



The Ian Potter Foundation

Grantee Key Learnings

General

Contents

Key lessons from previous grant recipients	3
Introduction.....	3
General observations.....	3
Section 1 – Importance of managing relationships- <i>Funders, stakeholders, networks, volunteers, staff, participants, experts/advisors</i>	3
Funders.....	3
Non-funding partners/collaborators	3
Stakeholders/networks	4
Suppliers/Distributors.....	5
Staff	5
Participants/clients	5
Volunteers	6
Experts/advisors	7
Section 2 – Planning.....	7
Research/Preparation/Regulatory	7
Budget.....	8
Capacity/staffing	9
Scheduling.....	10
Sustainability	12
Capital works.....	12
Technology.....	13
Managing Risk	13
Section 3 – Understanding context and environment.....	14
Diverse populations/participants	14
Location	15
Section 4 – Communications & Dissemination.....	15
Technology	16
Dissemination	16
Promotion	16
Fundraising.....	17
Section 5 – Evaluation.....	17
Measurement – how, why, when, what, who?	17
External data.....	18
Data management/storage	19
Continual improvement	19

Professional evaluators	19
Research	19
Benchmark	20
Quality Assurance	20
Adapt	20
Innovate	20

Key lessons from previous grant recipients

Introduction

This document is intended for future applicants and grantees. It contains the collective lessons reported by grantees in the past five years of final reports submitted to The Ian Potter Foundation.

The document is arranged thematically, and provides examples of learnings sourced from grantees final reports.

Views expressed here do not necessarily represent the views of The Ian Potter Foundation.

General observations

Be ambitious, but also mindful of capacity.

Grow your audience – do not diversify what you do / excel at.

Don't rush. There is nothing to be gained from rushing or short cutting the process.

Pace yourself.

Manage expectations – those of clients, volunteers, and staff.

Section 1 – Importance of managing relationships

Any project will involve different people or groups of people to execute it. Managing people and relationships is vital to the success of any project or program.

It is important to ensure all parties understand expectations of them and their obligations to each other from the beginning and agree on a rough plan and timescale.

Where possible collaborate with people or organisations that are doing similar work. Projects have a greater chance of providing a wide benefit when a range of knowledgeable groups contribute to its outcomes.

However, you should implement robust governance structures and processes, especially when there are multiple stakeholders drawn in (e.g. government departments, commercial providers).

Funders

Relationships with funders are key to any project/program. The key thing to note is that you can leverage one grant received to approach other funders whether they be private or public (government) to gain further funding. Many funders are not willing to fund the entire cost of a project or program but are looking for projects that have already received some funding and are looking for funding partners.

You can also often go back to previous funders for further grants so it is a good idea to complete all the necessary reporting obligations so that your subsequent grant applications are viewed in a positive light.

Non-funding partners/collaborators

Collaboration is something that should be considered early in the planning stages.

Working collaboratively with other organisations can result in cost savings. For example, you may be able to work with a local group to hold events, rather than carry the financial risk of large events on your own. Potential groups to partner with could be Landcare groups, friends groups, other local charities or special interest groups depending on the nature of your event.

If you do collaborate with other organisations then there are certain things to be aware of. Firstly, you will have limited control over the other collaborators. One grantee found other organisations are not always upfront with their plans which in turn can affect a project you are working on together.

Communicate expectations with other organisations early. One grantee found that the tertiary institutes they were collaborating with were only interested in implementing one of the programs they were offering, limiting the options available to students.

It's important to work slowly through the politics of interagency collaboration. Grantees have found that even though a good professional network had been established, a lot more preparatory work was required than the grantee initially thought.

You will need to develop patience if you are waiting for offers of pro bono support to be realised. Pro bono work often has to be fitted around a contractor or organisation's paid work.

Stakeholders/networks

For many projects or programs it is necessary to work with other people or organisations (stakeholders) that have a vested interest in what you are trying to do. Involve your key stakeholders/next funders from day one. If you are not sure who they are, approach the government/organisation and arrange a face-to-face meeting to find out.

There are many ways to engage and work with stakeholders but there can be some pitfalls.

Be aware that consultations with stakeholders can take a longer amount of time than anticipated. For one grantee, as the project progressed a number of new stakeholders were identified and so subsequent consultations needed to be arranged.

Don't be afraid to be nimble. The formal reference group model can be useful but some grantees find this approach outdated for their project. Instead they received quicker on-the-ground community input via connecting with a range of community workers on a regular basis.

Use other groups associated with your key stakeholders more effectively. For example, one grantee went beyond farmers and landholders to those that worked closely with them and are in regular contact, such as agronomists, to aid the dissemination of information.

