Shifting to Outcomes-Orientated Grantmaking

An Institute of Grants Management White Paper

May 2025



SmartyGrants
Software, data science & grantmaking intelligence

INSTITUTE OF
GRANTS MANAGEMENT

Shifting to Outcomes-Orientated Grantmaking:
An Institute of Grants Management White Paper

Published by Our Community Pty Ltd, Melbourne, Victoria, Australia
Distributed in the UK by Our Community International, London, United Kingdom

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Edition 1 – Published May 2025.

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Institute of Grants Management (IGM) is part of the Our Community group of enterprises.

Our Community is the engine room for creating and disseminating practical, affordable training, leadership and technological solutions that allow not-for-profit and grantmaking organisations to get on with the crucial work of building stronger communities.

Through the Institute of Grants Management (IGM), we are distilling and disseminating all we've learnt about best practice grants management over more than two decades of tracking grants and working alongside grantmakers and their grantees.

Through the Institute of Grants Management's sister enterprise, SmartyGrants, we're embedded best practices into grantmakers' favourite tech tool.



Report authors:

This report was written by Our Community Executive Director Kathy Richardson and Chief Impact Officer Jen Riley.

Acknowledgements and thanks:

The authors are indebted to the work of Fiona Dempster and Barry Smith in helping us understand and conceptualise the grantmaking lifecycle via the original IGM/*SmartyGrants Grantmaking Toolkit*. We also acknowledge the many hundreds of grantmakers and grant applicants who have patiently shaped and tested our grantmaking knowledge base over many years; and the Our Community team members who have empathetically worked alongside them and contributed to our body of knowledge.

Our thanks also to Naomi Turner (Wannon Water) and Jaki Dyer (Synergy) who provided valuable feedback when reviewing an early draft of this paper.

Shifting to Outcomes-Orientated Grantmaking

Introduction

Vast sums of money are spent on grants each year around the world. In Western countries, most of this money comes from government (central and local), though philanthropic, community and corporate foundations also make an important contribution.

Despite perceptions to the contrary, it's not easy to give money away well. Good results are not guaranteed. Common problems include clumsy program design, inadequate technical and administrative systems, and poor (and poorly documented) decision-making processes.

Grantmaking has matured as a profession over the past 20 years. Grantmakers have become more adept at planning and efficiently administering grants funding. However, while grantmaking has become more sophisticated and increasingly more efficient, it has not necessarily become more effective at driving meaningful change.

It's time for a paradigm shift toward outcomes-oriented grantmaking. This isn't just about reporting on outcomes, it's about rethinking how we design, manage, and evaluate grants to ensure they lead to meaningful and measurable change.

The focus of this paper

This paper focuses on **outcomes**, which is just one sub-set of what you would examine if you were undertaking a comprehensive grant program evaluation. A wider evaluation should additionally include other domains such as the **efficiency**, **appropriateness**, **sustainability** and **long-term impact** of your program. Each of these dimensions requires careful consideration, distinct processes and targeted measurements. These other dimensions will be considered in a future IGM paper.

The diagram below illustrates the focus of this paper and the work still to come.

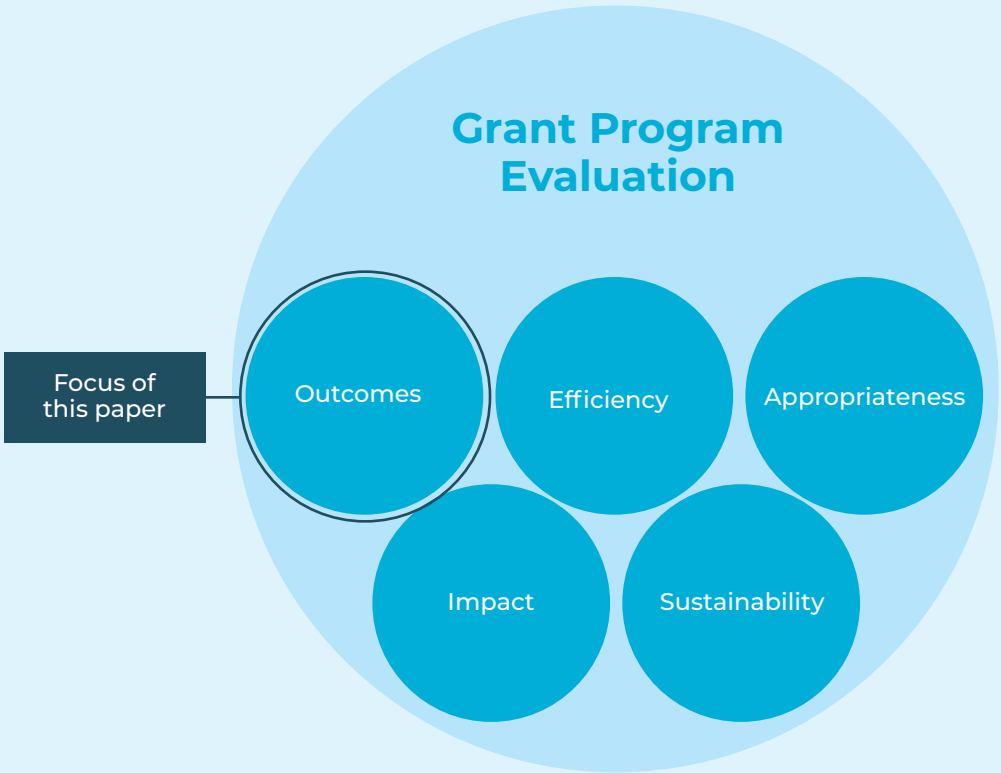


Figure 1: Grant Program Evaluation should include a range of areas of evaluation such as outcomes, efficiency, appropriateness, sustainability and long-term impact. This white paper is concerned with only the first – outcomes.

What changed?

This question has possessed us since we started charting the grantmaking field in Australia in 1999. For many years we had tracked the announcement of thousands of grants programs through our grantseeker-facing EasyGrants database; then, after launching SmartyGrants in 2009, we got another view as we watched how those programs were being planned, launched and managed. As more and more grantmakers joined SmartyGrants, we began to get a clearer picture of how government, corporate and philanthropic funds were being applied for, allocated and spent.

Billions of dollars were flowing out into the business and community sectors. *What changed?* We couldn't tell, and neither could most of the grantmakers who were using SmartyGrants to administer their grants.

It wasn't for lack of reporting. Progress and final reports were being demanded and submitted, but grant recipients were being asked to report on *spending* and *outputs*, not *outcomes*. There were receipts and widget-counts coming through, but nothing that would show what dial had been shifted, and how far it had been turned.

The evidence of the non-evidence was everywhere. We sat on grant assessment committees that had trouble telling us what criteria to apply when judging merit. We flicked through "Impact Reports" that showcased hundreds of smiling faces without giving us any indication about how many of the 'beneficiaries' of the grant experienced any benefit at all. Despite great intentions, much hard work and billions of dollars, no one seemed any wiser about what was working to create change.

The rise of technology

Prior to the launch of SmartyGrants in 2009, the Australian grantmaking industry had been poorly served by tech solutions. That's a topic for another white paper but suffice it to say the take-up of SmartyGrants was swift.

At time of writing, our software is used by more than 800 different funders across Australia, New Zealand and the UK/Europe, making us one of the most-used grantmaking solutions in the world. This has allowed us a view over the flow of vast amounts of money – many billions every year. Coupled with our parent organisation's deep entanglement with the Australian not-for-profit sector, we now have a unique vantage point. We are able to see what works, and what hinders, the flow of funds from government, business and philanthropy to social, environmental, cultural and economic causes. We have a unique opportunity to help all parties understand more about what is changing as a result.

Applying an outcomes lens

Around 2014, having learned a lot about how to create better efficiencies, we started focusing more on outcomes. We read everything we could find on the topic and interrogated grantmakers' impact reports. Thanks to an Eisenhower Fellowship (Innovation), we undertook a six-week odyssey across America, picking the brains of field experts. We thought we'd bring back a solution to help grantmakers assess their outcomes. Instead, we realised no one had solved the problem, but as overseers of a system embedded in Australia's funding landscape we had a great opportunity to push the field forward.

We began reimagining and re-engineering our software to transform it from a tool for efficiency *(better use of time and resources)* to one for effectiveness *(achieving better outcomes)*. Efficiency matters, but effectiveness is key to making grants go as far as possible.

The Outcomes Engine, a tool for grantmakers that is built into SmartyGrants, was released to a small group of beta testers in 2021. At the time of writing (April 2025) more than 160 grantmakers are using the Outcomes Engine to track and report on the outcomes of their grants. Hundreds of grant recipients have interacted with the tool.

This white paper is designed to lay out what we've learned so far in the hopes it will help others get on the right path. We don't profess to know everything. We're still learning.

To ensure we stay focused on practicality, we have applied an outcomes orientation to each step of the "grantmaking lifecycle" (see next page), as articulated in the IGM's *Grantmaking Toolkit*, the definitive guide to building best practice into your grants processes and programs. We also highlight other tools we've discovered or developed to help make it as easy as possible for you to shift to an outcomes-orientated funding mindset.

We have bold ambitions. We want the data from the Outcomes Engine to populate a new Centre for What Works and offer that knowledge to grantmakers and grantseekers at the right time, format, and context, helping them make informed decisions and accelerate impact. We believe this will help us all sprint toward the finish line, whatever that looks like for you.

This paper forms part of the Institute of Grants Management's suite of information and resources at **smartygrants.com.au** / **smartygrants.co.uk** / **smartygrants.co.nz** / **smartygrants.com** (free) and at **help.smartygrants.com.au** / **help.smartygrants.co.uk** (SmartyGrants users only).

We welcome feedback. Our contact details can be found here: : **https://www.smartygrants.com/about/contact-us**

Best practice grantmaking lifecycle

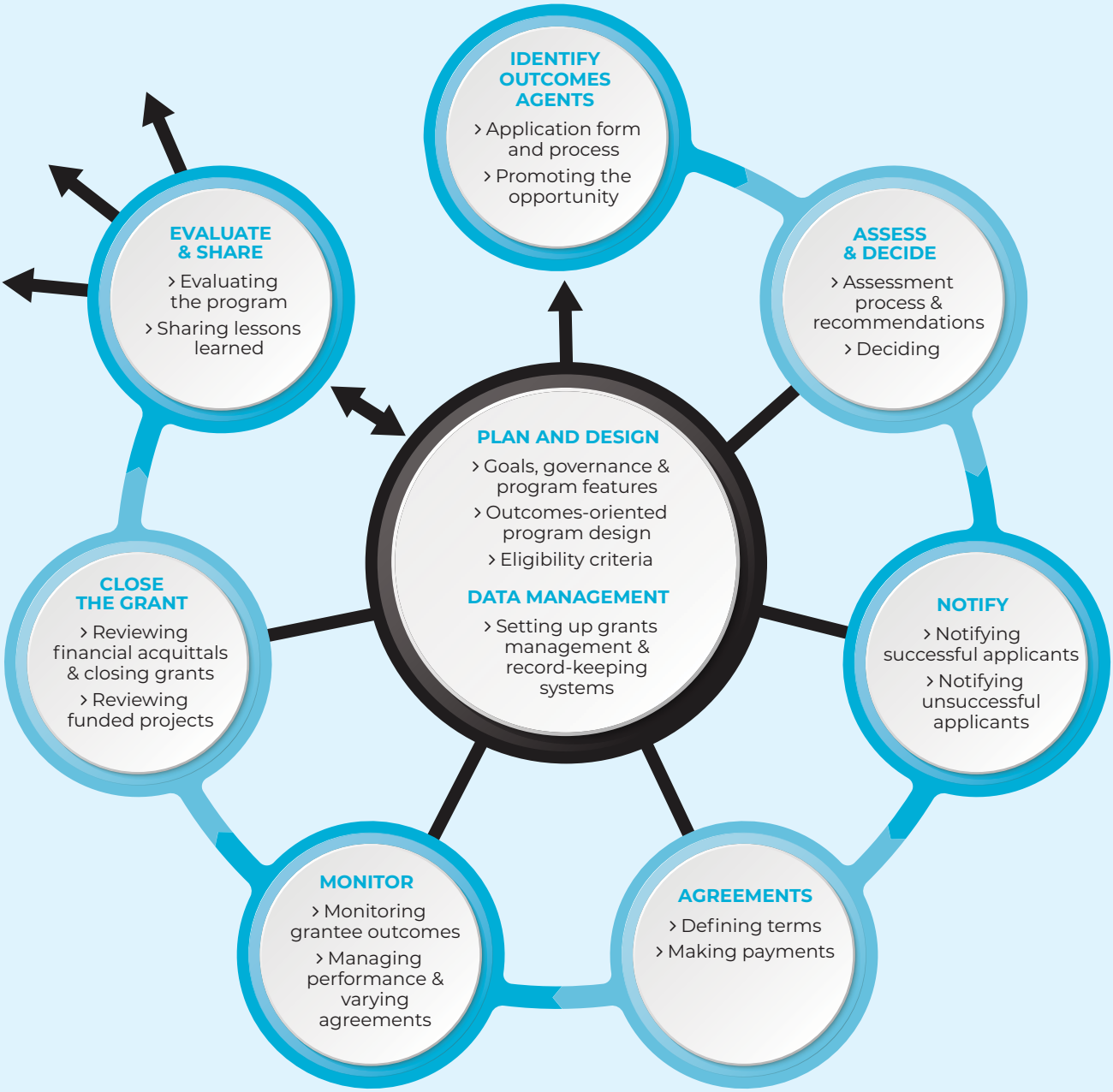


Figure 2: Grantmaking Lifecycle – from the IGM Grantmaking Toolkit

Who is this white paper for?

