



# GEMS FUNDING INSIGHTS

*Connection, Collaboration, Co-funding*



# Insights for greater giving and impact

**We asked, can we play a role in helping funders, charities and government identify gaps and work together to fund needs in the community sector?**

Strategic Grants has the most comprehensive funding data insights in Australia and NZ collated since 2009 - a sustainable resource that can help inform and enable collaboration and decision making to improve community outcomes for all.



# Insights for greater giving and impact

## Why we asked...

- a. Our understanding of sector needs based on funding grant round data and charity application data.
- b. Our purpose and drive to support and facilitate sector outcomes where practical.
- c. Our assumption that funders, charities and sector agencies can benefit from collective and accurate knowledge/evidence.



# Strategic Grants:

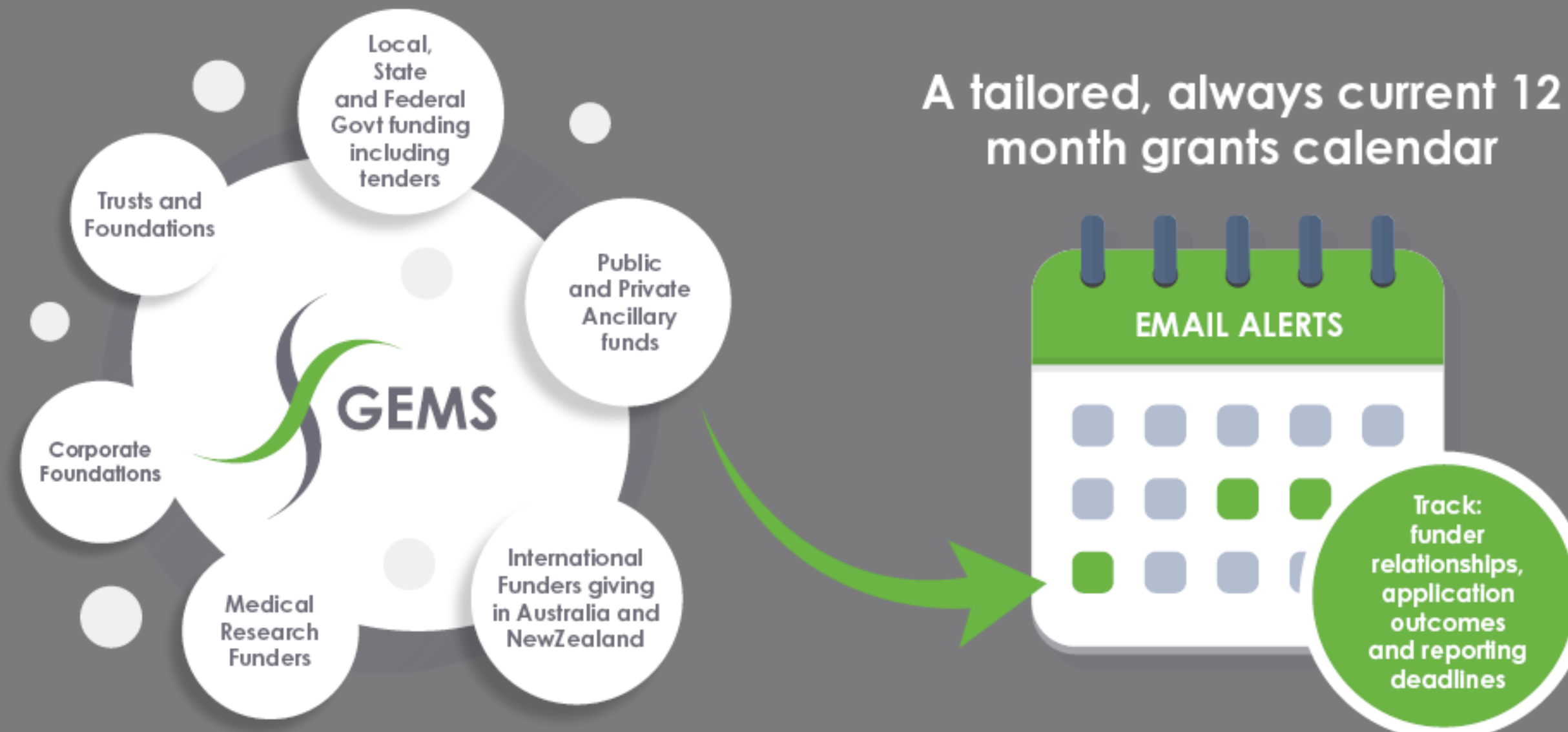
## An Australian owned SME that exists to support the for-purpose sector and build best practice.