The most important thing to remember is timing. You should gather information from stakeholders to find out what is wanted prior to implementing a program.

Factor in time for community consultations. Provide systematic opportunities for different stakeholders to engage and have a stake in the evaluation of programs/projects.

Be aware that some stakeholders may resist change. For instance, one grantee found that renovations to a museum, whilst worthwhile in terms of greatly increasing the number of

visitors, were problematic in that some members who had been involved with the museum since its inception found it hard to adjust to the changes.

Suppliers/Distributors

Relationships with suppliers and distributors can be equally as valuable in terms of saving time and money. Don't be afraid to negotiate with a supplier/distributor. Ask the distributor if there are any deals available. For example, purchasing an ex-demonstration model allowed a grantee to acquire equipment with significant advantages over the equipment they were originally anticipated acquiring; another grantee received free training from their distributor.

You can lean on manufacturers/distributors for training if you are deciding between their equipment and another suppliers. One grantee was able to arrange an intensive training session with the technologies manufacturer to train their physical therapists.

Staff

Recruiting, managing and training staff is central to many projects or programs. Without skilled, committed people to run them, programs don't happen.

Lessons learned by our grantees all tend to come back to listening to staff feedback. One arts sector grantee provides the example that their production had many small administrative improvements to scheduling and processes throughout the year due to staff feedback. These included reducing the amount of team/office meetings, increasing rest periods, streamlining and clarifying decision making processes and creating OH&S protocol documents covering issues such as unsuitable and unsafe performance spaces.

In other sectors it may be necessary to plan for staff turnover. One education sector grantee reported that maintaining relationships with others in the program after key advocate teachers left was a challenge. Your plan should include how would you ensure that knowledge or trust is not lost if key people do leave mid-project.

Participants/clients

Central to all projects/programs are the participants or clients they seek to serve.

Above all, consider the end-user. Many clients may be unaware of services available. It can be extremely difficult for most clients to navigate systems, both public and private.

Numbers aren't everything. One grantee involved less participants than anticipated, however, they found that engaging a core group of young people repeatedly, as opposed to different groups, led to greater long-term benefits.

Where you are mainly involved with teaching or mentoring participants, then it may be important to provide some sort of orientation at the beginning of a program.

Start early. Earlier contact with participants lead to more effective relationships.

It may be possible to allow students/participants to determine the direction of the program to create a sense of common purpose and goals.

You should be aware of cultural sensitivities in diverse groups. Select leaders and mentors who have an understanding of diverse cultural backgrounds, or even opt for leaders from the cultural background of participants. It may also be difficult for participants from different cultural backgrounds to work together in some instances.

You might also need to deal with family members of participants and this may require extra time to get a program started. For example, for one education sector grantee, gaining access to student report cards and other assessments and tests was an issue for the program. The grantee found that whilst a program information letter – containing Department of Education and Training endorsement – had been distributed to all schools, there remained a small number of parents that were reluctant to provide report cards.

Another useful option to ensure strong participant engagement is to charge fees. One grantee created a fee for joining the program to pay for on-going costs and found it helped weed out those who were less committed to effecting real change.

Volunteers

Many programs rely on volunteers to run successfully. These relationships are often crucial to the efficiency of a program.

Recruit volunteers strategically: finding volunteers for a larger centre can be more difficult than for a smaller centre; young people are often less likely to volunteer long term; retirees can be more interested in travel than volunteering for extended periods.

It is important to induct volunteers, particularly if the conditions or location are difficult. For example, due to the challenging nature of volunteering in remote Australia – including farmers under stress, unfamiliar driving conditions and isolation – the grantee found young volunteers required a high level of support and an 'induction' experience before being ready to volunteer in the overall program.

Train your volunteers. One grantee realised that training volunteer carers was an important pre-requisite for effectiveness; and a handbook was really needed and wanted by the volunteers.

Remember volunteers' capabilities are quite varied. One grantee found that some volunteers were limited in their capacity to develop stronger skills in certain areas of their volunteering roles.

Carefully consider what tasks volunteers will perform. Reliance on volunteers for complex tasks may be problematic. One grantee found collecting evaluation data was the biggest issue for workers. In the future, their staff will reorganise the balance of time spent on various activities to ensure that the evaluation activity becomes a staff role, rather than a primarily volunteer role.

Give volunteers a sense of ownership in their day-to-day activities as well as the broader activities of the service. Diversify roles for volunteers to include administration, fund-raising and events.

Involve corporate partners and staff in volunteering opportunities. Mix volunteer roles for corporate partners, who are seeking opportunities to suit a variety of employees.

