

AUSTRALIAN ENVIRONMENTAL GRANTMAKERS NETWORK

Giving Green: A Guide to Environmental Grantmaking

June 2012



AECN

AUSTRALIAN
ENVIRONMENTAL
GRANTMAKERS
NETWORK

*A donation to environmental care
is an investment for eternity.*

David Thomas, The Thomas Foundation



Giving Green: A Guide to Environmental Grantmaking

June 2012



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Australian Environmental
Grantmakers Network
Level 1, 39 Little Collins Street
Melbourne 3000
Victoria, Australia
ABN: 75 129 986 116
Telephone: +61 3 9663 7844
Website: aegn.org.au
ISBN 978-0-9873371-1-5
Written and produced by
Amanda Martin

Foreword





Welcome to the Australian Environmental Grantmakers Network (AEGN) *Giving Green: A Guide to Environmental Grantmaking.*

This guide is one part of an ongoing series of resources that the AEGN is putting together for current and potential donors and their advisors.

Many people tell us they are concerned about the environmental decline they see around them but they are not sure what to fund and whether their funding will make a difference. AEGN members have a wealth of experience in effective environmental funding and this guide is based on much of this experience. Our aim with this guide is to help people feel confident in funding environmental issues.

We begin by checking that you are ready to be a planned giver, that you have defined your vision, mission and values and that you have some idea of how much you want to give away. We also ask you what you are passionate about and what skills and knowledge you have. We think these are essential steps because understanding what drives and shapes your interests and passions will make you a much more strategic and effective funder. It can be difficult to hone in on what you are passionate about, what the priorities are and where your funds will be best used, but a bit of work now will help make your giving program as successful as possible.

Whether you are an individual just starting out on your journey in philanthropy, a staff member of a philanthropic trust or community foundation, a wealth manager working for a bank, an estate planner or manager in a trustee company, *Giving Green* can help you. The AEGN will hold workshops to help you work through this guide but we can also tailor a presentation, workshop or guide that suits you, your organisation or your clients.

We look forward to working with you on your green giving!

Jill Reichstein
Chair

Amanda Martin
Executive Officer

Introduction





The aim of this step-by-step guide is to help you, your foundation or your clients focus intentions and give you the tools to develop a program of environmental giving.

It has been written for a range of different people involved in the craft of giving and wealth management. It is accompanied by three other resources which can be found on AEGN's website:

- *Giving Green: An Introduction for Grantmakers* which gives you the importance and value of environmental funding and an overview of the themes and issues we face in Australia
- briefing notes on nine environmental themes. These papers have been largely based on the Federal Government's *State of the Environment Report 2011 (SOE)*. Each paper outlines the theme, the issues it faces and the overarching solutions that experts have proposed
- case studies that illustrate the successful funding of environmental issues.

The AEGN offers workshops that take you through each step of this guide. The times and venues for our workshops are on the AEGN's website. You can use the guide individually or within your organisation to help make decisions about your environmental funding. You can dip in and out of it depending on where you are with your funding. The funding cycle is not linear and you might find that you need to move back and forth between the steps outlined. There is a worksheet at the end that helps guide you through these steps. Try to fill in the worksheet after each step. For more information on how to use this guide, go to the next section.

There are ten questions/steps to help guide you in your environmental giving:

1. Are you ready to be a planned giver?
2. What is your vision, mission, values and operating principles?
3. What are you passionate about and what are your skills and expertise?
4. What region and issues do you want to work on and with whom do you want to work?
5. What's the problem and what are the solutions?
6. What approaches need to be funded to make a difference?
7. What are the types of funding you might give?
8. Who will you fund?
9. How are you going to administer your funding?
10. Get Funding!



How to use *Giving Green*

Whether you are an individual just starting out on your journey in philanthropy, a staff member of a philanthropic trust or community foundation, a wealth manager working for a bank, an estate planner or manager in a trustee company, *Giving Green* can help you.

Individuals

If you are an individual who is already an environmental funder or thinking about starting, you can:

- read *Giving Green: An Introduction for Grantmakers* and be motivated and inspired
- attend an AEGN workshop to go through this guide in a comprehensive step-by-step process
- use the guide at your leisure and make sure you fill in the worksheet as you go
- read about the issues by going to the AEGN website and downloading the briefing notes. The AEGN can also suggest experts who may be able to assist you in your deliberations
- join the AEGN and become part of the discussion, information sharing and collaboration on environmental funding.

Philanthropic trusts or foundations

If you are a staff member or trustee of a trust or foundation, you can:

- read *Giving Green: An Introduction for Grantmakers* and be motivated and inspired
- attend an AEGN workshop or use all or part of this step-by-step guide to help you plan your work in environmental funding
- ask the AEGN to tailor a workshop that suits your trust or foundation and involves your board, trustees, steering committee or other staff members
- read about the issues by going to the AEGN website and downloading the briefing notes. The AEGN can also suggest experts who may be able to assist you in your deliberations
- ask the AEGN to help you find a good speaker on one of the issues that your trust or foundation is interested in
- join the AEGN and become part of the discussion, information sharing and collaboration on environmental funding.



Trustee company

If you work for a trustee company you can use the guide in the following ways:

- read *Giving Green: An Introduction for Grantmakers* and be motivated and inspired. Share it with your clients
- use parts of this step-by-step guide to help you determine what approaches and types of funding you might use to fund a particular environmental issue
- go to the AEGN's website and read the briefing notes to help you better understand the issues your trust, foundation or clients are interested in and the solutions that might be available to deal with these issues. The AEGN can also suggest experts who may be able to assist you in your deliberations
- choose an issue, approach or type of giving from this guide that you or your clients are interested in and ask the AEGN to help you find a speaker to address other staff or your clients.

Community foundations

If you work for a community foundation, you can use *Giving Green* by:

- reading *Giving Green: An Introduction for Grantmakers* and be motivated and inspired. Share it with your foundation and donors
- going to the AEGN's website and reading the briefing notes to help you better understand the issues your foundation and donors are interested in and the solutions that might be available to deal with these issues. The AEGN can also suggest experts who may be able to assist you in your deliberations
- choosing an issue, approach or type of giving from this guide that is relevant to your foundation or that your donors are interested in and asking the AEGN to help you find a speaker to address your foundation or your donors
- using this guide to tailor a workshop for your foundation and donors. If you would like the AEGN's assistance in doing this, call the AEGN office.

Professional advisers

If you are a wealth adviser, financial planner, estate planner or solicitor who works with high net worth individuals you can:

- build a deeper and more trusted relationship with your clients interested in environmental philanthropy by reading *Giving Green: An Introduction for Grantmakers*. That way you become a professional adviser who sits beside and guides your clients as they develop their philanthropic interests
- share *Giving Green* with your clients
- use the guide to help your clients achieve their charitable goals, through planned giving to the environment
- use the guide and the briefing notes on the AEGN's website to help you make decisions on where a bequest could be used in the environmental sector
- partner with the AEGN to gain full access to the environmental expertise your clients are looking for
- stay competitive in the sector by keeping abreast of current environmental issues, their challenges and solutions by reading *Giving Green*
- call the AEGN to customise a presentation for you, your colleagues and/or your clients.