- **2009:** Commenced AU operations – Australian owned and operated.
- **2012:** Built [GEMS](#) (Grants Expertise Management Systems) platform – funding records back to 2012
- **2014:** Commenced NZ operations.
- Members of Philanthropy Australia, Philanthropy New Zealand the Fundraising Institute Australia.
- Approximately 1,000 organisations currently access GEMS.
- Our clients report an average 50% funding success rate.



# GEMS

- Largest and most up to date funder and grants database across Australia and New Zealand.
- Currently more than 6,500 active grants in our GEMS database.
- 90+ hour per week specialist research team, plus software development, data quality, auditing and customer experience teams.
- AI and automation increasingly optimising software efficiency, data accuracy and currency.



# The data already captured in GEMS

## Three levels of funding records:

### INSTITUTIONS

- Public Contact Details
- Funders within this institution

### FUNDERS

- 25+ unique data points
- Funder legal requirements (e.g. DGR)
- All public grant data including locations, categories and amounts
- Trustee and Public contact information
- Public and provided distribution data
- Funder mission / purpose

### GRANTS

- 35+ Unique data points (amount, location, category)
- Criteria, eligibility and application process information
- Attached funder profiles
- Hard & soft Legal status requirements (20 fields)
- Over 400 distinct grant categories organised into a three-tiered hierarchy