This white paper is designed to provide not just theoretical but practical advice for grantmakers who wish to understand more about the outcomes of their funding. Where possible, we will point to SmartyGrants features that can assist you in that task; as such, this document will be particularly useful to people who use SmartyGrants to manage their funding programs. However, the principles and practices outlined here are broadly applicable to all grantmakers, regardless of the software or tools you use.

Whether you manage small-scale community grants or oversee large-scale funding programs, this White Paper will equip you with actionable insights to enhance your outcomes-orientated approach.

For those just beginning their journey into outcomes-orientated grantmaking, this document will serve as a foundational guide. For seasoned professionals, it offers advanced strategies and considerations to refine your processes and deepen your understanding of how to measure and amplify the outcomes of your grants.

What is 'outcomes-orientated grantmaking'?

Most grants programs have a stated aim at their core. The program might be designed to increase volunteering, improve health outcomes, enhance business opportunities, heal an ecosystem, etc. For government grantmakers, program aims usually flow from a policy document; for philanthropic grantmakers they might arise from the stated wishes of the founder, or from a theory of change.

Unfortunately, those aims often get lost as grants administrators get buried in the practicalities of building forms, attracting and assessing applications, arranging contracts, and ensuring funds are spent appropriately. Outcomes-oriented grantmaking involves applying an intentional learning stance and returning to those core aims repeatedly – re-examining goals, strategies, and emerging knowledge to understand what's working and what could improve. It means considering intended grant outcomes in every step of the process.

- **In the design process:** Outcomes-orientated grantmakers set out with clear, achievable and measurable aims and outcomes for their grant programs.
- **In the applications process:** Outcomes-orientated grantmakers seek applications from those who are most likely to help them achieve their aims.
- **In the assessment process:** Outcomes-orientated grantmakers assess the likelihood that applicants will help shift the dials that matter to them.
- **In the contracting process:** Outcomes-orientated grantmakers keep grantees focused on the overriding program goals when setting milestones and tracking/reporting requirements.
- **In the reporting/acquittal process:** Outcomes-orientated grantmakers don't just collect receipts, they collect information about what worked, and what didn't work, and why. They're interested learning, not just accounting.

This shift may seem subtle, but you should not under-estimate how tricky it can be to replace a punitive/accountability mindset (if that's the frame you're used to) with a trusting/learning mindset. It's worth the trouble, however. Outcomes-orientated grantmaking empowers you to be a responsible steward of the funds you administer, ensuring your decision-making is both informed and effective. By focusing on outcomes, you can have confidence that resources are being directed towards meaningful change, while everyone gets to learn more about what works and what does not. Simply put, your money goes further.

There's an added bonus: our experience shows that when grantmakers focus on outcomes, much of the "messiness" in grants administration – clunky processes; bulky forms – simply falls away.

While shifting to an outcomes-oriented mindset can be tricky, it doesn't have to be onerous. You don't have to change everything at once. You can start small and increase your outcomes-oriented activities and scope as your confidence and resources allow. This approach also gives you time to promote buy-in from sponsors, program administrators, and managers. Throughout this white paper, we'll show you how to scale your shift into outcomes-oriented grantmaking in line with your organisation's circumstances.

Our experience shows that when grantmakers focus on outcomes, much of the "messiness" in grants administration – clunky processes; bulky forms – simply falls away.

Why is 'outcomes-orientated' grantmaking so difficult?

We are not going to sugar coat it. There are many reasons why tracking outcomes is hard:

- Putting in place a sensible measurement and evaluation framework requires some know-how and can be time consuming. It can be difficult to find the time, skills and funds to do the work properly.
- Poorly designed evaluation processes can produce misleading results, which can lead to a *better-to-do-nothing-than-do-something-badly* mentality.
- There's rarely, if ever, a neat line that can be drawn between a single activity and an outcome. More often a whole system is at play. Even if you can detect an outcome it can be hard to know which bit of that outcome your intervention (or your money) contributed to.
- Context is everything. Just because something works in one context doesn't mean it will work in another.
- Outcomes can be very slow to emerge – what might seem like an unsuccessful intervention might turn out to be extremely successful, depending on when you measure the results. The opposite is also true – positive outcomes can sometimes fade over time.
- Those working to create social, cultural, environmental and economic changes are generally rewarded for *doing*, not *analysing*; there are few incentives for doing the hard work that is required to get to grips with outcomes. 'Bad results' are punished; talking up 'good results' is rewarded.
- The language around outcomes and impacts can be confusing and disputed. While people get bogged down arguing over semantics, more money goes out the door without anyone knowing if it's achieving anything.

For grantmakers, there are additional complexities:

- Grantmakers are rarely out in the field doing work themselves – their results are dependent on the work of their grantees. As such, they're at least one step removed from the outcomes their funding is contributing to. Their ability to understand the results of their funding are dependent on the data collection and evaluation capacities of their grantees.
- Grantees' results need to be viewed both singly (project by project; grantee by grantee) and in aggregate if they are to be useful in informing future decisions. Aggregation requires standardisation, and standardisation is difficult. (Standardisation is the focus of another upcoming IGM white paper.)
- Most grantmaking systems are set up to reward efficient and fraud-free distribution of funds. Thus, grantmakers' success metrics (or key performance indicators) often focus on efficiency metrics – *how much, how quickly, how many* – rather than outcomes metrics *(how effective)*.
- The mere fact of asking grantees (or their beneficiaries) to track or report on a particular set of metrics can influence their behaviour (not always in a positive way).
- Grantseekers get greater approval if they emphasise the positives and may be (justifiably) fearful of being punished if they report any missteps along the way. They too are disincentivised from a learning mindset.

The result is a system focused more on reporting than on learning what works or could improve. Grantmakers and grantees often highlight positives,

Aggregation aggravation

A key challenge for grantmakers wanting to shift to an outcomes-oriented mindset is that they must learn how to deal with a portfolio of funding; not just one grantee or one program, but a whole portfolio's worth of disparate data points.

SmartyGrants has solved this problem through the development of the Outcomes Engine, a tool that helps you define a data schema across your entire portfolio, while still collecting information that's unique to each round and each grantee.

FIND OUT MORE:

www.smartygrants.com.au/outcomes-engine | www.smartygrants.co.uk/outcomes-engine

www.smartygrants.co.nz/outcomes-engine | www.smartygrants.com/outcomes-engine

hide poor results, and miss chances to reflect and adapt—avoiding complexity, chasing quick (but possibly wrong) answers, and fixating on receipts and headcounts.

The grantmaking ecosystem has in-built design faults that are working to impede a shift to outcomes-orientated practice.

That's not to say it's impossible!

It's important not to let the complexity stand in the way of getting started. Keep the complexities in mind, but don't let them paralyse you.

Stay focused on that central question – *What changed?* – and use that to tease out a path towards greater insight.

Don't let perfection impede progress.

If you try to get from "we know nothing" to "we know everything" in one go you're likely to fall flat. There are a lot of steps between world war and world peace. Learning is better done in increments. Take a realistic view of where you are now and concentrate on edging forward rather than trying to catapult to the end – you're far more likely to make meaningful progress this way.

We also recommend that you get in the habit of critically examining your results (without fear or blame) and tweaking your systems and processes so you they get better and better at showing you what you need to know.

In this white paper we'll show you what this mindset looks like in practice.

CASE STUDY: Community Broadcasting Foundation

Starting small with outcomes measurement

The Community Broadcasting Foundation (CBF) is an Australian organisation that distributes more than A$20 million (£10 million) each year to strengthen and support over 450 community broadcasting services across Australia.

CBF was eager to begin measuring outcomes but wanted to avoid overwhelming their grantees. As an early adopter of the SmartyGrants Outcomes Engine, they started small by embedding some of the system's default standard sections (a set of editable outcomes-oriented data fields) into their grant forms. To ease the transition, they customised the language and format of these sections to closely resemble the questions they had used in previous years.

CBF made one significant update: they used the Outcomes Engine's standardised Outcomes Framework feature to provide applicants with a predefined list of outcomes and asked them to align their projects with that list. This small but meaningful change allowed CBF to aggregate data and report on the number of aligned outcomes across their grantees.

Outcomes measurement is now a key focus for CBF. By taking a long-term view and thoughtfully engaging stakeholders, they've ensured that the changes they are making are both effective and sustainable.

Do I need a consultant?

We get this question a lot. The answer, as with many things in life, is, "It depends".

If you're using SmartyGrants to start (or continue) your journey towards outcomes-orientated grantmaking, you can access our outcomes training for free and this will help you articulate your program's intended outcomes in a way that can be "read" by the system and then played back to you, through reports, later on. That should be enough to get you started on the right path.

Some grantmakers, however, will want to go deeper – you may want to initiate a needs analysis; you may wish to articulate a clear theory of change; you may want to develop a full Measurement and Evaluation framework; you may need to track to a strategy document that's owned by another entity. If you don't have the in-house expertise to carry out these functions, our SmartyGrants Managed Services team can help you, or can point you in the direction of a trusted consultant that understands both outcomes and SmartyGrants.

One word of warning: you do need to have at least one "enthusiastic amateur" on staff – someone who can commit to understanding the concepts, apply these concepts to your organisation's particular circumstances, and keep track of progress.

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Speaking the language

In the field of outcomes and impact evaluation, many terms are used interchangeably and inconsistently. Below we have provided our interpretation of some of the terms you may encounter when shifting to outcomes-orientated grantmaking, including within the SmartyGrants Outcomes Engine. (Additional guidance is available for SmartyGrants users through the Help Hub.)

Domain

A Domain is a heading or category for a group of outcomes.

Grouping outcomes into categories or themes makes it easier for you to find and report on similar outcomes; for example, you can filter by domain in your Outcomes Engine report.

Your domains should describe the high-level arenas in which change is going to occur for your stakeholders – e.g. 'Arts and Culture,' 'Community Development,' 'Economic Development,' 'Personal Wellbeing'.

Outcome

Outcomes are the specific changes you hope will occur as a result of an intervention or funding an intervention. They should describe changes that you hope will occur in the lives of stakeholders/beneficiaries. In SmartyGrants, we make a distinction between 'grantmaker outcomes' (a list of outcomes provided by the grantmaker that grantseekers can align to) and 'grantseeker outcomes' (outcomes the grantseeker is interested in achieving and reporting on). Sometimes grantmaker and grantseeker outcomes are the same (albeit worded differently), or a grant may include a mix of grantmaker and grantseeker outcomes.

Regardless of whether the outcomes are grantmaker or grantseeker in origin, outcomes are about creating change for a beneficiary. It can be helpful to apply the "BACKS[1]" concept to your outcomes – articulating and assessing changes in: what people are doing (behaviour); what they are thinking or believing (attitudes); their status (conditions such as housing or employment); what they know (knowledge); or what they can do (skills). Basically, anything they (*the beneficiary*) do as a result of the funded intervention is an outcome, so this can include attending an event.