Lastly, you can leverage volunteers. One grantee was left with a \$40,000 surplus which they were able to spend on another activity.

Experts/advisors

Experts and advisors can be an enormous asset and useful resource for your project or program. You may have a formal steering committee or simply a pool of people who have particular expertise and can advise at critical points.

Recruiting a steering committee can give you an edge. One grantee found that recruiting 10–15 climate change, academic, government, humanitarian and business leaders meant that the project was taken seriously from the outset.

However, developing a network of valuable, well-respected contacts who can provide you with reliable evidence or realistic ‘on-the-ground’ case studies, is equally useful.

Remember to consult with your experts when making decisions or changes. In health-related projects it may be wise to engage GPs and health workers in local clinics as primary contact points. Similarly, in the education sector, it’s a good idea to include the welfare team in working out options and making decisions.

You can also use technology to bring in experts. Where possible work with local partners but you can also use Skype for presentations from experts/advisors based in other locations.

Section 2 – Planning

Planning really includes all aspects of a project or program. In this section we’ll break the planning process down to include research (including preparation and regulatory issues), budget, capacity/staffing, scheduling, sustainability, capital works, equipment, technology, and managing risk. Each of these aspects is critical to ensuring a targeted, successful project/program.

Research/Preparation/Regulatory

First things first, know what you’re dealing with. Without an understanding of the context or environment you are operating in, you will not have a successful outcome. The context of a project is multifaceted, including such things as the type of participants/clients, stakeholder expectations/needs, and regulatory requirements. Following are just some of the learnings our grantees have reported back to us.

Research the number of people who will require your services. For example, a grantee found clients stayed within the shelter for longer than expected periods of time due to lack of external accommodation. Have clear estimates of the level of service needed.

Be mindful that combining approaches from two or more different programs into the one project can be challenging. In addition, adapting culturally specific programs to meet the requirements of government-funded programs can be problematic. One grantee found that adapting a government program to serve youth from remote areas ended up being more expensive than the government budget allowed, and they had to seek funding elsewhere.

Gather information from stakeholders to find out what is wanted prior to implementing a program (see [Relationships, Stakeholders](#) above).

For certain projects/programs there may be external regulations or standards that need to be adhered to. Be careful to consider federal regulations.

You may need to factor in ethics requirements. Know ethics deadlines. One grantee did not have an ethical application approved which caused delays.

In general, plan as much as you can on paper prior to starting any activity. Much as a film requires a script before shooting can begin, a project/program needs a detailed plan before anything can start.

Finally, when writing a grant application, emphasise the parts of the project that you are passionate about, and those that have the greatest capacity to create positive change. View the application forms as an invitation to discuss what is most important and interesting about the project, not as a rigid questionnaire that may have gaps where your particular project is concerned.

Budget

An important part of any plan is the budget. How much money have you got and how much do you need to spend to achieve your goals? There are many aspects to budgeting financials and below are just some of the useful tips our grantees have passed on from their experiences.

Salaries, staff expenses & training

Ensure salary levels are appropriate. One grantee wanted to recruit a business developer in order to bring in additional funds, but was unable to recruit a quality candidate at the stated salary. Include overtime rates in your budget. One grantee's lab ran from 8am–10pm each day, but found it difficult to run on a skeleton staff, particularly in the evening.

Allocate a higher proportion of funds to project support in order to ensure sustainability of the workload. Make sure you accurately budget for expenses such as transport. A grantee found under-budgeting in this area left people stranded.

Incorporate training costs into your budget. One grantee's staff did not know how to use the new software which in turn stalled the project.

When combining services at a hub, increase the staff hours during the first few months to offer a more coordinated approach with clients (initially, when combining services, $1+1=2.5$ —where the additional 0.5 represents the extra time required to 'learn' to coordinate).

Capital costs

Capital expenditures can improve throughout, and property ownership is preferable to rental.

Contingency & accuracy

Have contingency funds for unexpected costs, for instance, in the event of equipment breaking down or accidents involving equipment.

Expenses can blow out. For example, damage done to native forest and restoration by feral fallow deer forced one grantee organisation to guard every tree in deer-prone areas and had a major impact on logistics and cost. Another grantee found that the cost of materials fluctuated with a drop in value of the Australian dollar.

When organising events such as a conference, ensure you include all costs such as catering (at a minimum, this should involve constant access to coffee/tea and healthy snacks throughout the day). Also consider what the break-even attendance numbers are when booking a venue so as not to run a deficit.

If your project involves hosting an event or exhibition, be sure to factor in the cost of cleaning, maintenance and repairs to whatever premises you use. For instance, one grantee

failed to budget for the cleaning and repairs that were required following an exhibition that they held at an historical building.