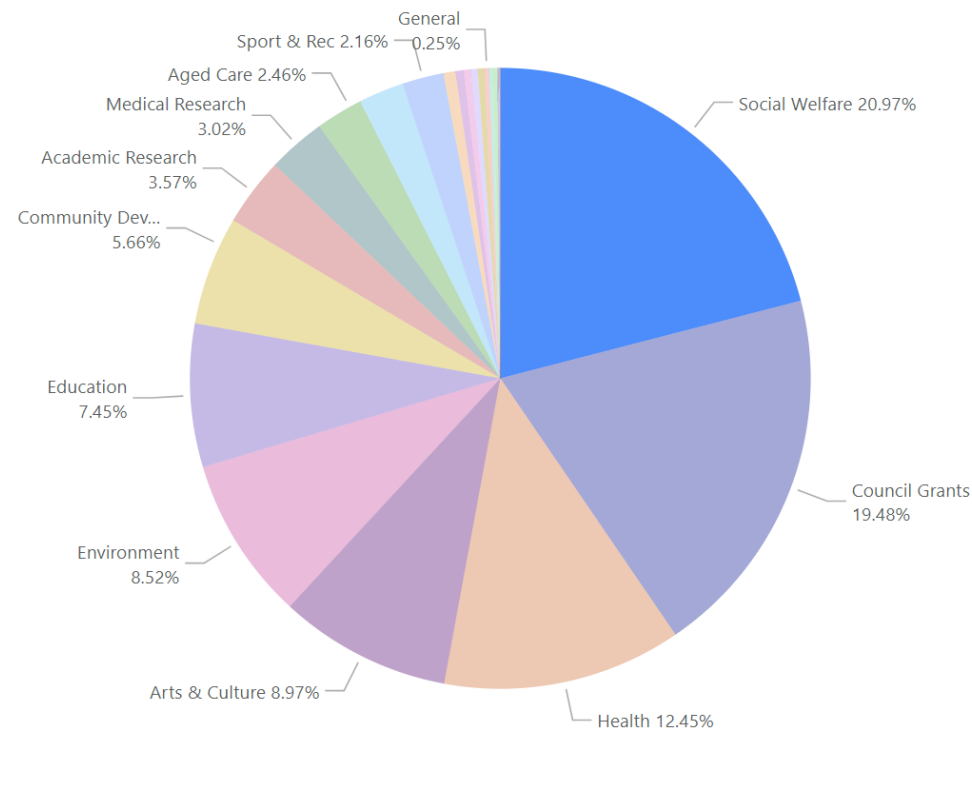


# Sample of current funding insights

## Grants by Grant Range

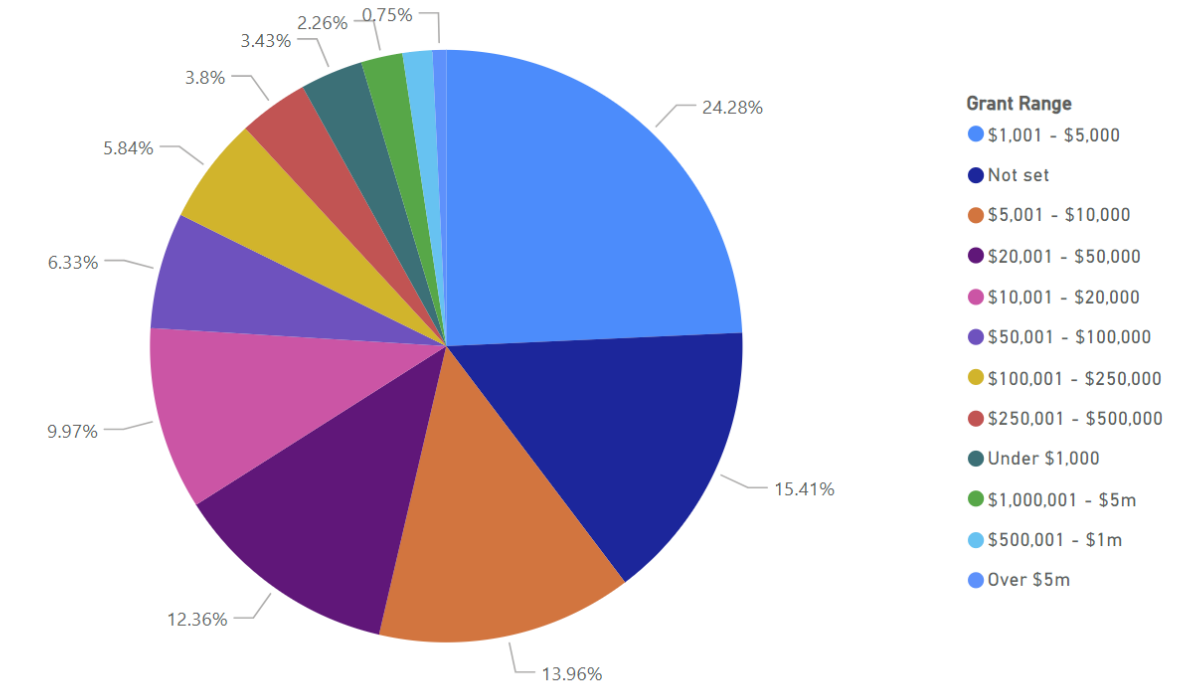
Based on active grants in the next 12 months

### Grants available per sector



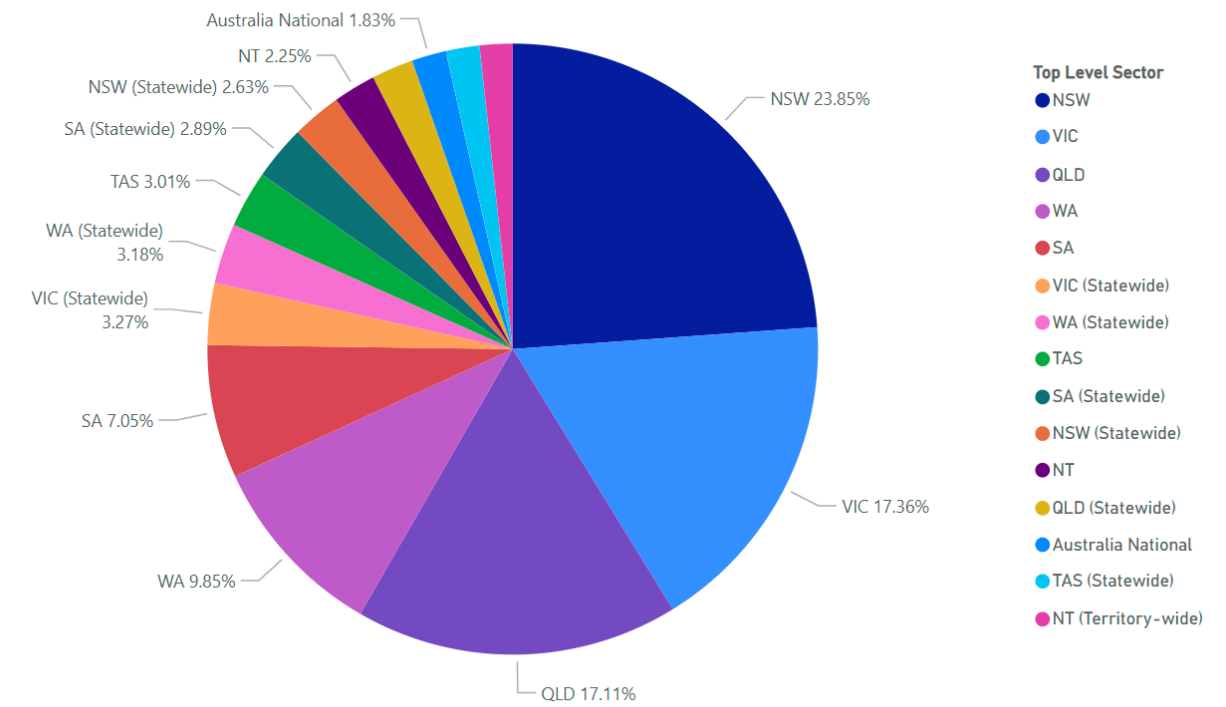
### Breakdown of Social Welfare subcategory grants

