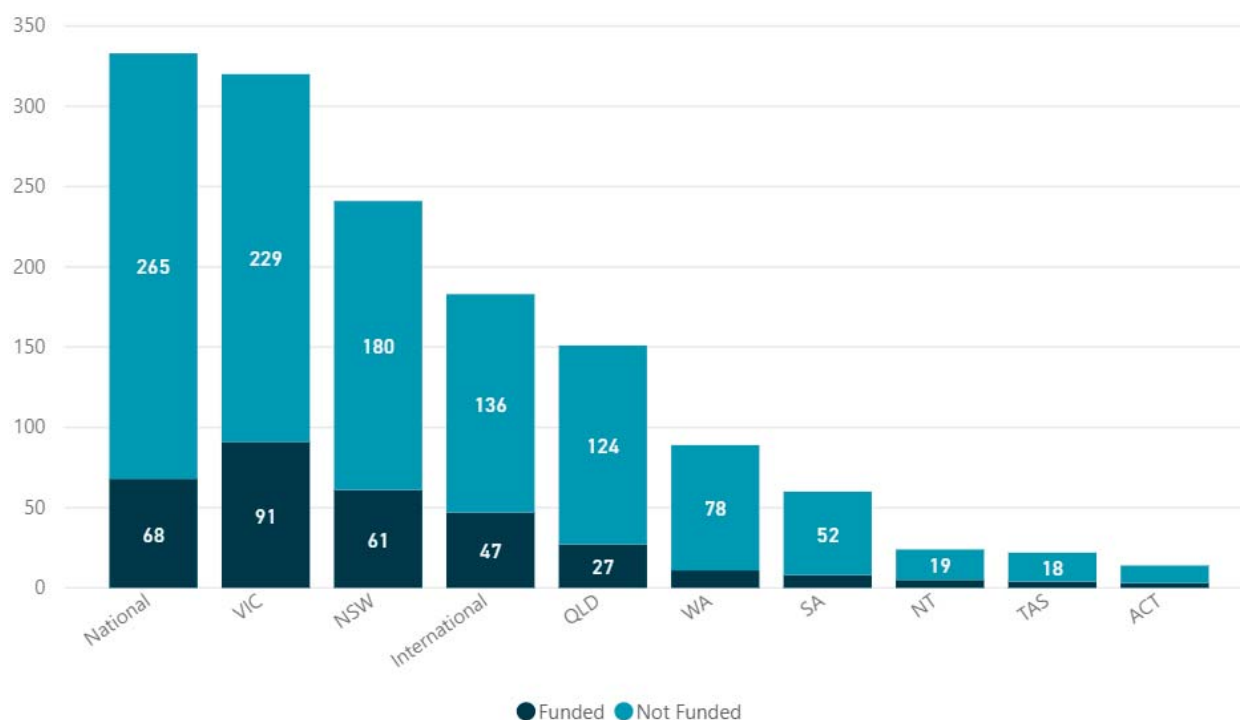
**A.** You can read about some of the organisations that have received funding in the past, in [IMPACT, our philanthropy newsletter](#).

