



2023–24 Environmental Education program guidelines

NSW Environmental Trust

Department of Planning and Environment



Acknowledgement of Country

The Department of Planning and Environment acknowledges the Traditional Custodians of the lands where we work and live.

We pay our respects to Elders past, present and emerging.

This resource may contain images or names of deceased persons in photographs or historical content.



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How to use this guide

These program guidelines provide an overview of the NSW Environmental Trust's Environmental Education grants program, including the types of organisations eligible to apply for funding and the activities that may be funded under the program. The guidelines also outline how applications will be assessed and what to expect if you are awarded a grant.

Important dates

Opening date	Closing date
Monday 13 November 2023	Monday 5 February 2024

Funding available

Two Environmental Education grants program funding tiers are available in 2023–24, with a total available funding pool of \$1 million.

Funding tier	Funding per project	Project timeframe
1	up to \$60,000	2–3 years
2	from \$60,001 to \$250,000	3–5 years

Getting started

Step 1

Download and read the program guidelines (this document).

Links to key resources to help develop and submit an application are provided on the **Environmental Education grants program webpage**.

These include:

- Designing and planning your project guide
- Grants Management System link to register and submit an application
- Creating change through your environmental education project practical guide
- previously funded projects
- workplan sample.

Links to additional resources are provided in **Part 8: More information**

Step 2

Check the eligibility conditions.

- Is your organisation eligible (refer to **Part 2: Eligibility**)?
- Are your proposed activities suitable for this program (refer to **Part 3: What can be funded**)?

Step 3

Access the Grants Management System (GMS) via the Environmental Education program webpage to register and complete an application. The GMS will automatically assign each application a project reference number. This reference number should be used in any correspondence with the Trust.

Enquiries

NSW Environmental Trust

Telephone: 02 8837 6093

Email: info@environmentaltrust.nsw.gov.au

Part 1: About the program

Who are we?

The NSW Environmental Trust ('the Trust') is an independent statutory body established by the NSW Government to fund a broad range of organisations to undertake projects that enhance and protect the state's environment. The Trust's main responsibility is to make and supervise the expenditure of grants.

The Trust is chaired by the NSW Minister for Environment, and its members include representatives from Department of Planning and Environment, local government, the Nature Conservation Council and NSW Treasury.

The Trust is currently administered by the Department of Planning and Environment (DPE).

What is the aim of the program?

The Environmental Education program (the program) is a contestable grants program funded by the Trust.

It provides funding to achieve long-term beneficial outcomes for the NSW environment by developing, broadening, and transforming the community's knowledge, skills, and intrinsic motivation to engage in sustainable behaviours and encourage participation in protecting the environment.

Program objectives

The program objectives are to:

- facilitate change in the practices and behaviour of individuals and groups to improve specific or broad environmental problems
- develop and promote education projects that improve the environment and address sustainability challenges.

Essential information for 2023–24

Priority themes

Since 2020, the Trust has been implementing its Strategic Plan 2020–24. To be considered for funding, applications must focus on one or both of the following immediate funding priorities:

- addressing climate change impacts on the **natural environment** – both mitigation and adaptation
- supporting threatened species recovery.

Funding tiers

Two funding tiers are available in this round. An overview of the funding tiers is provided in Table 1 below. Refer to **Part 2: Eligibility** for detailed information on each funding tier.

Table 1 Overview of funding tiers

	Tier 1:	Tier 2:
Implementation timeframe	2–3 years	3–5 years
Available funding	Up to \$60,000	\$60,000 to \$250,000

Application limits

Lead applicants may submit a maximum of 2 applications to Tier 1 and one application to Tier 2.

Applicant resources

A full list of links to relevant program resources is provided in **Part 8: More information**, at the end of this guide.

Important timeframes for this round



Figure 1 Application process

Part 2: Eligibility

Funding

Two funding tiers are available under the program, which align with project complexity and duration. Applicants will need to identify which tier their project is best suited to before applying. A single application process applies for both tiers.