Top Level Sector	Sub Category	Percent
Social Welfare	Disadvantaged Children	9.48%
Social Welfare	Disadvantaged Adults	7.92%
Social Welfare	At-Risk Youth	7.48%
Social Welfare	CALD Community Welfare	6.14%
Social Welfare	Crisis/Emergency Relief	5.76%
Social Welfare	Housing/Homelessness	5.69%
Social Welfare	Women & Girls	5.42%
Social Welfare	Family Services	4.98%
Social Welfare	Domestic Abuse	4.76%
Social Welfare	Employment Services	4.74%
Social Welfare	Indigenous Welfare	4.36%
Social Welfare	Drugs & Alcohol	4.29%
Social Welfare	Child Abuse	4.15%
Social Welfare	Parent Education & Support	3.99%
Social Welfare	Indigenous Employment	3.78%
Social Welfare	Sexual Abuse	3.66%
Social Welfare	LGBTQIA People	3.38%
Social Welfare	Veterans and Defence	3.19%
Social Welfare	Foster Care	3.02%
Social Welfare	Maori Welfare	1.35%
Social Welfare	Maori Employment	0.99%
Social Welfare	Social Welfare	0.87%
Social Welfare	Indigenous Children - Welfare	0.31%
Social Welfare	Maori Children - Welfare	0.19%
Social Welfare	Indigenous Adults - Welfare	0.09%
<b>Total</b>		<b>100.00%</b>



### Grants available per location

(Statewide and National indicate no specific location requirements)



# Research and funder feedback

As of 1<sup>st</sup> September 2024, we surveyed and interviewed 30+ funders of all types and size (Institution, family foundations, PAFs, community foundations and corporate foundations), plus advisory firms.



**80% responded yes or maybe** to:

- Viewing two-page charity profiles of GEMS subscribers or to ensuring their grant round information is in GEMS (it is!).



**85% responded yes** to:

- Viewing other funders who fund in their interest areas and geo locations.
- Potentially co-funding (where appropriate).
- Seeing an annual summary of the data findings that highlight what is (and is not) being funded in specific areas (both geographically and by category).



# The learnings that confirm the challenges

1. Funders use different grant-making platforms (or none at all) and capture different data sets relating to their funding distributions.
2. Only some track the project location, in addition to the head office location of the grantee.
3. Not all use all features of their grant-making software (if they have a platform).
4. Inconsistent data collection points.
5. When asked what funding distribution points they track, funding amounts and beneficiary name were the only responses that were consistent (100%).

Note: GEMS Funding Insights will NOT track government contract renewals for recurrent service delivery contracts that are not open tender rounds.





## Existing benefits for grant-seeking GEMS subscribers

- Ensures fund-seekers are ONLY applying to funders who are the best match to them through tailored calendar of deadlines and tracks when funding reports are due.
- Comparing the cost of GEMS development and subscription with the cost of retaining an internal prospect researcher (PT salary = \$40K +), the cost-benefit of GEMS is simple.
- GEMS frees up hours in the day, enabling organisations to:
  - Identify the funders best matched to their projects.
  - Have meaningful conversations with funders.
  - Submit more, higher quality applications.
  - Increase their success rate.



## Benefits for the sector

- Inform what other data points need to be captured (potentially through ACNC reporting / grant-making platforms, individual funder grant-making processes).
- Overlay data from GEMS with ABS / other data sets e.g.; Index of Relative Socio-economic Advantage and Disadvantage (IRSAD).



