

Impact Philanthropy Application Program 2025

Frequently asked questions

Here we provide answers to some of the most asked questions we receive during our IMPACT Philanthropy Application Program.

The 2025 IMPACT Philanthropy Application Program - Instructions and Guidelines also include detailed information which you should read carefully before submitting your organisation's application. These are available on our [website - https://www.perpetual.com.au/ipap-important-information](https://www.perpetual.com.au/ipap-important-information).

If you have questions that are not covered, please email philanthropy@perpetual.com.au and we will respond to you directly.

Q. Who can apply for funding in Perpetual's 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.**
- **Has a compliance action against it by the ACNC.**

Applications will also be marked **ineligible** if:

- **The bank account details provided are for an individual, or do not match the organisation name.**
- **Your medical research project has not received ethics committee approval. Confirmation of approval must be provided by 1 March 2025.**

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

A. 2025 applications **open at 9am AEDT on Monday 28 October 2024 and close 5pm AEDT on Friday 6 December 2024**. 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 2025. All other applicants will be notified of their outcome in the last week of June 2025. This information will come via an email to the CEO of the organisation and the applicant contact as provided in the application form.

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

A. All payments are made by the end of June 2025.

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 provide updates on the progress of applications.

Q. What should I do if my organisation's circumstances or funding situation changes, eg if we secure funding from another source for the activity we applied for:**i) During the process of application/assessment**

A. Please email 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 IPAP resources available on our website to assist you with your application. Visit <https://www.perpetual.com.au/ipap-important-information>.

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

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 on time, failure to do so may result in your application/s being marked ineligible.

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 apply 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 and Community Wellbeing, Health, Medical Research, Conservation and Environment, Education, Animal Welfare and Arts and Culture.

Q. Can Institutes such as Universities include administrative overheads / levies in their budgets?

A. Yes. University / Institutional overheads / infrastructure changes can be included in the overall budget.

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 \$120,000 per application. Any requests over this amount will be marked ineligible.

As a guide, grants generally range between \$10,000 and \$100,000. Over recent years, the average grant has been \$80,000.

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

Q. I have received several 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 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. 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 2024, we received 1,758 applications, of which 364 applications (around 21%) were funded.

Q. How are applications assessed?

A. Perpetual's Philanthropy Service Team assesses applications based on responses to questions in the application form, with a focus on the following four pillars - strategy, leadership, capability, and outcomes.

Please visit our website to access resources that provide guidance and examples on how to answer questions around our four-pillar assessment process.

All health and medical research applications are assessed by appropriately qualified individuals.

Q. Is it okay to have a co-investigator on the application who may be from another organisation or university?

A. A co-investigator is fine, however, if successful, the applicant organisation will receive and be responsible for administering the grant, including all reporting requirements.

Q. Can organisations apply for funding via an auspice?

A. Yes, auspice applications are accepted. Please apply under the organisation with the eligible ABN, ie the ABN that has one of the following:

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

Note that if successful the auspice organisation will be responsible for the grant and for meeting all conditions of funding including ACNC registration and reporting requirements. Funds will be paid directly to the auspice organisation so please include these bank details in the application form.

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.
- There are several resources, including a video, available on our website, that provide guidance and examples on how to answer questions around the four-pillar assessment process (strategy, leadership, capability and outcomes).

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

A. Two common reasons why organisations do not receive funding are:

1. The number of applications received far exceeded available funding.
2. 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. All organisations may submit **a maximum** of two applications, for projects anywhere in Australia (and overseas). Applications are no longer restricted by geography.

Universities, hospitals, and medical research institutions may submit a maximum of three applications. There is no longer a requirement for applications to be from different departments. We

recommend that you coordinate the lodgement of your application with your central research or fundraising office.

Please refer to the Guidelines available on our website for specific details – visit <https://www.perpetual.com.au/ipap-important-information>. 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 regarding 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 and at the Trustees discretion.

Q. What should the activity start date be?

A. If funding is received in June 2025, the earliest your project can start is July 2025.

Q. What is the period of funding?

A. Funding is usually for a single-year period, unless notified by Perpetual.

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 prior or during the application open period.

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 2025, please email us 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. 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. Several 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.

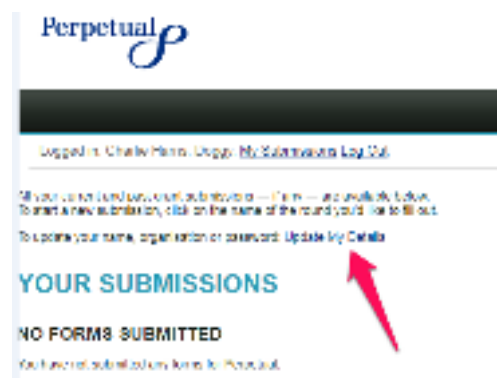
When you submit the application, you will receive an automated email indicating that the application has been submitted. This will be sent to the email address you used to log in.

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?

A. You can register to be notified when the next application round opens. Visit <https://www.perpetual.com.au/wealth-management/philanthropy-email-subscription/>

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