Tier 1

Tier 1 provides grants of up to \$60,000 for projects running for 2 to 3 years. This stream is best suited to the implementation of local projects that address a specific/small scale issue.

Tier 1 projects are expected to:

- achieve environmental outcomes involving either one or both immediate funding priorities
- engage with the target audience in the first milestone of the project, incorporating feedback, and adapting delivery of the educational framework accordingly for the remainder of the project
- move beyond ‘workshops and educational materials’ towards engaging and experiential activities that will result in systemic and/or behaviour change, and a measurable environmental outcome
- allow for innovative ideas and adaptive management
- measure and report on the rate of participation and satisfaction by the target audience
- provide qualitative and quantitative evidence of the differences they have made to environments and/or human/organisational practices.

Tier 2

Tier 2 provides grants of between \$60,001 and \$250,000 for projects running from 3 to 5 years. This stream seeks to enable emerging contemporary thinking in the design of education solutions to tackle complex and enduring environmental problems.

Tier 2 projects are expected to:

- achieve environmental outcomes involving either one or both immediate funding priorities
- address the systemic causes of problems
- include social research and co-design in project development to ensure solutions are carefully targeted to the practical realities of people’s lives
- conduct small scale field tests, prototyping, or piloting of ideas, and then amend project plans based on learnings, prior to full implementation
- take risks and trial innovative ideas
- move beyond the formula of ‘workshops and educational materials’ towards engaging, experiential, personally transformative or agency-building activities
- leave a sustained legacy in environments/systems that assist long-term shifts in human/organisational behaviours
- measure and report on the impact on the environmental problem they are tackling, as well as changes to organisational/human systems and environments.

An important outcome will be a transformation in thinking and assumptions by the project teams themselves so that they understand and appreciate the process their target audience is expected to go through.

Grantees will work with Trust Administration and leading environmental education and behaviour change experts in planning their projects in line with these expectations before implementing projects.

All applicants should read and consider *Creating change through your Environmental Education project practical guide* before applying. See **Part 8: More information**.

Eligible applicants

Proposals must have a lead applicant and collaborators. The following not-for-profit organisations are eligible to apply for funding:

- community organisations
- community groups
- incorporated associations
- incorporated non-profit organisations
- non-commercial cooperatives
- state government agencies and/or statutory committees
- local councils
- Local Land Services
- universities
- regional organisations of councils
- NSW Local Aboriginal Land Councils
- Registered NSW Aboriginal Corporations
- other local government-controlled organisations
- companies limited by guarantee (that can demonstrate not-for-profit status).

The role of the external manager

If your organisation or group is not incorporated or needs assistance with the financial management of the project, you may nominate another organisation (an external manager) to manage the grant funds on your behalf. The external manager must be an incorporated or registered organisation (e.g. a government organisation, NGO, or a university).

Funding agreements will include the name of the external manager, who is required to sign the funding agreement together with the grantee. The grantee remains the lead decision maker and will control the project's activities and direction.

Grant payments are made to the external manager, who is responsible for making all payments on the grantee's behalf, and preparing all financial reports as required under the funding agreement.

There should be an agreement in place between the grantee and the external manager, particularly regarding the project's management and submission of milestone/final reports. (See *The role of the external manager – tips and information* in **Part 8 – More information**.)

Ineligible applicants

The following entities are ineligible to apply for funding under the program:

- individuals
- industry joint ventures
- for-profit businesses
- profit-distributing corporations (limited by shares).

Conditions of eligibility

Status for tax purposes

All applicants must have an active Australian Business Number (ABN) establishing the organisation as an eligible entity.

Lead applicant

If successful in securing a grant, the lead applicant will hold primary responsibility for the delivery of the project. This includes managing the administrative and financial requirements of the grant, and the performance of collaborators.

