



Good Giving Toolkit

A practical guide for
effective philanthropy



Acknowledgement of Country

Australian Communities Foundation acknowledges the Traditional Owners and Custodians of the unceded lands on which we live, work, and give – the Aboriginal and Torres Strait Islander peoples who have cared for Country and community from time immemorial.

We pay our respect to Elders past and present, and recognise the enduring strength, wisdom and generosity of First Nations peoples.

Our giving community has a long history of supporting First Nations communities and self-determination, and we are committed to the pursuit of truth, treaty and First Nations justice. We recognise that sovereignty has never been ceded.

About us

Australian Communities Foundation is a non-profit organisation that supports and enables smart, rewarding and effective giving.

With over 27 years of experience in catalysing positive social and environmental change, we make impactful philanthropy easy and accessible. As Australia's only national community foundation, we are a community of givers made up of thousands of people from all over the country. What unites us is our desire to make a difference.

Our purpose is to activate a nation of givers to create a fairer and more sustainable Australia.

Contents

Welcome	4
Quick reference: All tools at a glance	6
Quick start guide: Using the toolkit in different scenarios	7
1 Some self-reflection before you give	8
1.1 Family history and money messages	8
1.2 How much?	10
1.3 Values	13
1.4 Giving motivations	13
1.5 Giving principles	14
1.6 Risk	15
2 Figuring out where to give	16
2.1 Finding your focus	16
2.2 Scanning the landscape	18
2.3 Articulating your purpose	19
2.4 Developing your Theory of Philanthropy	20
2.5 Applying lenses to your giving	21
3 Deciding how you'll give	22
3.1 Making a plan	22
3.2 Identifying funding opportunities	23
3.3 Evaluating funding opportunities	24
3.4 Making grants	25
3.5 A note on compliance	26
4 Putting it all together	28
4.1 A quick reference guide to the decisions you've made	28
5 Learning and adapting	29
5.1 Reviewing your own giving	29
5.2 Ongoing learning opportunities	29
5.3 Measuring your impact	29
6 Involving others	31
6.1 Engaging your family	31
Conclusion	33
Acknowledgements	34

Welcome

At Australian Communities Foundation, we believe that giving isn't just about generosity – it's about creating change in the world. Whether you're just starting out or deepening your giving journey, the most powerful impact comes when we give with intention. That's where this Toolkit comes in.

Welcome to the ACF Good Giving Toolkit – your go-to guide for effective and impactful giving. Developed with insights from Australian Communities Foundation's decades of grantmaking experience, this Toolkit draws on the knowledge of our community of givers, academic and community experts, and our philanthropic peers. It offers practical advice on what to consider on your giving journey, and a suite of tools to help bring your giving goals to life.

Who is this Toolkit for?

This Toolkit is primarily designed for families and individuals with a Named Fund at Australian Communities Foundation (ACF) who want to become more informed and effective in their giving. It's also a valuable resource for anyone in Australia who has the opportunity to give – whatever that looks like, and whoever you give with.

Why use this Toolkit?

If you find the world of philanthropy confusing or overwhelming at times, this Toolkit is here to help. It's designed to guide you through the process of developing your giving framework.

While we can't dictate what occurs 'on the ground' once a grant is made (nor should we try to), we *can* control how we show up, make decisions, learn and grow into our giving. Deepening your understanding of philanthropy also, importantly, makes the act of giving a grant more rewarding and meaningful.



How to use this Toolkit

Use this Toolkit in whatever way works for you. At ACF, we understand that everyone is at a different stage in their giving journey. We also know some people give as individuals, and some give together as families or groups.

You can work through the Toolkit on your own or use specific tools with others involved in your giving. These resources can help you share perspectives, find alignment and make more informed decisions together. For guidance on using the Toolkit as a family, see *Involving Others*.

While the Toolkit is designed to be followed from start to finish, you can also explore individual sections if there's a particular topic you would like to dive into or revisit. As you move through, you'll also notice some additional features:

Fairer Funding Insights

At ACF, we are committed to applying a social justice lens to our philanthropic efforts. This means recognising that systemic barriers, such as discrimination and unequal access to resources, disproportionately impact certain communities. Throughout the Toolkit, we offer Fairer Funding Insights to show what applying this lens to different aspects of your giving can look like.

Savvy Giving

This Toolkit also draws on the wisdom of respected philanthropy expert Genevieve Timmons, whose second edition of *Savvy Giving: A Roadmap for Contemporary Philanthropy in Australia*, published by ACF, is a valuable companion piece. You can explore it further and order your copy online at savvy-giving.com

We hope this Toolkit helps you give in ways that feel strategic, informed, and meaningful. Together, we can build a fairer, more sustainable future for all.



Andrew Binns

Chief Executive Officer
Australian Communities Foundation

Quick reference: All tools at a glance

Use this page as a reference guide for the tools in your Good Giving Toolkit.

TOOL	WHAT IT'S FOR
Family History	Explore your family's legacy and map out your family history.
Money Messages	Reflect on the messages you received about money and how they influence you today.
Perpetuity/Spend-Down Horizon	Consider whether your Fund will give indefinitely or spend down within a set timeframe – and what this means for your strategy.
Fund Projection	Understand how your Fund might grow over time and what that means for your giving potential.
How much do I want to give?	Clarify how much you'd like to give over time – and how that aligns with your values, goals and resources.
Values	Identify the values that matter most to you and how they can guide your giving.
Giving Motivations	Explore the deeper reasons that drive your giving.
Giving Principles	Define the principles that will shape how you show up in your giving.
Giving Risk Appetite	Consider your comfort level with philanthropic risk.
Giving Focus	Narrow in on the causes or communities you want to support.
Giving Landscape Scan	Survey the existing efforts in your area of interest to identify where your giving can complement or add value.
Giving Purpose Statement	Craft a clear and concise statement to guide your giving over time.
Theory of Philanthropy	Map how you will develop your giving to better contribute to meaningful change.
Giving Planner	Plan your annual giving activities, milestones, decision points and financial commitments.
Funding Opportunity Checklist	Assess whether a grant or funding request aligns with your strategy and priorities.
Giving Canvas	Create a one-page summary of your approach to giving.
Reflection and Adaptation	Take stock of how your giving is going and adapt your approach based on what you're learning.

Looking to complete the Toolkit as a group or family? See **6 Involving others**



Download all tools in the one document here:
communityfoundation.org.au/good-giving-toolkit



Each tool is introduced throughout the workbook with links included to download each tool as a standalone.

Quick start guide: Using the toolkit in different scenarios

This guide shows how to use the Toolkit based on where you are in your giving journey. While we recommend completing every tool in the kit, here are the most essential tools for a range of scenarios and the recommended order to use them.

Starting your giving journey

You've recently opened a Fund or are beginning your giving journey.