Step 1. Are you ready to be a planned giver?

This guide assumes that you aim to be organised about your giving, have an idea of how much you want to give and have already set up your philanthropic vehicle as one of the following:

- an individual donor
- a private ancillary fund
- a public ancillary fund – such funds are established by a will or trust deed and can only exist for the purposes of providing grants to deductible gift recipients
- a trust or foundation established by will – this is a testamentary trust established by committing a particular sum or specific assets or the residual of an estate
- a sub-fund in a community foundation – this is a named fund under the umbrella of a not-for-profit community foundation which offers administrative and investment services
- a foundation or giving program with a trustee company – this is a foundation where a trustee business will act as sole trustee or co-trustee and will provide administrative and investment services
- a corporate giving program.

If you haven't decided what vehicle you are going to use or how you might set up your planned giving program, you will find information below on organisations and resources that can help you get started.

It is also good to decide how much you might have to give away. Sometimes it's hard to know exactly, for instance because of investment income, but try to guess how much you might give for the next three years. This will help guide you in deciding what to fund.

The savvy funder

"While there is growing enthusiasm and involvement in giving, the work of philanthropy is still being pioneered, with people breaking new ground with ideas and strategic approaches. Cheque book charity is now largely a thing of the past, and thoughtful, informed giving is emerging as a more fulfilling and effective way to share wealth... The signature of a savvy giver is to be bold and informed, to be curious and committed, and to seek out relationships that put money to work in powerful and effective ways."¹



Not-for-profit organisations

There are a number of not-for-profit organisations dedicated to helping people who wish to give.

- **Philanthropy Australia (PA)**

www.philanthropy.org.au/involved/guidetogiving.html

PA is the national peak body for philanthropy and is a member-based organisation. It produces a number of useful resources including Private Ancillary Funds Trustee Handbook, an Introductory Guide to Grantmaking and The Guide to Giving, all of which are available free online. These publications provide a good starting point and are designed for people who are new to the idea of planned giving.

- **Australian Communities Foundation (ACF)** – www.melbournecf.org.au

ACF offers individuals, families, groups, corporations and not-for-profit organisations an easy way of giving in a planned way. Donors establish philanthropic funds under a legal structure established by the Foundation, and all donations are pooled and invested. The income generated from this investment is used over time to support charitable projects and organisations. ACF uses its grantmaking expertise and knowledge of community issues to assist donors to develop giving plans.

- **Our Community and the Australian Institute of Grants Management (AIGM)** – www.ourcommunity.com.au/best_practice/best_practice_main.jsp

The AIGM is the grantmaking arm of Our Community. It is a best-practice network for government and local government grants managers and grantmakers. The AIGM helps grantmakers review and improve their grants programs, and keep abreast of best practice in Australia and internationally. The AIGM has produced the Grantmaking Toolkit: The Smart Way to Build, Review or Refresh your Grants Program. The toolkit has a comprehensive and detailed set of worksheets, guidelines, policies and processes to help you set up or review a grants program.

- **Social Ventures Australia (SVA)** – www.socialventures.com.au/private-ancillary-fund-service/

Social Ventures Australia (SVA) invests in social change by helping to increase the impact and building sustainability of those in the non-government sector. SVA has established a PAF service to help Australian philanthropists set up this kind of giving structure.

For-profit organisations

Philanthropy Australia's website has a list of for-profit service providers that can help donors set up their giving programs. The list includes legal firms, trustee companies, wealth managers, accounting and business consultancy firms, and other consultants. For a full listing go to www.philanthropy.org.au/sector/serviceproviders.html.

Who is going to help you make a decision on what to fund?

It's important to think about who you are going to work with. These people can be involved with you from the beginning or they might help you when you are doing your detailed research. It's important that you find people who are 'trusted advisers' or 'shared decision makers'. You have a number of options:

- Work with others responsible for your trust or foundation such as your trustees, directors or other family members.
- Do it yourself. This can mean you begin a fascinating journey learning about the issues you are interested in and who is working on them to make a difference. This option also gives you total control over what you do.
- Employ someone to help you. The process of funding can be time consuming and demanding. It can also require detailed knowledge on an issue or how to fund in an area to have an impact. Employing someone with these skills and knowledge can be an effective way of making decisions on what to fund.
- Consult an organisation that can give philanthropic advice. There is an increasing number of not-for-profit and for-profit organisations that will work with you on your philanthropic giving as consultants for defined periods of time or on a specific project – see above.
- Join the AEGN – see the box on the following page.





How do AEGN members use the AEGN to help them in their donation programs?

- They look for environmental projects that require funding in the AEGN's clearing house. AEGN members seeking to collaborate with others on particular projects place those projects in the AEGN's clearing house. They also list projects they can't fund themselves but recommend. This is a great place to find projects that require funding and on which someone else has done the due diligence.
- They seek advice from other members about projects on a specific topic, region or issue.
- They attend conferences or workshops on issues or themes. These events are a great way of finding out more about projects and discovering other like-minded funders to collaborate with or learn from.
- They attend AEGN field trips. These trips are crash courses in funding in a particular region or theme. Most members who attend trips end up doing some shared funding and many people continue their relationship with the community groups they meet on the trip.
- Finally, the AEGN runs annual environmental funding workshops to help you plan your environment giving program and provide you with opportunities to learn from other donors. Details are on the AEGN website or call the AEGN office to find out the date of the next workshop.

What our members say about being involved with the AEGN

The Ian Potter Foundation – Caitriona Fay

A major reason why the Foundation is a member of the AEGN is to draw on the experiences of the AEGN staff, board and members in philanthropy and environment funding across the sector. The AEGN has also been a critical vehicle in ensuring that this Foundation stays abreast of the challenges and potential solutions to our most pressing environmental issues. This has been achieved through the high quality of speakers who present to members regularly.

Bindy Gross – private donor

I am a member of AEGN because of my experience in the power of collaboration. Environment work is multifaceted and complex. My involvement in this network has meant I have been able to collaborate on projects I would not otherwise have known of. Over the years I have tended to respond to projects that came my way, and now I feel interested to learn more about how others go about this task... the AEGN is a network that supports me in asking 'how best can I contribute, how best can we all work together?'

Al Gore recently spoke of an old Chinese proverb that went something like this:

*If you want to move quickly, you go alone
If you want to go far, we go together*

Purves Environmental Fund – Rob Purves

The AEGN is a terrific initiative for enhancing environmental grant giving in Australia. The Purves Fund believes it can catalyse positive change by opening up new funding opportunities to grant givers and grant seekers alike. It can also improve environmental outcomes by stimulating collaborative funding potential and making possible projects that would otherwise not get off the ground.

Diversicon Environmental Foundation – Colin & Pam Brown

We have found the networking opportunities provided by our AEGN membership very helpful. Our participation has led, already, to collaborative opportunities which we are pursuing with other members. We have gained a broader view of potential areas for grant making. And besides, it has been fun.

