
Perpetual Private

Maximise the impact of your grants

Trust is earned.

Perpetual 

Strategic grantmaking can be a complex and time-consuming process. Whether you're an individual or family philanthropist, involved in a foundation, or working with a not-for-profit or government agency, your grantmaking can be more effective with the help of the expert services of Perpetual's philanthropy specialists.

How we can help you

Ensuring you are granting with maximum impact to create positive change can be challenging and resource intensive. Many grantmakers are rightly concerned with ensuring they find great organisations to support to ensure the impact of the funding in community.

Perpetual's grantmaking consulting service gives you the opportunity to leverage our skills, experience and best practice processes. Utilising our IMPACT Philanthropy Application Program, or designing a bespoke end-to-end grant making strategy, we can help you get the best outcomes from your grantmaking while reducing your costs in time, worry and workload.

We provide a range of packages to make it easy to choose the right level of support for your foundation or organisation. Our grantmaking consulting service draws on our extensive experience and capability in the community sector to provide a comprehensive grantmaking solution for organisations and foundations of all sizes and levels of complexity.

Perpetual's best-practice grantmaking process

The IMPACT Philanthropy Application Program (IPAP) is Perpetual's proprietary annual grant round. Peer-reviewed and internationally respected, IPAP has been supporting philanthropists since 2001.

Over 1400 Australian charitable organisations apply and are assessed each year, making it one of Australia's largest grant rounds. Each application is put through a rigorous assessment process that examines the governance and capability of the organisation to deliver outcomes for the communities it serves.

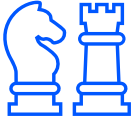
IPAP assessment focuses on organisational strategy, leadership, capability and outcomes, and undertakes a thorough due diligence process to ensure that applicants have met all reporting and compliance requirements before they are recommended for funding.

Importantly, IPAP accepts applications from organisations regardless of sector, geographics, or project, so philanthropists and funders with the widest and most varied interests or strategies can find applications from organisations serving communities and delivering programs that they are passionate about.

This process is now available to the charity and philanthropic communities to use as a best-practice grant making tool.

Our grantmaking philosophy

We help you find organisations that align with your strategy and approach, by assessing applicants across four key criteria.



Strategy

We look for organisations that have a clear mission and a strategy to achieve it. We understand that organisations that know what they want to achieve, and how they are going to do it, are the ones that make a positive impact. Organisations we recommend for funding consideration are those that are mission-driven, impact and outcomes-focused, and committed to continuous learning.



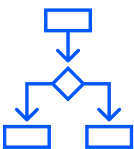
Capability

We look for organisations that have the ability to pursue their mission, and, just as importantly, have structured their organisation and programs for sustainable efficiency.



Leadership

Through our work with hundreds of organisations we have learnt that the most effective community organisations have strong leadership and clear priorities. They are organised around those priorities and have demonstrated their ability to collaborate with other community organisations, policymakers, and government agencies.



Outcomes

We identify organisations that:

- Can demonstrate real, measurable outcomes from their activities
- Are systematically evaluating their work to understand their impact and the value their beneficiary communities place on it
- Can communicate to philanthropists, foundations, and agencies the impact they make on the communities that they serve.

By partnering with the Perpetual, you gain access to our organisational research and assessment across these four pillars, plus comprehensive compliance and eligibility checks into any organisations you might support. We also manage a reporting process that gives you clear visibility of how your funds are used and the impact they're having.



Services to meet your needs

We provide a range of options to make it easy to choose the right level of support for you or your organisation. We can also tailor a package to suit your exact needs.

Option A – Access to applications

Access to Perpetual's annual IMPACT Philanthropy Application Program to simplify the process of selecting high-quality organisations to fund.

We draw on the research and analysis of IPAP to curate a specific shortlist of high scoring organisations that align with your grantmaking strategy. We can then either facilitate introductions to the selected organisations or act as a liaison point on your behalf.

If you need help finding great organisations affecting real positive impact in the areas that you are passionate about, option A is a cost-effective way to simplify your research and selection process.