1. **How much do I want to give?** (and **Perpetuity/Spend-Down** and **Fund Projection** if you've established a Fund) – Plan your giving allocations.
2. **Values** – Identify what matters most to you.
3. **Giving Motivations** – Explore what drives you to give.
4. **Giving Focus** – Decide where to focus your giving.
5. **Giving Purpose Statement** – Articulate your purpose.
6. **Giving Planner** – Plan your first year of giving.

Reflecting on what brought you to giving

You want to reflect on your personal journey towards giving.

1. **Family History** – Explore your family's history.
2. **Money Messages** – Reflect on personal influences about money.
3. **Values** – Identify what matters most to you.
4. **Giving Motivations** – Explore what drives you to give.
5. **Giving Principles** – Clarify the values and ethics behind your giving.

Reviewing your grantmaking

You want to reflect on your past giving and plan the year ahead.

1. **Reflection and Adaptation** – Review how things are going.
2. **Giving Purpose Statement** – Revisit your purpose.
3. **Giving Risk Appetite** – Consider your comfort with risk and innovation.
4. **Funding Opportunity Checklist** – Assess previous and future granting decisions.
5. **Giving Landscape Scan** – Refresh your view of the field.
6. **Theory of Philanthropy** – Map out how you plan to develop in your giving.
7. **Giving Planner** – Outline your giving for the year ahead.

1 Some self-reflection before you give

Before diving into the mechanics of grantmaking, it's valuable to take a step back and reflect on your approach to giving. What values and motivations drive you? How much do you want to give, and over what timeframe? What is your appetite for risk in your giving?

This section of the Toolkit is designed to help you explore these questions through a series of guided exercises. From reflecting on your family history to defining your personal giving principles, these tools will help you build a strong foundation for effective giving.

No matter where you are on your giving journey, these reflections will provide clarity and confidence for your next steps.

1.1 Family history and money messages

Stories shape the way we see the world, especially the ones we tell ourselves about money. They are often so ingrained in our psyche that we rarely stop to reflect on them. Taking the time to reflect can help you understand the origins of your wealth, family and individual attitudes toward money, and how these can be celebrated, challenged or relinquished.

Start your self-reflection using two tools designed to help you think through where your resources come from and your relationship to them:



- The **Family History Tool** guides you through a mapping process of the historical movements of people and resources and the external forces that influence who you are today. It also highlights what you might not yet know about this history and gives you the opportunity to fill in some knowledge gaps.



- The **Money Messages Tool** helps you explore the common beliefs people absorb about money while growing up. It encourages you to reflect on which messages about money shaped your thinking, which ones no longer serve you, and which you want to hold onto, live by or pass on.



HELPFUL HINT

Filling the gaps in your family story

If you discover there are things you don't know about your family history, consider reaching out to relatives or others who might be able to help you fill in the gaps.



FAIRER FUNDING INSIGHT

Understanding the broader context: How history may have shaped your story

Throughout history, the distribution of wealth has been shaped by factors like race, class and gender, creating advantages for some while limiting opportunities for others. No one's money story exists outside these influences. As you use these tools, consider how these factors may have shaped your story. Do they influence how you give or what causes you support? Keeping these factors in mind can help guide your decisions as you move through the Toolkit.



HOW WE CAN HELP

If you would like support to work through these tools, **get in touch** with the ACF Philanthropy Team.

1.2 How much?

Getting clear on how much and when you want to give is an important foundation for strategic giving. Whether you're working with a lump sum or planning to contribute over time (or both!), this section of the Toolkit includes exercises to explore key financial considerations – from deciding between a perpetuity or spend-down model to determining how much you want to contribute over time.

When deciding how much you plan to give, there are three important factors to consider:

- **Your giving capacity:** Thinking about your financial position, both now and in the future, helps you determine what level of giving is sustainable and aligned with your broader financial goals.
- **The urgency of the issues you want to support:** Some causes, such as climate action or crisis relief, require immediate funding, while others may benefit from long-term investment, such as medical research.
- **Your giving timeframes:** The period over which you plan to give – whether a few years, decades, or indefinitely – will shape how much you give at any point in time. If you intend to spend down your Fund within a set timeframe, you may choose to give larger amounts in the short term to maximise impact. Alternatively, if you want your Fund to last in perpetuity, you'll need to balance annual giving with investment growth to ensure sustainability. Your timeframe also influences how you respond to urgent needs versus long-term challenges, helping you decide whether to prioritise immediate grants or sustained funding over time.

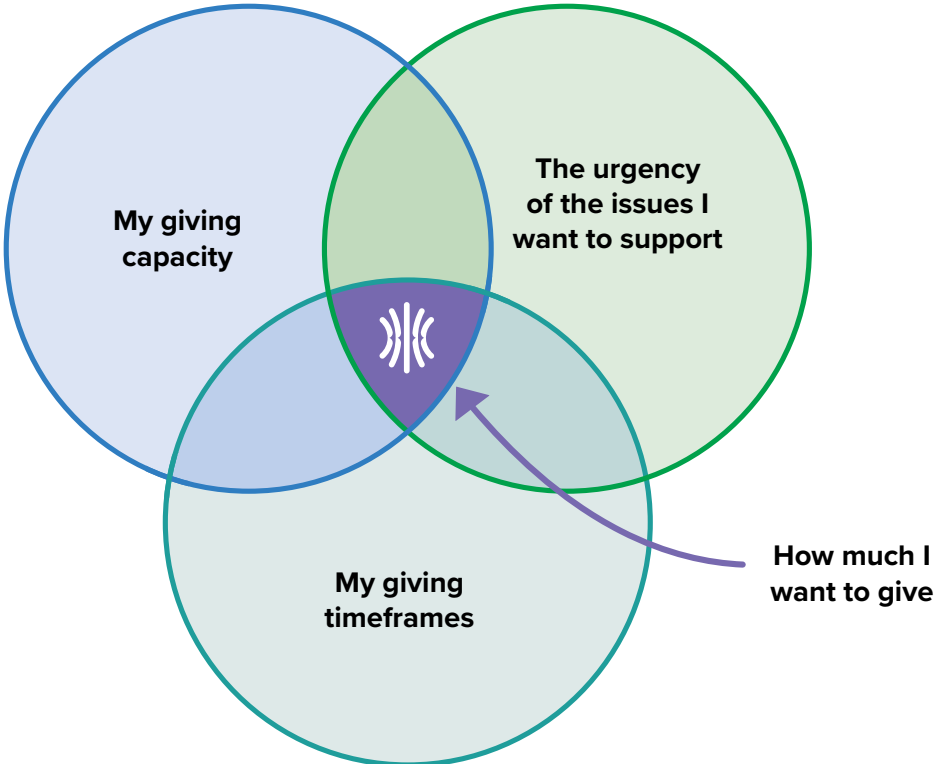


Fig. 1: The Giving Sweet Spot



Give

Structure your giving through a Fund or Foundation



Grow

Your donations are invested and can grow



Grant

Your funds become an ongoing source of support for communities

Fig. 2: The Perpetuity Model of Structured Giving

Perpetuity vs spend-down

If you've started your Named Fund with a lump sum, you have the advantage of knowing exactly what you're working with, making it easier to plan ahead and be strategic about your giving. That's one of the many benefits of a Named Fund.