[1] Drawing on Bloom's Taxonomy, KAB theory, and behavioural psychology to consider how knowledge, skills, attitudes, conditions, and behaviours interact.

For example, the domain 'personal wellbeing' might include physical outcomes like 'reduced disease' or 'increased fitness', and psychological outcomes like 'decreased anxiety' or 'improved confidence'. The domain 'community connection' might include outcomes like 'improved sense of belonging' and 'a more vibrant community'.

Your outcomes should ideally indicate a direction of change: *reduced; increased; decreased; improved*; etc. However, you can have an outcome that is *maintain* i.e. 'maintaining biodiversity in a protected ecosystem'.

Outcomes are best identified through a *theory of change* (see p15). In the absence of a theory of change, your guidelines (or, one step above that, your strategy documents) are a good place to start. Look for statements that help you answer questions like: *What is the primary purpose of your program? What are you hoping to change in the lives of the intended beneficiaries?* If it's 'to provide capacity building support for local community groups', one of your outcomes might be 'increased financial sustainability of local community groups'.

Your outcome statement should ideally identify who is going to benefit, i.e. 'young people in North Goodtown', 'children aged 3-5 attending pre-school programs', 'women attending the health program' – your *target group* or *beneficiaries*.

Here is a simple approach to writing an outcomes statement:

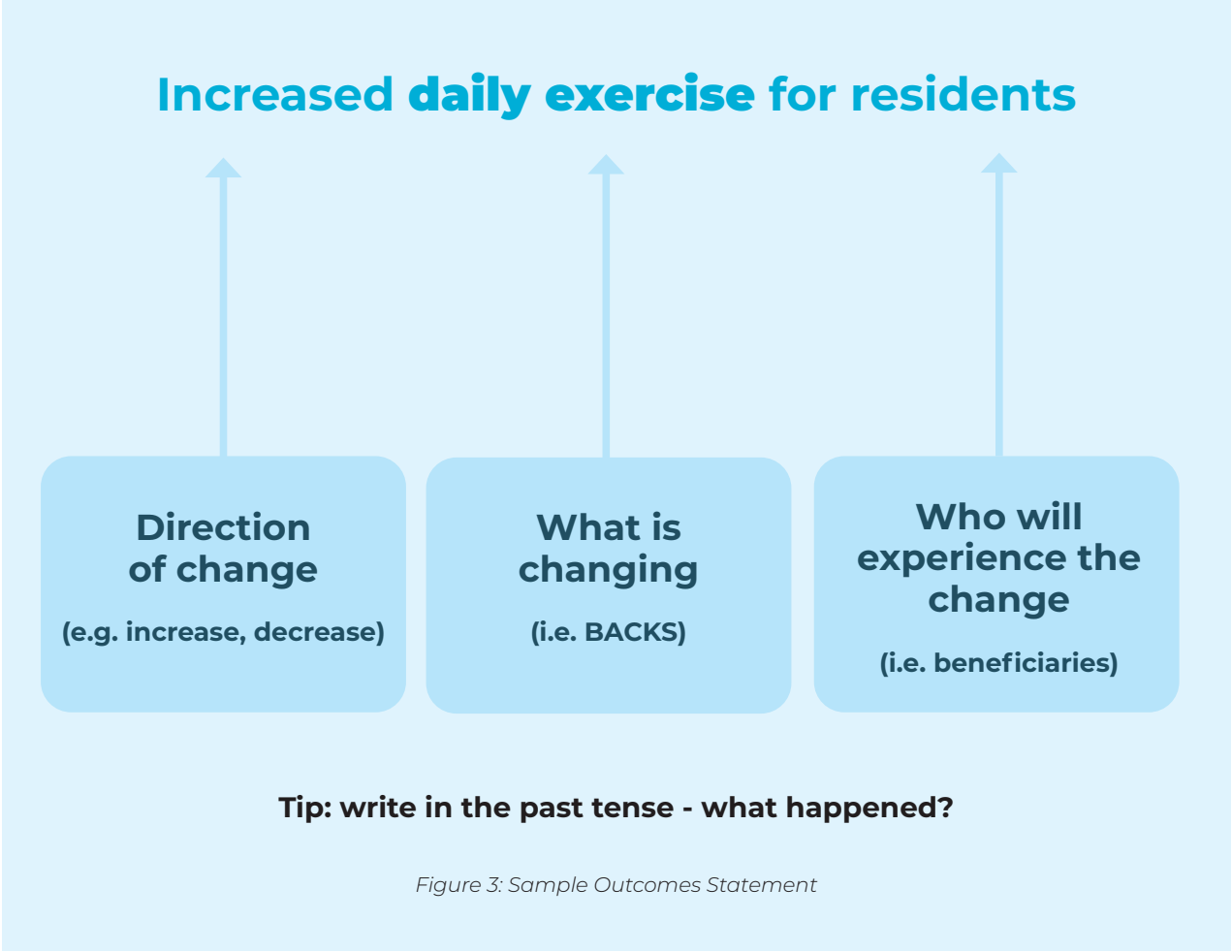


Figure 3: Sample Outcomes Statement

Impact vs outcomes

Many descriptions of impact vs outcomes exist in the evaluation and measurement community. What matters is being clear with applicants and grantees about what those terms mean to you.

For us, 'impact' refers to long-term, sustained change, while an 'outcome' is a short- or intermediate-term change resulting from a program. For example, young people participating in community theatre might experience short-term outcomes such as increased participation, enhanced confidence, and improved skills. The long-term impact could be a supportive peer network that thrives and influences lives beyond the program. Similarly, short-term outcomes of a reforestation initiative might include increased community engagement in planting efforts and early signs of improved soil quality, while the long-term impact could be a restored ecosystem that supports biodiversity, regulates climate, and provides sustainable resources for nearby communities.

Metrics

A metric (also called an 'indicator' or 'measure') is a numeric tool used to assess whether progress toward an outcome is occurring, and to what extent. There are many types of metrics. At SmartyGrants, we distinguish between:

- **Activity metrics,** which are designed to count/measure the things produced or served as a result of the grant (e.g. 'number of training sessions') – also referred to as 'outputs'. Both grantmakers and grantseekers can have and track activity metrics, though grantmaker activity metrics generally represent an aggregation of data across a portfolio of grantseekers.
- **Outcome metrics,** which are designed to measure the change experienced by the target group (e.g. 'number of program participants who gained employment') – also referred to as 'change indicators'. In SmartyGrants we distinguish between 'grantmaker outcome metrics' (the standardised metrics that are important to the grantmaker, which generally represent an aggregation of data across a portfolio of grantees) and 'grantseeker outcome metrics' (those provided by the grantseeker, that are specific to the grant context).
- **Population metrics** (sometimes called 'administrative data'). These are measures or indicators that are too large or widespread to be tracked by any individual grantee; instead, they're more likely to be tracked by an overarching body such as the Bureau of Statistics or the Department of Health. Examples include the unemployment rate, the homelessness rate, and the rate of immunisation across a population group.
- **Program metrics –** these are the measures you may use to monitor the efficiency and overall health of your funding round or program. Examples include 'percentage of funded organisations from under-served communities' or 'number of applications received' or 'number of days it takes us to complete all assessments'. (These metrics will be explored further in an upcoming publication, where we will tackle the non-outcomes-related dimensions of grant program evaluation.)

The table on pages 13–14 shows example metrics that our fictional grantmaker, Goodtown Council, has chosen to collect and report on in its shift toward outcomes-focused grantmaking.

Metric	What does this tell us?	Type of metric	Data source
Number of applications received *(Total number of applications submitted for grants)*	How successful we were at spreading the word about our grants.	Program Metric*	SmartyGrants system field: **"Number of Applications"**
Percentage of applications that are successful *(Proportion of applications approved out of a total received)*	How successful we were at attracting applications that were: a) appropriate for our program b) commensurate with the amount of funding available.	Program Metric*	SmartyGrants system field: **"Application Approval Rate"**

Table 1: Example metrics and data sources

Continues...

Metric	What does this tell us?	Type of metric	Data source
Number of people who attended a funded activity *(or, in aggregate, number of people who attended a portfolio of funded* activities, in total)	How relevant and well promoted was the funded activity (or, in aggregate, how well the portfolio of funded activities engaged the community)	Grantseeker (/Grantmaker) Activity Metric	SmartyGrants Outcomes Engine **"Grantseeker Metric standard section"** (or, "Grantmaker Metric standard section")
Number of volunteers participating in a grant-funded activity *(or, in aggregate, number of volunteers who participated in a portfolio of funded activities, in total)*	How relevant the activity was to our volunteers (or, in aggregate, how well the portfolio of funded activities engaged the community)	Grantseeker (/Grantmaker) Outcome Metric	SmartyGrants Outcomes Engine **"Grantseeker Metric standard section"** (or, "Grantmaker Metric standard section")
Number of young people who enrolled in a grant-funded community sport program	How far was the reach of the funded programs?	Grantmaker Activity Metric	SmartyGrants **"Grantmaker Outputs standard section"** (custom built)
Number of program participants who take part in at least 80% of total netball games for the season	How appropriate and well run was the funded program?	Grantseeker Outcome Metric	SmartyGrants Outcomes Engine **"Grantseeker Metric standard section"**
Number of program participants who report feeling a 'greater connection to their community' *(or, in aggregate, number of program participants, across the entire a portfolio of funded activities, who report feeling a 'greater connection to their community')*	Provides a data point to answer the bigger question: To what extent did the program (or, the portfolio of programs) contribute to 'Improved sense of connection to community'?	Grantseeker (/ Grantmaker) Outcome Metric	SmartyGrants Outcomes Engine **"Grantseeker Metrics standard section"** (or, "Grantmaker Metric standard section")
Percentage of participants in grant-funded activities that feel a 'greater connection to their community'	Provides a data point to answer the bigger question: To what extent did we achieve the outcome of 'Improved sense of connection to community'?	Grantmaker Outcome Metric	SmartyGrants Outcomes Engine **"Grantmaker Metric standard section"**
Increased community connection in the City of Goodtown	Whether or not the sense of community connection is maintaining, improving or declining in the City of Goodtown. (Further analysis would be required to understand the contribution of your specific intervention to this measure.)	Population Metric	**Council Survey**

**Program Metrics will be discussed in a separate IGM publication focusing on the non-outcomes-related dimensions of grants evaluation (e.g. efficiency; appropriateness, sustainability, impact), due for release in coming months.*

The 'What does this tell us?' column in the table above is very important. If you can't answer this question then your metric needs removing or redefining.

Theory of change

A theory of change describes, through a series of 'if-this-then-this' statements, how one activity (or a series of activities), when carried out in a certain way, may lead to a particular outcome. **Those familiar with the scientific method may think of it as a "hypothesis" – an educated guess about what will happen as a result of your intervention.**

A theory of change can be provided in written or diagrammatic form. Below is a simplified example of a theory of change, developed by a grantseeker, that includes an activity ("give apples to children"), the short-term outcome ("children eat apples"), intermediate outcome ("fewer unhealthy snacks consumed") and the long-term impact ("improved child health").