The Norman Wettenhall Foundation – Beth Mellick

The environment is an area that needs more concentrated investment from the philanthropic sector and, as a small group, we would like to work with other philanthropists to leverage greater funds for preserving Australia's habitat and working towards decreasing the rate of decline of biodiversity.

Paddy Pallin Foundation – Robert Pallin

I believe it is important to be part of organisations like the AEGN to share experiences and find out what others are doing so that a small organisation like ours can ensure we contribute most effectively.

Ruffin Falkiner Foundation – Leslie Falkiner-Rose

The RFF joined the AEGN because the trustees think that collaboration, continuing education and learning from past mistakes is essential to improve the effectiveness of philanthropic funding. As trustees of a small foundation, with limited funds, they are also keen to make each dollar work as hard as possible.

Jane Abercrombie – private donor

I feel a bit isolated as a donor (geographically, and also because it's not part of my everyday life) so it's good to be plugged in to a larger network. Also I value the role AEGN plays in terms of providing and disseminating information and offering a 'big picture' overview. Even though I hardly ever get to any of the events, it's comforting to see the emails come past – reminds me that there is an environmental givers' 'community' out there.

Ann & Bruce McGregor – private donors

Our membership of AEGN has benefited us with stimulating and highly enjoyable field trips, informative speakers and opportunities to get to know other environmental grantmakers. AEGN also provides some great opportunities for collaborative funding – through working groups, the website clearing house and conversations with other members. We look forward to our continued involvement.

Worksheet Questions

1. What type of funder are you? For example, are you an individual donor, a private ancillary fund, a trust etc?
2. Approximately, how much do you intend to give away to environmental issues and in what time frame?
3. Who is going to help you make your decisions?



Step 2. Vision, Mission, Values and Operating Principles

Decide on your vision, mission, values and operating principles. You may have this sorted out already. It could be part of your trust deed, or something you have discussed with your trustees or family. Vision and mission statements should articulate the essence of your organisation's beliefs and values and define its place in the world. They establish the long-term direction that guides every aspect of an organisation's daily operations. A vision statement expresses an organisation's far-reaching goal and reason for existence, while a mission statement provides an overview of plans to realise that vision by identifying the service areas, target audience and values and goals of the organisation.

Have you thought about what values and operating principles you want to work with in your giving? The box below may give you some ideas of how other donors have answered these questions. If you have already done this, do you include environmental operating principles? Maybe it's time to add something about the environment here. You might want to ensure that your foundation or the organisations that you fund operate on an environmentally sustainable basis. Go to the worksheets at the back of this document to get some guidelines about how you could achieve this.

It might be that you can't settle on a final mission and your values and operating principles yet. Don't worry. Keep moving through these steps and your mission and values will probably become clearer.

Examples of missions of donors

The Thomas Foundation's vision and mission

Our over-riding objective is to halt the decline in Australia's native animals, plants and forests. Our mission is to support science-based conservation that contributes to the protection of Australia's remaining species, and to generate new funds for this purpose.

The Rockefeller Family Fund's environment program's mission

Enact aggressive policies at the state and national levels to reduce carbon emissions. We help to bring diverse and compelling voices into the climate debate. We highlight the risks of coal burning power plants and mountain top removal coal mining. We support sound climate science while exposing those who distort it.

The Purves Environmental Fund's mission

...advance, primarily through education of individuals and organisations, environmental sustainability and preservation of biodiversity.



The Christensen Fund's mission

The Christensen Fund believes in the power of biological and cultural diversity to sustain and enrich a world faced with great change and uncertainty. We focus on the biocultural – the rich but neglected adaptive interweave of people and place, culture and ecology. Our mission is to buttress the efforts of people and institutions who believe in a biodiverse world infused with artistic expression and work to secure ways of life and landscapes that are beautiful, bountiful and resilient.

We pursue this mission through place-based work in regions chosen for their potential to withstand and recover from the global erosion of diversity. We focus on backing the efforts of locally-recognized community custodians of this heritage, and their alliances with scholars, artists, advocates and others. We also fund international efforts to build global understanding of these issues. These are challenging goals, so we seek out imaginative, thoughtful and occasionally odd partners to learn with. The Fund works primarily through grant making, as well as through capacity and network building, knowledge generation, collaboration and mission-related investments.

The worksheet at the back has a list of values from Tracy Gary's book *Inspired Philanthropy*². Go to the worksheet and circle the three main values that resonate with you. Add in some operating principles that help you become more environmentally sustainable.

Worksheet Questions

1. What is your vision?
2. What is your mission?
3. What are the three main values that are important to you or your organisation?
4. What operating principles can you describe that will help you become more environmentally sustainable?



Step 3. What is your passion and what are your skills and expertise?

The best funding is driven by what people are passionate about and what inspires them. This funding comes from a place of inspiration, wisdom and hope.

Knowing what you feel passionate about is the first step in determining where your philanthropic giving might be most effective. Do you have a deep connection to the land, water or the sea? Or are you more interested in encouraging people to live more lightly on the planet? Is it the challenge of climate change and how it will impact on the future of your children that has inspired you to set up your funding program? Perhaps your motivation has been an area that you have visited and of which you have wonderful memories, or a health issue that has affected a family or friend. At this stage, don't worry if you have multiple issues that you are interested in or if it seems that the things you have chosen are too big for you to manage.

Do you have specific skills and expertise or knowledge that might help you with your environmental grantmaking? You might have a business background, maybe understand the communications sector, have organisational governance experience or understand the importance of grassroots organisations.

Worksheet Questions

1. Summarise what you are passionate about.
2. What skills and expertise are you willing to use in this process?



Step 4. What region, issues and people do you want to focus on?

It's now useful to think of an issue and or region in which you are interested. Or it might be that you have a specific group of people in mind. At this stage, the scale doesn't matter: it could be a national issue or confined to your local neighbourhood; you may want to focus on a whole region such as northern Australia or a single species like the numbat or a particular group of people like youth. You may have already articulated this in Step 3 because it is something about which you are passionate.

What is important is that you decide on something and make this explicit. Some examples of issues are presented in the adjacent box, and appendix 1 has a list of regions or ecosystems to consider. Alternatively, you might be interested in people and how they are affected by environmental issues – in the second adjacent box is a list of groups to work with.

At this point you can also refer to the issues section on the AEGN website. It may help you clarify your interests.

Worksheet questions

1. Summarise the region and/or issues you want to focus on.
2. Are there particular groups of people you would like to assist or fund?

Issues

The environment and issues you can fund can be categorised into the following:

- The land and its biodiversity
- Inland water: rivers, estuaries and wetlands
- The marine environment and its biodiversity
- Indigenous land and sea management
- Agriculture & food systems
- Sustainable cities & communities
- Climate change and energy
- Toxics
- Sustainable economy

A summary of these issues can be found in appendix 1, and comprehensive briefing notes that describe these issues and overarching solutions can be found on the AEGN's website.

What groups of people might you fund?

