



Major Projects: grantee guidelines

Acknowledgement of Country

Department of Climate Change, Energy, the Environment and Water 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This resource may contain images or names of deceased persons in photographs or historical content.

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Artist and designer Nikita Ridgeway from Aboriginal design agency Boss Lady Creative Designs created the People and Community symbol.

Cover photo: Darling River campground, Toorale National Park. Joshua Smith/DCCEEW

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ISBN 978-1-923436-08-4

EH 2025/0073 March 2025

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About these guidelines

These guidelines provide an overview of the grants administration process for the NSW Environmental Trust Major Projects program.

The NSW Environmental Trust has a legislative requirement under the *NSW Government Sector Finance Act 2018* (GSF Act) to comply with the *NSW Government Grants Administration Guide*. The guide provides best practice ensuring accountability, integrity and transparency when managing public money. For further information refer to the [Grants Administration Guide](#).

NSW Environmental Trust

The NSW Environmental Trust (the Trust) is an independent statutory body that supports projects that enhance the environment of New South Wales. The Trust's main function is to award grants and supervise the expenditure of money granted.

The Trust was established under the *Environmental Trust Act 1998* and administers grants across a diverse range of programs, including contestable grants, major projects, and various NSW Government initiatives.

The Trust is chaired by the NSW Minister for Environment and Heritage. Its members include representatives from the NSW Department of Climate Change, Energy, the Environment and Water; Local Government NSW; the Nature Conservation Council of NSW; and NSW Treasury. The Trust's grant programs are administered by the Grants Branch within the department. For further information about the Trust and its grant programs refer to the [NSW Environmental Trust](#) website.

About the Major Projects program

Projects funded under the Trust's Major Projects program are designed to tackle large-scale or complex environmental issues. The Trust identifies and co-designs these projects through consultation with key stakeholders. The goal is to maximise environmental outcomes in New South Wales by investing in projects that are high priority, cost effective, collaborative, and designed in consultation with subject-matter experts.

Roles and responsibilities

NSW Environmental Trust board

The NSW Environmental Trust board approves grants for funding. Trust administration provides an update of all major projects to the Trust board annually, including highlighting any risks. Grantees may be asked to present their project at any stage of its lifecycle to the Trust board at a Trust meeting.

Trust administration

The Major Projects team administers the grants and sits within the Grants Branch in the department.

Trust administration oversees all grants awarded and monitors their progress. As a grantee, you will be allocated a project officer within the Major Projects team who will oversee your project and be your contact at the Trust. We aim to contact each of our grantees via phone or email every 6 to 8 weeks. This is a chance to discuss any concerns and identify changes that might need to be made or potential variations. Grantees can also contact their project officer as needed.

Technical review committees

The technical review committees (TRCs) are established by the Trust under section 9 of the Environmental Trust Act. TRCs provide advice and recommendations to the Trust on the practicability and worthiness of grant applications (business plans).

Each TRC is made up of between 3 and 5 members, with at least one representative from the community and one from industry. The remaining members are subject-matter experts. Existing TRCs include:

- Biodiversity
- Invasive Species
- Community and Sustainability
- Clean Technology
- Contaminated Land Management.

TRC responsibilities also include monitoring and reviewing the progress of funded projects, where relevant, and providing feedback to the Trust on process improvements.

TRCs do not have a role in either awarding grants or approving grant expenditure. The Trust (or its delegate) awards grants and approves grant expenditure during the life of the project.

Grantees present their project's progress to the relevant TRC throughout the grant delivery process.

Grant lifecycle

The graphic below outlines the grant lifecycle that each project will go through, from business plan to acquittal.



Business plan and budget approval

Your project business plan and budget, approved by the Trust board, helps you to manage your grant by outlining key milestones, activities, outcomes, outputs, the schedule and budget.

Your business plan is your licence to operate; any work undertaken, or expenditure incurred should be consistent with the approved business plan and approved budget.

If an activity is in your business plan, it is your responsibility to complete and deliver it. If something has been excluded from your business plan, you are not permitted to

undertake that work unless you have submitted a variation to the Trust administration and have received written approval of your variation request. If this occurs, you will be required to update your business plan accordingly.

See 'Variations' for further information.

When you receive a grant offer

Funding agreement

Following the approval of your business plan by the Trust board, you will be provided with a funding agreement. Please ensure you read it carefully. The funding agreement must be signed and returned to the Trust within 30 days of when you receive it, with a tax invoice for the first payment. (An invoice is not required for department grantees.)

The funding agreement sets out the terms and conditions of the grant, including reporting requirements and when payments are made.

The Trust board may apply conditions specific to your project; if so, these will be included as special conditions in Schedule A of the funding agreement.

You must not begin your project until the funding agreement has been signed and returned, as the Trust will not fund any activities undertaken before the execution of the funding agreement.

Inception meeting

Following the execution of the funding agreement, the Trust administration will arrange an inception meeting with you. This should include the project manager and supervisor or sponsor of your project.

