



The Ian Potter
Foundation

The Ian Potter Foundation

Foundation Key Learnings

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Overview

These learnings have been distilled from grants acquitted by The Ian Potter Foundation over the last fifteen years. They reflect the changing focus and guidelines that the Foundation has had over this period. The learnings have been organised into timeframes for when their consideration is most useful. However, they may be considered at any stage of a grant application and during implementation and acquittal. Under the timeframes, learnings have then been grouped into themes to help navigate the detail.

New Foundation Learnings from Recent Grants

Since the last update in 2024, we have been compiling new Foundation learnings from completed grants across our four pillars. While the projects are different, common themes have emerged across the grantmaking lifecycle, from the early stages of project design through to understanding long-term change. These new insights have been incorporated into this document (highlighted in green for quick identification). A snapshot is provided below.

What to look for in applications as a Funder

Design and pre-planning

Overall, the importance of investing time upfront is very clear.

The strongest projects were underpinned by trusted community relationships, genuine partnership and meaningful co-design processes that share decision-making power with communities. Successful projects recognised that building trust takes time and prioritised engagement with the right communities early in the planning process.

What does this look like in practice? Funders should clearly understand the nature of the relationships and partnerships organisations have already established to deliver projects. Where these have not been established, funders should look to ensure that sufficient time, resources and engagement have been built into the timeline to allow for this. For projects involving First Nations peoples or cultural knowledge, in particular, funders should prioritise those that embed First Nations governance, project leadership and decision-making authority. Similarly, funders should seek to ensure that projects have appropriately allocated resources when working with culturally diverse communities to ensure they are able to engage equitably.

For digital, capital, and equipment projects, careful planning is critical to achieving objectives on time and on budget, including robust risk management, stakeholder commitment, and appropriate cross-functional coordination. Funders should assess how well prepared these projects are and encourage essential early planning where it is lacking to ensure projects are best equipped to navigate implementation challenges and delays.

Delivery and relationship management

A recurring theme since the last update has been the risk of relying heavily on a single champion or key individual, both for project delivery but also as a sole contact with a funder. Funders should encourage organisations to plan to embed initiatives across systems, processes, and teams to reduce dependence on individual staff members and improve overall project sustainability.

We also found that maintaining continuous feedback loops with communities and stakeholders strengthened project outcomes, enabling real-time learning and the ability to

respond and adapt to emerging needs. This approach was effective, but it highlights that funders must remain flexible, especially in how they assess progress and success, since projects often develop differently from initial plans.

Outcomes and evaluation

As projects evolved, their original goals no longer aligned with the work being delivered. Consequently, funders should be open to revising goals, and measures throughout the life of a grant to ensure they remain relevant and are capturing what matters.

We continued to find that strong project outputs do not automatically get taken up by end users, communities, government or the wider sector. Funders should look to understand how project findings, knowledge, or outputs will be translated into practice and adopted by others and encourage grantees to consider this early in the project lifecycle.

For projects seeking long-term or systems-level change, measuring success can be particularly challenging since many factors outside the project's control can affect the outcome. In this context, funders should ensure that the project's assumptions have been clearly outlined at the outset, that the idea of 'success' is clearly defined, and how progress will be measured along the way can be explained.

Sustainability – looking beyond the grant

Organisations that experienced changing circumstances and context had to adapt. Funders should recognise that supporting flexibility can enable innovation and resilience, provided there is still clarity around expectations and accountability.

For complex capital, infrastructure, and restoration projects, realistic timelines and contingency planning were particularly critical due to the implications of potential regulatory, heritage, construction, or approval delays. Funders should consider how they will respond to changing resource, funding or timeline requirements in line with their granting approach, to balance flexibility with other requirements.