- Youth
- Australians living in rural and regional areas
- The sick and elderly
- Those suffering the burden of poverty and other forms of social disadvantage
- School children
- Farmers
- Scientists
- Volunteers
- Activists
- Media
- Environmentalists
- Indigenous Australians
- Women's groups
- People with disabilities
- Migrants



Step 5. What's the problem and what are the solutions?



This is the difficult bit. Can you define the problems or issues that relate to your areas of interest and find out what needs to happen to make a difference? Don't worry if you can't do this in the next five minutes! This might take you a few weeks or a few years to develop. But it's a great place to begin to sort out where to direct funding to best address the issues you are concerned about.

Getting clarity about what the issue is, or what the issues in a particular region are, and what the broad solutions might be is the beginning. The next step – flushing out the possible solutions to these issues – doesn't mean that you have to fund them all in their entirety. They might seem too big to tackle. Don't worry – the next steps will help you focus on what you might fund.

So how do you go about this? At this point, you could find others who share your particular environmental interests. You could form a 'giving circle' and work together on understanding the issues and their solutions. Or you might like to work on your own. Whichever way you choose, here are some questions to get you started. Don't be concerned if you can't answer them all. They are simply pointers to where you might go to find out more:

- a. Has anyone else funded in this area? What can you learn from them? AEGN members can be an excellent source of information here.
- b. Which community groups are working on these issues? What are they doing to address them? What do they think needs to happen?
- c. Who are the experts in this area? You could seek out academic experts, community leaders and policy makers. What do they

say? You could attend conferences and meetings on the problem or issue you've chosen – these are often an excellent source of information and showcase what experts are currently saying.

- d. What can you read to help you? Again, ask the experts or consult publications or online content that has been written for a general audience. You could review academic literature, journal and newspaper articles, as well as articles written by non-government organisations.
- e. What is government doing? Often government agencies are already on the right track but need some help or smart thinking to lead them in a slightly different direction. Sometimes they might know where the funding gaps are.

Worksheet Questions

1. What steps are you going to take to understand the issue (or set of regional issues) in which you are interested and what the solutions are?
2. Do you need a giving circle?
3. Who else has funded in the area?
4. Which community groups working on this issue or region could you talk to?
5. Who are the experts you might talk to?
6. What can you read?
7. What do you know about what government is funding in this area?
8. Now, can you write in a few simple sentences the issue or issues you are interested in and what needs to be done to address them – from a very broad perspective?

Step 6. What approaches are needed to catalyse the solutions?

You now need to decide what approaches need to be funded to catalyse the solutions you have identified. This will very much depend on what you are interested in and what needs to happen to achieve an outcome. How does change happen? There is no 'right' approach or silver bullet here. You might decide that before you can really have an impact on an issue, more scientific research is required, or the capacity of community groups to address the issue needs to be enhanced. Sometimes all approaches need to be funded at particular times in the life of an issue.

Alternatively, you could specialise in a particular funding approach. For example, you might decide that advocacy is the most important way of addressing environmental issues, or that you would like to deal with dual issues by funding Indigenous land and sea management.

You will need to put together your thoughts after talking to many people and of course with guidance from the community you are considering funding. You can have your staff do this research or consider employing a consultant to help you.

Non-government organisations (NGOs) are often expert at developing a strategic approach to address environmental issues but usually don't have the time or funds for thinking and strategising. With some extra funds you might enable an NGO to do some excellent thinking and planning about your issues of concern. Alternatively, you could call for expressions of interest from NGOs to see what the community sector is thinking and planning. This is a great way of inspiring new thinking or catalysing action.



The approaches you could fund fall into the following broad categories:

Approaches that could be funded	Definition
Capacity building	Capacity building is about ensuring efficient and effective grantees are able to better achieve program outcomes. You could fund capacity building in: <ul style="list-style-type: none"> • leadership development • governance • fundraising and resource development • financial management • strategic planning • evaluation • messaging and communications • public engagement and mobilisation • technology • collaborations and partnerships
General or core funding	General support of an organisation, usually goes towards day-to-day operations, salaries, rent and so on. It is especially important for small groups.
Advocacy – public policy input and analysis, lobbying, government relations	Important in environmental work because much of how the environment is managed and used is ruled or guided by legislation and policy. Can be about establishing and managing national parks, public environmental funding, legislation, policy, and regulation.
Legal work	Using existing policy or legislation to protect the environment or to test legislative capacity and meaning. Can be used in tandem with advocacy.
Communications, public education and awareness	Raising community awareness and telling people about an issue can often be fundamental to achieving long-term environmental goals. This could be part of an advocacy or behavioural campaign.
Community development	Empowering individuals and groups so they have the skills to effect change in their own communities. Grassroots community action can be very empowering.
Indigenous land and sea management	Establishment and management of Indigenous protected areas and Indigenous participation in land and sea management. Currently around 23% of Australia is in the Indigenous estate.
Private land management including the acquisition and management of private protected areas	Can include land acquisition, private land conservation management, and people working directly on land or sea management – for example, tree planting, fencing and weed eradication.
Economic instruments	Using economic instruments like purchasing fishing quotas can be very useful. Other examples of economic instruments are the emissions trading scheme and auctions for environmental funding.
Research	Research can be essential in understanding issues, threats, pressures, solutions and priorities.
Monitoring and evaluation	Understanding what is happening in the environment and evaluating action to protect it is important in ensuring funds are effectively and efficiently distributed.



Worksheet Questions

1. Summarise what you think are the best approaches to address the issues you are concerned about within a specific timeframe.

Step 7. What are the types of funding you might give?

Once you have a sense of what needs to be funded to make a difference, you can decide on the types of funding you prefer. This is not an easy question and the answer is not always evident. Again, there will be no 'right' answer or silver bullet.

You might like to specialise in a particular type of funding – for example small grants, project grants or scholarships. Or you may need to begin with a few small grants to help you understand the issue more, or the capacity of a community organisation. Before you finalise this part of your giving plan, it may be a good idea to go to Step 8 and consider who you might fund and what their needs are. The table on the adjacent page outlines some of the types of funding you can make.

Small grants for biodiversity conservation: Beth Mellick – The Norman Wettenhall Foundation

We are firm believers that the small grants we give out to community groups are vitally important. Someone once said that small grants take up too much time and aren't worth bothering with. That might be true for some, but for many small community groups across Australia, we have been able to see some very positive results from receiving our grants.

Our small grants have enabled groups to produce guides, hold workshops, carry out research, create websites and train community members in various aspects of science and monitoring. We have been delighted to receive copies of flora guides, bird guides and moth books which have been professionally produced and used by groups to share knowledge, engage the local community and increase general interest in biodiversity. Other small grants enable groups to train volunteers in monitoring and recording data in a systematic way, to employ scientific research and to work on conservation activities with expertise.

To be good grantmakers, particularly for small grants, funders need to respect community groups and their knowledge of conservation on a local level. It's about thinking outside the box and considering funding groups who may not have a high profile in the city, but have a solid track record in conservation management, the ability to collaborate effectively and evidence of tangible outcomes from past projects.

To find a good project and a solid group to support, you need to look at the communities who are living in the environment they want to save. They have the best idea about what's important and whether they have the capacity to do the work. Scientific expertise can be brought in when necessary – the two go well together.