To help you map out your approach, we've included two key tools that work together:

- The **Perpetuity/Spend-Down Horizon Tool** prompts you to reflect on your long-term giving plans and decide whether you want your Fund to last indefinitely or be spent down over a set period.
- The **Fund Projection Tool** helps you model different scenarios by entering key figures like your starting balance, timeframe, interest earned, expenses and grants.



HELPFUL HINT

Questions to guide your giving timeframes

When deciding between giving in perpetuity or spend-down, it's useful to consider:

Your funding focus: Is the issue you're supporting particularly time sensitive (e.g. climate action)? If the answer is yes, you may consider a shorter spend-down horizon.

Future engagement: Are you looking to engage future generations in your philanthropy? If the answer is yes, a longer spend-down horizon may be appropriate. If the answer is no, you might consider whether giving in perpetuity makes sense for you and the communities you're looking to support.

Contributing over time



If you're looking to make contributions to your Named Fund over time, the '**How Much Do I Want to Give?** Tool can help. This tool is designed to help you assess your personal or family financial situation and determine your giving capacity. Understanding the current and future scale of your giving and setting intentions around this can help with planning and strategy.



Consider this in conjunction with whether you are seeking to grow your Fund over time or grant out most of your contributions sooner. The **Fund Projection Tool** can help bring clarity relating to this last point too.



HELPFUL HINT

Finding your giving sweet spot

The sweet spot for 'how much?' often sits somewhere between what feels comfortable and easy, and what feels like a stretch.

If you're struggling to answer some of the questions in these tools, you may want to seek out the services of a professional advisor for a clearer picture of your overall financial situation. Australian Communities Foundation can connect you to a trusted professional advisor. Contact the ACF Team if you would like to discuss this further.



FAIRER FUNDING INSIGHT

Managing your giving timeframes: Balancing longevity and impact

A common critique of philanthropy is that too many resources sit in philanthropic endowments instead of reaching communities in need. Traditionally, perpetual giving has been a core principle of structured philanthropy, ensuring long-term funding and intergenerational engagement. However, this approach also means that communities don't immediately benefit from the full value of these funds. As you consider your giving timeframe, ensure your reasons are clear. Ethical and impact investing is another way to put your Fund to work before grants are made, ensuring it is generating positive impact at every stage. Learn more about ACF's approach: **100% responsible investing**

1.3 Values

Our personal values are almost always a driving force for our approach to philanthropy. They shape what matters most to us, influence our decision-making, and provide a sense of purpose in our giving. And just like our experiences and perspectives, our values can evolve over time.

To reflect on what drives your giving, use the [Values Tool](#).

Your values are a great foundation to revisit when you're faced with a difficult giving decision or need to realign your priorities in future. As values can shift over time, revisiting this tool periodically can be a useful exercise.



HELPFUL HINT

Starting family giving with shared values

If you're giving as a family, starting with conversations about values can be a great way to find common ground. You can work through this exercise together as a family or have each family member complete it individually before discussing the results.

1.4 Giving motivations

It is important to understand your motivations for giving and how they might influence your approach. While people give for many reasons, some of the most common motivations include a desire to have a positive impact on specific issues, leave a lasting legacy, instil values across generations, or honour a loved one.

Use the [Giving Motivations Tool](#) to help you think through why you want to give in the first place. This tool presents a list of common reasons why people give and invites you to reflect, adjust, or add your own, and rank these from most to least important, helping you gain a clearer picture of what drives your giving.



HELPFUL HINT

Taking the time to explore what drives your giving

Take time to reflect on what truly drives your desire to give. While 'wanting to make a difference' is often part of the story, your motivations are likely deeper and more personal – shaped by your experiences, values, family history, or hopes for the future. Understanding these underlying motivations can help you give with greater clarity, purpose, and connection.

1.5 Giving principles

Your giving principles guide how you show up in your philanthropy. They act as your moral compass, shaping your decisions, influencing your actions, and ensuring your giving aligns with what you believe is right. Giving principles take the form of actionable statements that reflect your approach to giving.



Use the **Giving Principles Tool** to translate your top values (from the **Values Tool**) into clear, actionable giving principles.



HELPFUL HINT

Examples to help craft your giving principles

It can be hard to create principle statements from scratch. Here are some examples to draw inspiration from:

- “We don’t reinvent the wheel – we build on existing partnerships.”
- “We believe in collective impact and the power of working together, so we don’t do anything in a silo.”
- “We show up with humility in all our interactions with potential grant recipients.”
- “We begin with listening, not assumptions, recognising that those we seek to support are the experts in their own lives and communities.”
- “We place our trust in those closest to the work, believing that solutions are most powerful when they are community-led and grounded in lived experience.”
- “We take a long-term view, building enduring relationships with our grant partners and recognising that systemic change doesn’t happen overnight.
- “We invest in the strength and sustainability of organisations, not just in the outcomes of individual projects.”
- “We hold ourselves to the same standards of transparency and accountability that we might ask of our grant partners.”

1.6 Risk

Another key influence on how people give is their risk appetite. Having conversations about risk early on can help you make decisions more confidently and avoid pitfalls down the track.

Use the **Giving Risk Appetite Tool** to explore your comfort level with risk in philanthropy. The risks associated with giving can be complex. This tool helps you consider a variety of risks that may apply to your giving and how comfortable you are navigating them. While it's not a replacement for a detailed risk framework, it provides a valuable starting point for understanding your approach.



HELPFUL HINT

Understanding the power of risk-taking in philanthropy

Philanthropy has the flexibility to take risks that government and business often can't. That's why it's sometimes called 'risk capital'. Unlike government, which is accountable to taxpayers, and business, which answers to shareholders, philanthropy has the freedom to test new ideas and back new initiatives that might not succeed – but could create meaningful change if they do. Even when things don't go as planned, the lessons learned can be just as valuable as the successes. While diligence and rigour are important, they shouldn't hold you back from being bold in your giving. Thoughtful risk-taking can be one of the most effective ways to drive impact. Your philanthropic risk appetite might be the same or quite different to the risk you are prepared to take in other aspects of your life.



If you're interested in diving deeper into the topic of risk, see **Excerpt 1 from Savvy Giving.**

2 Figuring out where to give

2.1 Finding your focus

Many people begin their giving journey with a clear idea of the issues they want to support or the communities they want to benefit, but it can be hard to know where to go from there. Taking the time to think through the different aspects of your potential focus is key.