Before: Evidence and Diligence

Pre-planning and Groundwork Considerations for Grants:

1. **Sector/Network Alignment:** Collaborate with multiple partners for ideas emerging from sector forums, recognising the time and attention required for non-established concepts.
2. **Assessing Need:** Assess the need before implementing projects; understand sector/network needs through surveys, interviews or scoping before funding activities.
3. **Small Grants for Scoping and Business Case:** Use small grants to facilitate idea exchange between grantees, leveraging their potential impact, especially in cash-poor sectors.
4. **Strategic Geographic Expansion:** Consider a strategy of starting with 'easier' geographic locations before expanding to consolidate operations, potentially deviating from the traditional approach of starting where the need is greatest.
5. **Pilots:** For trials, pilots or similar projects – ensure clear gateways have been built between phases – build in flexibility in case adaptations are required – including exiting



Before

the project. Ensure there is a review and improvement cycle within the project plan or application.

6. **Monitoring System Reforms Impact:** Be mindful of wider system reforms that could make a pilot redundant, inquire about possible impacts of upcoming community changes.
7. **Assessing Community Relationships:** Long-term engagement and trust between an intermediary and a community (e.g. multi-year or decade-long partnerships) can significantly strengthen delivery outcomes. When assessing grants focused on community engagement, be clear on how you will understand community interest or commitment.
8. **Partnership:** Consider how partnerships or sustained relationships have been built over time, particularly if they are driven by core individuals with distinct styles. Ensure clear ways of working are in place prior to funding.
9. **Cultural Awareness:** Where projects involve cultural knowledge or First Nations populations, prioritise those that have clearly embedded First Nations governance, project leadership and decision-making structures.
10. **Planning for Engagement Beyond the Grant:** Ensure projects demonstrate how they will create ongoing user engagement beyond the development of a platform or tool and that engagement won't stop at the end of the funding.
11. **Small Organisation Access to External Support:** In smaller organisations, internal tensions or limited change management capacity can significantly affect delivery when changes are being implemented. Consider an organisations readiness for and access to required expertise when reviewing applications. This may include creating provisions for access to expertise beyond the grant.
12. **Key Person Risk:** Projects that depend heavily on key personnel pose a sustainability risk if these individuals leave or reduce their involvement. Assess risks of individual dependence and encourage diversification across team members and organisational embedding of projects.

Evidence and Understanding

1. **Establish Clear Problem Identification:** Ensure there is clear problem identification before application. Is the project solution the right fit and does it address the fundamental problem – if not, are there alternative options or will the project create sufficient impact to mitigate some of the problem. Understand their context and what other key stakeholders and programs may be doing – what if any is the overlap or complementary aspects.
2. **Learn from Past Projects:** Gambling on innovative programs is inherent to philanthropy, but if similar projects have previously failed, success may be unlikely without alterations. Inquire about outcomes of similar projects, especially internationally.
3. **Justify Changes to Proven Models:** When modifying a proven model, ensure there is a comprehensive understanding and justification for the changes before endorsement as well as understanding how the proposed changes align to context.
4. **Stakeholder Voice:** When gathering evidence, ask whose voices are dominant and whose are absent. While peer-reviewed academic papers may present compelling evidence, they may not tell the whole story.
5. **Balancing Aspirational Thinking with Achievable Delivery:** Where needed, applicants should be engaged with early to reinforce the challenge of balancing aspirational thinking with achievable delivery.