Finding good small grants to support can be time consuming. But there are groups who can help. The Norman Wettenhall Foundation offers participation in their Small Environment Grant Scheme for a modest fee. Networking with other funders is also extremely important – not just in finding out who is funding what, but for forming potential partnerships and funding projects together, getting more bang for your buck, perhaps even turning a small grant into a bigger one.



Worksheet Question

1. Summarise your preferences for the type of funding to have impact on the issues you are interested in.



Type of Funding	Strengths	Challenges
Small grants (\$500 - \$15,000)	<ul style="list-style-type: none"> • Useful to small and grassroots organisations • Can help to gauge the capacity of an organisation • Great way to begin a relationship with an organisation • Can have impact that is beyond the size of the grant 	<ul style="list-style-type: none"> • Can take a lot of administration • Can't always change the world!
Medium grants (\$15,000 – \$50,000) Large grants (\$50,000+)	<ul style="list-style-type: none"> • Can make a significant difference 	<ul style="list-style-type: none"> • Too much investment in one organisation/strategy can lead to dependency • Can be a significant risk if not successful
Multi-year grants	<ul style="list-style-type: none"> • Great way of building capacity of an organisation, building momentum on an issue and building a relationship • Is a preferred approach for strategic funders 	<ul style="list-style-type: none"> • Difficult to get out of or change if you are not happy with the funding or you want to change your priorities/direction
Pilot/seed funding – grant to develop projects or to undertake a feasibility study	<ul style="list-style-type: none"> • Great way of testing the viability of an idea/program • Large projects can take an enormous amount of time and effort to develop well and often the process or outcome is not clear. Giving a grant to develop a project helps an organisation focus on this important step 	<ul style="list-style-type: none"> • Doesn't always lead to success or bring further funding • Requires an organisation to have project development skills • Might mean that a project does not go ahead
Grants that scale up success (follows from seed funding, small grant or specific project)	<ul style="list-style-type: none"> • Builds on success 	<ul style="list-style-type: none"> • Might cost a lot • Requires the group to have good organisational skills and capacity to scale up
Challenge grants (based on an organisation raising funds from other sources)	<ul style="list-style-type: none"> • Great way of developing the fundraising potential of an organisation and leveraging other funds 	<ul style="list-style-type: none"> • Can place a significant fundraising burden on an organisation in the face of difficulty finding funds
Scholarships	<ul style="list-style-type: none"> • Good way of growing skills and capacity 	<ul style="list-style-type: none"> • Need to be clear on the risk of replicating other scholarship programs • Can take a long time to have impact
Awards	<ul style="list-style-type: none"> • Good way of raising the profile of an issue, developing capacity and profile in a sector 	<ul style="list-style-type: none"> • Administratively laborious
Project funding	<ul style="list-style-type: none"> • Focus on a specific outcome 	<ul style="list-style-type: none"> • Requires good organisational capacity in project management and relies on existing core funding
Collaborations	<ul style="list-style-type: none"> • Great way of leveraging off others and building small funds into larger ones • Could include partnerships with government 	<ul style="list-style-type: none"> • Difficult to achieve because of different approaches, timelines and processes among the organisations involved
Capital grant (for building, land etc)	<ul style="list-style-type: none"> • Given to a major capital expenditure like a building 	<ul style="list-style-type: none"> • Can require large amounts of funding
Endowment grant (usually to an academic or cultural institution and to be used over a long period of time)	<ul style="list-style-type: none"> • Can be a permanent ongoing source of funding • Can be a great way of building capacity 	<ul style="list-style-type: none"> • Can require very large sums of money that might be better used for more immediate activities
Evaluation grant	<ul style="list-style-type: none"> • Given for the completion of a grant. Is especially good for large projects or grants to help determine next steps and to understand strengths and weaknesses of a project/organisations 	<ul style="list-style-type: none"> • Initial project needs to be set up with clear objectives that can be evaluated and data collected along the way
Program-related investment	<ul style="list-style-type: none"> • Loans made at low interest or no interest but which are paid back. Can be a great source of capital 	<ul style="list-style-type: none"> • Works only in circumstances where organisations are generating a profit: for example, a community micro-hydro scheme or a small business enterprise

Step 8. Who will you fund?

Now that you are clearer on your mission, focus, issues and the approaches and types of funding you prefer, you need to decide who to fund.

Non-government organisations are the most common vehicle for distributing philanthropic funds in Australia. NGOs are legally incorporated organisations exempt by law from corporate income tax because of their mission to accomplish defined charitable work and because no individual or entity shares in any profit or losses. This sector plays an important role in Australia, providing important services and employing an enormous number of people. As at 31 October 2009 there were nearly 53,773 tax concession charities but only about 27,028 qualify as deductible gift recipients (DGRs) able to give tax deductible receipts. DGR organisations fall under one of the following categories: health, education, research, welfare and rights, defence, environment, the family, international affairs, sports and recreation, cultural organisations, fire and emergency services or ancillary funds.

Environmental non-profit organisations are often seen as the engine room of change and activity. They focus on providing a variety of services including private land purchase and management, advocacy for better environmental policy, research, awareness raising and environmental education. Currently there are around 541 organisations on the Register of Environmental Organisations that have DGR status and 625 Tax Concession Charities with an environmental focus. Many other non-government organisations such as academic institutions, public museums and welfare groups also provide environmental services such as education, research and health programs.

There is limited research on how the environmental NGO sector is funded, but anecdotal evidence shows that at least 50% of funds come from donations from the public and philanthropic sector. The AEGN aims to analyse the available data in the next few years and produce a map of the environmental NGO sector. Let us know if you would like to be informed about this research.

It can be difficult to sort through the hundreds of not-for-profit organisations that you can fund. This is a good point at which to get some help again. The box on page 21 outlines the type of information you should gather about organisations you are considering funding. Alternatively, you could be a 'responsive grantmaker'.

Responsive Grantmaker

Taken from Meachen, V. An Introductory Guide to Grantmaking³

A foundation choosing the responsive style determines its criteria for funding ... and then invites the community to submit applications based on those criteria. The applications are assessed on their own merit and the most appropriate are selected for funding.

Advantages of the responsive style:

- A good way to get to know a variety of community organisations
- Less pre-application research required
- Enables you to be truly responsive to what community organisations need

Disadvantages of the responsive style:

- Usually means a large volume of applications and therefore more resources spent on responding to them.





What information should you gather about an environmental organisation that you are considering funding?