**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 2019.

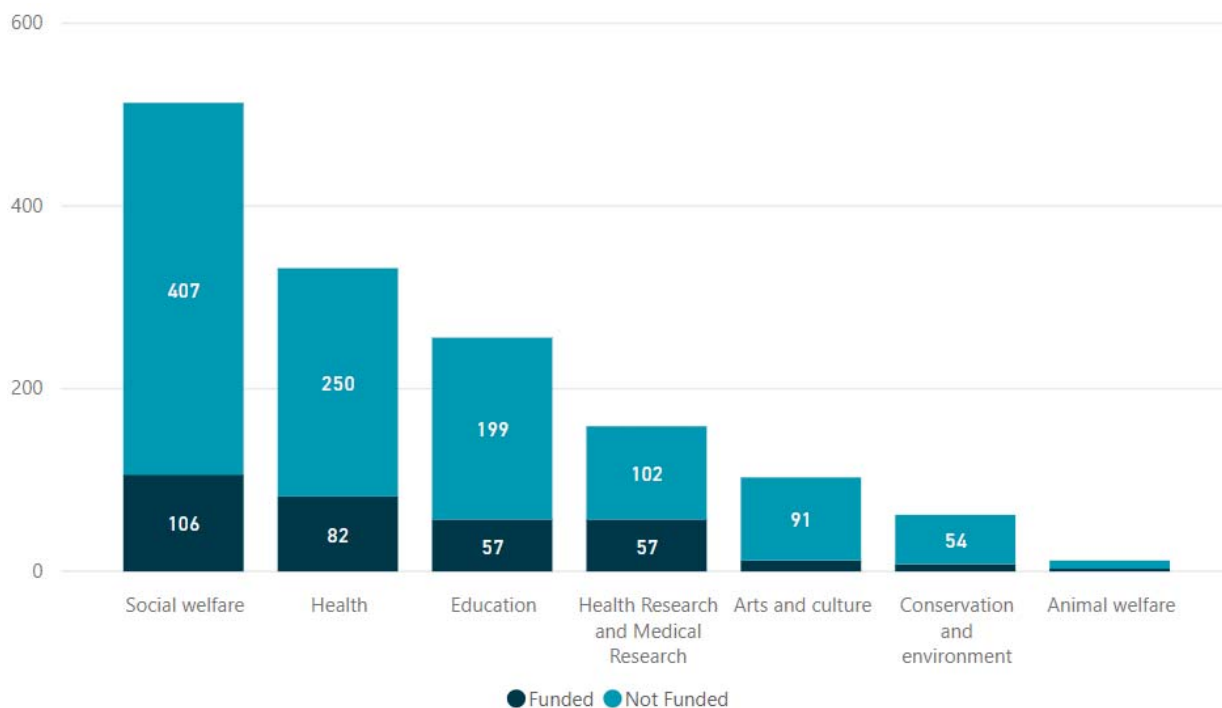
1. The number of applications received far exceeded available funding, as shown in the following graphs.

**Number of applications received – by geographic focus**

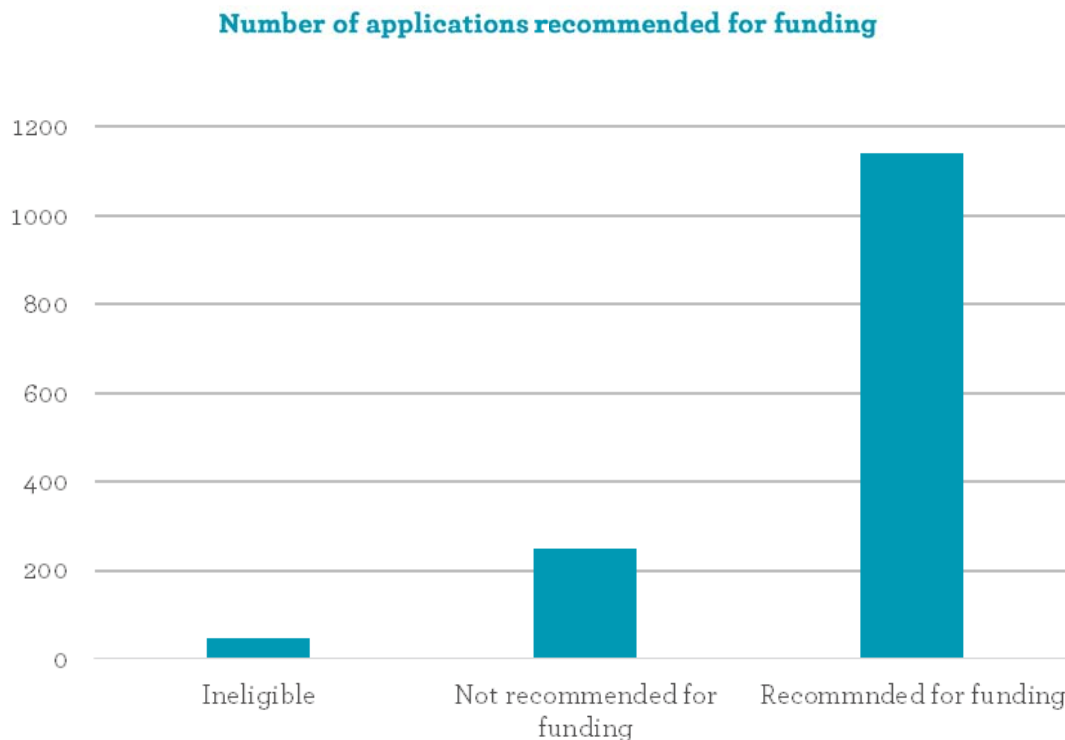


2.