Design

1. **Community Involvement and Support:** Projects, especially in remote areas, should engage community groups during design development or at least ensure there are letters of support from the community. Ensure the project allows significant time upfront for genuine community or stakeholder engagement (consider where it is on the [IPA2 spectrum](#) for public participation) on projects. Projects that identify they will be co-designed need to be at the empower end of this spectrum. Consider appropriate compensation for those in the community/cohorts that are being requested to support any co-design process.
2. **Working with First Nations Australians:** Projects primarily supporting First Nations Australians should be 'owned' and led by First Nations people. They should ensure culturally safe environments are established, and culturally relevant systems and policies are in place to support participants.
3. **Involvement and Project Design:** Where grants are engaging with a specific cohort or group, ensure this group and their perspectives are included in the design and evaluation.
4. **Effective Communication:** Projects engaging with groups where English is not their first language should use accredited translators to ensure effective communication where possible. Organisations with community-based projects should consider how to allow for staff time (internal or external) to manage communications with the broader community.
5. **Volunteer Support:** If critical elements of grant delivery heavily rely on volunteers ensure that the project allows adequate time for completion, and expect delays. Also consider having a project manager (with relevant expertise) to manage the project.
6. **Capital Works Grants:** Ensure capital works grantees are clear on disability requirements, heritage permits, and necessary land and building permits from the council. Ask about any environmental impacts or 'green' building aspirations. Grants should also be clear on capacity and resource requirements required following completion and how these resources will be obtained and maintained.
7. **Cross-functional Planning (Capital/Equipment Grants):** Encourage early cross-functional planning within an organisation for complex capital and equipment grants (e.g. coordination with suppliers, facilities and IT). This helps to ensure projects are prepared for potential delays in installation, training, infrastructure etc,

Scalability and Replicability

1. **Avoid Duplication:** Encourage grantees to explore collaboration or partnerships before expansion to prevent duplication, especially when expanding into new regions.
2. **Assess Similar Programs:** before funding applications projects replicating an existing project understand and assess local programs providing the same or similar service.
3. **Consider the broader context:** For place-based projects consider the broader context the project will be implemented within – this may be external to the project but critical to its success. E.g. Local government support; community engagement; reputation of leaders.
4. **Factor in Additional Costs:** Recognise that the cost to expand to remote/rural areas may not be directly proportionate; ensure organisations consider and include adequate costs like travel and are conscious of limitations such as network connectivity.

Who's on board?

1. **Recruitment and Planning:** Where possible applicants should have recruited key qualified staff or have a clear plan for attracting suitable candidates before commencing.

They should look to prioritise roles and structures embedded in the organisation – not individuals and ensure adequate time is allowed for recruitment.

2. **Authorising environments:** Understand the requirements of projects looking to work within areas that are regulated or have government oversight e.g. ensure letters of support or Memorandums of Understanding (MOUs) are in place. Ensure the executive and leadership of the organisation support the project to create a strong authorising environment for project implementation.
3. **School-Driven Projects:** Projects driven by schools tend to have higher success than those being delivered in but not driven by the schools; ensure logistics are worked out with individual schools before commencement, including ethics clearance, teacher training and availability, and adequate funding for program participation.
4. **Partnerships and MOUs:** Partnerships may require clear terms of reference and MOUs. Ensure these are in place prior to or within the first year of a grant.
5. **Other Funding:** Verify claims of other funding and ensure early conversations with other funders when there is mutual support for a project.
6. **Local Champions and Volunteer-Run Organisations:** Programs of a 'drop-in, drop-out' nature may lose momentum without local champions' engagement. It should also be understood that volunteer-run organisations may have lower capacity than staff-run organisations for grant delivery – consider requirements and delivery accordingly.
7. **Government impacts:** Consider the potential impact changes to federal/state government policy might have on projects or advocacy work – especially over election cycles.
8. **Diversity, Equity & Inclusion:** Projects involving CALD communities require resourcing for structured processes to identify and address barriers to participation, create inclusive environments, and ensure representation of those most in need. Ensure that applications have inbuilt sufficient time and resources to achieve this.

Due Diligence Support

1. **Financial:** Conduct due diligence on company financials for large projects and consider the adequacy of contingency plans. Consider the financial security of the organisation and any major partnering organisations, especially for social enterprises.
2. **Be cautious:** Project plans should err on the cautious side, plans, budgets, and timelines should have sufficient consideration and contingency for delays and unexpected events.
3. **Environment projects:** Projects focused on the environment, nature conservation and biodiversity may be highly reliant on, or subject to, external factors. Consider upfront, the broader social, political and ecosystem contexts for the project; governance and land tenure; which communities, sectors (e.g. Industry or science) and organisations should have a stake/voice; the need for flexibility and adaptive management; and the potential impact of considerable changes or delays to project implementation.