In the case of a research project, it might be important to budget for research funds in addition to the fellowship. For one grantee this was critical in ensuring that research could commence.

Finally, make sure you anticipate on-going costs. For example, monthly connections to broadband service can add up over a longer period. For one grantee they were over \$25,000 per annum.

Leverage and future

Receiving funding from one source can provide you with leverage to obtain further grants from different sectors. For instance, obtaining a grant from a philanthropic body may make it easier for your organisation to obtain government funding (see also [Relationships, Funders](#)).

In terms of approaching funders, it pays to have completed rigorous evaluation of past or current projects, as quantitative evidence of a program's efficacy will ensure future applications for funding are competitive.

Think ahead and plan to fund for the future. Consider the cost of sustaining the project beyond the employment of a particular staff member or the duration of a pilot phase.

Capacity/staffing

Any project plan needs to consider capacity in terms of staffing/volunteers as well as other resources.

Recruiting

Recruit wisely. Delaying projects in order to attract the right personnel proved highly beneficial in the long run. Otherwise you may experience unplanned delays as a result of engaging the wrong personnel at the outset to manage the project. Identifying a project manager is important and making sure that the person/s has the support to see the project through can be a challenge in small not-for-profit organisations. Many grantees cite problems with staff overseeing projects in addition to their regular workload.

Plan timelines for recruiting. Depending on your sector, recruitment may need to occur at a particular time. For one grantee, recruitment was delayed until the start of the academic year in February. A new staff member was recruited and trained, however, the overall result was that the project ran several months behind.

Juggling the hiring of staff while being involved in other activities can also be difficult. For example, an arts sector grantee found it very time-consuming to recruit while increasing the tour load. Ideally, these activities would take place in succession.

You also need to consider location issues. It may be possible to employ local community members. In another case, one grantee had difficulty recruiting scientists who could engage with the community and were willing to live on a farm.

When recruiting it is also important to define clear parameters around salary in order to ensure consistency between roles. This includes pro rata arrangements and superannuation.

Ensure staff being recruited have appropriate qualifications. One grantee found unexpected challenges in the training process in terms of the amount of time and effort required in updating training qualifications in order to meet national accreditation.

Training & development

Any organisation should invest in capacity building to support development of expertise in areas that the organisation has not traditionally engaged in before. Capacity building can take many different forms but staff training is a key practice.

Note that more experienced workers are likely to uptake new practices more easily. If delivery is sector-wide, workshops can (and should) be differentiated according to the skill levels of employees.

Ensure training is accessible for your staff. For example, one grantee found that the relevant TAFE course, a Certificate III in Natural Area Management, was not able to be adapted for staff with disabilities.

Disseminate training among staff to ensure knowledge and skills are retained by the organisation. It may be best to train at least two staff members in the use of new technology.

Identify and address barriers to training. One grantee found the following barriers existed for Aboriginal Health Workers in attending external training: limited resourcing in the work place, attending external training was not common practice, attending a national seminar was intimidating for workers who did not know/had not had contact with anyone else attending.

Maintaining staff

Consider staff burden particularly for part-time staff. A project's expectation of fortnightly meetings may be too onerous for part-time staff.

Don't trim all fat. It's good to have some spare capacity to take advantage of opportunities as they arise.

Changing staff can have repercussions on participants. For example, a change of tutor part way through a project can be challenging for participants, due to differences in approaches.

Consider what level of staffing may be required to provide care after the project life. A small number of the cohort may need support beyond the end of the pilot, which can present a challenge.

Scheduling

Timing is everything. A fundamental aspect of any plan is working out the schedule or timelines for activities to occur.

In many sectors it will be important to match your timelines with your participants/clients/target audience. For instance, to attract schools, your schedule must reflect theirs. It's best to approach schools at the beginning of the year as school calendars fill up quickly.

Consider the timing of your event. In the Arts sector, consider whether your planned event/performance clashes with other major events. In education sectors, school holidays can make it difficult to contact/engage transient families in activities.

You also need to consider the best time of day/night to provide a service. For example, providing a homelessness service after hours might better correspond with the visibility of the homeless at night. One grantee also found that their education program worked best when it was run during school hours, and incorporated into the school curriculum.

Timing is also important when planning the production of materials. If you are producing a resource (e.g. DVD), then you may want to time its completion to match with the needs of your end-user, for example in the education sector, at the end of the academic year when curriculum resources are compiled.

You may have to work around participants. For example, one grantee noted that some families had not been able to participate in activities due to inter-family fighting. This meant attendance at excursions had to be organised whereby families in conflict did not attend together so there was a 'one in one out' approach for such families.