One important consideration is the kind of change you want to support. Social change approaches can be organised on a continuum from downstream to upstream based on their focus:

- **Downstream approaches** address immediate needs at the individual level
- **Upstream approaches** target systemic or root causes at a broader, societal level

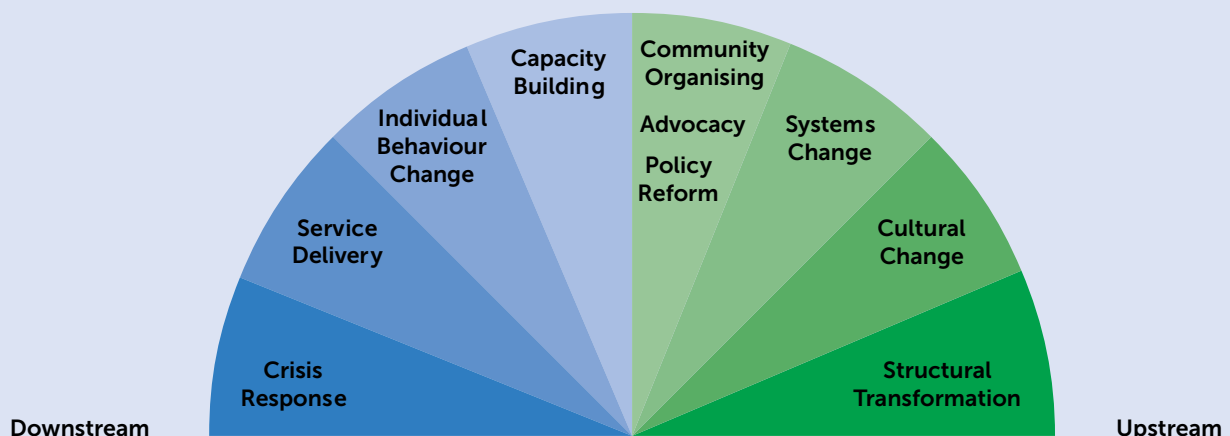


Fig. 3: The Social Change Continuum: Downstream to Upstream

These approaches can be complementary and often overlap, but they differ in scope, scale, and impact. Downstream efforts tend to have immediate, localised effects, while upstream approaches aim at long-term, systemic change. The right approach for you will depend on the issues or communities you want to support. You don't have to choose just one – many funders incorporate elements of both to create a well-rounded giving strategy.

Clearly defining the kinds of change you want to fund creates a framework for your decision-making and reduces overwhelm when choosing which organisations and initiatives to support.



Use the **Giving Focus Tool** to define what you want to support with your giving. This tool provides you with lists of the issues, communities, geographies and approaches you may wish to support and provides you with a template to map out your focus.



HELPFUL HINT

Start small, think big: Defining your focus

Focusing your funding and not spreading your resources too thin tends to be more effective. This is because we all have limited capacity, and change takes time. Narrowing your focus allows you to develop deeper expertise, build stronger relationships, and create more meaningful impact. This is just one step in shaping your giving strategy and identifying opportunities to support. At ACF, we often hear from people who feel uncertain about defining a focus, and that's completely normal. This tool is designed as a brainstorming exercise – it doesn't need to be perfect! Subsequent tools will help you test your assumptions and consult more widely to validate or adapt your thinking.



FAIRER FUNDING INSIGHT

Giving for lasting change: Providing untied funding for upstream and community-led approaches


Social justice giving tends to focus on upstream approaches that seek to address the root causes of issues. It also prioritises funding community-led solutions, ensuring that those most affected by an issue are leading the response. Giving with a social justice lens also usually means providing untied support – that is, funds that are not restricted to a specific program but given to support an organisation's overall mission. This approach acknowledges that an organisation is often best placed to determine how its funds are used. See also: **Pay What It Takes** – an initiative focused on ensuring organisations receive funding that covers the full cost of their operations – led by the Centre for Social Impact, Social Ventures Australia, and Philanthropy Australia.



If you're interested in diving deeper into the topic of funding advocacy to address root causes, see **Excerpt 2 from Savvy Giving**.

2.2 Scanning the landscape

A landscape scan can be a useful way to get a good overview of a sector or issue. It helps you map out key players, identify gaps, and understand the broader ecosystem in which you're operating. Think of it as a working document – a tool you can build on over time as you deepen your knowledge.

 Use the [Giving Landscape Scan Tool](#) to start mapping out a sector or issue you want to support. This tool provides two templates – you can use them both or choose the one you find most useful:

- The **Sector Mapping Template** helps you outline a particular sector, its sub-sectors, and the key players working within them, as well as relevant stakeholders outside the sector who still have an impact. This template is useful for exploring *who* is working in a particular space at the organisational level.
- The **Issue Mapping Template** helps you break down a particular issue into its sub-issues and the different approaches being used to address them. This template is useful for exploring the nuances of an issue and how they might be addressed.



HELPFUL HINT

Building your understanding over time: Use your landscape map as a work-in-progress

You can stay high-level or get very detailed with your landscape scan. Start by filling in what you already know, then refine it over time as you conduct research or speak with others. The templates are designed to be added to as you learn more about the landscape, so don't worry if there are gaps. You also don't need to record every organisation working in a particular space – focus on capturing the types of organisations and some examples.

Once you've completed the first draft of your Landscape Scan, it is a good idea to revisit your initial responses in the [Giving Focus Tool](#) based on what you have discovered. Has your understanding of the issue changed? Have you uncovered new needs, key players, or approaches that might shift your priorities?

Keep updating your map as you learn! Candid has a great [infographic](#) about what to consider when conducting a landscape scan.



FAIRER FUNDING INSIGHT

Broadening your perspective: Seeking out underrepresented voices

The most visible players in a landscape are often those with the most resources. Take the time to seek out those not already on your radar. One way to do this is by listening to people with lived experience or those working on the front lines of an issue. If possible, look for opportunities to learn from them without directly asking for their time, such as by attending events they're speaking at, reading their published work, or engaging with their existing resources.



If you're interested in diving deeper into the philanthropy ecosystem, see [Excerpt 3 from Savvy Giving](#).

2.3 Articulating your purpose

Taking the time to create a clear and meaningful purpose statement for your giving can provide useful direction and clarity. A good purpose statement brings together your values, motivations and focus all in one place. It's also a way for others to understand what you're about quickly and easily, and something that other members of your family or group can contribute to and rally behind.

Craft yours with the **Giving Purpose Statement Tool**. This tool guides you through key prompts to help you articulate your purpose in one clear and concise statement that includes your long-term vision for the future, how you plan to contribute to achieving it, and what you hope to achieve in the shorter term as you work towards your vision.