Health, Safety and Security Considerations

1. **Occupational Health and Safety (OH&S):** Ensure projects have considered OH&S standards.
2. **Data Security for Online Projects:** Enquire about and ensure budget allocation for data security, particularly for online projects handling sensitive data.
3. **Safety and Risk Plans:** Ensure safety and risk plans are in place before undertaking remote field trips and other situations where personnel and project partners may be placed in vulnerable situations.
4. **Public Liability Insurance for Volunteers:** Ensure newer organisations have public liability insurance for their volunteers and other required policies and procedures.

5. **Legal Contracts, Intellectual Property and Trade Marks:** Where required, ensure solid legal contracts, understanding of intellectual property ownership or requirements for registration for trade marks are in place or have commenced and sufficient time has been allowed.
6. **Equipping Staff for Vicarious Trauma:** Investigate staff readiness before funding client-based support programs. Ensure staff are equipped to deal with potential vicarious trauma.

Devil is in the Detail

1. **Check Demographics, Reference Numbers and Baselines:** Where available check available demographics. e.g. working with low socioeconomic schools, check the ICSEA and demographics on the MySchool website. Where possible ensure grantees have baseline or regional comparative statistics before assuming outcomes represent success.
2. **Funding Distribution:** Understand the proportion of a grant that will be covering overheads and indirect costs to manage expectations of deliverables and outcomes.
3. **Capacity Funding Ahead of Projects:** Fund capacity building beforehand (IT, fundraising, communications), especially for those transitioning from start-up to a larger organisation.
4. **Understand the Organisation:** Identify opportunities early in discussions where skills might be developed within the organisation or project team and ensure that there are support structures being built to develop these skills.
5. **Business Plans:** Ensure organisations have a 3–5 year business/strategic plan and detailed implementation plans (e.g., Fundraising, stakeholder engagement) before funding general operations.

Budget Considerations

1. **Multi-year Projects:** Recommend budgeting 10% for evaluation in multi-year projects.
2. **Staff Salaries:** Ensure grantees account for all staff salaries, including superannuation and CPI increases and that salaries align with industry standards.
3. **Regional/Remote Projects:** Recognise that regional/remote projects may allocate a higher proportion of the budget to staff/facilitators' salaries and increased service provision costs. Including aspects such as fuel, accommodation, satellite phones etc.
4. **Smaller Grantees:** Provide support for smaller grantees e.g. a 'Budgeting 101' workshop.
5. **Contingency Plans for Withdrawn Funding:** Discuss contingency plans with applicants in case government or other funding is withdrawn prior to or during implementation.
6. **Monitoring Profit Margins in Scaling Social Enterprises:** Monitor profit margins in social enterprises scaling up, especially with an increase in the number of employees.
7. **Inclusion of 'Other' Costs:** Encourage inclusion of 'other' costs (admin, travel) when applying for a grant, suggesting a generous range, such as 25%.
8. **Planning for Information Technology:** Emphasise the importance of gathering feedback and careful planning for IT endeavours, and set the scope of anticipated usage to determine if the budgeted amount for activities like website moderation is reasonable.
9. **Knowledge Transfer and Staff Turnover:** Ensure processes and policies are in place to support knowledge transfer in the event of staff turnover.

Planning for data capture, monitoring and evaluation

1. **Data Gathering Method Robustness:** Question the robustness of data gathering methods, especially if low numbers hinder drawing strong conclusions.

2. **Data Availability:** Inquire about data availability to ensure necessary information is accessible and consider the feasibility of ensuring accessibility of data.
3. **Data ownership:** consider who owns the raw data and who is setting the research agenda. Ensure those with a stake have appropriate engagement and voice.
4. **Human Research Ethics Committee (HREC) Clearance:** Ensure organisations conducting research have HREC-level ethical clearance or have planned for it, and have allocated adequate time and resources.
5. **Balancing Requirements:** Acknowledge the burdens of evaluation on cash-strapped non-profits and find a balance between paperwork and necessity during site visits.