You also need to remember that clients have full-time needs. For example, for one grantee major issues arose concerning how to occupy a young person between 9.00am and 4.00pm, during which time they were not staffed because it had been assumed that s/he would be at school, but this was not always the case.

It may also be advisable to incorporate breaks into the structure of programs. For example, in the case of high-risk youth, breaks can help to achieve the best results –i.e. 10:30 morning tea, 12:30 lunch break.

Similarly, you may want to include 'down time' in training or workshop sessions to provide valuable insights and conversation about the subject at hand.

You may need to adapt schedules for particular participants. For example, move workshop dates to a Saturday to make it easier for parents to attend.

Staff schedules may need to incorporate time for additional requirements. One grantee found that the security measures involved with entering the justice facility where a program was taking place was a barrier to starting class on time.

Throughout your project/program you need to allow time for stakeholder engagement. At the start of projects incorporate lead-up time to enable a project coordinator to map community interest and develop strategies for the existing programs or link local services such as allied health professionals into a regional network. Be aware that consultations with stakeholders can take a longer amount of time than anticipated. For example, as one grantee's project progressed, a number of new stakeholders were identified and subsequent consultations had to be arranged (see [Relationships, Stakeholders](#) above).

Pro bono workers may require an extended timeline. For instance, one grantee reported a delay to their project caused by their reliance on pro bono help from a local building company, which had to juggle their commitment to the project with paid work.

Depending on context such as regional/remote areas, you may need to allow for longer timelines. One grantee found program staff and local facilitators' time requirements were underestimated due to the complex issues of regional program participants. Another grantee reported not completing a project on time due to the tyranny of distance from Adelaide to the Riverland Region, as well as the gentle pace of action/response from remote stakeholders, contractors and volunteers.

When using technology or carrying out an experimental project, it may pay to be more conservative when setting goals and predicting output.

It's important to issue a clearly communicated schedule of deadlines for suppliers/distributors so your schedule is not held up by late delivery.

As with the budget, you should plan for contingencies at each stage, considering factors such as staff turnover, weather, community consultations, and environmental conditions.

If using volunteers, then there are several things to consider:

- Initiate the volunteer drive prior to the start of a campaign
- Factor volunteer support into staff hours
- Consider that including volunteers in scheduled meetings can prove difficult
- You need to train volunteers
- Schedule evaluation assessments on volunteering day/s.

Finally, be realistic about how long it will take to achieve your goal. One grantee found they needed two years to have the bike sheds fully integrated into the communities. Another grantee found, given the slow uptake and referral to the service, recruitment of clients took 2–3 years.

Sustainability

Where possible you need to plan for sustainability. This could involve developing easy-to-use processes, reporting or information-gathering right through to thinking about what equipment you already have that you can use.

Our grantees report that streamlining by using daily reports via cloud technology is worthwhile.

Capital works

When managing capital works projects there are many things to incorporate in your planning. Here are suggestions from our grantees.

Be aware of permits required. Building and heritage permits are not always one-offs as there may also be disability requirements, fire safety requirements, further heritage permits and unanticipated needs, for example, widening of an existing doorway, that emerge during a project.

Ensure you consult with neighbours (you may not be able to keep everyone satisfied, in which case budget accordingly). One grantee found that costs increased due to the need to install acoustic walls owing to noise complaints from local residents.

It is important to manage building projects tightly. This is especially critical to multi-million dollar capital works projects as building costs can increase dramatically. An allowance for inflation also needs to be calculated into multi-year projects.

For capital works keep visual and written records of projects – these may prove to be very useful in the future in the event of further approvals being required or when justifying variations.

You will need to scope facility requirements to meet regulatory compliance. Consider novating the consultant contracts to the builder to transfer risk from the client side.

Plan for all stages of the building process before beginning a building project. The planning stage is critical. Delays experienced by grantees in getting projects started resulted from difficulties in:

- Acquiring appropriate land and permits from the council (generally six months)
- Time taken to subdivide the land

- Time taken for the new Federal Government to settle into office and signing an MOU
- Council approval for the project changes.

Technology

When purchasing technology try to find a local supplier. It is easier to problem-solve issues when dealing with suppliers face-to-face or on local time.

Allow extra time for implementing new software. A grantee found the time needed to prepare and distribute a credible online survey was much longer than predicted; another found it was time consuming to integrate the new contact list with the existing database and to properly integrate the blog with the website; another found their website questionnaire design took longer than expected because of the complexity of the questionnaire.

Evaluate the effectiveness of technology for a particular activity. One grantee found virtual action learning sessions were not as effective as face-to-face action learning sessions.