Adapted from Tracy Gary, *Inspired Philanthropy: Your Step-by-Step Guide to Creating a Giving Plan and Leaving a Legacy*

- What is the leadership or management style of the organisation or its leaders?
- Do you admire the staff and leadership? Are they working in alignment with your giving goals and objectives in some important ways; are they a 'mission match' for you?
- Do the staff and board leadership work well together?
- What is the impact or effectiveness of the organisation, or its results?
- How well does it collaborate and with whom?
- Are diverse constituents involved and helping to guide outcomes?
- Is the organisation financially stable? How much income does it bring in from fundraising or earned income? Does it have any cash reserves?
- What are its strengths and challenges?
- What is the organisation working on now, and what does it need? ⁴

Here are a few tips to get you started:

- Start by getting to know several organisations really well. You might already have a relationship with a few. It's important to really understand who they are, how they operate and if they suit your interests and approaches.
- The AEGN website has a list of NGOs that work on environmental issues.
- You can search the legal status of an NGO by going to www.abr.business.gov.au and searching an organisation's Australian Business Number (ABN). This site will tell you a number of things including whether an organisation has deductible gift recipient status.
- The Federal Government has a Register of Environmental Organisations (all of which have DGR status) at www.environment.gov.au/about/tax/reo/index.html. At the time of writing, there were 541 organisations on this register.
- The following state conservation councils (or equivalent) are umbrella organisations for environment groups in that state. Go to the member, affiliates or partner page of their website to find a full listing of their member groups in that state:
 - Environment Centre Northern Territory - www.ecnt.org
 - Environment Victoria - www.environmentvictoria.org.au
 - Conservation Council of NSW - www.nccnsw.org.au
 - Queensland Conservation Council - www.qccqld.org.au
 - Conservation Council of South Australia - www.conservation.sa.org.au
 - Conservation Council of Western Australia - www.ccwa.org.au
 - Environment Tasmania - www.et.org.au
- Search the National Landcare directory - www.landcareonline.com.au. The groups that fall under the Landcare umbrella are varied and don't necessarily include Landcare in their names, including productive farming groups, 'Friends of', Bushcare, Coastcare, Rivercare and Dunecare. Landcare also include farmers embracing sustainable farm management, Indigenous traditional land

managers sharing their knowledge with the wider community and any community group that participates in voluntary environmental activities.

- The Climate Action Network Australia (CANA) has a list of organisations that work on climate change issues. Go to www.cana.net.au and look at their member page.
- Most academic institutions conduct excellent scientific research. You can easily find out more about this research by going to their websites. The following link has a list of all Australian universities - www.australian-universities.com/list/.
- Talk to people who have already funded the organisations you are interested in. AEGN members can be a great source of information here.
- Remember that many organisations don't have experience in building relationships with philanthropists. You will need to let them know what you need and what sort of relationship you would like to have with them.

Worksheet question


1. Develop a list of organisations that you would:
 - like to get to know more and how you are going to do this?
 - like to fund and how you are going to approach them?

Trust yourself

"Through all the number crunching and research, certain organisations and leaders may resonate for you. This is your giving. Does thinking about giving to this organisation evoke a smile? Does your gut feel right about it? Your brain is processing more than the data on the page. Do internal 'due diligence' and trust what does or does not feel right to you. It will make a big difference to the energy you are willing to contribute toward an organisation." ⁵



Step 9. How are you going to administer your funding?



In a way, you have already begun this step by identifying your vision, mission, operating principles and priorities. Now you need to complete the grantmaking cycle by deciding how structured you want your funding to be. There are many resources that can help you here. Philanthropy Australia's *An Introductory Guide to Grantmaking* gives a good overview of the options available in administering funding for all types of funders. The Australian Institute of Grants Management offers those who want to follow best practice a comprehensive administrative process and useful templates in the *Grantmaking Toolkit: The Smart Way to Build, Review or Refresh your Grants Program* ⁶.

The book *The Savvy Funder* provides some great guidelines which you can dip in and out of. Of course you don't need to take all of the steps below but they can be used in a comprehensive giving program.

1. Choose your priorities and funding mix.
2. Draw up guidelines.
3. Establish systems to monitor and manage information.
4. Invite applications or gather proposals informally.
5. Research and assess funding applications received.
6. Shortlist and refine the selection of proposals to consider.
7. Meet to make grantmaking decisions.
8. Communicate grant decisions to applicants.
9. Release the grant and receive receipt from grant recipient.
10. Maintain contact throughout the life of the grant.
11. Request report and acquittal of grant.
12. Receive report and acknowledge.
13. Take stock of your progress and achievements.
14. Disseminate and share the learning.
15. Review where you've been, where you are going.
16. Celebrate. ⁷

Worksheet question

1. Fill in the worksheet over time to ensure you are taking the right steps in the funding cycle.

Step 10. Get Funding!

Now bring it all together. Go to your worksheet and make sure you have filled in as much as you can.

Do you feel good about your research? Are you clear about your mission and values? Have you decided on your priority areas and the types of funding you might give? If there are too many, choose one to begin with. Have you talked to the organisations that you are thinking about funding? Do they agree with your ideas about the types of approaches that need funding or are you going to call for applications? Will you establish an agreement with your fundee and have you decided on how you want to stay in contact with them? Do you want the project you have funded reviewed or evaluated?

Once you have made your decisions, the next step for you to take is to give your funds away and enjoy your good work.

Remember, grantmaking is an imprecise science and there is no silver bullet to solving environmental issues. But many AEGN members have funded all sorts of different projects with terrific outcomes. Alone our work is a drop in the ocean but together we can save the world!

Finally, good luck! There is very little certainty in the business of giving funds away but it can be deeply satisfying and have great impact on the issues you care about. So take a leap and get funding!

Worksheet question

1. Who have you funded, for how much and over what time period?



Appendix 1 – Environmental themes and issues that you can fund



To help you understand the themes that you might be interested in, the AEGN's website has briefing notes on nine environmental themes and issues. These papers have been largely based on the Federal Government's State of the Environment Report 2011 (SOE). The AEGN aims to update these papers every five years, following the SOE reporting process. Each paper outlines the theme, the issues it faces and the overarching solutions that experts have developed. The following is a summary of these themes and issues some of which have been based on the book *Ten Commitments Reshaping the Lucky Country's Environment*⁷.

The land and its biodiversity

Deserts/the arid zone – Deserts in Australia are usually made up of red sand either swept into sandy ridges or as part of a featureless sand plain. There is usually very little surface water and the leached sands are among the least fertile land on the continent. But it is often covered in a wealth of plant life and has only very marginally been affected by Europeans. There is no commercial grazing and no land clearing but there are ecological challenges from wildfire, weeds, feral animals and climate change.

Rangelands represent over 50% of the continent between the core deserts and marginal agricultural lands, overlapping with the tropical savannas in the north and extending to the Great Australian Bight in the south. The rangeland economy is dominated by mining, with tourism coming in a distant second. However, livestock grazing is by far the main use. Management of weeds, feral animals and fire, and the maintenance of healthy soil, plants and animal diversity are the main ecological issues. This is occurring at a time when the non-Aboriginal population is declining and the Indigenous population of the region is increasing.

Temperate eucalypt woodlands are typified by open park-like country with scattered trees over productive grasslands, abundant wildflowers and low shrubs. These areas offered the answer to the search by European settlers for grazing and cropping land. Clearing, fertilisation, grazing and cultivation have led to the problems of salinisation, erosion, acidification and nutrient loss in productive land, and widespread weed invasion.