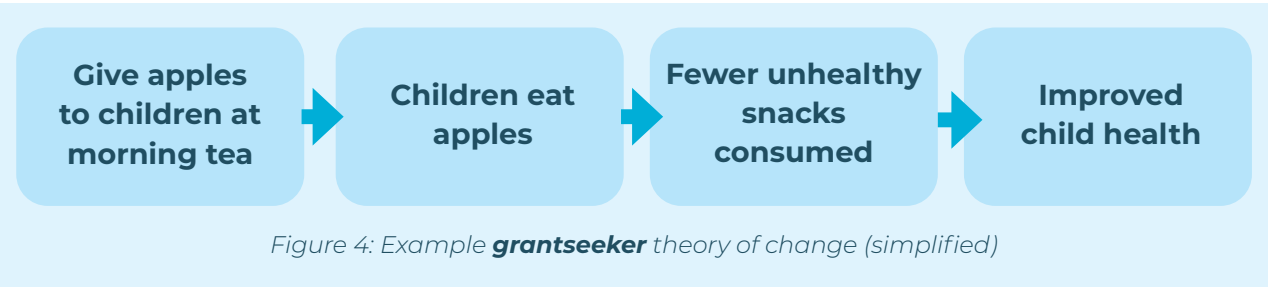


*Figure 4: Example **grantseeker** theory of change (simplified)*

By defining a theory of change a grantseeker can describe how the work they do may contribute to producing a short-term or longer-term change. Similarly, a grantmaker may define a theory of change in order to guide their decisions in relation to who and how to fund – for example:

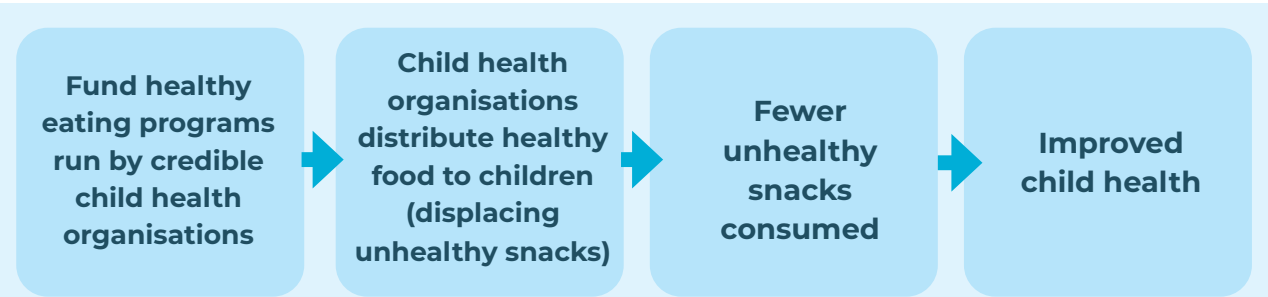


*Figure 5: Example **grantmaker** theory of change (simplified)*

Developing a theory of change can help funders work out the types of outcomes they hope their program will contribute to.

Using the two examples above, you can start to see how the goals and resulting funding decisions of the grantmaker can start to dovetail with the work of their grantees.

There is some excellent work provided by UK social sector think tank NPC on theories of change that can be accessed here: **https://www.thinknpc.org/resource-hub/theory-of-change-for-funders-planning-to-make-a-difference/**

Quantitative and qualitative evidence

Quantitative evidence is evidence that can be counted – like the "metrics" that we discussed earlier. *Qualitative* evidence, on the other hand, is a descriptive rather than numeric form of evidence. Qualitative data includes things like interviews, testimonials, focus group transcripts/summaries, social media posts, media appearances/mentions, and artistic or multimedia depictions such as photographs, videos and audio/podcasts.

Ideally you receive both qualitative and quantitative data as evidence (the SmartyGrants Outcomes Engine provides a separate standard section for this). Consider the expression 'no data without stories, and no stories without data'. Having the stories (or qualitative data) to provide more context and nuance to the numbers is useful, as is having the numbers to go along with the stories.

Beneficiaries

Outcomes, as we said earlier, describe a change in someone or something. Those who experience the change are often called 'beneficiaries'.

Beneficiaries may be specific (i.e. referring to particular individuals, or a particular group, whether named or unnamed – 'the grade 5 class at Goodtown Primary School') or generalised (e.g. 'rural people'; 'women'). Beneficiaries can also be part of the environment – for instance, a particular forest range or coastal region.

A note on direct or indirect beneficiaries. To explain this, let's take the example of a funded community football game, the *direct beneficiaries* of which are the team and perhaps the vendors at the sporting event. The *indirect beneficiaries* are community members who attend the games and gain a benefit of engaging with their local community. The SmartyGrants Outcomes Engine is designed to collect data on direct beneficiaries, however you may wish to include a question to collect data about indirect beneficiaries.

You may also encounter the term 'intermediary' or 'intermediate beneficiary' when discussing beneficiaries. Working with intermediaries can be a valid part of a theory of change, where the focus is on influencing intermediaries rather than directly targeting the ultimate beneficiaries.

For example, a program could involve encouraging parents to read to their children, training doctors to provide culturally sensitive healthcare to newly arrived migrants, or supporting employers to create more inclusive workplaces for people with disabilities. While you may not seek to measure the direct impact on the ultimate beneficiaries (as this occurs downstream), you can ask the grantee to report on the changes or outcomes experienced by the intermediaries – such as shifts in parental reading behaviour, improvements in doctors' attitudes, or changes in workplace conditions.

Did you know?

Our Community has developed a standard list of beneficiaries, contained within the CLASSIE (classification of social sector initiatives and entities).

Using the CLASSIE Population list makes it easier to track the flow of funding to particular population groups (e.g. immigrants; people with disability; people living in rural areas; etc) across your entire portfolio. SmartyGrants also includes a tool to allow you to auto-classify your data.

Visit www.ourcommunity.com.au/classie to find out more. (Currently available only in Australian and New Zealand markets.)

How to get started

It's important to create a clear line of sight from your overall strategy through to your program outcomes, into your application and assessment forms and processes, and on to your progress/acquittal forms. Once data is entered against the fields in your forms, it can be added to your reports. This allows you to paint a cohesive picture of how the work you're funding is contributing to your strategies and ensures you can improve over time.

The Institute of Grants Management's *Grantmaking Toolkit* steps you through each phase of the grantmaking lifecycle. We'll use this framework to provide the scaffolding for our discussion on how to weave outcomes tracking through your grantmaking process.

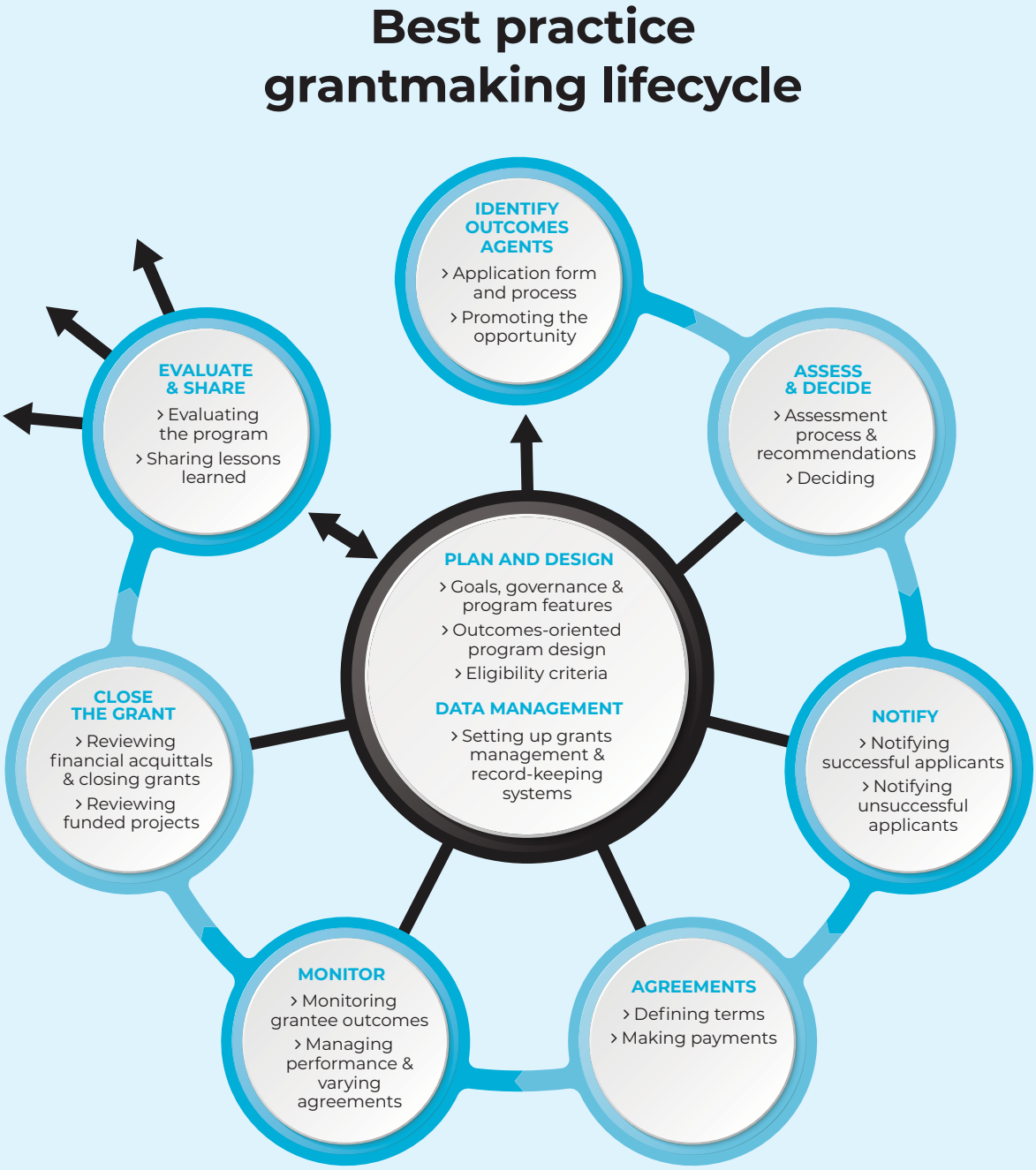


Figure 6: Grantmaking Lifecycle – from the IGM Grantmaking Toolkit

1. Plan and design

When defining outcomes for your grant program, start with the end in mind: what do you ultimately hope to achieve? Consider two key factors – how proposed outcomes align with your broader aims, and your sphere of influence. Both are discussed below.

Defining your intended outcomes

Why does your grants program exist, and what changes does it seek to influence? Your answer to these questions should inform and drive the development of your program's outcomes.

Often the answers to these questions can be found in strategy documents, or an organisational theory of change. The following questions may help you frame your thoughts:

- What is the overriding purpose of your program? (e.g. 'improved economic conditions in the local community')
- What are you trying to change? Which 'dial' are you trying to shift? (e.g. 'more people in employment')
- How far are you hoping to shift the dial? (e.g. '50% more jobs in the community' or '20% decrease in youth unemployment')
- In what way will the world be different if your program is successful? (e.g. 'local people have more economic independence'; 'less poverty-related illness in the local community'; 'less crime in the local community')
- Who are you trying to reach? (e.g. 'young people'; 'long-term unemployed people'; 'single parents')
- What change do you seek for your target group/s? (e.g. 'increased income'; 'enhanced self-esteem')

One way to address these questions is by creating a 'theory of change' (sometimes referred to as 'program logic' or 'log frame/logical framework'). Some people are really intimidated by this term as it sounds 'experty'. But really it is about taking your overriding purpose – your 'north star' – and working backwards in a series of logical steps.

SmartyGrants users

If using the Outcomes Engine, the process of defining your intended outcomes is simplified by using the standard Outcomes Framework template, which is connected to a set of standard sections that can be included in your forms. This ensures your data is aligned to your strategy, while giving you the opportunity to gather additional information that falls outside your strategy, which helps you learn and improve over time.

Below is an example of a theory of change for a funder who aims to reduce poverty. You can see the sorts of activities they want to fund and the short-term and intermediate outcomes they want to achieve.

