



Foundation Maps: Australia FAQs

Philanthropy Australia has partnered with Foundation Center to help make our members' grantmaking activities smarter and more strategic by boosting the availability of rich grants data—for and about funders in Australia. This data is delivered to you through a wonderful new tool called *Foundation Maps: Australia*—a highly interactive and searchable mapping platform.

With just a few clicks, *Foundation Maps: Australia* will show you **who** is funding **what** and **where**—across Australia.

Getting involved is easy: Just share your data (instructions below), and you'll be making a powerful contribution to a resource all of us can use to make our giving savvier and more strategic.

Foundation Maps: Australia is generously supported by the Ian Potter Foundation, Gandel Philanthropy and Perpetual Trustees.

Foundation Maps: Australia uses a common agreed data set and the Grant Classification Scheme (CLASSIE), developed for Australia by Our Community, based on the Foundation Center's PCS.

Why share your data?

It's good for the sector

Effective philanthropy requires access to good quality, timely data about who's doing what, where. By sharing your data, you're ensuring that the field has the best information to act on.

Take control of your story

People understand foundations by the grants they make. And no one knows your grantmaking better than you. Don't leave things to interpretation – share your data to make sure your story is told in the right way.

It's easy

Udpater makes it easy to update your profile and share your grants data. Some software partners will make even easier with a pre-formatted export report function that pulls all the data you need into one excel file.



How do I share data?

You will be supplied with a user name (**Your Email**) and a **Password**.

Enter your user name and password at the [Foundation Center Updater](#) website.

Once logged-in you can:

1. **UPDATE YOUR PROFILE:**

Basic Information – name, contact details etc

Work Categories – areas supported, geographic focus, target groups etc

Fiscal Data – financial information

People – can list trustees and key staff

Application Information – application deadlines & funding requirements

Programs – detailed information on Grant program areas

You control what information you wish to place in your profile.

2. **UPLOAD YOUR GRANTS DATA** using the excel template supplied (attached)

For foundations who wish to remain anonymous, please email fmasupport@philanthropy.org.au

What grants details should I provide?

Though organisations are encouraged to share a variety of information about their grants, only nine fields are required and a few more highly encouraged.

Required	High Encouraged
<ul style="list-style-type: none">• Recipient Organisation Name• Recipient Organisation City• Recipient Organisation State• Recipient Organisation Country• Grant Amount \$AUS• Grant/Project Start Date• Grant/Project End Date• Grant Description• Project/Beneficiaries Location	<ul style="list-style-type: none">• Recipient Organisation ABN• Recipient Organisation Address• Recipient Organisation Postcode• Recipient Organisation URL• Grant Title• Transaction ID• Grant Duration• Subject/Program Area• Target Group/Population Served or Funding Organisation Type• Grant Project Name• Grant Round Name

Why is it important to provide a grant description?

Providing a detailed grant description is one of the best ways to ensure that your data is coded with the correct **subject**, **population**, **geographic area served** and **support strategy** codes (for an example of how your grant will appear on your map, please see below).

In general, a good grant description includes information on:

- **WHAT:** What is the primary objective of the grant?
- **HOW:** How will the objectives of the grant be achieved?
- **WHO:** Which group or groups are meant to benefit from the grant?
- **WHERE:** What geographic location(s) is the grant meant to serve?

Example:

Basic Grant Information	More Details
TOTAL AMOUNT: \$15,000,000	PRIMARY SUBJECT: Child care
YEAR AWARDED: 2016	POPULATION SERVED: Children and youth
GRANT DURATION: 5 years	SUPPORT STRATEGY: Capital and infrastructure
	TRANSACTION TYPE: Cash grants
	GEOGRAPHIC AREA SERVED: Philadelphia

Grant Description

Continue to provide planning and capital support for the expansion of high-quality child care providers serving low-income children in Philadelphia.

Which grants data do I send?

In **Stage 1** – we are only seeking grants awarded from 1 January 2017 – and if readily accessible participants can also supply data from 1 January 2015.

