Impact Philanthropy Application Program 2027

Frequently asked questions

Below you'll find answers to some of the most commonly asked questions we receive during the IMPACT Philanthropy Application Program.

For comprehensive details, please refer to the **2027 IMPACT Philanthropy Application Program - Instructions and Guidelines,** available on our website. We strongly encouraqe you to read these and review the other resources available on this link carefully before submitting your organisation's application.

If your question isn't addressed here, feel free to contact us at philanthropy@perpetualwealth.com.au and we will respond to you directly.

Q. Who can apply for funding in Perpetual Wealth's Impact Philanthropy Application Program?

A. To be eligible for funding from the trusts and endowments that are managed by Perpetual Wealth, your organisation must have at least one of the following:

- Be a registered charity on the ACNC register and/or
- Australian Taxation Office Deductible Gift Recipient (DGR1) endorsement and is covered by Item 1 of the table in section 30-15 of the Income Tax Assessment Act 1997

Your application will be marked **ineligible** if your organisation is one of the following:

- **Under administration.**
- **Not a going concern.**
- **Has a compliance action against it by the ACNC.**

Applications will also be marked **ineligible** if:

- **The bank account details provided are for an individual, or do not match the organisation name.**
- **Your medical research project has not received ethics committee approval. Confirmation of approval must be provided by 1 March 2027.**

Q. When does Perpetual Wealth accept applications for the IMPACT Philanthropy Application Program?

A. 2027 applications open at **9am AEST on Wednesday 4 November 2026** and close **5pm AEST on Friday 4 December 2026.** We only accept applications during this period via our online system. **No extensions will be granted.**

Q. When will my organisation be notified of the outcome of our application?

A. If your application does not meet the minimum requirements to be recommended for funding, you will be notified of this outcome by March 2027. All other applicants will receive notification of their outcome during the final week of June 2027. Notifications will be sent via email the applicant contact.

Q. If my application is successful when will I receive funding?

A. All payments are made by the end of June 2027.

Q. What feedback can you give me on our organisation's application?

A. Due to the high volume of applications we receive, we are unable to provide individual feedback.

Q. Can we meet with Perpetual Wealth during the assessment period?

A. We are unable to meet with organisations during the application process. We encourage you to refer to the resources available on our website.

Q. Can I contact Perpetual Wealth to find out how the application is progressing?

A. Due to the high volume of applications we receive, we are unable to provide individual updates on the progress of applications. We appreciate your understanding and encourage you to refer to the key dates and notification timelines outlined in the Guidelines.

Q. What should I do if my organisation's circumstances or funding situation changes, eg if we secure funding from another source for the activity we applied for:

i) During the process of application/assessment

A. Please email philanthropy@perpetualwealth.com.au quoting your application number and outlining the change. If your organisation has since received funding from another source you may wish to withdraw your application.

ii) Following receipt of confirmed funding

A. Please submit a formal change request form – 'IPAP Change Request', which will be available in your Grant Toolbox profile once your funding has been confirmed.

Q. Will my application be shared with anyone outside Perpetual Wealth?

A. Your application information may be shared with external organisations/clients for the purposes of consideration for potential funding. By submitting an application, you consent to this information being disclosed for that purpose.

Funding recommendations and trends

Q. Our organisation has many funding needs. What should we apply for?

A. Perpetual Wealth manages hundreds of trusts and endowments that support a diverse range of projects and interest areas. As such, we recommend that you apply for funding that aligns with your organisation's most strategic and pressing need. Please note that Perpetual Wealth is unable to provide advice on which specific activity or project your organisation should apply for.

Q. My organisation applied last year but was unsuccessful. Can we apply for funding for the same project again?

A. Yes, you are welcome to apply for funding for the same project again. We recommend reviewing the IPAP resources available on our website to assist you with your application. Visit our website.

Q. My organisation was successful in receiving funding as part of a previous IMPACT Philanthropy Application Program. Is my organisation eligible to apply for the next IPAP?

A. Yes, your organisation may apply for further funding. Previous funding success does not affect your eligibility for future rounds, even if one or more funded projects are still in progress. Please ensure that all acquittals are submitted on time, as failure to do so may result in your application/s being deemed ineligible.