Non-incorporated community groups and organisations are only eligible to apply if they appoint an external manager to auspice grant funds on their behalf.

Collaborators

Collaborators are key project partners that are external to the lead applicant's organisation. They can provide a valuable source of expertise and skills to ensure the long-term success of a project (sustained behaviour change). They can also help lead applicants reach their target audiences.

Lead applicants must engage collaborators as part of developing an application and, if awarded a grant, maintain their active involvement during delivery of the project. Collaborators are also expected to commit to ongoing use of the project outcomes.

Note: Confirmation of collaborator commitments is a requirement in all applications.

Past performance

The Trust will take into consideration any record of past poor performance in respect of previous grants, or any history of non-compliance with statutory or regulatory obligations when assessing eligibility.

If it is considered that past performance presents a sufficient risk to the timely and effective performance of the project, an applicant may be asked to respond to the determination, and this response will be considered alongside the overall merits of the application. Special conditions may be included in the funding agreement to address any issues of concern.

Regional representation

The Trust uses a merit-based assessment process for all applications, and does not allocate funding for specific areas or regions of the state. However, we strongly encourage applications from regional and rural communities, or projects that incorporate regional collaborations or partnerships.

Part 3: What can be funded

2023–24 priority themes

Each year, the program funds activities aligned to priority themes of the Environmental Trust Strategic Plan 2020–24.

The priority themes for 2023–24 are:

Theme 1:

Addressing climate change impacts on the **natural environment** – both mitigation and adaptation.

Theme 2:

Supporting threatened species recovery.

Grants are available for projects involving activities that address either or both priority themes.

Eligible and ineligible activities

Eligible activities

Table 2 below provides examples of activities that may be funded through the program. Activities are not limited to the examples provided.

Further guidance and examples to assist applicants with linking practical activities with either or both of the immediate funding priorities are available in the *Designing and planning your project guide*, available in **Part 8: More information**, and on the program webpage.

The extent to which an application addresses these priorities will be considered when assessing applications.

Table 2 **Examples of activities eligible for grant funding**

Item	Description
Administration and accounting	Capped at 10% of the total grant. Administration can cover office-related overheads associated with delivery of a project (e.g. office supplies, accounting fees including final audit).
Consultancies/Contractors	Appointment of external specialists to manage the project or deliver specific project components (e.g. workshop/field event presenters, social researchers). Alignment with <i>Grantee guide to procurement for Environmental Trust projects</i> is expected to be followed when sourcing these services. A link to the guide is available in Part 8: More information .
Educational resources	Materials and production costs to create project specific resources (e.g. booklets, signage, app and website development). Note: General organisational website or app development costs, including ongoing maintenance of these platforms, cannot be paid for using Trust funding.

Item	Description
<p>Employment of project staff (either in-house through salary plus on-costs, or an externally appointed contractor)</p>	<p>Staff may be employed with the use of project funds under one of 2 options.</p> <p>Option 1: a merit-based, advertised, recruitment process for a new staff member.</p> <p>Option 2: direct appointment of an existing staff member who has previously been appointed through a competitive and transparent recruitment process (i.e. merit based and advertised) when first engaged with the organisation and who now has additional capacity to be appointed to the project under a new contract or is part-time and being employed for additional hours.</p> <p>Alternatively, a contractor can be appointed to manage the project – see <i>Consultancies/Contractors</i> below.</p>
<p>Facilities hire</p>	<p>Rental of appropriate spaces to facilitate project delivery to its target audiences. This may also include licensing for digital platforms to deliver content (e.g. Teams, Zoom).</p>
<p>Internal capacity building</p>	<p>Training and/or up-skilling project staff in specialist areas required to successfully deliver project components (e.g. short-course related costs to attend seminars or training).</p>
<p>On-ground activity demonstrations</p>	<p>Production of demonstration materials associated with education outcomes (e.g. GPS trackers, cameras for monitoring wildlife). Where these materials can be hired or borrowed on a short-term basis, this approach is encouraged.</p>
<p>Promotion and media</p>	<p>Costs associated with promotion of a project event or outcome (e.g. local media advertising to promote a workshop).</p>
<p>Transport and accommodation</p>	<p>Travel-related logistics required for successful project delivery (e.g. overnight accommodation for guest speakers at events).</p>
<p>Other items</p>	<p>If uncertain whether a proposed item or activity is eligible for funding, please contact the Trust to discuss.</p>