Funders may also decide to prioritise the grants they submit – for example the top 5 or 10 grants.

In **Stage 2** – funders are encouraged to share their on-going awarded grants data as frequently as possible – for example, monthly or quarterly – to ensure that the timeliest information is available to the sector.

How quickly will my information appear on the FMA?

In **Stage 1** – grants will only be available at and post the launch at the PA Conference

In **Stage 2** - your data will appear on FMA and other maps within 10 business days, if not sooner.



Are there any reports available for Gifts and/or SmartyGrants users?

For Gifts and Smartygrants users – there is a report template available for *Foundation Maps: Australia* – contact them directly for access and advice.

How is my grants data coded by Foundation Center?

To facilitate the use of this information, Foundation Center codes grants data with **subject**, **population**, **support strategy**, **transaction type** and **geographic area served** codes. To learn more about our Philanthropy Classification System please visit <http://taxonomy.foundationcenter.org/>.

For the most part, data we collect are coded in an automated process with review by data experts. The automated coding process is trained for accuracy with a supervised machine learning model. If you would like to have more direct control over how your data is coded, please include the appropriate codes in the data you submit to us. If you'd like to know more about our coding process, please feel free to contact us at egrants@foundationcenter.org.

How will my grant information be used and shared?

In addition to publishing your data in Foundation Maps: Australia, your data will also be appear in **Foundation Directory Online** (FDO **Foundation Maps Professional**, and if relevant, in **Foundation Landscapes** and/or special reports published by our **Knowledge Services** department.

In the future your data may also be published in **Our Community Maps**.

What should I do if corrections need to be made to my data?

If you notice any errors or need to make changes to your data after it has been processed, just email fmasupport@philanthropy.org.au. We will advise Foundation Center to take care of any needed changes right away.

What support is available?

For help at any time please email: fm-support@philanthropy.org.au

Philanthropy Australia has also established a **Data Support Team** which can provide detailed assistance over the phone/on-line support – at an agreed hourly rate of \$60.

For further information and to be connected to a member of the Data Support Team – please email us at: fm-support@philanthropy.org.au

Who provides the support for the Data Support Team?

Bernadette Allen



BJ has cultivated a career in banking and financial services for over a decade, including 4 years in the Philanthropic sector as a Grant Program Manager at ANZ Trustees. In this role, BJ gained a deep understanding of trends and challenges in the philanthropic sector within Australia and supported strategy development and granting execution across the \$2b FUM philanthropy business. In addition to her Philanthropy experience, BJ has held and led teams in numerous analytics, technology, strategy, risk and business optimization project roles. She has a passion for data and the use of information to drive change. Presently, BJ has a lead role in the development and deployment of a Net Promoter System at ANZ. BJ studied Bachelor of Laws and Economics at Latrobe University.

Rebecca Iliffe MA IntRel, B AppSci



Rebecca Iliffe is an Associate Consultant with Philanthropy Australia assisting with the Foundation Maps Australia project. She has a wide-ranging background in philanthropy as a grant maker, grant seeker and through her pro bono services. In her business, Turnstone Projects, Rebecca works with many of the sectors that receive philanthropic support from education, science to Indigenous and the environment.

Experienced in project management including project administration and reporting, Rebecca can assist grant makers, foundations and trusts by collecting, researching, transcribing and entering details into the Foundation Maps: Australia portal.

Services can be delivered on-site or remotely and include:

- Data research, consolidation and data entry;
- Data collection from existing grants management systems and data entry;
- Formatting grant details and data into the required Excel format; and, or
- Collaboration and coaching for data entry (delivered remotely).