Make sure you strike the balance between sophisticated functionality and complexity. You may want to consider if tablet devices would work in lieu of laptops.

Consider the best hardware for activities. One grantee found that in comparison to a laptop, the web-based software was not very well optimised for use with a tablet. Alternatively, for some tasks such as taking surveys, tablet devices may work better than laptops.

Depending on the complexity of your technology requirements, it may be worthwhile to consider using specialist consultants to advise on IT selection.

It may be possible to have your IT consultants train volunteers. For one grantee, volunteer hours for the project were much longer than anticipated. However, this issue was resolved following training from the web designer.

Cultivate relationships with programmers. One grantee found this to be instrumental in the development of an antenatal program, helping to create a new version of the program that was multi-browser compatible and scalable for future improvements. When dealing with programmers and technology providers, grantees report it is helpful to find a common language and understanding to communicate successfully and achieve the desired outcomes.

Before building software or apps, consult a community/staff reference group. One grantee found this ensured that a range of stakeholder needs and issues were considered throughout the development phase of the wiki so there was no need for major overhauls of the website later. Ensure websites will run quickly for those with slow internet connections.

Managing Risk

There is risk involved in all activities, but by thinking through likely scenarios you can develop risk management and contingency plans should the worse happen. Some examples are given below.

In the education sector, it pays to be nimble. Changes to TAFE fee structures affected one program but were not on the 'risk' radar.

It is important to monitor children's use of technology in order to ensure their cyber safety.

Ensure your volunteer insurance policy is adequate. Similarly, if working on council property make sure insurance plans have been incorporated into a more formal risk management plan.

Over-reliance on state-level funding has led to the closure of several programs; ensure the ability to draw from a diverse funding pool.

Section 3 – Understanding context and environment

Particular projects or programs will need to pay particular attention to the context and environment in which they are operating. Here we will look at dealing with diverse populations, rural/regional/remote projects, and issues to do with location.

Diverse populations/participants

You may be dealing with diverse populations in terms of staff, volunteers and or participants/clients. Know your target group. For instance, key findings from a parent knowledge survey indicated that there is a need for more engaging family health education on *otitis media* (inflammatory ear infections) in Aboriginal communities.

In general, it may be beneficial for staff to structure the workplace to incorporate a range of experiences and professional engagement. One grantee faced challenges in bringing together artists from diverse cultural backgrounds and used a mentoring system to assist.

When engaging with participants from diverse groups, our grantees have learnt the following.

Indigenous Australians

In the education sector, having a local community elder present can add value to sessions, validating the importance of school and education.

Plan for a community liaison. For one grantee, having an Aboriginal Registered Nurse who acted as the liaison with the schools and followed up with the families helped to ensure that the children who required follow-up received it.

CALD

Differentiate between language and cultural diversity. One project targeting the parents from a Chinese-speaking background assumed a common culture, however, Chinese-speaking parents were from different countries such as China, Hong Kong, Singapore, and Vietnam; and therefore values, culture and social rules varied.

Use accredited translators for official documents – volunteer translations can be sub-standard.

Reach out to some groups. One project found home interviews were the best way to reach the CALD, pregnant population.

Gender

Consider gender. One grantee found that having both a male and female facilitator was effective for ensuring inclusiveness for all participants. Similarly, discussions around gender roles and providing support for young women to participate are crucial.

People with a disability

Ensure appropriateness. It may be necessary to adapt your language. For instance, 'paint a rainbow' means little to the vision impaired.

Another grantee found that providing separate sessions for dance practitioners and participants with intellectual disabilities created an unhelpful dichotomy between people with and without disabilities.

Participants with disabilities may have limitations in terms of their energy and cognitive functions, which should be taken into account when scheduling.

Location

Consider location when planning. This may involve considering regional versus metropolitan sites, home versus external sites, as well as environmental conditions.

Regional/remote

When dealing with regional/remote participants, visit the area. One grantee attempted a regional workshop, but could not attract participants due to – they believe – a lack of physical presence. Spend more time in each location to enable better development of relationships with community organisations.

Hold activities in a suitable venue that regional/remote residents are proud of.

Recognise that privacy and confidentiality are more of an issue in a regional setting.

Utilise a community approach in rural and regional communities. Make use of volunteers, local community services and organisations.

Allow for longer timelines. One grantee found program staff and local facilitators' time requirements were underestimated due to the complex issues of regional program participants.

Be aware that some remote or hard-to-reach environments may cause staffing problems, such as difficulty obtaining staff with necessary experience/skills (see also [Planning](#), [Capacity/Staffing](#), [Recruiting](#)).