Tropical savannas/woodlands are defined as environments where the ground is dominated by (often very tall) grass, there are few shrubs, and trees are absent or moderately dense. Tropical savannas have large river and wetland systems that are usually unmodified. There is a strong seasonal monsoonal climate and the environment and its biota are largely intact.

Forests – While Australia's forests are small compared to many other countries, they are extremely diverse and support a vast number of species found nowhere else. Australia's forests are dominated by eucalypt species and range from the towering mountain ash forests (the tallest flowering plant in the world) of south-east Australia to the jarrah and karri forests of WA and northern white gums and silverbox of Queensland's open woodlands.

Tropical rainforests – Tropical rainforests are a rare environment, defined and limited by the persistent presence of clouds and mists. While they account for only 0.26% of the Earth's land surface they contain approximately 25% of all terrestrial biodiversity. Australia's only tropical forest occurs in the wet tropics bioregion in northern Queensland. This region is 0.1% of Australia's land mass, but contains about 30% of Australia's vertebrate biodiversity and has 83 species which occur nowhere else on Earth. The main threat to tropical forests is climate change combined with environmental degradation such as weeds, disease, habitat loss and fragmentation.

Alpine ecosystems are temperature-dependent high mountain environments that occur above the tree line. They are in Tasmania and the Great Dividing Range near the NSW and Victorian borders. An overarching problem facing alpine ecosystems is climate change. For example, 30% of the annual snow cover in the Snowy Mountains has been lost since 1954. Other issues include invasive pests, erosion and fire.

Coasts – Australia's coastline is dynamic and complex. Over 90% of our population and all but one of the Australian capital cities are located on the coast. We love our beaches, bays and coastal vistas but this relationship is having an increasingly detrimental effect with habitat destruction, pollution, invasive species and climate change.

Inland water - Rivers, wetlands and estuaries

Australia's inland waters, including rivers and floodplains, groundwater aquifers and springs, wetlands and salt marshes, lakes and estuaries support globally significant biodiversity, and are the lifeblood of agriculture, industry and communities. Our inland water systems include 64 wetlands recognised for their international importance, extensive free-flowing and largely intact river systems in the north, and highly seasonal and unpredictable systems in other parts of the country. Australia's per capita water use is among the highest of OECD countries. Agriculture uses about 65% of the country's total water resources, 95% of which is used for irrigation of crops and pastures.

The marine environment

Tropical marine ecosystems in Australia's north contain vast stretches of salt marshes, mangroves, seagrass beds, rocky shores, sand beaches, mud flats and the largest coral reef system in the world. Deforestation, over fertilisation, clearing of coastal habitats, trawl and shark fishing, invasive species and climate change are all having enormous impact on tropical marine ecosystems.

Temperate marine ecosystems are characterised by significant variation in sea floor features: shelf rocky reefs, undersea canyons, seamounts, dynamic oceanography and deep water. Temperate marine ecosystems are breeding and feeding grounds for a number of protected species including Australian sea lions, southern right whales, humpback whales, pygmy blue whales, large predatory fish and white and grey nurse sharks. The region faces many issues including pollution, overfishing, invasive species and climate change.

Indigenous land and sea management

The Indigenous estate held under various land rights and native title regimes covers about 1.7 million square kms or 23% of the Australian land mass. Many Indigenous-owned properties are contiguous with or form an integral part of the National Reserve System which protects areas of high environmental value.

Indigenous lands include an enormously rich diversity of ecosystems – from the tropics of northern Australia to some of the driest areas of the desert centre. Large parts remain ecologically intact, with vast tracts of mainly undisturbed, connected and healthy environments.

The ecosystems of Indigenous lands are threatened by feral animals and invasive weeds, land clearance, changed climate, overgrazing and the polluting of waterways and marine environments.





Agriculture and food systems

Farming has historically underpinned Australia's wealth. Our post-war economy was said to be 'riding on the sheep's back' thanks to the enormous contribution of the wool industry. With productivity growth of 2% or more per year for the past 30 years, Australian agriculture is among the most productive in the world.

However, this has come at a high cost. Our farming practices continue to cause extensive damage to soil, water and biodiversity. Agriculture also produces 15% of Australia's greenhouse gases.

Sustainable cities and communities

Most Australians live in cities. Our cities are centres of innovation, economic growth and cultural and social life. Jobs, educational opportunities and proximity to social services make them magnets for a growing population.

Australian cities also have an international reputation for 'liveability', which encompasses quality of life and includes housing conditions, access to transport and nature.

Despite this reputation, our cities and larger towns unsustainably deplete resources. They exert a 'vortex effect', importing resources and energy from the hinterland and rural parts of the country, as well as from overseas. Cities also dispose of waste outside their boundaries. Globalisation, population growth and increasing material wealth have only accelerated this effect.

Climate change and energy

Human activity, mainly the burning of fossil fuels, has caused a dramatic rise in the concentration of greenhouse gases in the Earth's atmosphere.

If the current emissions trend continues to 2070, average temperatures in Australia are expected to rise by 2.2–5.0 °C, endangering ecosystems, water security and coastal communities.

There is strong evidence that our climate is changing, with more heat waves, fewer frosts, more rain in north-west Australia, less rain in southern and eastern Australia, rising sea levels and an increase in the intensity of droughts. These patterns will mean the loss of unique animal and plant species and profound changes to our water systems, farming and communities. Australians, as inhabitants of the driest continent, have more at risk than most in a warming world.

Toxics

According to the UN Human Rights Commission, "living in a pollution-free world is a basic human right" and the "fundamental right to life is threatened by exposures to toxic chemicals, hazardous wastes, and contaminated drinking water." The rise in incidence of cancer, heart disease, diabetes, degenerative diseases and mental health problems is linked to air, water and food contamination.

About 80,000 new synthetic chemicals have been made, used and released into the environment since World War II. An estimated 1500 chemicals are introduced each year, many polluting our air, soil and water.

The majority of pesticides and industrial chemicals we use have not been adequately tested for their impact on human health and the environment. There is concern about endocrine disruption, epigenetics (changes to genes) and the effects of chemical mixtures. Most of the 38,000 chemicals listed for use in Australia have not been assessed by our national regulators.

Sustainable economy

A sustainable economy is one which:

- Lives within its means: the economy as a whole spends the 'income' from natural assets rather than depleting the assets themselves - using no more resources than the environment can replenish;
- Leaves a legacy, not a liability: pollution is limited to a level that the environment can absorb without ongoing damage to its function and health.

Australia's economy is one of the least sustainable in the world – we have an ecological footprint 2.8 times the world average. Cheap coal and a reliance on petroleum fuels for transport mean our domestic energy system is highly carbon-intensive. Our carbon emissions per capita are nearly twice the OECD average and four times the world average.



Appendix 2 – Worksheet

Fill in this sheet to help guide your environmental grantmaking. You might choose to answer all the questions or just a few. You can use the last few questions each time you make a grant. This document can also be found on the AEGN's website – www.aegn.org.au.

1. Are you ready to be a planned giver?

What type of funder are you? For example, are you an individual donor, a private ancillary fund, a trust etc?

Approximately, how much do you have to give to environmental issues and in what time frame?