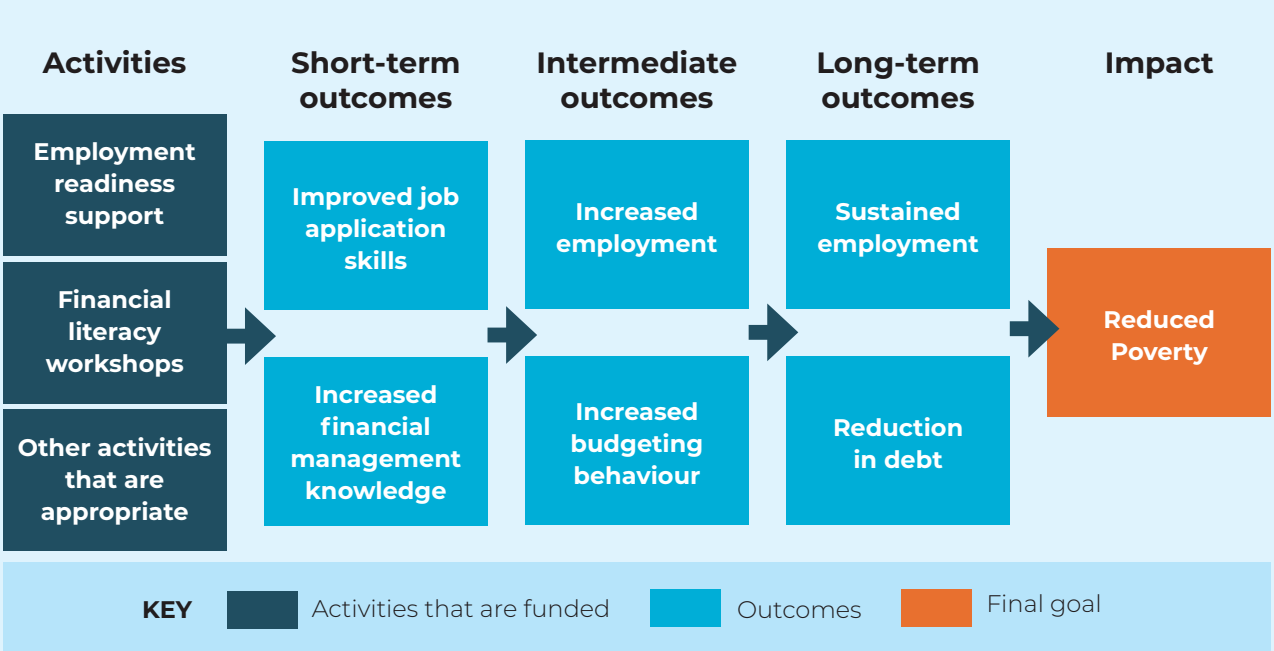


Figure 7: Simple theory of change

An excellent resource is *Theory of change for funders: Planning to make a difference*, by the UK's New Philanthropy Capital (NPC), a link to which can be found in the 'More Information' section of this publication.

Refer also to the definition and discussion of theories of change, contained in the 'Speaking the language' section of this white paper (see page 11).

Considering your sphere of influence

Before finalising your outcomes framework, you should take a clear-eyed view of your program's sphere of influence. What can you meaningfully achieve with the bucket of money you have at your disposal?

There is generally a strong correlation between significant, long-lasting outcomes and large budgets. Similarly, there's a strong correlation between shorter-term effects and small budgets. For example, a medium grant of $15,000-$50,000 (£7,300 – £24,000 / €8,800 - €30,000) could support a modest community health program, and could contribute to changing values as well as attitudes, knowledge and skills. (The holy grail of change-making is long-lasting outcomes that can be brought about by low-cost inputs.)

Below is a diagram that provides a guide to the size of a grant and roughly what that could 'buy' in terms of change.

	Micro	Small	Medium	Large	Mega
	< $2,000 < £1,000 < €1,100	$2,000-$15,000 £1,000-£7000 €1,100-€8,700	$15,000-$50,000 £7,300-£24,000 €8,800-€30,000	$50,000-$100,000 £24,000-£49,000 €30,000-€58,000	>$100,000 >£49,000 >€58,000
Outcomes	**Participation** **Accessibility** **Affordability** **Awareness**	**Participation** **Accessibility** **Affordability** **Awareness** **Knowledge**	**Values/ Attitude** **Knowledge** **Advocacy** **Skills**	**Skills** **Behaviour**	**Behaviour** **Social Norms** **Policy**
Types of funded activities	*e.g. community event*	*e.g. training/ professional development*	*e.g. community group program (health, social connection)*	*e.g. program to address a social challenge such as gambling, violence*	*e.g. multi-channel programs, media, infrastructure, multi-agency engagement*
	Short-term outcomes		**Medium-term outcomes**		**Long-term outcomes**

Figure 8: How far does your funding go?

Consider a grant in the range of A$2,000 to A$15,000 (roughly £1,000-£7,000 / €1,100-€8,700). Below, we've listed some examples of potential long-term outcomes (beyond the scope of a small grant), shorter-term outcomes (directly related to a small grant), and outcome statements and metrics associated with this size grant.

Long-term outcome / impact *(beyond the scope of the grant)*	**What $15,000 (£7,300, €8,800) might buy**	**Sample outcome statement**	**Outcome metrics**
Reduced personal debt among young people	Delivery of a short-term financial literacy program	Enable young people's **participation** in a financial literacy program	Number of people attending the financial literacy program
Increased social connection and wellbeing	Opening the library at different times, or making some library books available at the childcare centre, or installing bathrooms for non-binary people at the library	Increased **access** to the library	Number of people attending the library service
Increased physical and mental wellbeing	Reduced cost of an existing fitness program	Increased **affordability** of fitness activities	Number of people reporting that the fitness activity is affordable
Decreased rate of diabetes	Educational materials, education session	Increased **awareness** of diabetes risks associated with excessive sugar consumption	Number of people reporting increased awareness of diabetes risks associated with excessive sugar consumption
Increased physical and mental wellbeing	Nutrition-related educational materials, education session	Increased **knowledge** of healthy eating options	Number of people reporting increased awareness of healthy eating options

Table 2: Example outcomes associated with a $15,000 (£7,300, €8,800) grant

If your ambition is to change behaviours, attitudes, social norms or social systems, then you will almost certainly need to provide more than $15,000 (or its equivalent) in funding. The work required to achieve these "deeper" outcomes is likely to require a higher "dose" of your intervention (e.g. multiple financial literacy classes), a higher quality intervention (e.g. not just education classes, but maybe also an experience) and further reach (e.g. making the initiative more accessible to more people, including those who need it most).

This is not to say that a well-placed small grant can't be utterly transformative. Consider the words of a grantee quoted in this May 2022 article (**https://frrr.org.au/blog/2023/11/01/small-grants-are-vital-to-strengthen-rural-australia/**) by Australia's esteemed Foundation for Rural and Regional Renewal (FRRR), which funds "the genuine local needs of rural people and places":

> *"The grant received for strategic planning has paid for itself many times over," wrote the grantee – a Rotary Club representative.*
>
> *"We had members who had ideas in their head but didn't know how to plan or implement them. Since receiving the grant, we've been able to increase attendance of our market to over 5000 visitors in November 2021! We've also been able to provide free stalls to local community groups to increase their outreach. This also has a flow on effect to small businesses in the town. The pub is booked out for lunch, little local businesses thrive due to the amazing success of the market."*

Community-led initiatives create ripple effects for many, particularly in remote, rural and regional communities. Unfortunately, those outcomes might not appear within the 'grant reporting period', so it is worth checking back with grantees (and/or their beneficiaries) one, two, or five years later to find out what those ripples are!

This process of looking at outcomes and linking back to an intervention is called Outcomes Harvesting. You can find out more here: **https://www.betterevaluation.org/methods-approaches/approaches/outcome-harvesting**

Working out what to track

Grantmakers who want to track outcomes across their entire portfolio (or even within parts of their portfolio) should consider developing a standard list of outcomes.

Just as the Sustainable Development Goals provide an overarching framework for nations around the world to report against, grantmakers can have their own global framework so they can report against a consistent set of outcomes that matter to them and their stakeholders, across all or some of their programs.

Outcomes are best articulated using an Outcomes Framework – a simple hierarchy that links broad domains to specific outcomes and measurable metrics (see overleaf). For example, domains might include areas like 'economic development' or 'health and wellbeing'; outcomes within those domains could be 'increased employment opportunities' or 'reduced sugar intake'; and associated metrics might include 'number of new jobs created' or 'number of sugary drinks consumed'.

Structuring outcomes in this way enables funders to report on their impact at multiple levels – from broad domains to detailed metrics – and to aggregate data more effectively across programs.

Creating an outcomes framework can take time and might feel daunting at first. You may wish to engage an evaluation professional to help you develop your outcomes or to review what you have come up with.

Another useful starting point is simply asking your grantees what outcomes they are already tracking and what is meaningful to them.

While this information may not always be easily aggregated, it can offer valuable insights and help ground your framework in real-world practice.

The power of the crowd

If you don't have the resources or inclination to develop your own bespoke outcomes framework, you can seek out one that's been developed by another trusted party.

Examples of published outcome frameworks include the United Nations' Sustainable Development Goals; The Nest by Australian Research Alliance for Children and Youth; the Cultural Development Network's Outcomes Schema for the arts sector; Community Services Outcomes Tree (CSOT) by the Swinburne Centre for Social Impact in partnership with Uniting Vic Tas; the National Disaster Recovery Monitoring and Evaluation database; and there are many, many more. All of those mentioned, and a few more, have been converted to the SmartyGrants Outcomes Framework template so they can be instantly uploaded into your own account (see the Outcomes Engine section of the SmartyGrants Help Hub).

We encourage grantmakers to use published outcomes and outcome metrics where relevant and appropriate.

SmartyGrants Outcomes Framework Template

Get instructions
Download an example
Important Note: Each Domain, Outcome and Metric must be on its own row in the template. **Source:** SmartyGrants Team

Outcomes		
Domain A label or category to group together related outcomes (e.g. 'Economic Development'). Domains appear on forms as un-selectable headings. (Optional, max 250 characters)	**Outcome** The specific changes you hope will occur as a result of a program or initiative (e.g. 'Improved employment opportunities for youth under 30 in Goodtown'). There must be least one item in this column and one or more for each domain. (Mandatory, max 600 characters)	**Metric** A method to measure whether progress towards an outcome is occurring or not, and quantify the extent to which it is occurring (e.g. 'Number of jobs created in Goodtown per annum'). Use only metrics that are numeric and quantifiable. (Optional, max 600 characters)
Health		
	Increased positive experience	
		Number of people who report an increase in positive experience with physical activity
	Increased advocacy to family and friends about exercise	
		Number of people who report an increase in the level of their advocacy about physical activity to friends and

Figure 9: SmartyGrants Outcomes Framework template example

2. Data management

The primary function of the collection and management of data related to your grant program is to satisfy the accountability demands of stakeholders and auditors. But it should also form the basis of your internal 'monitor, learn and adapt' system for program improvement.

When setting up your data management system (which may be a grants management system), consider how outcomes data – and related information – will be stored and used. For example, conversations with grantees about programs, beneficiaries, activities, and outcomes may need to be recorded to provide context when later assessing a grant's performance.

Here are some questions about data to consider with an outcomes-orientated lens:

- What key data (i.e. metrics, qualitative evidence) will you collect to help you assess if you have achieved the outcomes you aimed for?
- How will your grants management system(s) support tracking, aggregating, and analysing data on outcomes, and ensure compatibility across different platforms (e.g. inquiries, contracts, monitoring visits, and reporting)?
- What specific outcomes-related data (e.g. baseline metrics, progress updates, final results) will be captured for each grant recipient, and how will it be linked to overall program reporting?
- When will data management begin – at first contact, on application, or during the approval stage? – and how will this help you and your grantees track progression toward outcomes?
- How will privacy, legislative requirements, and ethical considerations be addressed in collecting, using, and retaining outcomes-related data, particularly for vulnerable populations?
- How will information about applicant queries and interactions be recorded and analysed to identify barriers or opportunities to improve outcomes?
- How long will data be kept, and how will old records, including anonymised data, be disposed of or preserved for dissemination and learning?
- How will the system support grantees to improve their ability to measure and report on outcomes, such as identifying trends or capacity gaps?
- How will you ensure data is structured to enable long-term tracking and analysis of program outcomes across multiple funding cycles?

3. Identify outcomes agents

Grantmakers are rarely involved in doing the work that directly generates outcomes. Instead, they are instrumental in creating 'containers for change[2]' and rely on their grantees – their 'outcomes agents' – to do that work. Thus, it's imperative that your decisions about who to fund are made with reference to your intended outcomes.

Your intended program outcomes identified in the Plan and Design phase should determine who will be eligible to apply for and receive your grants. The grantees, or outcomes agents, are key to achieving the outcomes, as demonstrated in Figure 10 below.