Jacqueline Cameron



Jacqueline is a dedicated, motivated and results oriented fundraising professional who brings a broad range of experience to clients, from developing policies and procedures to support successful fundraising, prospect research, data mining and analytics, prospect management, relationship management, donor stewardship, grant proposals, collateral development, and developing fundraising strategies. Through working with Jacqueline, clients can expect a commitment to the highest quality and a focus on achieving results. She has exemplary time management and organisational skills, able to manage multiple tasks, complete deadlines and operational priorities simultaneously to achieve positive outcomes for clients. “I believe and have seen the important role that the not-for-profit sector plays in society and I want to be part of helping facilitate this work and enabling charities to achieve their mission.” Jacqueline’s qualifications include a Bachelor of Business (Marketing) and Masters of Business in Philanthropy and Non-profit Studies, in which she received a number of awards for excellence and was chosen for an exchange program, completing the ‘Globalising Europe’ program with EDHEC business school in France. Since 2011, Jacqueline has headed the research team and worked as a consultant for leading fundraising consultancy AskRIGHT. During this time, Jacqueline also completed an 18-month position with a national university as a Development Manager based in Melbourne and Queensland. Prior to this, Jacqueline worked in marketing and sales roles where she was responsible for identifying and researching key prospects, companies and market opportunities. She also assisted with fundraising at an independent secondary school. Jacqueline has provided services for a full range of not-for profit organisations in Education, Health, Community, Arts and Culture, Sport, and International Aid. She has worked with a number of non-profits to improve fundraising performance by developing fundraising collateral, fundraising strategies and establishing fundraising capacities.

Stacey Thomas



Stacey has extensive experience in the philanthropic sector having worked with individual, family and corporate foundations across Australia. She is currently the CEO of the Fay Fuller Foundation and Philanthropy Executive with the Jaquillard Minns Family Office. Stacey has a Master of Business majoring in Philanthropy and Social Investment and Bachelor of Psychology degree and previously held roles in the Myer Family Company, Telstra Foundation and Trust Company.

What is the Foundation Center

Established in 1956, Foundation Center is the leading source of information about philanthropy worldwide. Through data, analysis, and training, it connects people who want to change the world to the resources they need to succeed. The Center maintains the most comprehensive database on U.S. and, increasingly, global grantmakers and their grants — a robust, accessible knowledge bank for the sector. It also operates research, education, and training programs designed to advance knowledge of philanthropy at every level.

To learn more about the [Foundation Center](#).

What is the Foundation Center Updater?

The Foundation Center Updater is an easy-to-use online tool that allows grantmakers to keep basic information about their activities up to date in our databases. That allows us to communicate to the public the most current giving and activities of the reporting grantmakers. Once you log in to the Updater service, you have access to an online form in which you can enter specific information about your organization. The information that initially shows up on the form is the current information that displays within the *Foundation Directory Online*. Changes you submit using the Updater will be reviewed by Foundation Center staff and reflected in the next update to the *Foundation Directory Online*, which occurs on a weekly basis. There are profile sections you can select to update your organization's information. Locate and click the "Update Organization" tab on the upper right hand corner. This will bring you to the section page. Clicking on the individual sections allows you to update any or all of the information in that area.



The sections available include:

Basic Information — Including organization name, address, phone numbers and URL address.

Work Categories - Use the Foundation Center’s Philanthropy Classification System to communicate what you support, where you give your grant dollars, who benefits from your grantmaking, and more.

Fiscal Data — The most current financial information available.

People — List key officers, trustees and staff for the organization.

Application Information — Including application deadlines and other funding requirements.

Programs — Detailed information on the organization's direct program work.

Upload Grants – Allows you to submit a list of your latest grants directly to us.

How is Foundation Center Updater related to electronic grants reporting (eReporting)?

Foundation Center maintains the most comprehensive database on U.S. and, increasingly, global grantmakers and their grants—a robust, accessible knowledge bank for the social sector. We structure the publicly available grants information of funders and bring it to life for thousands of Foundation Center visitors, through our libraries and global network of partners and users of our online data services.

Sharing your information directly with us through eReporting ensures that the timeliest information is available to the sector and that the story of your foundation’s giving is told accurately. Foundation Center Updater allows you to eReport by uploading your grants directly to us, as well as accessing our standard template. For more information on electronic reporting, [visit our website](#)

What is the Dashboard and what does it represent?

