

**NEWCASTLE PERMANENT
CHARITABLE
FOUNDATION**

**2020 VIRTUAL
COMMUNITY WORKSHOP**

Due to COVID-19 restrictions, workshops will not be held during the September – December 2020 funding round.
The workshop material is contained in this guide

BACKGROUND: NEWCASTLE PERMANENT CHARITABLE FOUNDATION

- Newcastle Permanent Building Society is the largest and financially strongest customer-owned banking institution based in NSW in terms of net assets.
- It is a mutual organisation (no shareholders) with more than 320,000 members
- More than 50 branches across northern NSW.
- Has a comprehensive sponsorship program separate to the Charitable Foundation.
- Has a staff community assist program which provides approximately \$60,000 a year shared amongst four charities.
- Staff are provided two leave days per year to volunteer in the community.

BACKGROUND: NEWCASTLE PERMANENT CHARITABLE FOUNDATION

- Newcastle Permanent Charitable Foundation established in 2003 as a gift to the community with an endowment of \$30 million.
- In past 17 years have given \$22 million in grants to 496 projects.
- Approximately \$1.5 million is granted each year for community projects and initiatives.
- Charitable Foundation is a separate company to Newcastle Permanent Building Society. The Charitable Foundation manages the fund in trust and facilitates independent grant making decisions.
- Charitable Foundation is governed by a separate board of directors made up of Newcastle Permanent Building Society directors and community representatives.

BACKGROUND: NEWCASTLE PERMANENT CHARITABLE FOUNDATION

- Charitable Foundation has its own strategic plan that sets out how we will deliver the best possible impact to the community through our funding
 - Three key goals - Governance, Impact, Engagement
- Charitable Foundation is a Private Ancillary Fund (PaF)
 - Registered Charity governed by the ACNC and ATO
 - Must distribute at least 5% of value of capital each year to eligible charities (which for us means approximately \$1.5 million each year).
 - Must act 'charitably at law'

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GRANT GIVING SUMMARY

GRANT GIVING SUMMARY

KEY STATS:

Total Funding: \$22m 496 projects

Funded Projects Last Financial Year: 23 (\$1.6m)

Average grant size (since 2003): approx. \$50,000

Approximate Key Focus Split: Health 40%, Youth 30%, Social 30%

NEWCASTLE PERMANENT
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OUR FUNDING MODEL

VISION AND MISSION

VISION

Helping rewrite the future.
Now. And for generations to come.

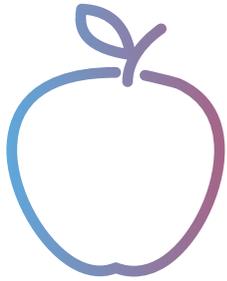
MISSION

To help people who are disadvantaged, marginalised or isolated and support social opportunity and development in our Australian regional communities.

CORE VALUES

- Address disadvantage, marginalisation or isolation in regional NSW
- Supporting innovative technology
- Supporting the development and opportunity for young people
- Supporting projects that are not able to attract other funding
- Recognizing and supporting the contribution made by volunteers
- Being an advocate for the regional communities and endeavours we support

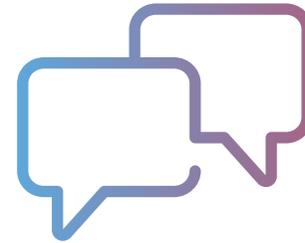
OUR FUNDING FOCUS AREAS



Health



Young People



Social Wellbeing

HOW TO QUALIFY FOR FUNDING

YOUR ORGANISATION MUST HAVE:

- Registration with the Australian Charities and Not-for-profits Commission (ACNC)
- Deductible Gift Recipient (DGR) status (Type 1)
- Tax Concession Charity (TCC) status
- Should be registered for GST

These can be checked on the Australian Business Register website www.abr.gov.au

- Must be a not-for-profit or charitable organisations (incorporated entity)
- Must be operating in the Central Coast, Central West, Hunter, Mid North Coast, New England, or Northern Rivers regions of NSW.

CHARITABLE FOUNDATION FUNDING EXCLUSIONS

- General sponsorship and fundraising activities.
- Events or commercial activities.
- Small contributions to large appeals or large capital projects.
- Projects of a political or religious nature.
- One-off activities, festivals, or events.
- Contributions to work that would normally be considered the responsibility of local authorities or government departments.
- Requests for recurrent or ongoing wages or personnel costs (non-recurrent personnel costs directly related to project delivery may be accepted).*
- Recurrent operational costs such as rent and utilities.*
- Requests to support individuals.
- Organisations which have not met their obligations and responsibilities under previous funding agreements.
- Expeditions or travel outside the Charitable Foundation footprint or overseas.
- Unsolicited applications for emergency relief and material aid.
- Study or attendance at conferences or seminars.
- Projects and programs based outside the NSW Central Coast, Central West, Hunter, Mid North Coast, New England, and Northern Rivers regions.
- Endowments, memorials, bursaries, or named academic chairs.