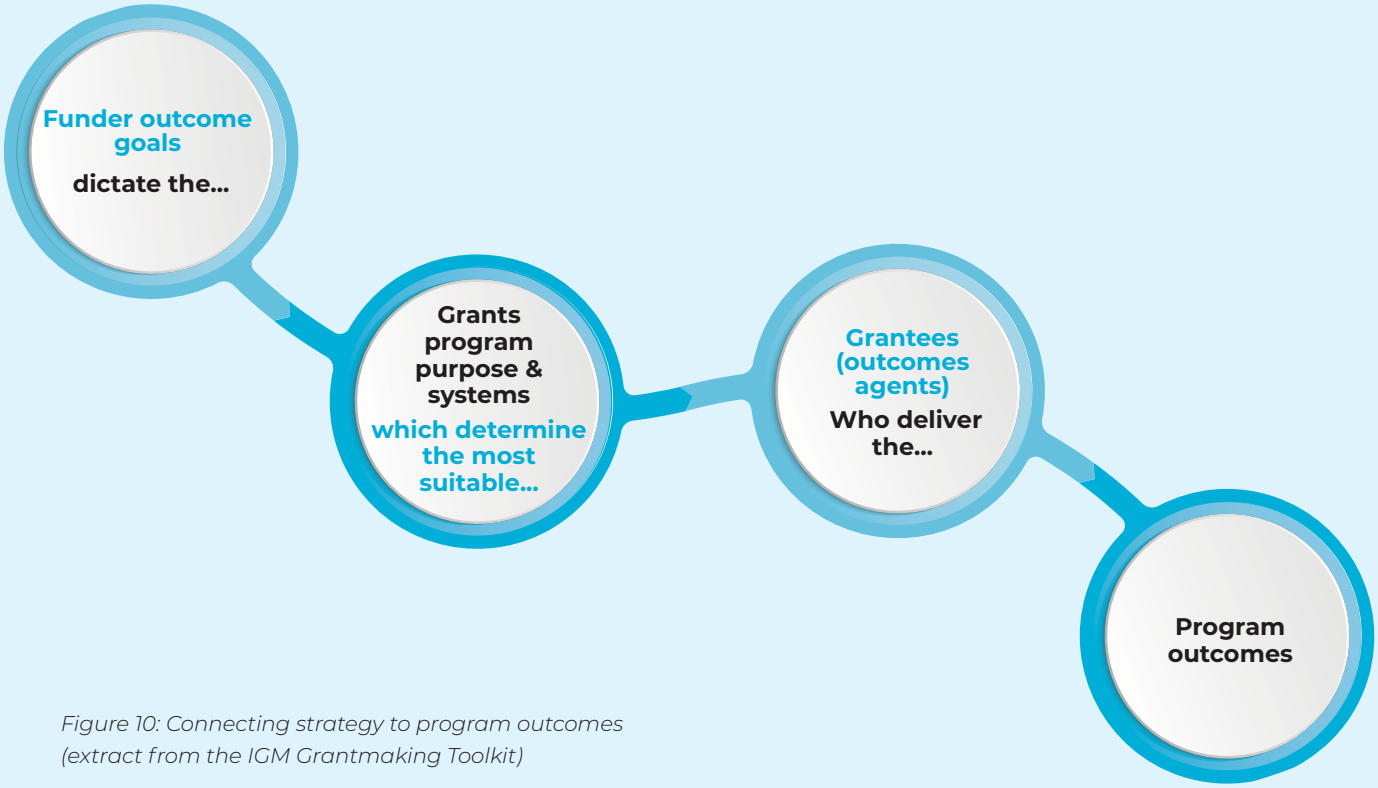


Figure 10: Connecting strategy to program outcomes (extract from the IGM Grantmaking Toolkit)

There are many great projects and organisations out there, but how many of them are positioned to create the change you seek? Selecting the right organisations and projects to fund is key to the success of your program.

Consider:

- What type of organisations are working within the domains you want to influence? Options could include individuals, not-for-profits, charities, community groups, social enterprises, B Corporations, businesses, government agencies.
- Who, specifically, is knowledgeable, credible, networked and achieving success within your outcome domains?
- Which of these entities (generally or specifically) are you able to fund, taking into account relevant legislation, guidelines and rules?

[2] In Heifetz and Linksy's Adaptive Leadership work, "containers for change" refer to the structures, relationships, and environments that hold and manage the tension and energy necessary for transformation.

Use this information to help shape your application process, and (if relevant) your application form or forms.

To assist the application process, the SmartyGrants Outcomes Engine includes a set of editable template outcomes questions, designed in consultation with evaluation experts, grantmakers and grantees, that will help you elicit the right information, including:

- What changes do you [grantseeker] expect will occur as a result of your project?
- Which of our [grantmaker] intended outcomes will your project contribute to?
- Please explain how your [grantseeker] intended outcome helps contribute to ours [grantmaker].
- Which of our [grantmaker] metrics (if any) will you track?
- Select the type of qualitative evidence you will use to help track your progress.
- Tell us about the activities you will undertake in order to create change.

Other considerations relating to eligibility and ineligibility rules, promotions and communications are provided in the *IGM's Grantmaking Toolkit*.

4. Assess and decide

Your assessment process provides the opportunity to unearth and select the grantees that are most likely to help you achieve your intended outcomes. To do this well, your assessment criteria should echo those outcomes. While you'll also need to consider other factors – such as eligibility requirements and risk – outcomes aspirations (yours and your grantees') should form an integral part of the process.

To support this, your assessment criteria should reflect your strategic goals, organisational values, and feasibility considerations. Below are example outcome-focused assessment criteria, each accompanied by a set of indicators that clarify what to look for. Assessors can use these indicators to guide scoring on a 1–5 scale.

These examples are drawn from SmartyGrants template assessment forms and are designed to be adapted to your context.

CRITERION 1a: Theory of change

Has the applicant identified a plausible rationale / 'theory of change'?

Indicators:

- Applicant has clearly identified the links between activities and expected outcomes
- The theory is plausible

OR

CRITERION 1b: Contribution to outcomes

Has the applicant clearly articulated intended outcomes, and do they align with the program activities?

Indicators:

- Application includes clearly articulated outcomes
- Applicant's outcomes align with the program's intended outcomes

CRITERION 2: Outcome feasibility

To what extent are the intended outcomes feasible, given the budget and organisational capacity?

Indicators:

- Program/service has been previously evaluated and shown to be effective OR the link between outcomes and activities and budget appears to be feasible
- The organisation has the internal capacity (skills, resources, social capital etc) to deliver the intended outcomes

CRITERION 3: Strengthens civil society

If successful, will this application result in improvement or strengthening of the local (or wider) not-for-profit sector?

Indicators:

- Funding would help the applicant organisation/collaboration to become stronger / more sustainable
- Funding would give the applicant organisation/collaboration experience in applying for grants
- Funding would give the applicant organisation/collaboration what it needs to continue serving the community by doing what it does well
- Funding would improve the organisation/ collaboration's capacity to deliver programs/ services
- Initiative would help build partnerships for community benefit
- Initiative would strengthen community groups and networks

CRITERION 4: Improves/strengthens the local community

Will the initiative, if successful, contribute to the improvement or strengthening of the local region?

Indicators:

- Initiative would support local business/ tourism
- Initiative would help to create an artistic and creative region
- Initiative would encourage healthier communities and active lifestyles
- Initiative would contribute to safer communities
- Initiative would preserve and promote the region's heritage
- Initiative would improve and activate community spaces
- Initiative would enhance a sense of identity and belonging among local residents
- Initiative would increase vibrancy and cultural diversity in the local region

CRITERION 5: Environmental sustainability

Will the proposed initiative create environmental sustainability outcomes?

Indicators:

- Proposed initiative preserves/enhances the natural environment
- Proposed initiative encourages the responsible use of natural resources

You may also need to consider the make-up of your assessment panel. Do panel members need domain expertise (e.g. economic qualifications or experience in the arts) in order to make a considered judgement about applications?

Information about other aspects of the assessment and decision phase of the grantmaking process is contained in the *IGM's Grantmaking Toolkit*.

5. Notify

When notifying successful and unsuccessful grantees, consider referencing their alignment (or lack thereof) with your desired outcomes as a key factor in the awarding of the grant. This way you send a strong signal that your funding is orientated towards delivering outcomes.

Where possible, provide meaningful feedback to unsuccessful grantees (the number one complaint from grantseekers, over our many years of tracking the field, is that too few grantmakers provide clear information about why their bid for funds failed). If an applicant did not present convincing case for how their program would help achieve your outcomes, let them know where the proposal fell short. Below are some example notification emails that reflect this outcome-orientated approach.

Successful Applicant Example

Subject: Your Application to [Grant Program Name]

Dear [Applicant Name],

We're pleased to inform you that your application to the [Grant Program Name] has been successful.

Your proposal demonstrated a strong alignment with the outcomes we are seeking to achieve, particularly [insert example, e.g., "supporting young people to transition successfully into employment"]. We were especially impressed by [mention a specific strength of the proposal, e.g. "your partnership model and clear plan for measuring impact"].

We look forward to working with you to deliver real and measurable benefits for the community. A funding agreement will be sent shortly with next steps.

Warm regards,
[Your Name]
[Your Title/Organisation]

Unsuccessful Applicant Example

Subject: Outcome of Your Application to [Grant Program Name]

Dear [Applicant Name],

Thank you for your application to the [Grant Program Name]. We appreciate the time and effort you put into your submission.

After careful assessment, we regret to inform you that your application was not successful.

In reviewing your application, we were unable to identify a clear connection between your project and our intended outcomes, which include [briefly list key outcomes, e.g., "increasing digital inclusion among low-income households"].

We understand this news may be disappointing. We encourage you to consider future funding rounds, particularly if your project evolves to more directly address our outcome focus areas.

If you would like more detailed feedback on your application, please feel free to get in touch.

Warm regards,
[Your Name]
[Your Title/Organisation]

6. Agreements

Grant agreements and contracts lay out the terms for provision of the money. Grant agreements vary from one grantmaker to the next but generally they should cover:

- The amount of the grant
- Permitted uses for the grant funding (and, in some cases, non-permitted uses)
- Agreed milestones (often these are linked to payments)
- Intended outcomes and metrics (see notes below)
- Reporting obligations
- Variations processes
- Timelines.

Emphasising learning over performance

When crafting a grant agreement, it's essential to approach outcomes with a learning mindset rather than a strict "performance evaluation" perspective. Here's why and how:

- **Avoiding the "payment for outcomes" perception:**
  - **Why:** If grantees interpret the agreement as "payment for outcomes," they may set conservative goals (or be tempted into doctoring their results) to avoid the risk of perceived failure.
  - **How:** To counter this, make clear to grantees that you're as interested in the "journey" (the process and the learnings) as the "destination" (outcomes). (Follow this up by not punishing grantees that honestly share their challenges and missteps.)
- **Aligning metrics with learning goals:**
  - **Why:** Design metrics that allow flexibility and context-sensitive interpretation.
  - **How:** Instead of measuring absolute success, focus on incremental progress or insights gained.
- **Building trust:**
  - **Why:** Use the grant agreement to signal partnership rather than a master-servant relationship.
  - **How:** Language should reinforce that grantmakers and grantees are working together to achieve shared goals.

By structuring grant agreements with these principles in mind, you ensure you're your grantmaking supports innovation, transparency, and meaningful impact.

Note that we're not advocating an either-or approach (i.e. either you're orientated on learning about outcomes or you're orientated on accountability) – your agreement can and should cover both.

You can use information collected through the application phase to build parts of your grant agreement. For example, information collected through the Outcomes Engine's outcomes, metrics, activities and milestones standard sections can be piped into agreement templates, then issued to grantees for review and agreement. These standard sections are designed to be reused in additional forms (e.g. progress reports and acquittals), piping past submission data into the new forms so you can show grantees what they said on application and ask them to provide an update on their progress.

If you want to aggregate data, you must set clear expectations during the contracting phase (or even earlier, in the guidelines) – if grantees report on different things and/or in different ways, then you won't be able to add things up or compare them meaningfully. Of course, not all data needs to be aggregated; you can outline in the agreement what's a compulsory data point and where there is some flexibility.

SmartyGrants Managed Services can review your standard grants agreement and advise how to make adjustments that will reflect a more outcomes-orientated approach.

7. Monitor

During this phase of the grants cycle the hard work you have done to understand your grantee's intended outcomes and align them to your own outcomes will start bearing fruit. Your grantees will be collecting and reporting on data that help you understand how they are progressing, and you will be able to see the individual and combined effect of the work you've funded.