HELPFUL HINT

There's no one way to articulate your giving purpose

There are all kinds of 'statements' you can craft for your giving: vision, mission, purpose, impact, and so on. The distinctions between these, and working out what's actually going to be meaningful to you, can be hard to navigate. There's no right or wrong way to bring your overall statement together, as long as it's clear, concise and true to you.

Tip: While crafting your purpose statement, refer back to your responses to the **Values Tool** and **Giving Principles Tool**.



FAIRER FUNDING INSIGHT

Words matter: Crafting a purpose statement with care

When developing your purpose statement, aim for language that is collaborative rather than paternalistic, and strengths-based rather than focused on deficit. For example:

- Use 'working with' rather than 'providing for'
- Say communities 'deserve' or 'are worthy of' rather than 'need'

Also, make sure your statement is up to date and a true representation of what you're trying to achieve. This promotes transparency and accountability in your giving.

2.4 Developing your Theory of Philanthropy

A Theory of Change is a widely used framework for mapping how desired change is expected to happen. Building on this, a Theory of Philanthropy helps you articulate how your giving will contribute to meaningful change. It outlines the pathway from inputs (resources and activities) to immediate outputs, longer-term outcomes, and the ultimate impact.

A theory of philanthropy is a valuable tool for:

- Testing your assumptions about what works and why
- Bringing more structure and clarity to your impact goals
- Adding rigour to how you measure success.

Perhaps most importantly, developing a theory of philanthropy helps you to think deeply about what you can give when it comes to ‘the six Ts’:

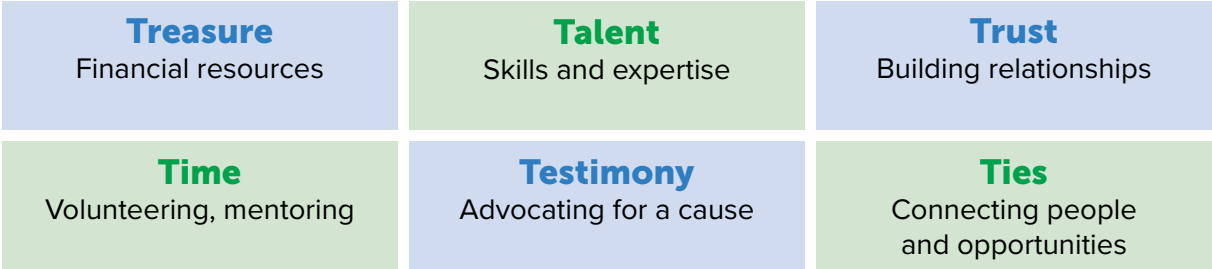


Fig. 4: The Six Ts

Your theory of philanthropy should reflect all the ways you contribute – whether it’s sitting on a board, introducing grant partners to other funders, or offering hands-on support. Make sure you include these activities, not just your ‘treasure’, as well as the outputs, outcomes and impacts you hope to contribute to by undertaking them.

While many theories of change share common elements, there is no strict template to follow. The most effective ones are often those tailored to the specific needs of the work.



Use the **Theory of Philanthropy Tool** to start mapping out your framework.



HELPFUL HINT

Staying clear on your own role vs. the work of the groups you support

This tool is designed to help you develop a theory of change for your philanthropy, not for the activities of the organisations you support – they likely have their own frameworks. Focus on your role – the activities you engage in, the immediate outputs and the longer-term outcomes. The change created by the organisations you support comes in at the impact stage. Being clear about your role will help you show up effectively in your partnerships.

While developing your theory of philanthropy, you may wish to go back and review your responses to the earlier tools to ensure you’re staying true to your capacity, values, risk appetite, etc. Make any tweaks to ensure everything aligns. If you want to do more reading before using this tool, Candid has a **great guide to creating a grantmaking theory of change.**

2.5 Applying lenses to your giving

Applying a lens to your philanthropy helps you better understand the broader systems that shape the issues you care about. This Toolkit uses a social justice lens to inform the ‘Fairer Funding Insights’ shared throughout, and there are a range of more specific lenses you can apply when giving.

Some of the most common include gender, racial equity and climate. Using these lenses can lead to more thoughtful, inclusive and effective giving. They can support you to identify where the greatest opportunities for impact lie, and ensure your giving addresses systems, not just symptoms.

A **gender lens** helps funders understand the unique barriers women and girls face and how addressing gender inequality can benefit whole communities. Australians Investing in Women (AIW) offers two key resources: the [Guide to Gender-wise Philanthropy](#), which provides a great introduction, and the [Gender-wise Toolkit for Grantmakers](#) – a downloadable how-to guide.

A **climate lens** recognises that climate change intersects with every cause area. The [Climate Lens Tool](#) from the Australian Environmental Grantmakers Network supports all people who give to consider climate impacts across their giving.

A **racial equity lens** asks funders to consider how race and power dynamics shape outcomes and opportunities. The [Grantmaking with a Racial Justice Lens](#) guide by the US-based Philanthropic Initiative for Racial Equity provides grantmakers with reflections, frameworks and tools for advancing racial justice in any philanthropic setting.

Decolonising philanthropy or wealth is a related but distinct approach that brings a critical lens to colonial dynamics in philanthropy and finance, as explored in Edgar Villanueva’s influential book [Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance](#). This approach prioritises more equitable and transparent pathways for First Nations communities to engage with philanthropy and supports greater racial equity more broadly. Organisations like [Woor-Dungin](#) in Victoria help drive this shift by connecting Aboriginal community-led organisations with philanthropy and supporting donors to take practical steps toward more culturally responsive giving.




HOW WE CAN HELP

Want to learn more about how to apply lenses to your giving? [Contact the ACF Team](#) for additional resources and to discuss tailored support to take your giving to the next level.

3 Deciding how you'll give

3.1 Making a plan

Now you've nailed the foundational thinking behind your giving, it's time to make a plan of action!

-  Use the **Giving Planner Tool** to start mapping out your next steps. This tool provides an annual planning template designed to help you organise key activities, milestones, decision points and financial commitments for the year



HELPFUL HINT

Building flexibility into your planning to stay responsive

Your giving plan doesn't need to be perfect the first time you map it out. Do your best to get a plan in place, ensure it is in line with your capacity to deliver, and be open to adjusting it as you learn what works best. Keeping some flexibility in your plan allows you to be more responsive to opportunities and needs as they arise. There are no set rules about when things need to happen – while that can feel overwhelming, setting intentions is still a valuable step in keeping your giving focused and effective.



FAIRER FUNDING INSIGHT

Managing expectations of your giving: Transparency and clarity is key

Being clear and realistic about your timeframes and decision points – even if they remain flexible – helps manage expectations with potential funding partners. Every interaction with a prospective grantee can create an expectation, so it's important to approach these relationships with transparency and respect. And it starts with being clear with yourself! A well-thought-out plan helps you stay accountable to your goals while remaining adaptable to changing circumstances.