Q. Can my organisation apply for general funding for a fundraising or capital appeal?

A. General funding requests for fundraising or capital appeals are not eligible. However, organisations may apply for funding to support a specific project or activity that forms part of a broader appeal.

Q. What sectors are funded?

A. The charitable trusts and endowments that we manage distribute to all sectors including Social and Community Wellbeing, Health, Medical Research, Conservation and Environment, Education, Animal Welfare and Arts and Culture.

Q. Can Institutes such as Universities include administrative overheads / levies in their budgets?

A. Yes. University or Institutional overheads and infrastructure costs may be included as part of your overall project budget.

Q. How much should our organisation apply for?

A. You should apply for the amount required for your organisation's activity up to a maximum of $120,000 per application. Any requests over this amount will be marked ineligible.

As a guide, grants generally range between $10,000 and $100,000. Over recent years, the average grant has been $80,000.

Please note that if your organisation has been invited to apply for a specific amount, you must apply for that amount only.

Q. I have received several invitations to apply for funding from specific trusts - how many applications can I make?

A. You may submit one application per invitation, specific to the trust named in that invitation. Receiving an invitation to apply for a particular trust or grant does not restrict your organisation from applying through our general application process. Additionally, it does not count towards the number of submissions permitted under the IPAP guidelines.

Q. Can I apply for funding from a specific trust even though I have not received an invitation to do so?

A. No, you can only apply for funding from a specific trust if you have been invited.

Q. What are my organisation's chances of receiving funding?

A. In 2026, we received 2,096 applications, of which 339 applications (around 16%) were funded.

Q. How are applications assessed?

A. Perpetual Wealth's Philanthropy Services Team assesses applications based on responses provided in the application form, with a focus on four key pillars - strategy, leadership, capability, and outcomes.

To support your application, we encourage you to visit our website, where you'll find resources offering guidance and examples on how to effectively address each pillar in your responses.

All health and medical research applications are reviewed by appropriately qualified individuals to ensure rigorous and informed assessment.

Please only submit the information requested in the application form. Additional supporting documents should not be included unless specifically requested by Perpetual Wealth.

Q. Is it okay to have a co-investigator on the application who may be from another organisation or university?

A. A co-investigator may be included in your application. However, if successful, the applicant organisation will be solely responsible for receiving and administering the grant, including meeting all reporting and compliance requirements.

Q. Can organisations apply for funding via an auspice?

A. **Yes. If your organisation is not eligible to apply directly, you may be able to apply through an auspice organisation.** Please apply under the organisation with the eligible ABN, ie the ABN that has one of the following:

- is a registered charity on the ACNC register and/or
- Australian Tax Office Deductible Gift Recipient (DGR1) endorsement (covered by Item 1 of the

table in section 30-15 of the Income Tax Assessment Act 1997).

The auspice organisation will be responsible for completing and submitting the application and, if successful, receiving and managing the funding on behalf of your project.

Funds will be paid directly to the auspice organisation so please include these bank details in the application form.

Q. Which questions within the application form are specific to the assessment criteria?

A. There are seven questions linked to the assessment criteria outlined above. They relate specifically to the organisation's:

- Efficiency, eg how efficiently it uses its resources (two questions).
- Effectiveness, eg how well it is tracking against its mission (two questions).
- Understanding of the external environment in which it operates.
- Understanding of risks related to how it operates.
- Measurement of outcomes related to activities.

There are several resources, including a video, available on our website, that provide guidance and examples on how to answer questions around the four-pillar assessment process (strategy, leadership, capability and outcomes).

Q. I have been unsuccessful in the past, should I apply again?

A. There are two common reasons why organisations may not receive funding:

1. High demand - The number of applications received significantly exceeds the available funding.
2. Assessment outcomes - The application did not score highly enough against the assessment criteria outlined in the Guidelines to be recommended for funding by our clients.

Application form

Q. Can we submit multiple applications if we operate nationally or internationally?

A. All organisations may submit **a maximum** of two applications, for projects anywhere in Australia (and overseas).

Universities, hospitals, and medical research institutions may submit a maximum of three applications. There is no requirement for applications to be from different departments. We recommend that you coordinate the lodgement of your application with your central research or fundraising office.