*Refer to Eligibility and Requirements on our website.

WHAT PROJECTS CAN BE FUNDED?

NON EXCLUSIVE LIST

- Infrastructure, Equipment, Technology and fit outs
- Pilot programs
- Expansion or continuation of existing programs (in some circumstances)
- Scholarship programs
- Funding range \$20k to \$200k
- See our website for many examples

BRINGING A SUCCESSFUL APPLICATION TOGETHER

- Meet the eligibility criteria
- Align with our Vision / Mission / Values
- Demonstrate Governance - Impact - Engagement
- Be for a defined, specific project with a start date, an end date, and have measurable outputs and outcomes
- Demonstrate effective project management and outcome evaluation
- Have a detailed, appropriate budget and resource allocation
- Directly benefit those in need
- Have a sustainable or enduring impact on the community

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PROGRAM LOGIC MODEL

PROGRAM LOGIC MODEL

SUCCESSFUL PROJECTS WILL DEMONSTRATE STRONG PROGRAM LOGIC.

Demonstrating program logic is shown by;

- clearly identifying the issue / problem.
- determining the goals to resolve the problem.
- exploring assumptions about what you know.
- examining the external factors.
- identify and mitigate risks.
- considering all resources required. (inputs)
- knowing what activities are required. (outputs)
- having a realistic timeframe.
- knowing what short, medium and long-term outcomes could be achieved.
- knowing how to measure if the activities were a success.

PROGRAM LOGIC

Use the NPCF Program Logic Model Template to assist to define your project logic.

Available at charitablefoundation.com.au

Some questions in the application relate directly to this Template.

OUTPUTS Planned process			OUTCOMES Intended results		
Inputs What we invest	Activities What we do	Outputs Expected results	Short Term Outcome Results 1-6 months	Medium Term Outcome Results 6-12 months	Long Term Outcomes Results Beyond 12 months
(What resources are required to address the issue / problem?)	(Application - Limit 50 words)	(Application - Limit 50 words)	(Application - Limit 100 words)	(Application - Limit 100 words)	(Application - Limit 100 words)
	(Application - Limit 50 words)	(Application - Limit 50 words)	(Application - Limit 100 words)	(Application - Limit 100 words)	(Application - Limit 100 words)
	(Application - Limit 50 words)	(Application - Limit 50 words)	(Application - Limit 100 words)	(Application - Limit 100 words)	(Application - Limit 100 words)
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	(Application - Limit 50 words)	(Application - Limit 50 words)	(Application - Limit 100 words)	(Application - Limit 100 words)	(Application - Limit 100 words)
What is the impact of NOT running the project?			Assumptions · (Consider these when identifying organizational / project) risks		
External Factors (recorded during the project, recorded in evaluation) · (Consider these when identifying organizational / project) risks			Are there any unintended results? (recorded during the project, recorded in evaluation) ·		

EVALUATION FRAMEWORK

In accordance with executed funding agreements, the Charitable Foundation requires all projects to provide an evaluation report detailing if the project met its goals and reflect on lessons learned.



The Charitable Foundation has developed useful templates to assist you. Evaluation process is dependent on the size and complexity of your project and organisation

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APPLICATION PROCESS

A TWO STAGE APPLICATION PROCESS

STAGE ONE

Expression of Interest (EOI) application

Allows organisations to pitch project ideas without the burden of committing time, energy and resources to a full application.

EOI's comprise approximately half of the full application.

STAGE TWO

Full Applications

Successful EOI applicants invited to submit a full application.

WHAT DO WE WANT TO KNOW?

STAGE ONE: EOI

Who are you?

- Background / mission / why you operate?
- What is the situation, problem, or issue you are trying to address?

Who is your project going to assist?

- How will your project resolve the issue?
- Is the project innovative or new thinking?
- Are there other organisations already providing a similar service or program?
- How will the project be managed?
- What is the expected budget?

WHAT DO WE WANT TO KNOW?

STAGE TWO: FULL APPLICATION

Key Milestones

- What will be the Key Milestones for the project?
- Example: Vehicle being ordered then delivered, building works commencing, program officially launched.
- Minimum of three Key Milestones.
- Form has space for up to six Key Milestones.

WHAT DO WE WANT TO KNOW?

STAGE TWO: FULL APPLICATION

Inputs

- What you need to invest in the project. (Inputs)
- Example: Program staff, volunteers, educational material, classroom space, funding.
- There are no minimum number inputs required.

WHAT DO WE WANT TO KNOW?

STAGE TWO: FULL APPLICATION

Outputs

- What will be the Outputs for the project? (what the project budget is used to deliver).
- Example: purchase of a vehicle, the number of clients treated, the number of people trained, equipment installed and in use, building refurbished.
- Minimum of three Outputs.
- Form has space for up to six Outputs.

WHAT DO WE WANT TO KNOW?

STAGE TWO: FULL APPLICATION

Outcomes

- Outcomes are the short, medium and long-term impact.
- Example: program enabled disadvantaged young people to access a university pathway and gain higher education meaning they can gain better employment and contribute to the community.
- Minimum of three Outcomes.
- Form has space for up to six Outcomes.