Ineligible activities

Table 3 below describes activities that cannot be funded through the program. This list is not exhaustive. If you need further guidance, please contact Trust Administration.

Table 3 **Examples of activities not eligible for grant funding**

Item	Description
Administration (non-project-related)	Operational costs of organisations that are not specifically related to the project. Project-related administration cannot exceed 10% of the total grant funds.
Capital expenditure	Infrastructure and large capital item purchases (e.g. vehicles, construction). Small capital equipment purchases are allowed where it can be demonstrated to be more cost effective to purchase than to lease for the project's life. Costs for capital items should generally not exceed 20% of the total project budget.
Core business	Projects that, in the normal course of events, are clearly the core business of local or state government authorities or educational institutions. Core business can be difficult to define as it varies by organisation, but generally, it is considered the essential business or legal responsibility of an organisation. The Trust will consider funding works that are related to core business but additional to the organisation's usual work or responsibilities.
Cost recoupment	Funding cannot be used on any activities that have commenced before the funding agreement is signed, including application development. Activities should be planned to commence after 1 August 2024.
Cost shifting	Reimbursement of salaries of existing state or local government staff who will be supervising or working on the project unless it can be demonstrated that salaries have not already been budgeted for (see examples in <i>Designing and planning your project guide Part 8: More information</i>).
Devolved grants	Projects that fund devolved grants (i.e. projects offering grants to third parties). Trust funds must be managed directly by the applicant or their appointed external manager and all financial transactions must be managed in line with the approved budget and the <i>Grantee guide to procurement for Environmental Trust projects</i> (see Part 8: More information).
Existing commitments	Ongoing maintenance of projects to which organisations have committed as part of a previous grant or their core business operations.

Part 4: Program governance

Technical Review Committee

Selection of the Trust's environmental education grants is a statewide, merit-based process. The Trust establishes an independent Technical Review Committee (TRC) for each grant program to assess applications against the published assessment criteria. These committees are made up of people with knowledge and experience relevant to each grant program and include at least one representative of community groups and one representative of industry. All members of the Environmental Education TRC have significant environmental education qualifications, experience and expertise. The TRC makes recommendations for projects to be funded, and these recommendations are forwarded to the Trust Board for consideration and approval.

Probity

The Trust places high importance on the integrity and transparency of program and project governance. All funded projects must be delivered in accordance with legal and regulatory requirements as specified in a funding agreement, as well as other accepted governance and project management standards. Project performance reviews are conducted by the Trust, which include an assessment of grantee compliance with their funding agreement.

Procurement

Value for money in project delivery is a priority for the Trust. To conform to relevant governance and probity standards, the Trust requires all grantees to follow *Grantee guide to procurement for Environmental Trust projects* (refer to link provided in **Part 8: More information**). This relates to all major budget items, such as purchase of materials or engagement of contractors. It also includes ensuring that goods and services are only paid for once they have been satisfactorily delivered.

All contractors (including consultants) must be chosen on their merits and ability to effectively deliver the work. Grantees will select contractors or consultants using a competitive process. The *Grantee guide to procurement for Environmental Trust projects* (refer to link provided in **Part 8: More information**) is based on the NSW Government Procurement policy and provides a summary of the NSW Government policy requirements.

Statement of business ethics

All providers of goods and services, including project managers and project partners, are required to observe the following principles when carrying out work on the funded project:

- help prevent unethical practices in business relationships
- declare actual or perceived conflicts of interest.