You will need to gauge effectiveness of remote programs. For instance, one grantee found virtual action learning sessions were not as effective as face-to-face action learning sessions.

Inhouse vs outreach

Reach out to your clients. One grantee reported that home visits were extremely important, allowing staff to counsel adolescents in a non-threatening environment. This led to more open and fulfilling sessions. Another grantee found that there were many people who simply would not set foot inside their service. For many, the street is their community. They learnt to join people where they were, rather than trying to attract them into their space.

You may also need to factor in turnover at a particular location. A social justice grantee found there were not as many opportunities for long term participation as expected because of the high turnover of women in detention.

Co-location

For research-based projects, some grantees find that co-location is a large contributor to success, so try to ensure that the researchers are based in the same space with purpose-built facilities.

Section 4 – Communications & Dissemination

Technology

Technology continues to provide very useful and powerful tools. And thanks to cloud computing and app development many tools are online and are now freely available.

You can use technology to improve access to information. For example, an app may be a user-friendly way to provide information associated with a conference.

When developing a website or app, make sure the design is simple, intuitive and easy to use.

Try to source the digital platform that best suits your needs. For instance, one grantee found that developing a website on the open-source Wordpress CMS platform was the best option in terms of enabling updates as new technology and services were rolled out.

Technology can also assist in overcoming distance. For example, you can use Skype for presentations from speakers based in other locations or to include remote participants.

However, you also need to make sure that risks associated with technology are dealt with. It may be advisable to create parent fact sheets to accompany school-based technology. Children also need to be considered when using technology to ensure that online materials are age-appropriate and that online interactions are safe.

Dissemination

Dissemination of information, updates or news can occur in many ways. However you choose to communicate, ensure you do so in a professional manner. You should also communicate regularly and at predictable times.

Consider the best mode of communication for your purposes. For instance, one grantee changed their initial plan to publish a booklet on the organisation's history, instead opting for an update of historical records on their website.

Consider too your audience. In the case of CALD families, or those with low literacy, information printed in a universal format, with more images and less text, may be more appropriate.

Some ways to disseminate include (but are not limited to):

- Social media – can allow for more interaction with your participants/clients/stakeholders
- Via respected industry leaders or organisations
- Use infographics to illustrate statistical information or data about organisational achievements
- Agricultural salesmen already have relationships with farmers – consider using their reach to disseminate ideas.

Promotion

Promotion can be necessary for many different activities and for many reasons, from advertising an event to promoting the availability of services.

Grantee suggestions include:

- Start promotion for events as early as possible, at least three months before an event. Arts grantees recommend seeking funding especially for promotion.

- Consider alternative methods of event promotion. One grantee had difficulties due to minimal internet access available to intended participants. Another grantee used a weekly TV show to attract traffic to their new online resource.
- Have multiple referral pathways (e.g. do not rely solely on one organisation).
- Appoint a well-known 'champion' to act as an ambassador, raise media interest and improve visibility.

Fundraising

When fundraising:

- Professionalise the effort. One grantee changed the way they staffed their fundraising efforts from volunteers to interns who worked for a period of 10 weeks full time and held post graduate degrees in events and marketing.
- Pilot your techniques, and consider terminating telemarketing teams, direct mail campaigns if insufficient return on investment is demonstrated.
- Consider in kind donation of goods or services. This may be equipment such as drums for therapeutic sessions, laptops for children in hospital, specialist learning and health-related assessments not funded by government.

Section 5 – Evaluation

With each project or program it is important to verify that your original aims were met. The only way to do this is to set objectives at the start that can be measured in some way. You will then need to record data along the way with surveys and other evaluation tools. Keep a professional and comprehensive track record of all Key Performance Indicators and how these have been achieved in order to clearly illustrate the success of the project.

Measurement – how, why, when, what, who?

Working out how to measure your success is often the most difficult task for grantees. Here are some of our grantees' learnings.

What

It's important to decide upon your goals so you can then work out what measurements will appropriately demonstrate your level of success. For instance, you may have an after-school art program—are you aiming to increase confidence, art skills, school attendance, family cohesion or some combination of the above?

Outcomes can be more than avoidance of the negative. For example, one grantee encouraged staff to document positive behavioural observations, in addition to reductions in antisocial behaviour, in the context of a rehabilitation program for youth.

When

Capture data from the very first activity. In one case, the grantee believed conducting a survey before the screening of a film would have been useful in terms of measuring the difference in audience understanding and engagement before and after the screening.

Consider whether holding a survey at a different time could increase the number of responses.

Who

Reach out beyond the 'converted' to survey people who have yet to be engaged with the issue.