The SmartyGrants Outcomes Engine allows your grantees to add progress data to any target data documented during the application and/or contract negotiation phases, or in previous progress reports. Simply add the relevant standard sections to your forms and publish.

The reporting burden

A great deal of work goes into collecting data and reporting to funders. This work needs to be proportionate to the size of the grant.

Ideally, funders should make an allowance in the project budget to support this work.

We recommend 10% of every grant be allocated to data collection, analysis and reporting (this is in line with international best practice).

At this stage, it's important to be mindful of potential challenges. Grantees may feel pressure to report positive outcomes to secure future funding, which can unintentionally introduce bias into the data. This dynamic is influenced by the inherent power imbalance in the grantee-grantmaker relationship.

To support data integrity and foster a more transparent reporting process, consider the following strategies:

1. Foster a trusting relationship

- **What:** Build relationships based on transparency and mutual respect. Grantees should feel safe sharing challenges and setbacks without fear of jeopardising future funding.
- **How:** Encourage open dialogue by regularly checking in (in-person if possible) and demonstrating an interest in the learning process, not just the results.

2. Emphasise learning over judgement

- **What:** Frame reporting as an opportunity to learn together rather than evaluate performance.
- **How:** In your communications, reinforce that honest reflections on challenges and failures are as valuable as successes for improving outcomes and future program design.

3. Use multiple data sources

- **What:** Seek stories and numbers.
- **How:** Collect qualitative data (use the standard section in the Outcomes Engine), such as interviews or case studies, to provide context and nuance to the quantitative metrics.

4. Support capacity for data collection

- **What:** Use grant set-up and monitoring activities as an opportunity to revise and ensure achievable targets that align with the grantee's capacity and the program's goals.
- **How:** Provide training and resources to help grantees improve their data collection and analysis methods.

5. Create feedback loops

- **What:** Share how the reported data will be used to benefit both parties, such as improving program design or identifying capacity-building needs. In smaller population centres, this can also help grantees get a sense of their contribution to regional impact.
- **How:** Offer constructive feedback to grantees on their reporting, reinforcing their efforts and identifying areas for improvement collaboratively.

6. Encourage third-party verification

- **What:** Where possible, incorporate external evaluations or independent reviews into the reporting process to validate findings.
- **How:** Cross-check self-reported data with independent evaluations, third-party audits, or beneficiary feedback (raw data).

By focusing on trust, collaboration, and a shared commitment to learning, you can reduce the risk of bias in grantee-reported data and create a more accurate and meaningful picture of the program's outcomes.

Monitoring activities (through progress reports, site visits and so on) also give you and your grantees the opportunity to develop trust and potentially uncover problem areas and change course if required. (**Tip:** Use an Administration Form in SmartyGrants to write some notes during or following monitoring visits.)

Remember: missteps can be just as useful as successes, so long as you're learning, documenting your lessons and adjusting your actions in response. Your lessons can help prevent people repeating the mistakes of the past, which will help accelerate progress.

As mentioned in the last section, if you're focusing on outcomes you may be less interested in holding grantees to their original plans and targets than teasing out what's being done, what's working, what's not working and why. Working in complex human, economic, environmental and cultural systems often requires a degree of adaptability as situations change and understandings emerge.

Best practice and outcomes-orientated grantmaking is centred on a learning rather than a punitive mindset. If a grantee sets out to achieve certain outcomes, and is not on track to achieve that outcome, but knows and can communicate why they are not getting there, then the grantmaker is well placed to learn from that information. Together the grantmaker and grantee can re-set the outcomes in the Outcome Engine. The Outcomes Engine also includes fields to encourage grantees to report on unintended outcomes that have begun to emerge.

Monitoring also allows you the opportunity to detect any issues the grantee is having in rolling out their intervention or in collecting and reporting on data. It's important to pay attention to emerging issues so you have time to adjust before a small issue turns into a large issue.

8. Close the grant

While funded interventions (and hopefully the outcomes!) may continue beyond the life of your grant it's likely that you will have a "close date" that signals when your involvement, as the grantmaker, will end.

This is the time to wrap up your grantee's reporting obligations and collect the final report, the last of the outcomes data and any other evaluation data you have requested (unless your grantee has committed to a longer-term follow-up regime). Financial acquittals – evidence that grant monies have been expended as authorised – are also commonly completed at this point (typically within eight weeks of project completion).

Reporting requirements should ideally have been agreed at the outset of the funding relationship so there should be no surprises when it comes time to collect the last pieces of data.

The final report is an important moment in the granting relationship and offers an opportunity for grantees to pause and reflect on what's been achieved or learned, and what that means for future funding practices and interventions. If your grantees believe you will pay close attention to their reports, that you're interested in learning about what worked *and what did not work*, that you will use the insights gained to inform future activities, and without penalising them for honest errors or deliberate changes in course, they'll be more likely to provide honest and meaningful reports (see the Monitoring section for ideas on how to improve the integrity of data). If grantees are incentivised only to reflect on their achievements, then that's all they'll report on and grantmakers will miss out on opportunities to build grantee capability and improve future outcomes.

SmartyGrants users

If using the Outcomes Engine standard sections in the application and acquittal forms, any data entered in the application form and progress reports will flow into the final report. This makes it easier for grantees to report against targets in the original application.

All you need to do is insert the standard sections into the acquittal template and 'turn on' any of the hidden fields i.e. 'result' and 'notes'. Good practice is to set the fields from the application to 'read only'. More information is available in the SmartyGrants Help Hub.

Grantmakers can assist grantees to fearlessly reflect on their projects by taking a collaborative approach, working to build trust and mutual respect. Interactions with grantees during the monitoring and reporting process will provide the foundations for a good relationship, engendering frank conversations over the course of the grant and a holistic end-of-grant project review.

The purpose and outcomes of a program should be clearly articulated in the guidelines, and grant recipients should be asked early in the process to show how they will help achieve those outcomes.

SmartyGrants users

A project review template is available in SmartyGrants (one of the Administration Form templates). We recommend completing this alongside the grantee's final report review and financial acquittal.

Ensure you allocate time to properly review, aggregate and reflect on final reports. Providing some sort of appraisal is a good way to provide feedback and lets grantees know their effort is appreciated, and their insights have been noted.

The "final[3]" step in evaluating a grant's outcomes includes asking yourself the following question:

> "To what extent did the grant achieve [enter intended outcome here; e.g. increased social wellbeing]?"

The phrase "to what extent" encourages a nuanced analysis, prompting you to consider whether the outcome was achieved significantly, moderately, or minimally.

To support this process, you'll need a rubric to guide your project review assessments, similar to how funding applications are evaluated.

Grant Outcome Assessment Rubric: Social Wellbeing

This rubric is based on Keyes' (1998) framework of social wellbeing, which includes social integration, contribution, and belonging. It is intended to help grants managers assess how well a funded project achieved outcomes relating to participants' social wellbeing, including improvements in relationships, community involvement, and sense of belonging.

Depending on your aspirations and resources, your own grant project review rubric may be more or less sophisticated than the one shown here.

Outcome	Outstanding (5)	Proficient (4)	Satisfactory (3)	Limited (2)	Insufficient (1)	No data (0)
Strong social connections	The project clearly helped participants form or strengthen many meaningful relationships, leading to strong, supportive social networks.	The project helped improve the quality of participants' relationships and increased their social connectedness.	There is some evidence that participants' relationships improved or new connections were formed.	Only a few or minor improvements in participants' relationships are evident.	There is no sign that the project helped participants build or improve their relationships.	No data available

Table 3: A rubric to help assess
'To what extent have participants increased their social wellbeing as a result of this program?'

Continues...

[3] Ongoing grant programs should never have a true "final" stage – lessons from one round should inform the next.

[4] Informed by: Keyes, C. L. M. (1998). Social Well-Being. *Social Psychology Quarterly*, 61(2), 121–140

Outcome	Outstanding (5)	Proficient (4)	Satisfactory (3)	Limited (2)	Insufficient (1)	No data (0)
Active community engagement	Participants were actively involved in community life through the project – showing leadership, initiative, and making a positive difference to others.	Participants were engaged in community activities through the project and contributed positively to community wellbeing.	There was some participation in community activities, suggesting that the project encouraged social interaction.	Only limited participation in community life is evident; participants were mostly inactive or uninvolved.	There is no evidence that the project helped participants engage with or contribute to their community.	No data available
Sense of belonging	The project fostered a strong sense of belonging among participants, who felt well connected and supported.	The project improved how connected and included participants felt in their communities or social groups.	Some participants reported feeling more connected, though the difference from before the project may not be very significant.	Only a weak improvement in participants' sense of belonging is evident.	Participants did not feel any more connected or included as a result of the project.	No data available

Table 3: A rubric to help assess
'To what extent have participants increased their social wellbeing as a result of this program?'

Grant managers should review all available data, including progress and final reports, as well as insights from site visits, to make an informed judgement about the level at which the grant data indicates the funded project (or grantee) is performing. For example, if the qualitative evidence shows that participants demonstrated moderate interpersonal relationships, with some signs of increased social connections, the score for strong social connections may be deemed satisfactory or a 3. This structured approach ensures a consistent and transparent evaluation of social wellbeing outcomes.

Making these judgements requires more than just reviewing available information; it also requires assessing the quality of that evidence. Not all evidence carries the same weight. Grantmakers are encouraged to use tools such as the Nesta Standards of Evidence, which offer a tiered framework for evaluating the robustness of claims about impact.

The Nesta model includes five levels of evidence: from Level 1 (a clear logic model or theory of change) through to Level 5 (independent replication). By integrating this kind of framework into your end-of-grant reviews, you can differentiate between anecdotal reflections and rigorously validated outcomes, enabling smarter decisions and continuous improvement in your funding practice.

Ideally, each outcome will be assessed using this approach, which is why we recommend keeping the number of outcomes manageable. Since each outcome requires a dedicated rubric to ensure clear and consistent evaluation, having too many can make your program reviews resource-intensive and, quite possibly, too complex to implement effectively. By focusing on a select number of key outcomes, you can ensure the assessment process remains thorough, feasible, and meaningful.

Grant managers with sufficient resourcing are strongly encouraged to first assess grant outcomes, document any questions, and then collaborate with the grantee to finalise the evaluation. Since reports may not capture the full story, this process offers an opportunity for grantmakers and grantees to reflect jointly on what worked and to what extent. This may involve site visits and direct discussions with participants to ensure a more comprehensive, accurate review.

SmartyGrants users

In SmartyGrants you can convert your rubric into assessment questions on a Program Review Form (using an administration form type) to streamline collection of and reporting on your data.

You can make use of functionality like calculated fields and SmartyGrants reporting and analytics tools to further enhance your outcomes analysis capabilities.

9. Evaluate and share

Well done for making it this far! Now, let's shift our focus to grant portfolio evaluation – the big-picture review of how your grants are going. This isn't just about assessing individual projects or initiatives; it's about bringing all that data together to uncover the full story of your grantmaking efforts.

A comprehensive grant program evaluation considers key factors such as outcomes (the subject of this paper), as well efficiency, appropriateness, sustainability and impact. In this paper, our focus remains on outcomes, and in this section, we'll explore what a portfolio-level review of outcomes data could look like.

So, how do you bring all this together? One of the most valuable components of your program report will be the aggregated outcomes data from all your funded projects. By analysing this data collectively, you can uncover patterns, identify trends, and gain deeper insights into the overall impact of your portfolio.

To help illustrate this, you can find an example of an organisation-level Outcome Report [**here**][5]. This report consolidates data across all funded projects, highlights lessons learned, and identifies unintended outcomes, offering a holistic view of how grants are contributing to change.

SmartyGrants users

The standardised data from the Outcomes Engine standard sections (covering activities, outcomes, metrics and qualitative data) can be displayed in a simple report and aggregated across programs, providing a solid foundation for an annual Outcome Report.

This data also provides a starting point for evaluating to what extent the outcome has been achieved.

In SmartyGrants we provide templates to help you report on your outcomes data in Excel, Word and via the Analytics functionality.