# Benefits for funders – new GEMS features

- Search other funders with similar interests by category and geo location.
- Make immediate connections to other funders via the GEMS funder record contact details:
  - Helps with due diligence.
  - Opens co-funding opportunities.
  - Peer learning and mentoring opportunities.
  - View which grant-making systems are used by other funders.
- Access reports on Financial Year grant round “total funds available / allocated”, which will summarise and draw conclusions on what is not being funded.
- View 2-page profile of the charities who subscribe to GEMS, including their key objectives and current priority funding needs.
- Start to consider a consistent set of funding distribution data collection points.



# Benefits for funders – new GEMS features

- Opportunity to pilot more specific data collection points from sector / project specific funders.
- GEMS will continue to collect grant round distribution data, where available (beneficiary location, project location, type of work, funding amounts) and work with the sector to develop a framework for consistent data collection points.
- Anonymity - funders can remain anonymous to fund-seekers but visible to funders. Publicly available information on funders is already within GEMS.

**Note:** GEMS privacy and security is compliant with major global provider requirements including Salesforce and Blackbaud, as there are API connectors with both CRM platforms used by NFPs (and a connector with Microsoft Dynamics 365 is in development).



# Benefits for Philanthropy Advisors

## *Tailored Access for Sub-Funds and Intermediaries*

- **Sub-Fund Management:** The system allows sub-funds linked to a fund manager to have access, providing Philanthropy Advisors with a valuable time-saving tool, enabling their clients to help them find charitable causes that align with their philanthropic objectives, and connect with them directly.
- **Intermediary Access:** Intermediaries such as financial advisors can be granted limited access, allowing them to view key information (without grant-specific details) to support their clients' philanthropic endeavors. This promotes transparency while protecting sensitive data.

# GEMS Funding Insights – Annual

## Subscription deliverables & benefits

Beyond the annual publicly released Funding Insights Report that we will be releasing from late 2025, subscribers will have unique access to auto - generate reports on:

- Other funders who give to your interest areas and in your geographic location of interest. You can do other searches too, including what grant-making platforms are being used.
- Charities who match your giving criteria using key words and easy to use drop down field selectors (by sector and geo location and their annual revenue)
- You can search on just those charities with DGR 1 and TCC
- There are currently ~1000 Australian-based GEMS Subscribers

If you are a Philanthropy Advisor the **additional** benefits are:

- Enable your clients access to GEMS Funding Insights so they can access all of the above, directly. Saving you time in helping to connect them with charities they may want to support.



Your fees include a FREE 12-month GEM Local account for a charity of your choice, who has an annual revenue of under \$1M.

Value \$480 per year.

# Investment



Funder size / annual funding distributions	Investment
Under \$1M in funding distributed per year	\$500 per year
\$1-\$5M in funding distributed per year	\$1000 per year
\$5M -\$10M distributed per year	\$2500 per year
Over \$10M	\$5000 per year
Trustee Company's, Family Offices, Wealth Advisory Firms that manage PAFs, PuAFs and Sub-Funds	\$7500 per year (for up to 100 unique access codes for your individual clients to search other funders and charities who subscribe to GEMS). Quotes for additional access codes can be provided.
Bespoke research and reporting can also be provided to overlay with your specific sector needs data	Quotes to be provided against scope and start at \$1750



# NEXT STEPS

August / September  
2024



Continue sector consultation and confirm what GEMS can and will do including how it can inform peak body initiatives.

✓ **In progress & ongoing**

August - November  
2024



Continue software enhancements for soft launch to funders involved in R&D in November re: connecting with other funders, viewing charity profiles and viewing current data insights reports based on grant round guidelines (as opposed to grant round distributions information).

✓ **In progress & ongoing**

December  
2024



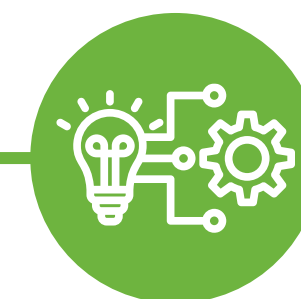
Software refinements and further User Acceptance Testing.

February  
2025



Launch new features to current and prospective GEMS users.

Ongoing



Continue to refine data sets captured and the reporting functionality of GEMS to complement other systems that identify areas of social and funding need.

Continue collaboration and consultation with the sector to enhance data capture, analysis and reporting.



[Click here to register your interest and receive updates](#)

If you have been forwarded the testing links by a grant-making colleague, please complete the feedback form [here](#).

For additional information:  
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A decorative graphic on the right side of the slide consists of several overlapping circles in various shades of green, grey, and white, creating a sense of movement and connection.

*Connection,  
Collaboration, Co-funding*