Cast a wide net for survey participants, as it can be difficult and take more time than expected to obtain sufficient responses. For example, a research team had to expand their approach – both in terms of geography, as well as the type of antenatal services offered.

Plan carefully when engaging local campaigners. One grantee found this to be difficult. Local environmental groups were approached to assist with a campaign, however, these groups were very small and their limited resources meant that their existing campaigns consumed them entirely. Despite extremely positive responses from all those contacted, they were unable to assist in data collection.

How

Measuring audience engagement is easier when everything is channelled through one central website.

Complete questionnaires in person. One grantee attributed the small sample size to the change in delivery method (they used email instead) and recommends combining any future efforts with a participation incentive program to encourage participant completion of their survey. Keep the survey short, no longer than five minutes.

You can ensure data is captured by making it a condition of using a particular service. For example, in order to track lab usage one organisation required researchers to complete annual feedback forms as part of the conditions of accessing the facility. This form provided information on outcomes from their research.

When seeking feedback on events, grantees provide the following suggestions:

- A portable tablet rather than a fixed station makes it easier to solicit feedback.
- A staff member should be available to encourage and guide users.
- The survey should take no longer than 4 minutes to complete.
- An incentive such as a Prize Draw increase participation rates.
- Language used in the survey should be appropriate to the user.

Why

Consider why you are seeking feedback and how often. You may need to reduce survey fatigue.

External data

Sometimes you will need to evaluate how things have changed using external data sources. There are numerous sources of existing statistical data depending on the sector. These can be government sources such as the Bureau of Statistics or more local government entities. For instance, when a grantee was unable to source data from one city on child educational attendance, they looked at local council statistics.

Various research centres also produce reports that contain statistical data which may be very useful. Again, these will vary depending on your sector.

You should ensure there is good measurement data available rather than assume it already exists. For example, there was a lack of good quality data to adequately assess educational outcomes in association with *otitis media* in Aboriginal children living remotely in Australia. NAPLAN scores were not sensitive enough to answer this research question.

Be aware there are substantial challenges (including time taken) in obtaining data from government organisations. One grantee waited almost eight months to receive relevant government data.

Data management/storage

Learn how data is stored. One grantee found that data analysis was more time consuming than anticipated due to the need to check and re-check many of the data sheets.

Plan how to manage large amounts of data. Use a database system to avoid double-entering into Excel.

Continual improvement

Record and learn from your mistakes.

Collect feedback. Participants from one conference suggested that the cost was prohibitive. The grantee was able to consider changes for future events, such as adding further registration types and discounts for large groups.

Learn from the data (e.g., if participation rates are low, seek information as to why and alter the program to meet client needs).

At a client/participant level you can also set goals, provide feedback and aim for continuous improvement. For example, in the at-risk youth/families setting, you can work with each family to determine specific goals for each child and work towards them and giving feedback to parents after each session.

Recognise that clients/participants can also be a source of feedback to ensure continual improvements. Unemployed jobseekers can be experts providing the grantee with insight into user behaviour, motivations and enable the creation of a much more effective product/service due to their involvement.

Professional evaluators

Choose your evaluator wisely. One grantee found that a KPMG evaluation helped secure government funding.

Consider contacting evaluators on The Ian Potter Evaluation Pool:

<http://www.ianpotter.org.au/the-ian-potter-foundation-evaluation-pool-2016/>

Evaluating the process used can be valuable in finding the most effective way to reach your goal.

Research

Some research needs to take place before you embark on a project/program. Research can take many forms from a literature review (to see if what you want to do has been tried before and whether it worked or not) to feasibility studies.

Conducting feasibility studies (with the support of industry experts) is a way to explore the many different delivery options, validate them, cost them and ensure their sustainability.

Proceed with further feasibility studies only after at least part of the funding necessary to establish and run the pilot program has been secured. One grantee found it very difficult to secure new funding for a program in a new location.

Benchmark

Benchmarking outcomes against federal standards can add credibility when communicating impact.

Similarly, after a program/project has completed you can benchmark your results against what has been done internationally.

Quality Assurance

During your program/project you should monitor for 'regression'. For example, the success of one reading program was due to the one-to-one relationship the volunteer Buddy had with the child, but unless monitored, some teachers used the Buddy as a general classroom aide rather than a dedicated helper for one child.

Adapt

Accept that it is common to re-work policy-focused research in response to early findings or changes in the research landscape. This is particularly the case in scientific and medical research projects.

Innovate

Don't be afraid to innovate. For example, the original bionic eye failed to meet the surgical and patient requirements so the grantee developed its own bionic eye components to fulfil the anatomical, surgical, patient and safety needs.