How to Grant from Your Fund

Granting From Your Fund · https://www.foundationsa.org.au/fund-support-centre/how-to-grant-from-your-fund/

Making a grant from your Fund is simple. You can request a grant at any time through your Fund Portal or by contacting our team.

Reminder: Granting is not avail able for Gumnut Accounts.

Request a grant from your Fund Portal

Log in to the Fund Portal using your email address and password and go to the Grant Requests tab. There are three ways to complete your request:

- Choose from grantees you have given to previously
- Search for other grantees in our database
- Enter grantee information manually

In your Fund Portal, you can also view a list of all grants requested from your Fund including their status. To view your Fund’s granting history, navigate to the Grants tab.

Request a grant by email or phone

You can also request a grant by contacting our team at grants@foundationsa.org.au or on 08 8223 3597, and providing the following details:

- Your Fund name
- Recipient organisation (and project if relevant)
- Grant amount ($)
- Organisation contact (if known)

Our Team will then be in touch to finalise. If the request has been made by phone, confirmation in writing is required (email is fine).

More about granting

Guidelines

- **Minimum grant amount is $500**. There is no maximum limit on grant value provided your Fund's balance does not fall below $20,000.
- **A minimum of $20,000 must be retained in your Fund at all times**
- **The decision to provide grants remains the discretion of Foundation SA**.
- **If you are unsure of an organisation's eligibility to receive a grant, contact us**. Our team always checks eligibility before advising an organisation that a grant has been recommended.
- **You are not required to make a minimum distribution each year. Foundation SA** is obliged to grant a minimum of 4 per cent of capital but this is calculated for the Foundation overall and we exceed this minimum each year as a matter of course. This means you have the flexibility to grant as much as you like or choose to grow your Fund without making grants in a given year.*

* In the highly unlikely event that the Foundation does not meet the 4% distribution requirement in a given year, Foundation SA may require sub-funds that have not made any distributions that year to make a grant.

Grant Process

At Foundation SA, we distribute grants on behalf of our Fund Advisors every fortnight.
Each grant follows the below steps. Fund Advisors only need to provide the information required in Step 1 and then Foundation SA takes care of the rest.

1. **Fund Advisor submits a grant request** via Foundation SA online. Required details: recipient organisation (and project if relevant), grant amount ($) and organisation contact (if known).
2. **Foundation SA conducts compliance checks and confirms eligibility**, i.e., charitable purpose, registration with The Australian Charities and Not-for-profits Commission (ACNC), and DGR1 status where required.
3. **Foundation SA contacts the organisation** to let them know they have been nominated to receive a grant. For grants over $10,000 or project specific, Foundation SA provides a grant agreement for review and signature.
4. **The grant details are sent to the CEO for approval**. A grant is only ready for approval once the recipient has provided payment details.

5. **Grant is paid**. Grant payments are made every fortnight, one week after a grant approval.
6. **Foundation SA notifies Fund Advisor when grant has been made**. This email will be sent from *no-reply@fcsuite.com*.
7. **For grants over $10,000 or project specific, Foundation SA requests a grant acquittal report from organisation 12 months later**. We do not request specific reports for general purpose grants.

   Looking for granting inspiration? Go to Granting Advice and Support