The purpose of this meeting is to provide an overview of the Trust, key administration requirements and expectations including:

- funding agreement clauses
- key deliverables
- reporting requirements
- milestone payments
- role of the technical review committee.

The inception meeting can be repeated if there is a change in project manager throughout the project delivery.

Payments, reporting and reviews

Payments

Your payment and reporting schedule is outlined in your funding agreement. The first grant instalment is generally paid when the Trust receives your signed funding agreement, although this can vary between grants. At least one payment a year corresponds to you submitting a satisfactory milestone report (usually the annual report), or achieving a key milestone, and is linked to the annual component allocated in your project budget.

If key milestones in the reporting and payment schedule are not completed on time, the next payment may be delayed.

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

Unspent funds cannot be returned to the Trust until the project is completed. Any underspends each year must be managed by the grantee through your own internal processes, for example the use of a 'carry forward' to move unspent funds to the next financial year.

Milestone reports

As a grantee you are required to prepare and submit milestone reports regularly throughout your project: a 6-monthly report and an annual report. You may also be required to submit other information or reports from time to time, as requested.

Milestone reports provide each grantee with the opportunity to review project progress and provide the Trust with updates and supporting evidence on the delivery of activities, progress towards outcomes, and expenditure. They also provide an opportunity for all parties to reflect on the implementation of the business plan and identify potential for adaptive management if required.

Two milestone reports, along with corresponding financial reports, are required each year.

Name	Period	Due date
6-monthly report	1 July – 31 December	31 January each year
Annual report	1 July – 30 June	31 July each year

Your assigned project officer will provide you with a template for each report. Financial reports, outlining expenditure for the period, are to be provided with each of the milestone reports. The annual financial report is due on 31 July each year and must be certified by a chief financial officer or equivalent, as outlined in your funding agreement.

The reports are reviewed by your project officer and checked against the approved business plan. You may be asked to provide further detail or more information before they are approved.

Six-monthly progress reports are reviewed and approved by your project officer, and the annual reports are reviewed by the relevant TRC before Trust administration approval.

Once your annual report has been accepted as satisfactory, you will receive the corresponding payment, according to the funding agreement.

If you do not report on time, or if the reporting is unsatisfactory, your payment may be withheld until a satisfactory report has been reviewed and approved by the Trust administration.

Delays

- If a milestone report will be delayed by up to 4 weeks, you must notify your project officer via email.
- If a report will be delayed by more than 4 weeks, you must submit a variation request for consideration by the Trust administration before the expected due date.

Annual implementation plans (for relevant projects only)

If, at the time of submitting your business plan, there were components of your project that had not been completely finalised, you will need to submit an annual implementation plan (AIP). This requirement is detailed in your funding agreement.

AIPs outline the proposed activities and budget for the following financial year and must be approved before you begin those activities. The Trust will provide an AIP template for you to complete.

AIPs are due on 31 March each year. They are reviewed by the relevant TRC before Trust administration approval. Approval takes place before 30 June, so activities can start from 1 July.

Technical review committee meetings

All business plans and annual reports are independently reviewed by a TRC established by the Trust. The Trust administration will determine the most appropriate TRC to oversee your project or will establish a new TRC if additional expertise is required.

TRCs meet 1 to 3 times a year as needed via an online meeting to review business plans, annual reports, annual implementation plans, or other documentation identified in project business plans.

All grantees give a short 5 to 10 minute presentation of their relevant plan or report to the TRC, after which members ask questions. This is to ensure the project is meeting its objectives and progressing well. Your project officer will advise you of the timing of the TRC meeting several weeks in advance. The project manager or a representative of the project is expected to attend and present.

Your project officer will provide details on what to include in your presentation. Usually, it will include key milestones, risks or challenges.

Grantees are not permitted to directly contact TRC members to discuss their project. If required, additional clarification on TRC feedback can be sought via the Trust administration.

Variations

You will determine your relevant timelines and activities through the development of your business plan. You will also need to determine the risks and appropriate mitigation and management strategies before you start your project. However, the Trust administration recognises that variations to a project are sometimes inevitable, and these can be discussed with your project officer as the project progresses.

Please discuss all proposed variations with your project officer and seek approval before you implement them, as retrospective variations may not be approved and are considered as part of your overall grant performance record.

If a variation is required, submit a variation request to your project officer before implementing the change. Your project officer will provide you with a form to complete.

Depending on the nature of the variation (budget, methodology, scope or timeline), your request will be submitted to an appropriate delegated officer for consideration, or, if the change is significant, to the Trust board for consideration. Any requests required to go to the Trust board may also go to the TRC. This process may take some time.

Types of variations

Timeline

If you require an extension to the funding term (as noted in the funding agreement), you will be required to submit a timeline extension request outlining the reason for the delay and project progress to date. This should be submitted as soon as possible, allowing at least 2 weeks for processing. Adequate justification must be provided to support an extension of time in which to complete the project (for example, delays caused by factors largely beyond the grantee's control, such as unfavourable weather conditions).