Option B - Grants management

A comprehensive service spanning grant strategy, selection, administration, and thought leadership including:

- A workshop to help clarify and articulate your philanthropy strategy, interest areas, and financial parameters.
- Administration of your annual grant round, using the Perpetual IMPACT Philanthropy Application Program, including creating a bespoke shortlist of applications for consideration, managing grant payments and correspondence, recipient relationships and reporting.
- Access to Perpetual's philanthropy thought leadership.

Option C - Bespoke grants management

Access Perpetual's expertise to co-design a bespoke grantmaking capability.

Our team provides the design and administration of an end-to-end grantmaking function specifically tailored to your needs, objectives and branding.

This service focuses on targeted impacts, bringing into consideration issues like annual versus multi-year funding, and optimising your approach to funding across projects, capacity building, research and core funding.

This option is for individuals or organisations that want the guidance of experts to give them detailed advice on how to design and implement a unique and highly effective funding strategy.



Since enlisting Perpetual to manage our grant rounds, FightMND has been able to extend our reach to a greater range of organisations who support people living with MND in different ways, whilst still supporting our longer-term partners in the sector. This has laid the foundations for greater collaboration across the MND community so that together we can improve the lives of people with MND in Australia.

Dr Fiona McIntosh – CEO, FightMND



Why engage us? Four good reasons

We make a difference in four key areas: effort, expertise, risk and cost.



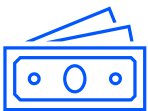
Less time and resourcing

When you engage us, we do all the tedious and difficult work for you. We dramatically reduce the amount of time and effort you have to devote to administration and paperwork to give you more time to devote to strategy, impact measurement and beneficiary relationships.



Access to philanthropy specialists

Our team of expert philanthropy and charity sector consultants has extensive experience and capability in the community sector. Through extensive careers in the charity sector, and years of involvement in IPAP, our philanthropy specialists have gained a deep understanding of the grantmaking process. We know how to choose organisations that match your objectives and create strategies to maximise the benefits of every dollar you give.



Reduced risk

We perform extensive due diligence on all funding applicants. Our tried and tested processes reduce your risk of choosing an inappropriate organisation to fund, so you can be confident you've made a sound choice.



Lower costs

Many organisations have to hire a full-time dedicated staff member to manage the grantmaking process, which is both costly and time-consuming. We can provide dedicated support from a team of industry experts at a significantly lower cost.



Peace of mind

Above all, when you engage us, we give you the breathing space, time and peace of mind to focus on granting with maximum impact.

The Perpetual difference

Perpetual has been establishing and managing philanthropic structures and charitable trusts for over 130 years and manages more than \$3.3 billion in philanthropic and community funds (as of 30 June 2023).

Our unique combination of experience enables us to provide insights through wide-ranging thought leadership and tailored philanthropy and grantmaking advice from a team of experts. Our skills and knowledge of investment, and the not-for-profit sector as a whole, enable us to advise philanthropists on the key areas of fundraising, strategy and asset management.

Fundraising and philanthropy strategy

Our team of philanthropy specialists will work with your senior management team to ensure strong alignment between your organisational strategy, including your vision and mission, and your operating plan.

We will work with you to clearly link current and future operating activities to your strategy, your target impact, and outcomes, supported by a fundraising and philanthropy strategy that incorporates your nominated operating activities intended to achieve impact.

Asset consulting and Outsourced Chief Investment Officer (OCIO)

Perpetual's asset consulting and OCIO team works with not-for-profits and sophisticated wholesale investors to optimise any or all aspects of their investment portfolios including performance outcomes, investment governance, ESG considerations, manager selection, implementation and reporting.

This service is designed to help sophisticated investors more effectively deliver on their mission.

Who to talk to

If you'd like to talk about your grantmaking needs – whether you want to outsource the admin and research burden or gain new strategic insights – we can help.

To speak to with our philanthropy specialists, please reach out to us at:

1800 501 227

philanthropy@perpetual.com.au

perpetual.com.au/philanthropy

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