All contracted and sub-contracted staff, or associated staff, are expected to comply with the Department of Planning and Environment's *Statement of business ethics*. If sub-contractors are employed as part of a project, they must be made aware of this statement and the Trust's expectation that they will abide by it. A link to the Department of Planning and Environment's *Statement of business ethics* is available in **Part 8: More information**.

Conflicts of interest

All staff and contractors are required to disclose any actual, potential or perceived conflicts of interest to the Trust relating to the project. This may be at the time of application development or during the implementation of a project, if funded. Conflicts of interest may relate to such areas as procurement, grants, direct negotiations, sponsorships, partnerships, third party service provisions. Examples of conflict of interest are found in the *Designing and planning your project guide*. See **Part 8: More information**.

Recruitment

The Trust supports the employment of new or existing staff to manage and implement projects and will pay for their salaries where:

- additional hours/days can be clearly demonstrated to relate to existing staff being appointed to a new project
- the Trust is not effectively reimbursing an organisation for salaries it has already budgeted for (cost shifting), or for work that is part of its core business
- a competitive process is run for new Trust funded employment opportunities
- recruitment using Trust funds is transparent and accountable.

To demonstrate transparency of the recruitment process, grantees will be required to provide supporting information demonstrating how the selection was made. This information will need to be provided with either the first milestone report or subsequent milestone reports if new staff are recruited or replaced. Information required (where relevant) will include:

- evidence of advertisement (either external or internal)
- number of applicants interviewed, and the date of the interview panel convened
- copy of the internal document used for recording and approving employment of the staff member at the conclusion of the recruitment process.

Recruitment of staff should only occur once a grant has been awarded.

Third party assistance

Lead organisations are encouraged to collaborate with project partners during development and implementation of a project, however, careful consideration is required around the establishment of any commercial relationships. Lead organisations are welcome to seek third party assistance to develop their project and complete their application, however, any costs associated with this service cannot be reimbursed using Trust funding.

The NSW Government is committed to ensuring transparent and equitable access to government-funded opportunities. Third parties who have assisted in the development of an application may bid for Trust funded work if the grant is awarded. However, grantees must clearly demonstrate that they have ruled out any potential or perceived conflicts of interest during the recruitment of any third party contractors by implementing transparent processes and providing adequate justification for their selection.

Grantees must demonstrate that no competitive or commercial advantage was gained by third parties as a result of their involvement in project planning.

Privacy

The Trust uses the information supplied by applicants for processing and assessing applications. While we do not publicly release applications as a matter of policy, we may be required to do so under the *Government Information (Public Access) Act 2009* or other lawful requirement. A link to the Act is available in **Part 8: More information**.

The Trust may also disclose information supplied to us for the purpose of evaluating and/or auditing its grant programs. If you require strict commercial and/or personal confidentiality, you should address this in your application.

Part 5: Developing your project concept

The program funds projects that seek to create a consciousness shift in target audiences toward adopting lasting, environmentally sustainable behaviours. Rather than using traditional approaches based on incentives or regulations, which often only result in temporary behaviour change, applicants are encouraged to design projects that generate transformative learning outcomes.

Transformative learning for sustainability

Transformative learning is about eliciting changes in the identity of the learner through motivation, practice and feedback. It is about challenging underlying beliefs and frames of reference about an attitude and world belief, through critical reflection, open discourse and implementing new understandings into practice.¹ An overview of the theoretical framework behind the program is provided in the *Designing and planning your project guide* to help guide the thinking behind an application. (See **Part 8: More information**).

Guiding principles of environmental education projects

Designing a project underpinned by a theory of change that leads to transformative learning outcomes involves forward thinking and careful planning. Figure 1 and Table 4 provide a set of guiding principles for effective and impactful environmental and/or sustainability education projects, which should be reflected in all applications.