WHAT DO WE WANT TO KNOW?

STAGE TWO: FULL APPLICATION

Key Risks

- What are Key Risks for the organisation?
- What are the Key Risks for the project?
- Example: loss of key person, failure of contingent funding application, refusal of development approval, low public interest, reliance on third party to deliver project, Public Health Order enforcing social distancing.
- Minimum of two Key Risks for both organisation and project to be identified and mitigations presented for each risk.
- Form has space for up to five organisation and project Key Risks each.

WHAT DO WE WANT TO KNOW?

STAGE TWO: FULL APPLICATION

Project Engagement and Awareness

- How will you promote the project and engage the public/stakeholders
- Consider promotion activities such as media and public relations but also social media, stakeholder engagement, branding, story telling and case studies
- There is no one size fits all approach - be creative

WHAT DO WE WANT TO KNOW?

STAGE TWO: FULL APPLICATION

Budget

Provide a detailed project budget

Income

- Confirmed Funding - (other grants received, your own funds).
- Unconfirmed Funding (NPCF grant, other grants applied for, fundraising required).
- In kind - volunteer hours, material donations etc.

Expenditure

- Itemised expenditure to match income.

APPLICATION PROCESS

- Two funding rounds open each year.
- Applications must be completed online.
- During the review process of the applications, a site visit, further information or discussions may be required.

THINGS TO KNOW WHEN COMPLETING YOUR APPLICATION

- Two funding rounds open each year.
- Review our 'Guide to Applying for Funding', 'FAQs', and 'Grant Seeker Tips.'
- Does your project have a clear program logic and evaluation framework?
- Consider your responses to Key Milestones, Inputs, Outputs, Outcomes, and Key Risks.
- Remember, we can only fund organisations with DGR (Type 1) status.
- We want you to succeed. How can we help?

SUCCESSFUL GRANT MANAGEMENT

Receiving the funds is only the first step of successful grant management

Good grant managers:

- Keep on top of agreed Key Milestones and deliverables
- Remember the project awareness and promotion that you committed to in your application.
- Ensure all reports and documentation are submitted with appropriate detail and outcomes are measured.
- Communicate issues early and don't make big changes without discussion
- Work with us to enable us to showcase your great work and achievements and the impact you've had on the community.

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SOME INSPIRATION & TIPS

HELPING REWRITE THE FUTURE

2019/20 Annual Review



REACHING
\$20M
IN 2020

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/cerebralpalsyalliance

CEREBRAL PALSY ALLIANCE

Cerebral palsy is a complex disability that impacts people's lives in various ways but it commonly affects strength, movement and posture. As the most common physical disability in childhood, 34000 people in Australia and 17 million worldwide live with cerebral palsy.

Parents who have children diagnosed with cerebral palsy can often feel overwhelmed when it comes to diagnosis, treatments, and appropriate therapies for physical development.

Cerebral Palsy Alliance (CPA) has been operating for almost 75 years and helps families overcome these feelings. CPA provides family-centred therapies, life skills programs, equipment and support for loved ones living with cerebral palsy or other neurological and physical disabilities. CPA was started by parents of children living with the condition to ensure their children could gain access to an education and to specialist therapy services.

CPA is the oldest organisation of its kind in the world, and its centres and services make it invaluable to the cerebral palsy community, particularly in regional areas where specialised care is not always easily accessible.

Newcastle Permanent Charitable Foundation supports CPA because of its life-changing programs that enable treatment for clients in regional areas. With a focus on new technology, our 10-year partnership gives families access to leading concepts in therapy that might only be otherwise available in major cities. Children can maintain or increase development in the important early years and families are not forced to travel far from home to seek the best care for their child.

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Most recently we've helped bring the groundbreaking Magic Carpet – an innovative projection technology that helps improve physical and cognitive functions via an interactive video carpet – to regional centres spanning Newcastle, Port Macquarie, the Central Coast, Dubbo and the Northern Rivers.

For six-year-old Eadie Ross, the Magic Carpet provides a controlled environment to build strength, skills and balance, but also incorporates the excitement of interactive games and patterns; and even her big sister, Ruby, can join in a therapy session.

Eadie's therapist, Anna Mills said "The Magic Carpet therapy challenges her balance but she never hesitates to get back up. This technology makes therapy possible, and it makes it fun".

cerebralpalsy.org.au



Eadie enjoying the Magic Carpet

IT MAKES THERAPY POSSIBLE AND MAKES IT FUN



/cerebralpalsyalliance

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ONLINE RESOURCES

charitablefoundation.com.au

Some helpful resources to help you reach success:

- A Quick Guide to Applying for Funding.
- Frequently Asked Questions (FAQs).
- Charitable Foundation Grant Seekers Tips.
- Look at other funded NPCF projects.
- Read about NPCF funded projects case studies.
- Use the guides provided.

CONTACT US

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Thank you!