When you log into Foundation Center Updater, the first thing you see is your dashboard. This represents the completeness and freshness of your organizational profile data. The top section of the dashboard tracks your lists of submitted grants – when they were submitted, and if they have been processed by Foundation Center staff for publication. Looking at this allows you an at-a-glance way to determine if it is time to submit fresh grants data to best reflect your organization’ giving activities. The bottom section of the dashboard represents completeness of profile data, specifically tracking if you have submitted data for each of the informational sections in your profile. This is a quick way to ensure your organizational information has no gaps or missing areas.

How do you navigate Updater?

When you log into Foundation Center Updater, you begin on the Dashboard, where you can see status information about the completeness and timeliness of your profile information. From this page you have two options- you can either upload a new grants list, or you can begin updating your organization profile. If you update the profile information, you begin on the “Basic Information” screen, where all of the information about your organization that is eligible to be changed for this section is available on screen by scrolling down to the bottom. If you want to access information in other sections of the form, select from the row of tabs located on the top of the screen directly under your organization name. Clicking on any of the sections will take you to that area of the form. It is recommended that when using Updater you check all information for accuracy.



Additionally, on every page for updating your profile, you have options to: 1) Save draft data; 2) Submit your changes to Foundation Center; 3) Clear all changes made during the session; 4) Clear all changes on the current page only; 5) Navigate to the Upload Grants or Dashboard areas; 6) Review the FAQ or your user profile.

When on the Upload Grants area, you have the following options: 1) Save a draft of your grants information; 2) Submit your grants to Foundation Center; 3) Navigate to the Update Profile or Dashboard areas; 4) Review the FAQ or your user profile.

How do you update Your Organizational Profile?

Each section of Updater has multiple fields with your organization's information inside. To edit the information, simply make changes to the existing data. In some cases where you can have multiple pieces of information (Example: You can have multiple contact emails) you will be able to add or remove information using the buttons provided. You can edit a section of information as many times as necessary prior to submitting.

Clicking on Save will save your data in draft form, clicking on the Submit button will end your session and send your information to Foundation Center.

How do you upload your grants?

The Upload Grants section allows you to submit a list of grants to Foundation Center using common formats (excel or csv). To begin the process, either click the "Select File" button to search for your list, or simply drag your file to begin the upload process. Once you select a file, you'll have an opportunity to review and confirm information about the list prior to submitting to Foundation Center.

In addition, you can download our standard eReporting template so you can use it to create and send your selected grants to us. Click the button to have the template downloaded to your machine.

Saving and Submitting Each section on Foundation Center Updater has two options: Saving and Submitting your data.

- **Save:** Save buttons are located in two places on the screen- underneath the last editable field on each page, as well as at the very bottom of the screen. Hitting save allows you to save draft information in your local user session, so the changes you've made will appear when you log in next. *Data that is merely saved only appears on this form and does not get sent to Foundation Center for review.*
- **Submit:** The Submit button is also located in two places on the screen – underneath the last editable field on each page, as well as at the very bottom of the screen. *Hitting Submit button sends any changes you have made to Foundation Center for review and posting in your online profile.* Once you have submitted information, there is no way to recall it. If you want to alter submitted changes you will have to re-edit the submitted information in another session.



How do you change updates that you have already submitted?

If at any point you wish to change information you've previously submitted, simply go to the section of the form containing the information you want to change. Your previous edits will be reflected on the form. Overwrite the existing information as necessary, and click the Submit button. The new information you enter will be sent to Foundation Center staff. You can submit multiple changes per day, and the latest version sent will always be the one that is used in your online profile.

Resetting Original Values in the Form

When editing information, if you do not want to save your changes, you have two options at the bottom of the screen:

- Clear All Changes: Will remove all changes made during the session and reset *all fields* to their original values.
- Clear Changes on this Page: Will remove changes and reset all fields only on the current page to their original values. Changes made to other pages will remain intact.

Please note that if you edit information and hit Submit, you will not be able to reset those changes to the original settings.

How do you contact the Foundation Center?

Questions regarding organisational grants should be directed to egrants@foundationcenter.org

Questions regarding organisational profiles, or how to use Updater, should be directed to Updater@foundationcenter.org