3.2 Identifying funding opportunities

There are different ways to identify funding opportunities, each with its own benefits and considerations. Key approaches are outlined below, along with factors to help you decide which might work best for you.

APPROACH	DESCRIPTION	CONSIDERATIONS
PROACTIVE	<p>Identifying opportunities based on your own research and scoping</p> <p>Examples: Desktop research into organisations working in a specific space, attendance at events and seminars held by organisations, etc.</p>	<ul style="list-style-type: none"> • Do you have enough background knowledge to know where to start? • Do you have the time to conduct research and outreach? • Do you want to connect with smaller or less visible groups? If so, how will you find them? • Are you comfortable approaching organisations you've identified?
OPEN	<p>Receiving applications for funding via an open grant round</p> <p>This involves developing a process, guidelines and application forms, and promoting to relevant audiences.</p> <p>Example: Australian Communities Foundation hosts many open grant rounds on behalf of our giving community. Visit communityfoundation.org.au/grant-rounds for current and previous grant rounds.</p>	<ul style="list-style-type: none"> • Does the amount you plan to distribute justify the higher level of time and resourcing typically required to set up an open grant round (for both you and your applicants)? • Do you want to learn from incoming applications to inform your future giving? (Open rounds can be great for landscape scanning)
CONSULTATIVE	<p>Identifying opportunities based on the advice of intermediaries or partners</p> <p>Examples: The ACF Philanthropy Team, Australian Environmental Grantmakers Network, Australian International Development Network, Australians Investing in Women.</p>	<ul style="list-style-type: none"> • Do you wish to outsource a level of due diligence to others? • Are you willing to pay for access or membership to be able to seek advice?
COLLECTIVE	<p>Pooling funds and decision-making through giving circles or at collective giving events</p> <p>Examples: The ACF Impact Fund, Groundswell, Five Bucks, Impact100, Mannifera, The Funding Network, WELA Giving Circle.</p>	<ul style="list-style-type: none"> • Does connecting to others who share your interests appeal to you? • Are you comfortable giving away a certain amount of decision-making power to a collective?

Fig. 5: Approaches to identifying funding opportunities

The approach you choose also shapes the type of partnership you build with those you support. Whether you take a hands-on, research-driven approach or collaborate with others through an established network, the key is finding a model that aligns with your capacity, goals, and values.



If you're interested in diving deeper into the topic of effective relationships with grant partners, see [**Excerpt 4 from Savvy Giving**](#).

3.3 Evaluating funding opportunities

When considering a funding opportunity – whether it's a formal proposal you've received or an organisation you've come across in your own research – taking a structured approach can help you assess its potential impact and alignment with your values and goals. By asking key questions and looking at the broader context, you can make informed decisions about which opportunities to support.

At Australian Communities Foundation, we break the areas for consideration into four key questions:

<p>The Organisation Is it the right organisation/group for the job?</p>	<p>The Proposal (where one is provided) Is it a strong proposal?</p>
<p>The Approach Is it the right approach to the issue?</p>	<p>The Context Are they aware of the landscape they are operating in? Are you?</p>

Fig. 6: What to consider when evaluating a funding opportunity



Use the **Funding Opportunity Checklist Tool** to help guide your evaluation of a specific opportunity. This tool takes you through must-haves and nice-to-haves for each of the above areas of consideration.

3.4 Making grants

If you have a Named Fund or Foundation supported by ACF, we handle this part of the process for you. Here's an overview of the steps usually involved:

- 1 Fund Advisor submits a grant request** via ACF online portal.
- 2 ACF conducts compliance checks and confirms eligibility**, i.e., charitable purpose, registration with The Australian Charities and Not-for-profits Commission (**ACNC**), and DGR1 status where required.
- 3 ACF contacts the organisation team** to let them know they have been nominated to receive a grant. For grants over \$10,000, ACF provides a grant agreement for review and signature.
- 4 Grant is sent for approval by CEO/Committee.** A grant is only ready for approval once the recipient has provided payment details.
- 5 Grant is paid.** Grant payments are made every fortnight, one week after a grant approval.
- 6 ACF notifies Fund Advisor when grant has been made.**
- 7 For grants over \$10,000, ACF requests a grant acquittal report from organisation 12 months later** (unless otherwise instructed by the Fund Advisor), and report is shared with the Fund Advisor. We do not request specific reports for general purpose grants.

Fig. 7: Making a grant at Australian Communities Foundation



HOW WE CAN HELP

If you would like to discuss more about how ACF makes grants on your behalf, **get in touch** with the ACF Philanthropy Team.



If you're interested in diving deeper into how a grant is generally made, see **Excerpt 5 from Savvy Giving**.



FAIRER FUNDING INSIGHT

Streamlining granting processes: Easing the administrative burden so grantees can get on with their work

At ACF, we have simplified our granting processes and default grant agreements to include only the essential compliance requirements – nothing more. This ensures a clear, efficient process that minimises administrative burden and allows grant partners to focus on their work.

3.5 A note on compliance

At Australian Communities Foundation, we take care of all compliance aspects of grantmaking for our giving community, so we won't go into a lot of detail here. If you have a Named Fund with us, it's our responsibility to ensure your giving is compliant with regulations. If something you'd like to do is not compliant, we'll let you know and work with you to see if there is an alternate approach to achieve your giving goals.

It can still be useful to understand what your primary grantmaking compliance considerations are if you have a Named Fund at ACF. These come down to the eligibility of the organisations you support:

- If your Fund sits within the **ACF Main Fund** (tax-deductible): Grants must go to Australian charities with deductible gift recipient status item 1 (DGR1).
- If your Fund sits within the **ACF Extension Fund** (not tax-deductible): Grants can go to individuals or any Australian not-for-profit, as long as the funds support a charitable purpose.