During: Relationships and flexibility

Timelines: Realistic and flexible

1. **Ensuring Realistic Timelines:** Verify grantees establish realistic timelines, potentially comparing to similar past projects. Be mindful of proposed scheduling and consider timing of events e.g. avoid scheduling surveys or focus groups during the Christmas holidays.
2. **Handling Delays:** Exercise patience with potential delays; slow starts or staff turnover don't signify failure. Follow up on delays, especially where they are occurring due to partnerships or reliance on government or volunteers. Be aware of potential delays caused by factors such as ethics approval processes, weather conditions, or unexpected challenges.
3. **Flexibility:** Be flexible with timelines, considering extensions due to illness, unforeseen legal/financial obstacles, or external factors such as emergency events. Encourage collaborative grantees to jointly consider analytics for real-time adjustments.
4. **Final Reports:** allow flexibility in scheduling final reports so that projects can be assessed on a full set of data once the project is concluded.

Measuring Progress: Realistic and Achievable

1. **Setting Realistic and Achievable measures:** Align measures with the project plan, making them as specific as possible and achievable within the funding timeframe. Discourage unrealistic targets.
2. **Be Clear:** Work with grantees to establish clear, achievable measures and clarify how data will be collected for the measures identified. Allow the review of measures at the start and during the project, to support flexibility in project implementation.
3. **Emphasise Flexibility:** Acknowledge the importance of flexibility; outcomes can be achieved even if outputs deviate from the initial plan. Allow more latitude in measures for partners where there is a long-standing relationship and trust has been established.
4. **Quality:** Allow grantees to set a high bar for quality, emphasising the importance of excellence over meeting original target numbers.
5. **Communication and Support:** Provide ongoing support to grantees, including workshops, simplify reporting processes and consider phone calls for closure, saving time for grantees and fostering better relationships.
6. **Data Collection Techniques:** Recommend the use of free online platforms for smaller grantees. Encourage grantees to be persistent in data collection and report on negative and unexpected findings.
7. **Continuous Feedback Loops:** Prioritise applications where approaches embed continuous feedback (i.e. from communities and service providers), ensuring flexibility

in how success and progress are assessed. These approaches enable real-time learning and the implementation of changes during project delivery.

Outcomes and Evaluation

1. **Measuring Outcomes:** Emphasise the importance of measuring long-term outcomes and support organisations new to outcomes measurement, addressing challenges like data overload. Encourage grantees to include long-term quantitative data in evaluations and share links to tools for measuring outcomes in a standardised manner.
2. **Evaluation Design and Delivery:** Discuss evaluation plans with grantees early and assist with tool development. Request mid-point evaluation results along with progress reports to address issues promptly. Encourage the follow-up of participant withdrawals to identify larger issues or unexpected program dynamics.
3. **Evaluation Quality:** Emphasise the importance of high-quality evaluations and ensure grantees have sufficient budget and internal capacity for effective evaluations.
4. **Revise Goals Alongside Project Changes:** As projects adapt and change, proactively support the revision of any agreed goals and measures to ensure success can be assessed and evaluated as the grant progresses. This highlights a challenge in aligning flexibility with accountability.
5. **Translation Pathways:** Work with grantees early to identify clear pathways for translation and uptake, bridging gaps between knowledge production and sector impact.
6. **Clearly Define Assumptions and Indicators:** Environmental and long-term outcome projects demonstrated challenges in attribution and monitoring due to external unpredictability. Ensure that assumptions are clearly articulated to better understand the context and identify why assumed progress cannot be seen.