Who is going to help you make your decisions?

2. What is your vision, mission, values and operating principles?

What is your vision?

What is your mission?

What are the three main values that are important to you or your organisation? Tick them below.

- | | | | |
|--|--|--|---|
| <input type="checkbox"/> Community | <input type="checkbox"/> Freedom | <input type="checkbox"/> Justice | <input type="checkbox"/> Service |
| <input type="checkbox"/> Compassion | <input type="checkbox"/> Generosity | <input type="checkbox"/> Knowledge | <input type="checkbox"/> Simplicity |
| <input type="checkbox"/> Courage | <input type="checkbox"/> Good sense | <input type="checkbox"/> Leadership | <input type="checkbox"/> Spirituality |
| <input type="checkbox"/> Creativity | <input type="checkbox"/> Hard work | <input type="checkbox"/> Love of comfort | <input type="checkbox"/> Stability |
| <input type="checkbox"/> Determination | <input type="checkbox"/> Harmony | <input type="checkbox"/> Love of others | <input type="checkbox"/> Teamwork |
| <input type="checkbox"/> Diversity | <input type="checkbox"/> Healing | <input type="checkbox"/> Loyalty | <input type="checkbox"/> Thrift |
| <input type="checkbox"/> Empathy | <input type="checkbox"/> Honesty | <input type="checkbox"/> Patience | <input type="checkbox"/> Tradition |
| <input type="checkbox"/> Equality | <input type="checkbox"/> Humility | <input type="checkbox"/> Peace | <input type="checkbox"/> Transformation |
| <input type="checkbox"/> Excellence | <input type="checkbox"/> Independence | <input type="checkbox"/> Preservation | <input type="checkbox"/> Other ⁸ |
| <input type="checkbox"/> Fairness | <input type="checkbox"/> Innovation | <input type="checkbox"/> Respect | |
| <input type="checkbox"/> Faith | <input type="checkbox"/> Integrity | <input type="checkbox"/> Self-Discipline | |
| <input type="checkbox"/> Family | <input type="checkbox"/> Interdependence | <input type="checkbox"/> Self-Respect | |

What operating principles can you describe that will help you and your funders become more environmentally sustainable?

3. What are you passionate about and what are your skills and expertise?

Summarise what you are passionate about.

What skills and expertise are you willing to use in this process?

4. What region and issues do you want to work on and what constituencies do you want to work with?

Summarise the region and and/or issues you want to focus on.

Which particular groups of people would you like to assist or fund?

5. What's the problem and what are the solutions?

What steps are you going to take to understand both the issue (or set of regional issues) in which you are interested and what the solutions are?

Do you need a giving circle? If so, does one already exist or how might one be set up?

Who else has funded in the area?

Which community groups working on this issue or region might you talk to?

Who are the experts you might talk to?

What can you read about the issues?



What do you know about what the government is funding in this area?

Now, can you write down, in a few simple sentences the issue or issues you are interested in and what needs to be done to address these issues – from a very broad perspective?

6. What approaches need to be funded to make a difference?

Summarise what you think the best approaches are to address the issues about which you are concerned within a specific timeframe.

7. Decide on the types of funding you might give.

Can you summarise your preferences for the type of funding you think is suitable to have impact on the issues you are interested in.

8. Decide on who you will fund.

Develop a list of organisations that you would:

- like to get to know more and how you are going to do this?

- like to fund and how are you going to approach them?



What type of information are you going to gather about them? Tick the boxes below.

- ☐ What is the leadership or management style of the organisation or its leaders?
- ☐ Do you admire the staff and leadership? Are they working in alignment with your giving goals and objectives in some important ways; are they a 'mission match' for you?
- ☐ Do the staff and board leadership work well together?
- ☐ What is the impact or effectiveness of the organisation, or its results?
- ☐ How well does it collaborate and with whom?
- ☐ Are diverse constituents involved and helping to guide outcomes?
- ☐ Is the organisation financially stable? How much income does it bring in from fundraising or earned income? Does it have any cash reserves?
- ☐ What are its strengths and challenges?
- ☐ What is the organisation working on now, and what does it need ⁹
- ☐ Other

9. How are you going to administer your funding?

Decide on what type of administrative process you want to undertake.

You can use this checklist each time you start a new funding round.

- ☐ Choose your priorities and funding mix
- ☐ Draw up guidelines
- ☐ Establish systems to monitor and manage information
- ☐ Invite applications or gather proposals informally
- ☐ Research and assess funding applications received
- ☐ Shortlist and refine the selection applications received
- ☐ Shortlist and refine the selection of proposals to consider
- ☐ Meet to make grantmaking decisions
- ☐ Communicate granting decisions to applicants
- ☐ Release grant and receive receipt from grant recipient
- ☐ Maintain contact throughout the life of the grant
- ☐ Request report and acquittal of grant
- ☐ Receive report and acknowledge
- ☐ Take stock of your progress and achievements
- ☐ Disseminate and share the learning
- ☐ Review where you've been, where you are going
- ☐ Celebrate ¹⁰



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GIVING GREEN: A GUIDE TO ENVIRONMENTAL GRANTMAKING



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Level 1, 39 Little Collins Street
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Endnotes

- 1 Timmons, G. (In production) *Savvy Giving: A guide to contemporary philanthropy for donors, trustees, staff and allied professionals.*
- 2 Gary, T (2007) *Inspired Philanthropy: Your Step-by-Step Guide to Creating a Giving Plan and Leaving a Legacy.* 3rd edn, Jossey-Bass, San Francisco.
- 3 Meachen, V. (2010) 'An Introductory guide to Grantmaking Philanthropy Australia Inc.'
- 4 Gary, T (2007) *Inspired Philanthropy: Your Step-by-Step Guide to Creating a Giving Plan and Leaving a Legacy.* Third edition, Jossey-Bass, San Francisco, p.68.
- 5 Gary, T. (2007) *Inspired Philanthropy: Your Step-by-Step Guide to Creating a Giving Plan and Leaving a Legacy* Third edition, Jossey-Bass, San Francisco, p.96.
- 6 Timmons, G. (in production) *Savvy Giving: A guide to contemporary philanthropy for donors, trustees, staff and allied professionals.*
- 7 Lindenmayer, D., Dovers, S., Olson, M. and Morton, S. (2008) *Ten Commitments: Reshaping the Lucky Country's Environment*, CSIRO Publishing, Collingwood.
- 8 Gary, T. (2007) *Inspired Philanthropy: Your Step-by-Step Guide to Creating a Giving Plan and Leaving a Legacy* Third edition, Jossey-Bass, San Francisco, p.40.
- 9 Gary, T. (2007) *Inspired Philanthropy Your Step-by-Step Guide to Creating a Giving Plan and Leaving a Legacy* Third edition, Jossey-Bass, San Francisco, p.68.
- 10 Timmons, G. (in production) *Savvy Giving: A guide to contemporary philanthropy for donors, trustees, staff and allied professionals.*







*I have sought to understand
what is important to me, what
speaks to my heart, and what
can make a difference.*

Bindy Gross, individual donor