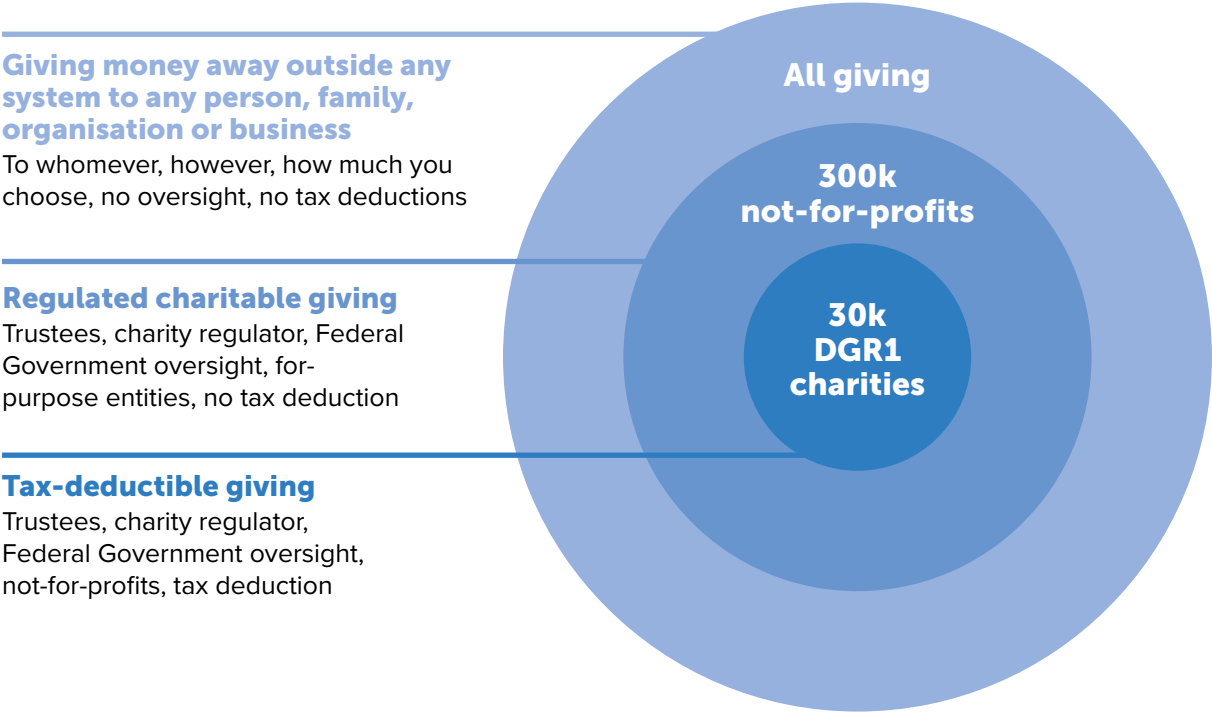


Fig. 8: Giving in Australia

ACF will always check compliance before making a grant on your behalf, but if you wish to confirm a potential grant partner's eligibility yourself, you can do so by searching the organisation's ABN on the Australian Business Register and checking charitable, not for profit and/or tax-deductible status.

If you believe you are able to fund individuals based on the table above and wish to do so, you can check if a certain activity is likely to be charitable by looking at the Charities Act 2013.

Finally, ACF can help facilitate funding through an auspice arrangement, where an eligible organisation accepts and manages a grant on behalf of one that doesn't have charitable or DGR status. This allows you to support important work aligned with your giving goals, even if the group delivering it isn't directly eligible to receive funding.




HOW WE CAN HELP

If you're unsure whether a grant you wish to make is eligible, or want to understand more about compliance considerations for your giving, **get in touch** with the ACF Philanthropy Team.

4 Putting it all together

4.1 A quick reference guide to the decisions you've made

 You can use the **Giving Canvas Tool** to summarise the outputs from all the exercises you've gone through so far. If you haven't gone through the whole Toolkit, you can fill in the parts you might already know or leave them blank.

This tool provides a one-page template for you to populate as an easy reference point and overview of your giving. You can use it to remind yourself of the decisions you've made as you've worked through this Toolkit, or share it with others as a quick and easy way for them to understand your approach to giving.

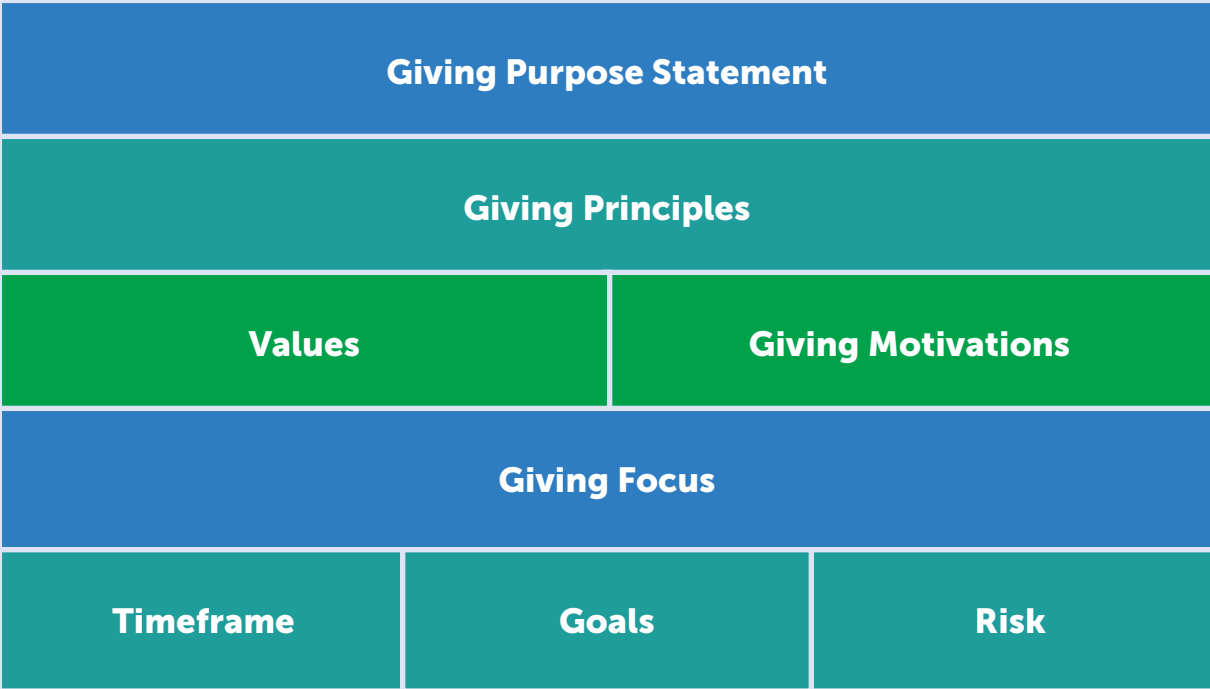


Fig. 9: Foundations of your Giving Canvas

5 Learning and adapting

5.1 Reviewing your own giving

A simple way to begin building reflection, insights and adaptation into your giving is to complete the other tools and make a habit of revisiting them at intervals that make sense for you. Upon revisiting them, complete the Reflection and Adaptation Tool.



5.2 Ongoing learning opportunities

Reflecting on your giving is a great way to keep improving and evolving your approach, but seeking out additional learning opportunities is equally as important. You might wish to sign up to newsletters from organisations working in your areas of interest, head along to events, seek out relevant media, and engage directly with those close to the work where you can.



HOW WE CAN HELP

ACF has a full calendar of events and communications dedicated to supporting our community of givers to deepen their understanding of the areas they fund, and of grantmaking itself. We are also here to connect you to other individuals and networks to learn from. If you want to know more about the learning opportunities and connections on offer, get in touch with the ACF Philanthropy Team.