Stay in touch

1. **Communication and catch-ups:** Have regular communication and catch-ups, including site visits, to strengthen the relationship with the grantee. Clearly communicate any 'subject-to' conditions of the grant and consider the possible implications if requesting requirements or outputs not in the original application.
2. **Shared Understanding:** Ensure alignment of goals and expectations between the grantee and the foundation from the outset. Record all correspondence to facilitate smooth transitions in case of staff turnover.
3. **Board and Grantee Meetings:** Provide opportunities for grantees to meet with Board members, emphasising the importance of personal interactions.
4. **Check-ins:** Check in with grantees around every six months to discuss progress and identify how the Foundation might be able to offer additional support, e.g. introductions to other funders. Use informal questions and focus on critical project elements.
5. **Multi-year grants:** For multi-year grantees, try and meet face-to-face annually if possible and ask precise questions during check-ins to elicit specific information from grantees.
6. **Progress Reports:** Limit the number of questions and response length. Be clear on what the information being collected is used for and focus on challenges and changes. Support sensible goal abandonment or adaptation if necessary. Follow up for necessary information, even with familiar grantees. Clarify the process and time from submitting a progress report to receiving a payment, especially for smaller grantees. Treat unsatisfactory progress reports seriously, possibly cancelling the remainder of the grant.
7. **Progress delays:** Where there are significant delays in the delivery of a project, and timelines are extended, ensure communication remains open.
8. **Be vigilant:** Be aware of funding partners potentially pulling out of projects.

Engagement with Stakeholders

1. **Early Stakeholder Involvement:** Promote early involvement of stakeholders with grantees e.g. government meetings at the start of projects. Encourage grantees to engage with their 'next funder' in the first year.
2. **Stakeholder collaboration:** If all project elements are collaborative, ensure sufficient timeframes for developing relationships and facilitating consensus across stakeholder groups. Acknowledge that government collaboration can extend the timeline of programs.
3. **Establishing Governance Groups:** Identify and establish governance groups early in the project to ensure a shared vision and approach for delivery. Understand and clarify stakeholders' expectations on project delivery, outputs and outcomes to avoid derailment later in the project.
4. **Funding or Ongoing support:** Support grantees in making connections with other funders early in their projects and support building strong contacts to assist ongoing project support.
5. **Program adoption:** If government adoption is the project goal, ensure key officials are on board from the beginning and facilitate meetings to enhance program uptake.
6. **Early Approvals:** Start early to navigate local council or government permit requirements as these may cause delays. Ensure essential regulatory approval is obtained early.
7. **Major Project Partners:** Maintain close contact with major project partners, especially when co-funding with other philanthropic organisations. Engage actively in advisory committees for large-scale collaborative projects.

After: Learning from the Past

Outcomes and Learnings

1. **Following-up:** Conduct follow-up queries on outcomes progress at different intervals, especially for programs with on-going data capture or upcoming evaluations.
2. **Analyse Successful Grants:** Examine the most successful grants over a specified time period to identify patterns of success.
3. **Identify Successful Strategies:** for example, workshops followed by training of volunteers from workshop participants.
4. **Learnings:** Establish a mechanism to work with grantees to use evaluations for learning.
5. **Long-Term Impact:** Recognise that measurable outputs, takes time. Encourage publishing research and evaluations on platforms like Issue Lab, and share with relevant funders groups.
6. **Flexibility and Adaptation:** An adaptive and flexible approach to projects has led to meaningful outcomes, even where full funding is not secured or other challenges have arisen. Continue to support adaptive approaches while ensuring clarity of expectations and awareness of the challenge of consistency in decision-making and evaluation.
7. **Balance Timeline Extensions with Accountability:** Where reporting requirement exist (formal and informal), extending these due to project delays can result in more comprehensive insights and learning, however, this needs to be balanced with accountability, including internal cycles and expectations.