Please refer to the Guidelines available on our website for specific details – visit https://www.perpetual.com.au/ipap-important-information.

Q. What do I do if my organisation does not come under one of the sectors listed in the application form?

A. Please select the sector that most closely aligns with your organisation's primary focus. Your responses to the remaining questions in the application will provide us with the information we need to assess your submission.

Q. Has your organisation merged with another organisation in the past 12 months?

A. If your organisation has merged with another entity within the past year, please provide organisational information based on the new, merged entity. When reporting on metrics or historical data related to your key performance indicators (KPIs), you may include data from the pre-merger organisation if it is relevant. Please ensure you clearly indicate which entity the data refers to in your answer.

Q. How can my organisation secure multi-year funding?

A. Multi-year funding is by invitation only and at the Trustees discretion.

Q. What should the activity start date be?

A. If funding is received in June 2027, the earliest your project can start is July 2027.

Q. What is the period of funding?

A. Funding is usually for a single-year period, unless notified by Perpetual Wealth.

Q. How do I know if I am an invited organisation?

A. Organisations invited to apply for funding from a specific trust will receive a separate notification from Perpetual Wealth, either prior to or during the application open period.

Q. Our organisation does not yet have DGR status however we have applied. Would this make our application ineligible?

A. Your organisation must disclose its current DGR status at the time of submitting the application. If your DGR status changes before January 2027, please notify us via email at philanthropy@perpetualwealth.com.au. Failure to do so may result in your application being deemed ineligible.

Q. What happens if I make an error in the application form that has already been submitted?

A. The application you submit will be considered your organisation's final application. No further applications or supplementary information will be accepted. All required fields in the application form must be completed. Before submitting, please take the time to review and confirm that your application is complete and accurate. You can save and return to the application at any time prior to final submission.

Q. Can I use the department name and address, instead of the university details on the application form under "Organisation information"?

A. Yes, as long as there is sufficient information on the department to enable us to contact you, and the university name is noted somewhere on the form.

Q. Can I save a draft application and return later?

A. You can press 'save draft' at any point and log out. When you log back in, your draft application will be saved, and you can start where you left off.

Q. Can more than one person work on an application?

A. Several people can work on an application at the same time. At the start of the application choose "**Yes**" to the "**Do you wish to collaborate on the application with anyone else"** question and follow the instructions.

Q. How will I know the application has been submitted?

A. The submit application button is located at the bottom of the page. You will not be able to submit your application until all the mandatory questions (marked *) are completed.

When you submit the application, you will receive an automated email indicating that the application has been submitted. This will be sent to the email address you used to log in. You will also be able to view any draft or submitted applications on your home page in your Grant Toolbox profile.

Q. Can I print or download the application form?

A. You can download the completed application form, as a PDF from your Grant Toolbox profile. Click into the submitted application and then the PDF application button.

Q. How do I change my details in Grant Toolbox?

A. We cannot update these details. Once you are logged in, go to "organisation" on the top of the screen and update details.

Q. What should I do if I experience a technical difficulty with the application form?

A. If an error occurs, please contact Grant Tool box through the support page located at the top of the screen. Please note, late submissions will not be accepted due to any technical difficulty.

Q. What is the difference between confirmed and unconfirmed funding?

A. Confirmed funding includes funds that have already been secured for the project, such as your organisation's own contribution, confirmed grants, donations, and any in-kind support.

Unconfirmed funding refers to the remaining amount your organisation is seeking from external sources. This includes the funding requested from Perpetual Wealth, as well as any other grants, sponsorships, or donations that are still pending approval.

Q. What do you mean by 'people with lived experience'?

A. People with lived experience are those who have personally experienced the challenges, barriers or circumstances that a charity's programs are designed to address. Their perspectives help ensure services, programs and decision-making are relevant, effective and responsive to community needs.

Registration

Q. What should I do if my organisation is not applying for funding this year, but would like to receive updates about future funding?

A. You can register to be notified when the next application round opens. Visit https://www.perpetual.com.au/wealth-management/philanthropy-email-subscription

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