**Number of applications received – by sector**



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



## APPLICATION FORM

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

**A.** Organisations that operate nationally or internationally may submit up to three applications. Applications can be for national/international activity and/or across different state and territory (with only one application per state, territory & country)

Universities, hospitals and medical research institutions may submit one application per department, up to a maximum of three applications per organisation. We leave it up to university's to determine what constitutes a department, given there are many and varied classifications/options. We recommend that you coordinate the lodgment of your application with your central research or fundraising office.

Please refer to the [2020 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. Has your organisation merged with another organisation in the past 12 months?**

**A.** If your organisation has merged with another organisation in the past year, please include organisational information based on the new entity. When providing metrics or historical data in regard to the measurement of your KPIs, we are happy for you to include information based on the old entity if relevant. Please make clear which entity these KPIs relate in your answer.

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

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



**Q. What financial figures should we use in section 1.5?**

A. Use your last full financial year figures as reported on your last AIS submitted to the ACNC.

**Q. What should the activity start date be?**

A. Funding is received in June 2020. The earliest your project can start is July 2020.

**Q. What is the period of funding?**

A. All funding is for a single-year period, unless invited from a trust.

**Q. How do I know if I am an invited organisation?**

A. Organisations who are invited to apply for funding from a specific trust receive a separate email from Perpetual in mid-late October.

**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 2020, 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. You can save and review the application before submission.

**Q. I am unsure on what figures to use for the resourcing insights?**

A. We understand that in some cases coming up with these figures may not be easy to obtain especially if your organisation is a hospital or university. Perpetual does not assess this question and data here will only be used to provide insights into the sector. You may wish to speak to the organisation's accountant or if unsure, please write the amount as zero dollars.

**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.

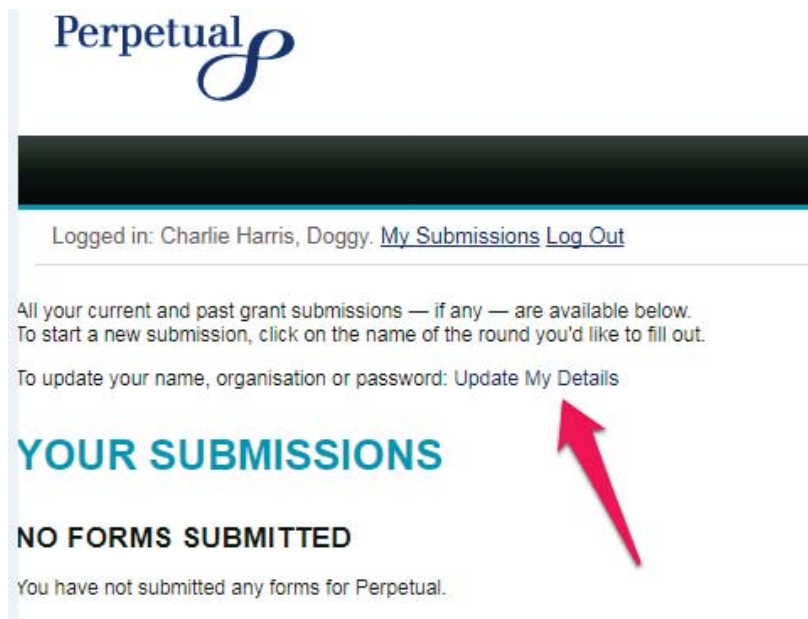
When you submit the application, you will receive an automated email indicating that the application has been submitted. This will be sent to the email address you used to log in.

**Q. Can I print or download the application form?**

A. You can download the application form, whether draft or completed, as a PDF. Click on the 'Download' button located at the bottom of the last page of the application form.

**Q. How do I change my details in SmartyGrants?**

A. We cannot update these details. Once you are logged in, use the “update my details” on the home screen. See screen shot below.



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

A. If an error occurs, please contact SmartyGrants to assist on 03 9320 6888. Please note, late submissions will not be accepted due to any technical difficulty.

**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](https://www.perpetual.com.au/IMPACT-Newsletter) to IMPACT our philanthropy newsletter via our website <https://www.perpetual.com.au/IMPACT-Newsletter>.

**MORE INFORMATION**

**Perpetual Philanthropic Services**

**Phone:** 1800 501 227

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<https://www.perpetual.com.au/impactphilanthropy>