A revised payment and reporting schedule will be provided by the Trust administration outlining the new due dates, including any additional milestone reports or changes to payment distribution required due to a timeline extension.

Budget

If you need to vary the budget, you will be required to submit a budget variation form with supporting justification.

Budget variations are considered according to line items, for example salaries, materials or publicity. You should be able to demonstrate:

- improved outcomes or efficiencies
- the item is being sufficiently funded elsewhere
- the variation will continue to provide the NSW Government with good outcomes for its investment
- there is no net loss of outcomes due to the reallocation of funds between items.

There can be no increase to the total amount awarded by the Trust.

In accordance with the funding agreement, Trust administration approval is required for budget variations (increases or decreases) with a total value of over \$50,000 per line item over the life of the grant.

Variation amount	Level of approval
More than \$50,000 variation for line item	Trust administration
Less than \$50,000 variation for line item	No approval needed

Administration costs cannot exceed 10% of the total direct project costs, and salary on-costs must be below 26.5%.

Methodology

If you are proposing a change to project methodology (for example, a change to how an activity is delivered), you will be required to submit a variation form with supporting justification. The justification must include how the revised details are broadly consistent with the outcomes and objectives of the original business plan and will deliver comparable or improved results.

Scope

If you are proposing a change to the project scope (for example, what is being delivered), you will be required to submit a variation form with supporting justification. The justification must include how the revised details are broadly consistent with the outcomes and objectives of the original business plan and will deliver comparable or improved results.

If the change in scope is significant, it may need to be considered by the Trust board. Your project officer can provide advice about this requirement according to the change requested.

Devolved grants

Where a third party is engaged to administer grants on behalf of a grantee, the Trust must be satisfied there are appropriate governance practices and procedures in place. Your funding agreement will stipulate a special condition that all applications, forms, guidelines, assessment criteria, report templates and the operational framework must be approved by the Trust Secretary before the devolved grants are dispersed to the third-party grantees.

The grantee should allow one month minimum for Trust administration to review, comment and issue written approval of all documentation. However, this timeframe may be extended if documentation is missing or there are extensive changes requiring multiple reviews.

Media and acknowledging government funding

You are required to acknowledge Trust funding in any public statement or written material in relation to the project, including media releases, publications, promotional material or signage, as outlined in the funding agreement, by using the NSW Government logo and the following acknowledgement statement:

This project has been proudly supported by the NSW Government through its Environmental Trust.

The NSW Government logo can be downloaded from the Trust website: [Brand and logo](#).

Media opportunities

There may be media opportunities for key project milestones or achievements that may warrant a Ministerial or departmental media release, or Ministerial or departmental attendance at a launch or event. Please discuss potential media opportunities with your project officer. A lead time of 6 to 8 weeks is usually required for media opportunities.

Final reporting and acquittal

Submitting your final report

Your final report is due on the date specified in your funding agreement.

- If your final report will be delayed by up to one week, please notify your project officer.
- If your final report will be delayed by more than one week, you will need to submit an extension request via email outlining the reason for the delay and a proposed due date.

If there are works outstanding when your final report is due, please contact your project officer. You may need to submit a timeline variation request to allow for the remaining works to be completed

Your final report outlines the overall achievements of the project, confirms all required works as outlined in the business plan have been completed and includes a financial report certified by your financial controller.

Your final report enables the Trust to report to government on the outcomes that have been achieved by the program and through government investment.

Submission of a final report does not mean the grant has been completed. Your grant is considered active until you receive written notification of acquittal from the Trust administration.

As with all milestone reports, the final report will be reviewed by the relevant TRC and will include a presentation of project outcomes by the grantee at a TRC meeting, before approval by the Trust administration.

At the end of the project, any unspent funds must be returned to the Trust within 30 days. A tax invoice will be provided.

Evaluation

Your project budget will include an allocation of funds for evaluation. While these are included in the total grant awarded, these funds are retained by the Trust, which will commission an independent consultant to complete the work. Evaluations usually occur at project completion; however, they may also be undertaken throughout project implementation, particularly for projects that are over 5 years in length.

The evaluation is used to assess how well the project is achieving or has achieved the intended outcomes, guided by the evaluation questions contained within the business plan. Grantees and project stakeholders are required to provide input to the evaluation, as requested by the evaluator, and will also have an opportunity to respond to the final evaluation report.

Evaluation reports, Trust administration and grantee responses are published on the Trust website.

Project acquittal

Once your final report has been reviewed by the TRC and approved by Trust administration the project can be acquitted. The acquittal process verifies that the funding received has been used according to the grant agreement and that all financial reporting requirements have been met. You will be notified in writing that the acquittal is complete, and the grant has concluded.

The acquittal process may take place before the independent evaluation is commissioned and completed.

More information

- [Grants Administration Guide \(NSW Government 2024\)](#)
- [NSW Environmental Trust](#)
- NSW Government [brand and logo](#)