Table 4 Guiding principles of environmental education projects

1. Environmental outcome
<ul style="list-style-type: none">• Identify and understand the environmental problem being addressed. (Who/what is causing it? What needs to change?)• Understand and clearly demonstrate the theory of change underlying a project (i.e. how the project proposal will improve the environmental problem)• Look beyond the traditional focus on single behaviours to broader approaches considering practices, values, worldviews, and changes in organisations and institutions. For tips and examples on designing a best practice environmental education project, applicants are encouraged to read <i>Creating change through your environmental education project practical guide</i>. (see Part 8: More information)
Community need
<ul style="list-style-type: none">• Know the target audience (e.g. Who are they? Where are they located? Why target them?)• Explore and build evidence on the target audience needs (e.g. What are their typical behaviours, characteristics, values, and worldviews? What influence do they have on the environmental problem you are seeking to address?)• Understand appropriate ways to engage and educate the target audience to inform the project design and delivery

¹ Meziro J et al. 2000, *Learning as Transformation, Critical Perspectives on a Theory in Progress*. Jossey-Bass, San Francisco pp. 3-33

Collaboration

- Identify relevant collaborators (or partners)
 - Establish how collaborators can add value to the scoping, implementation, evaluation and dissemination of the project
 - Indicate how collaborators will be actively involved in the project
-

Capacity building

- Consider how the project will enhance the skills and capacity of the target audience and collaborators
 - Capacity building and training is integral in developing sustained behaviour and skills
-

Evaluation and dissemination

- Identify evaluation techniques that will:
 - measure the success of the project (i.e., have changes occurred in the practices of the target audience that will result in an environmental outcome?)
 - ensure continuous improvement based on findings
 - share education and engagement outcomes (e.g. approaches, tools, resources)
-

Target audience

The target audience is the demographic that the project activities will seek to engage. Understanding the target audience is perhaps the most crucial component when designing an education project.

Applicants should carefully consider a community's characteristics, including geographic location, socioeconomic status, specific needs, values, drivers, culture and interests, and what they will need to contribute towards the environmental outcome you want to achieve.

Applicants are strongly encouraged to read 'Theory of change' in the *Designing and planning your project guide* (**Part 8: More information**) when considering the target audience.

Part 6: Application and assessment

Applications must be registered and submitted in the online Grants Management System (GMS), available on the program webpage and must meet the following conditions:

- projects must aim to commence between 1 December 2023 and 31 January 2025
- projects under Tier 1 must end no later than 31 January 2028
- projects under Tier 2 must end no later than 31 January 2030.

Table 5 Grant round timeframes

Step	Timeframe	Process
1	13 November 2023	Applications open.
2	5 February 2024	Applications close.
3	February — May 2024	The Technical Review Committee reviews each application using the assessment criteria and recommends projects for funding to the Trust. Trust staff may also contact applicants or their nominated referees for further information about an application.
4	June — July 2024	The Trust, having considered the Committee's recommendations, determine which applicants will receive funding. Decisions by the Trust are final. There is no appeal process.
5	August — September 2024	Successful applicants will be notified by Trust staff and grant funding will be announced publicly. Successful applicants may not receive the full amount requested and funding may be subject to special conditions. A summary of each successful project will be published on the Trust website. Unsuccessful applicants are advised of the outcome and encouraged to contact the Trust for feedback on their application.
6	October — November 2024	Project planning (including mandatory workshops for Tier 2 grantees) to review and refine the workplan to support the delivery, communication and reporting for the project, issuing of funding agreements and first payments.
7	December 2024 — January 2025	Projects commence.

Assessment criteria and process

All applications are assessed against the criteria outlined below in Table 6. After individual assessment, the TRC meet to discuss and agree on which projects will be recommended to the Trust for funding consideration.