5.3 Measuring your impact

While reviewing your own giving is about how effective you have been in playing your role as a funder, measuring your impact is about understanding what change you have contributed to on the ground.

Impact measurement can be complex, and the field of practice around this aspect of grantmaking is vast. Impact measurement alone warrants its own toolkit!

One simple way to get started with understanding what change your giving has contributed to is to add indicators to your Theory of Philanthropy Tool.



Next to each of the outcomes and impacts you have listed, add an indicator that would help you to conclude it has been achieved or progress has been made. Then, when you receive reports or updates from your grant partners, take the time to absorb them and take note of any data relating to those indicators you've identified. If you do this consistently, over time you'll start to build a picture of what's working, what's not, and where you might focus next.



HELPFUL HINT

Tracking your impact without creating more work for those you support

Avoid asking your grant partners to track indicators defined by you if they're not already tracking them unless absolutely necessary – imagine if every funder did that! This process is designed to get you thinking about how change happens through the work you support, and engaging with the information your grant partners already provide in a way that deepens your understanding.



HOW WE CAN HELP

If you would like support to work through this step, **get in touch** with the ACF Philanthropy Team.



FAIRER FUNDING INSIGHT

Embracing shared learning in evaluation

There is a growing shift in the evaluation space from setting and tracking milestones to shared learning. This means rather than funders imposing frameworks on grant partners, those doing the work are resourced to define their own goals, how to measure them and how to apply and share this learning. In this context, funders are focusing on playing their role well and benefiting from the learning agendas set by their partners. This means you may want to include an additional amount in your grant to help an organisation do its own evaluation.



If you're interested in diving deeper into the topic of impact measurement, see **Excerpt 6 from Savvy Giving**.

6 Involving others

6.1 Engaging your family

Having family conversations about giving and developing your approach together can strengthen relationships, build shared purpose across generations, and create a lasting culture of giving.

For those wanting to complete the Toolkit as a family, use the guide below.

TOOL	INSTRUCTIONS
Family History	Complete individually and discuss - help each other to fill in the blind spots
Money Messages	Complete individually and discuss - where are there consistencies or differences? Agree on the money messages you want to hold onto or let go of as a family
Perpetuity/Spend-Down Horizon	One person completes and shares for discussion/agreement
Fund Projection	One person completes and shares for discussion/agreement
How much do I want to give?	One person completes and shares for discussion/agreement
Values	Complete individually and discuss - where are there consistencies or differences? Agree on your shared values
Giving Motivations	Complete individually and discuss - where are there consistencies or differences? Agree on your shared giving motivations
Giving Principles	Complete individually and discuss - where are there consistencies or differences? Agree on your shared giving principles
Giving Risk Appetite	Complete as a group
Giving Focus	Complete as a group
Giving Landscape Scan	Complete as a group
Giving Purpose Statement	Complete as a group
Theory of Philanthropy	Complete as a group
Giving Planner	Complete as a group
Funding Opportunity Checklist	One person completes and shares for discussion/agreement
Giving Canvas	One person completes and shares for discussion/agreement
Reflection and Adaptation	Complete as a group

Fig. 10: Using the Toolkit as a family



HELPFUL HINT

Here are some practical tips for involving family, especially the next generation, in your giving:

- **Create time and space** to come together as a group, and agree on how decisions will be made. Set clear expectations around roles and participation.
- **Make sure everyone has a voice** and feels heard and valued.
- **Consider designating a small annual giving budget** to younger members of the family so they can explore causes that matter to them.
- **Invite family members to pitch ideas for potential support** – a great way to learn more about one another’s values and interests.
- **Spend time learning together** – explore your areas of interest, review available evidence, and listen to the voices of lived experience.
- **Consider as a group what else, beyond funding, you might offer** the organisations you support – strategic advice, introductions, volunteer time, ambassadorial or board roles? See: Treasure, Time, Talent, Testimony, Trust and Ties.
- **Encourage connection with peers** – look for and offer opportunities for family members to engage with networks and learn alongside others.
- **Keep it true to you** – This can be as formal or informal as you like, from the kitchen table, to the boardroom to your favourite beach – these conversations can be had anywhere and in a way that feels true and energising for you and your family.



HOW WE CAN HELP

If you would like support involving others in your giving, **get in touch** with the ACF Philanthropy Team.

Conclusion

This Good Giving Toolkit provides a comprehensive framework for effective, impactful grantmaking. By emphasising the importance of clear objectives, transparent processes, and meaningful community engagement, the Toolkit empowers you to make well-informed decisions that drive positive change. Through thoughtful planning, continuous learning, and strong partnerships, you can use your resources efficiently, creating long-lasting benefits for communities across Australia.

We hope it serves you as both a practical guide and a call to action for fostering equity, sustainability, and collaboration in grantmaking. It should also provide an opportunity for you to realise more joy and engagement with your giving.

Contact us for support with developing your giving framework

Every step of the way the team at Australian Communities Foundation is on your giving journey with you – so get in touch whenever you are looking for inspiration, for guidance, for assistance with a tool, for connection with like-minded funders or whatever else will support your giving journey.

03 9412 0412

info@communityfoundation.org.au

Acknowledgements

This Toolkit has been a long time coming with a heritage at least as long as Australian Communities Foundation's 27 plus years. We are so grateful to all our Fund Advisors over this time who have taken us with them on their good giving journeys. We learn much from the granting you do each and every week.

ACF team members across almost three decades have all played a part in finessing our approach to grantmaking and we hope you can see your influence throughout – in particular Gabby Lam, Laura Mannix and Dom O'Donnell. Thank you also to our sector friends and colleagues including Australian Environmental Grantmakers Network, Australian International Development Network, Australians Investing in Women, Community Foundations Australia, the Reichstein Foundation and the many more who share our commitment to effective giving.

A special thank you to our fellow traveller, Genevieve Timmons, who always inspires and challenges us to enhance our philanthropic practice. Thank you also for allowing us to share some powerful excerpts from your important contribution to Australian philanthropy: *Savvy Giving: A Roadmap for Contemporary Philanthropy in Australia*.

A final special mention to former ACF team member and one of the most insightful and experienced philanthropy consultants in Australia, Georgia Mathews – you skilfully ran with the conception and writing, helping us realise the Toolkit which had been so long on the to-do list.

We are deeply grateful to everyone who contributed to the development of our Good Giving Toolkit. Your expertise, insights and unwavering commitment to the practice of effective and equitable grantmaking have been invaluable in shaping this resource.



Carly Severino

Director of Community & Philanthropy





Australian Communities Foundation
Level 6, 126 Wellington Parade
East Melbourne VIC 3002
03 9412 0412
info@communityfoundation.org.au

communityfoundation.org.au

© 2025