After

Improve Grantmaking Decisions

1. **Capacity Consideration:** Reconsider fully funding projects with insufficient capacity initially; involve more capable organisations for strong project ideas.
2. **Innovation Adoption:** Consider the pace of innovation diffusion within community-based change.
3. **Performance Comparison:** Compile lists of high-performing and lower-performing organisations for regular updates. Evaluate the success of funding initiatives like websites through pooled evaluations.
4. **Program Effectiveness:** Individualised support programs for vulnerable individuals tend to be more effective than large-scale programs.
5. **Consult Industry Experts:** Consult industry experts to determine reasonable targets, e.g., for first-time visitor percentages in arts performances.

Learn What's Difficult

1. **Challenges in Volunteer Recruitment:** Achieving the target number of volunteers can be challenging. Have clear engagement strategies to maximise recruitment chance.
2. **Pro Bono Support:** While valuable, pro bono support can lead to delays beyond the grantee's control.
3. **Scalability Issues:** Skills and geographic locations of volunteers can make scalability challenging. Consider difficulties in scaling virtual learning in regional professional development programs.
4. **Contingency Planning:** Accurately forecasting timelines for complex builds is an ongoing challenge. At the application stage for capital and restoration projects, ensure contingency planning is in place to account for potential delays arising from heritage or regulatory processes, as these can significantly affect timelines and costs.

Embrace Failure, but Avoid What Doesn't Work

1. **Adaptation for Duplication:** If a multiyear grant encounters duplication on implementation, consider converting project funding to core operational funding.
2. **Tailor Approaches:** Tailor approaches based on the specific needs of organisations/projects rather than assuming one approach fits all.
3. **Consider Prevention Funding:** Focus on prevention rather than supporting projects responding to the problem.
4. **Risk Acceptance in Research:** Understand that leading-edge experiments may involve risk, and 100% achievement is not always desirable.
5. **Scholarships:** If a scholarship lacks applicants, work with the grantee to redesign to attract the right applicants.
6. **Professional Development vs. Project-Based Initiatives:** Professional development and capacity-building grants show higher rates of outputs and outcomes compared to project-based initiatives.
7. **Community Sector Capacity Building:** Highlight the importance of community sector capacity-building projects and consider them as a crucial part of grant-making strategy.

Sustainability:

1. **Ongoing Funding:** Collaborate with successful grantees to discuss strategies for ongoing sustainability from the application stage. Government connections don't guarantee sustainability. Assist grantees with demonstration projects needing further refinement before widespread adoption.

2. **Leverage Sources:** Local councils and clubs can be strong leverage sources for smaller grants. Encourage ARC, NHMRC, or equivalent for science and health research grants.
3. **Social Enterprise:** Social enterprises need a strong foundation for geographical scaling. Track successful social enterprise grants to determine funding duration impact.
4. **Other Considerations:**
 - Be cautious of expansion before proving outcomes; include outcomes measurement in ongoing funding budgets.
 - Learn from ineffective programs, strive for excellence, and avoid 'selling' unsuccessful programs.
 - Consider qualified, well-structured organisations for 'high-risk, high-needs' projects.
5. **Financial Diversification Strategies:** Capacity building projects were sometimes constrained by the availability of external funding, particularly a reliance on one funding source. Consider financial sustainability and diversification strategies an organisation has in place to continue post-delivery of the grant.

Knowledge and Dissemination:

1. **Knowledge Dissemination:** Grantee's plans should ensure knowledge dissemination beyond project closure, support through social media and stakeholder contacts.
2. **Measuring Dissemination:** Design ways to measure long-term outcomes and uptake of disseminated knowledge.
3. **Networking and Collaboration:** Question the effectiveness of international travel for networking; consider Australian-based networking for local social enterprises. Enhance grantee dissemination strategies through workshops and roundtables to prevent overlapping services.

Meta: The Foundation and the Sector

1. **Standardisation and Collaboration:** Streamline final/progress reports to align with sector standards. Collaborate with other funders to establish common success measures and encourage transparency by sharing failures.
2. **Advocacy and Networking:** Facilitate meetings with state government officials and other funders for future grantees to enhance program uptake. Disseminate good ideas to other foundations before grant completion for sustainability and continuous service provision.