Table 6 Assessment criteria

Criterion 1: Environmental outcome (scored out of 10)

- Clear explanation of the environmental problem (aligned with the Trust's Strategic Plan 2020–24 priorities) and sustainability challenges to be addressed (i.e. need is clearly demonstrated)
- Likelihood that the project will make a difference to this problem. Clear description of the theory of change underlying the project
- The application demonstrates how the project will facilitate behavioural and systemic changes that will deliver clearly defined, measurable outcomes for the natural environment, and implementation of activities to achieve these changes are clearly described in the workplan

Criterion 2: Target audience (scored out of 10)

- Clear specification and understanding of a target audience that can achieve the environmental outcomes identified
- Likely impact of communication on the target audience and quality of the engagement strategy
- Extent to which project activities build capacity of target audience, as well as the applicant and collaborators
- The activities described in the workplan reflect an understanding of the transformative learning model and include co-design principles
- Proposed changes in behaviours and systems, and the activities and resources that will facilitate these are measurable, either quantitatively and/or qualitatively

Criterion 3: Project team and collaborators (scored out of 10)

- Relevance and strength of the collaborators' and project team's expertise and experience
- Demonstrated engagement of collaborators in developing proposal and commitment to involvement in project
- Demonstrated commitment of the applicant to continue to support the project's outcomes beyond the life of the grant
- Participation of project collaborators is visible in the workplan activities

Criterion 4: Project planning (scored out of 10)

- Clear explanation of how the project will be evaluated and disseminated. The workplan integrates monitoring and evaluation into project activities
- How well the project incorporates measures to monitor and address identified risk factors
- Feasible timeframe for achieving proposed outcomes and outputs
- Demonstrated evidence that similar or existing programs/projects are not duplicated (this does not include expansion of pilot projects or implementation of plans developed through previous programs/projects)
- Degree of originality or innovation of a proposed approach (not essential)

Criterion 5: Value for money (scored out of 10)

- Extent to which the budget supports the proposed activities and resources, and whether it will ensure the viability of the project overall
 - The likely environmental/sustainability impact of the proposal relative to the amount of program funds sought
 - Transferability for dissemination of project outcomes
 - The applicant has proposed a project budget that clearly describes project costs, demonstrates how Trust funds will be spent. It also provides details about any funds from other sources where relevant, and describes what in-kind contributions can be expected
 - Appropriate allocation of funds across a range of items eligible for funding (see **Part 3: What can be funded, eligible and ineligible activities**), including materials and other direct project costs, professional expertise, in-kind support and/or cash contributions, and voluntary time
-

Part 7: Managing a grant

Starting work

Successful grant recipients (grantees) will be notified by September 2024. Grantees will then be required to undertake a project planning process from October to November 2024. This will involve formalisation of the grant via a funding agreement. Trust staff will also work with grantees to further develop their project workplan to guide delivery of the project.

Project activities can commence between 1 December 2024 and 31 January 2025.

Funding agreement

Before activities commence, grantees must sign a funding agreement that sets out the terms, conditions of the grant and outlines a schedule of milestones, including reporting and funding instalments. A draft copy of a standard funding agreement will be provided when project planning commences. Note that the standard conditions of this agreement will not be changed.

The Trust may also place additional conditions that are specific to the project. A grants administrator will discuss these conditions with the grantee.

The final version of the funding agreement will be issued on completion of the project planning process once the workplan has been reviewed and approved.

Signing the funding agreement commits the grantee to the following general obligations:

- comply with all conditions contained in the funding agreement
- provide evidence of appropriate insurance coverage on request
- start the project within a month of signing the funding agreement
- seek prior approval for budget changes greater than 10% (while project administration costs should never be more than 10% of the project costs)
- seek prior approval from the Trust to alter proposed outputs, outcomes or timeframes
- provide milestone reports in accordance with the terms of the funding agreement and any advice provided by Trust Administration
- acknowledge the Trust's support in any promotional materials or public statements about a project, including use of the NSW Government logo in published materials
- be prepared for all knowledge gained as part of the grant to be made publicly available, whether that be publishing of the final report or promoting the project via other avenues available to the Trust.