[5] **https://www.smartygrants.com.au/help-sheets/turning-grant-data-into-clear-and-meaningful-reports-goodtowns-grant-program-example** or, for UK and European readers, here: **https://www.smartygrants.co.uk/help-sheets/turning-grant-data-into-clear-and-meaningful-reports-goodtowns-grant-program-example**

Making value judgements about outcomes

But how do we actually evaluate outcomes? How do we make a value judgement about whether a portfolio has successfully achieved its intended outcomes?

Much like we did at individual initiative or project level, we need to ask at portfolio level:

> "To what extent did the portfolio of grants achieve [enter intended outcome here; e.g. increased social wellbeing]?"

One way to do this is to take the results of individual project evaluation undertaken in the previous step (see page 29) and collate them into a portfolio-level report, which provides a high-level snapshot of how your grants are performing.

Example: SmartyGrants Evaluation Review Table

Outcome (examples)	**Evaluation (score from rubric out of 5)**			
	Grantee A	Grantee B	Grantee C	Average
Increased social wellbeing	3.5	2	4	3.25

Table 4: Example evaluation review table

While the average score provides a useful starting point for understanding portfolio performance for a particular outcome, the real value comes from digging deeper into the stories behind the numbers:

- Why did Grantee C perform well? What strategies did they use that could be replicated elsewhere?
- What challenges did Grantee B face? Were there contextual barriers, capacity issues, or other factors that influenced outcomes?
- Are there trends across the portfolio? Are some types of projects performing consistently better or worse?
- Which grants or interventions were most effective? Which had unexpected positive or negative consequences?
- Why did some projects perform exceptionally well while others struggled? What factors influenced these differences?
- Did external factors, such as policy changes or economic shifts, affect the portfolio's ability to meet its goals?

By taking a thoughtful and holistic approach, grant managers can go beyond the numbers to tell a richer, more meaningful story about the impact of their grants.

Beyond the numbers: A more meaningful portfolio review

While aggregating scores can be useful, it's important to remember that numbers alone don't tell the full story. To truly understand impact, consider:

- **Combining quantitative and qualitative insights** – Use rubric scores alongside grantee reflections, site visits, and participant stories.
- **Segmenting data for better comparisons** – Look at project type, geography, funding amount, or target population to identify trends.
- **Identifying opportunities for learning** – Use insights to inform future funding decisions, scale best practices, and improve program design.

By taking a thoughtful and contextualised approach, grant managers can move beyond simple scoring to create a more meaningful and actionable evaluation of their entire grant portfolio.

Combining data: The Centre for What Works

As part of our vision for the Centre for What Works, we aim to share insights, within or – perhaps, later (with permission) – between portfolios on grants that score a high on outcomes (scoring a 4 or 5). By doing so, others can learn from successful initiatives, understanding what works, for whom, and in what context.

This goal is highly achievable, given that:

- More than 800 funders now use SmartyGrants to manage their grant programs.
- More than 160 funders (at date of publication) are leveraging the Outcomes Engine's data standardisation tools to collect structured outcomes data.

With more funders adopting standardised approaches, we have an opportunity to build a shared evidence base that supports smarter, data-informed grantmaking.

While we are not there yet, our goal is to create a system where outcomes data is consistently collected, shared (where appropriate), and used to extract meaningful insights. Achieving this will take collaboration, commitment, and ongoing refinement of data collection methods.

Beyond outcomes

As mentioned at the start of this section, outcomes evaluation is just one piece of the puzzle – albeit a critical one! Outcomes evaluation focuses specifically on what has been achieved – examining the extent to which intended outcomes were realised and the tangible benefits that resulted from the funded activities.

However, a full program evaluation should also assess other critical factors that influence long-term impact and effectiveness, for example:

- **Efficiency –** How well were resources (time, money, effort) utilised to achieve the outcomes?
- **Appropriateness –** Was the program design, and were funded activities, suitable for the needs of the target population?
- **Sustainability –** Are the benefits and changes likely to last over time? Did the program help build capacity or resilience in the community?
- **Long-term impact –** Did the program contribute to broader or systemic changes beyond its initial scope?

To gain a holistic understanding of your portfolio's success and areas for improvement, it's essential to evaluate these dimensions alongside outcomes.

For a deeper dive into evaluating efficiency, appropriateness, sustainability, and long-term impact, watch out for our upcoming publication on this topic.

Suggested follow-up actions

To support your transition to outcomes-orientated grantmaking, we recommend the following next steps:

1

Start with a pilot

Choose a single grant program or funding stream to test outcomes tracking. SmartyGrants subscribers should ask the service team to turn on the Outcomes Engine (it's free!). Use the default templates and tweak them as you learn.

2

Define your outcomes framework

Articulate a set of domains, outcomes, and metrics that reflect your funding goals. Keep it simple, and be open to refining over time.

3

Align forms and processes

Update your guidelines and your application, assessment, and reporting forms to reflect outcomes-focused questions. Use standard sections in SmartyGrants where possible.

4

Train your team

Ensure your internal team understands the why and how of outcomes-orientated grantmaking. Provide training on evaluation concepts and how to use the Outcomes Engine effectively. (IGM can help with this, if required.)

5

Build trust with grantees

Communicate clearly that you're interested in learning, not just accounting. Create space for grantees to reflect honestly on what's working and what isn't.

6

Evaluate and refine

Review your outcomes data regularly. Use rubrics to make value judgements about your grants. Share what you learn internally and externally.

7

Contribute to the Centre for What Works

Help build the sector's shared evidence base by contributing your anonymised, high-quality outcomes data to the Centre for What Works. The more we share, the more we all learn.

Conclusion

For decades, grantmakers have been improving how they design and deliver funding. We've made great strides in efficiency, streamlining application forms, modernising systems, and speeding up payment cycles. But efficiency isn't enough. The core question remains: What changed as a result of our funding?

This white paper has argued that it's time to refocus the field of grantmaking around outcomes – the tangible, meaningful changes experienced by individuals, communities, and environments as a result of funded interventions. This shift isn't about layering on more reporting, nor is it about punishing failure. It's about better learning: identifying what's working, what's not, and why, so that we can direct funds more strategically, support the right agents of change, and ultimately achieve more impact with every dollar, pound or euro that we invest.

We've laid out a pathway for moving toward outcomes-orientated grantmaking, using the IGM's grantmaking lifecycle as a framework. At every stage, from planning and design, to contracting, monitoring, and evaluation, there are opportunities to embed an outcomes focus. We've shown how a clear theory of change, well-structured outcome frameworks, standardised metrics, and supportive data systems like the SmartyGrants Outcomes Engine can help make this shift both manageable and meaningful.

We've acknowledged the challenges: outcomes are often complex, slow to emerge, and difficult to attribute. Data collection can be messy. Aggregating across a portfolio requires standardisation and careful interpretation. Grantees may lack capacity, and power imbalances between funder and grantee can inhibit honest reporting. But we've also shown that these challenges can be addressed, by starting small, building trust, aligning data systems, and taking a developmental approach to evaluation. We don't need perfect data to make better decisions; we need good-enough data, thoughtful interpretation, and a commitment to learning.

Importantly, we've made the case that outcomes-orientated grantmaking is not just about measurement, it's about mindset. It means seeing grantmakers not as auditors or paymasters, but as learning partners who walk alongside grantees in the shared pursuit of change. It means designing systems that reward honesty and reflection, not just success stories. And it means recognising that outcomes are co-produced, by funders, grantees, beneficiaries, and the wider context in which they all operate.

Finally, we've looked to the future. As more funders adopt systems like the SmartyGrants Outcomes Engine and begin collecting structured, standardised data, we have a unique opportunity to build something greater than the sum of its parts: a Centre for What Works – a shared evidence base that reveals what works, for whom, in what contexts, and why. The possibilities for learning, collaboration and improvement across the grantmaking sector are immense.

We're not there yet – but we're on the way. The shift to outcomes-orientated grantmaking is a journey, and every step counts. Whether you're just starting out or refining an existing approach, we invite you to join us. Because when we understand what's changing, we can change more.

More information

- The *SmartyGrants Grantmaking* Toolkit, 2020 (available to SmartyGrants users, via the SmartyGrants Help Hub)
    - Australian/New Zealand SmartyGrants users: **https://help.smartygrants.com.au/using-smartygrants/getting-started/grantmaking-toolkit/**
    - UK/European users: **https://help.smartygrants.co.uk/grantmaking-toolkit/**
- How to turn grant data into meaningful reports using the Outcomes Engine, SmartyGrants article, 2025: **https://www.smartygrants.com.au/help-sheets/turning-grant-data-into-clear-and-meaningful-reports-goodtowns-grant-program-example**
- Identifying outcomes agents: How to target grantseekers to reach your goals, SmartyGrants help sheet, 2020: **https://www.smartygrants.com.au/help-sheets/identifying-outcomes-agents-how-to-target-grantseekers-to-reach-your-goals**
- Transforming your Intentions into Outcomes, SmartyGrants article, 2018: **https://www.smartygrants.com.au/articles/transforming-your-intentions-into-outcomes**
- Six hot tips on using SmartyGrants to track grantmaking outcomes, SmartyGrants article, 2021: **https://www.smartygrants.com.au/articles/six-hot-tips-on-using-smartygrants-to-track-grantmaking-outcomes**
- How to measure outcomes when you have only partly funded a project, SmartyGrants article, 2022: **https://www.smartygrants.com.au/help-sheets/measuring-outcomes-from-part-funded-projects**
- Just one in four grantseeker outcomes is an outcome, analysis reveals, SmartyGrants article, 2023: **https://www.smartygrants.com.au/help-sheets/just-one-in-four-grantseeker-outcomes-is-an-outcome-analysis-reveals-2**
- Why it is so hard to move from outputs to outcomes, SmartyGrants article, 2021: **https://www.smartygrants.com.au/articles/why-its-so-damned-hard-to-move-from-an-outputs-to-an-outcomes-focus-and-how-you-can-make-the-shift**
- How far does a $5,000 grant go, and how much evaluation can we ask for in return? SmartyGrants article, 2023: **https://www.smartygrants.com.au/help-sheets/how-far-does-a-5000-grant-go-and-how-much-evaluation-can-we-ask-for-in-return**
- Delivery and Evaluation of Grant Programs, Australian National Audit Office, 2016: **https://www.anao.gov.au/work/performance-audit/delivery-and-evaluation-grant-programmes**
- Better Evaluation website: **https://www.betterevaluation.org/**
- Theory of Change for funders: Planning to Make a difference, NPC, **https://www.thinknpc.org/resource-hub/theory-of-change-for-funders-planning-to-make-a-difference/**, 2021
- Heifetz, Ronald A., Marty Linsky, and Alexander Grashow. *The Practice of Adaptive Leadership: Tools and Tactics for Changing Your Organization and the World.* Harvard Business Press, 2009.
- Nesta Standards of Evidence: **https://www.nesta.org.uk/feature/innovation-methods/standards-evidence/**

ourcommunity.com.au
Where not-for-profits go for help

OurCommunity.com.au

Our Community is a world-leading social enterprise that provides advice, connections, training and easy-to-use tech tools for people and organisations working to build stronger communities. **The Our Community group of enterprises are:**

INSTITUTE OF COMMUNITY DIRECTORS AUSTRALIA
Knowledge Connections Credentials

CommunityDirectors.com.au

The Institute of Community Directors Australia is the leading governance and leadership network for members of Australian not-for-profit and government boards, and their senior staff.

Funding Centre
Where not-for-profits go for money

FundingCentre.com.au

The Funding Centre is Australia's smartest grants database and fundraising capacity building website.

GiveNow
for your community

GiveNow.com.au

GiveNow is Australia's first and best giving platform, providing donations, ticketing and membership services for Australian not-for-profits.

SmartyGrants
Software, data science & grantmaking intelligence

SmartyGrants.com.au

SmartyGrants delivers software, data science and grantmaking intelligence for funders.

OUR COMMUNITY HOUSE

OCHouse.com.au

Our Community House is a green and creative co-working space for the social sector in Melbourne, Victoria.

SmartyFile
Store it, share it, use it

SmartyFile.com.au

SmartyFile is a red tape-busting data-storage and data-sharing tool for not-for-profits and other grant applicants.

Succession Media

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A news service for Australia's not-for-profit sector.

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