Workplan

Applicants must develop a workplan as part of their application. This outlines the project outcomes, activities, measures and associated outputs, dates and budget. Successful grantees are then asked to review and refine the workplan prior to signing a funding agreement. The workplan is designed to help grantees and the Trust gauge the impact of a project and is a reference point for annual milestone reporting to the Trust.

Research and testing

The Trust encourages grantees to incorporate a research component into the first milestone of their project to provide an evidence base on which assumptions can be tested. If existing evidence from thorough social research is already available, grantees can opt out of conducting further research.

A testing phase is, however, compulsory for all successful grantees to incorporate co-design principles into the project, and test assumptions about what resonates with the target audience.

Tier 2 grantees and their key collaborators will be required to attend free workshops early in the project to assist with design of their research and testing phase and finalisation of their project workplans.

During a project

Monitoring and evaluation

The Trust requires effective and consistent evidence-based monitoring of project activities to ensure the project is delivered on time, on budget, and in line with the approved workplan.

Grantees must demonstrate how they will monitor project activities by identifying and building monitoring techniques into their workplan. Monitoring methods will vary depending on the nature of the work being carried out, however, the Trust aims to ensure that minimum standards are created by establishing:

- consistent monitoring methods to measure activity implementation and progress, for example, participant surveys, data audits, photo monitoring, etc.
- benchmarks/baseline data at the commencement of projects so that grantees can clearly demonstrate the outcomes being achieved over the life of a project.

Evaluation methods should incorporate the principles of adaptive management. This may involve working with stakeholders/partners to review implementation of the workplan, assessing strengths and weaknesses, then integrating improvements (for both activities and timing) into delivery of the project for the following year.

Reporting

Grantees are required to prepare and submit milestone reports at the end of each milestone via the online Grants Management System (GMS). Milestone reports are typically required every 12 months. The due dates will be confirmed in the funding agreement.

Milestone reports allow grantees to evaluate their progress and provide details on activities and achievements. They also provide an opportunity to reflect on lessons learnt, assess and respond to emerging risks, and track project expenditure.

Each report is reviewed by a representative of the Trust with relevant technical expertise. Where a report demonstrates that the project is progressing well, the next funding instalment is authorised, and the grantee is provided with feedback on their report.

The Trust recognises that variations to projects are sometimes necessary, and these can be applied for online throughout the life of a project via the GMS. Trust staff will then contact grantees to finalise the outcome of each variation request.

Invoicing

A tax invoice (subject to GST if applicable) is required for each milestone payment at the time the instalment is due.

Completing a project

When a project is complete, grantees are required to submit a final milestone report via the GMS, reflecting on achievement of the project's outcomes. As with all milestone reports, a representative of the Trust will review the final report.

Trust staff will provide the grantee with project feedback, and if the requirements of the grant agreement have been met, the grant will be formally acquitted.

Financial reports carried out on completion of the project require independent certification in line with the Trust financial reporting requirements (see **Part 8: More information**).

Part 8: More information

About the Trust

- [NSW Environmental Trust homepage](#)
- [NSW Environmental Trust's Strategic Plan 2020-24](#)

Best practice environmental education guide

- [Creating change through your environmental education project practical guide](#)

Governance related issues

- [NSW Government procurement policy](#)
- [Grantee guide to procurement for Environmental Trust projects for Environmental Trust projects](#)
- [Department of Planning and Environment Statement of business ethics Government Information \(Public Access\) Act 2009](#)
- [Government Information \(Public Access\) Act 2009](#)
- [Department of Premier and Cabinet NSW Grants Administration Guide 2022](#)
- [Tips on working with an external manager](#)
- [NSW Environmental Trust financial reporting requirements](#)

Other resources

- [NSW Government logo](#)
- [Grants Management System user manual](#)