



DEPARTMENT OF PLANNING, INDUSTRY & ENVIRONMENT

# Environmental Education Grants Program Guidelines 2021-22

NSW Environmental Trust



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Cover photo: Community engagement. *The Elephant in the Woodlands – Impact of firewood collection*. Trish Rasmussen/Z-Net Uralla Inc

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EES 2021/0404  
September 2021

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## How to use this guide

These program guidelines provide an overview of the NSW Environmental Trust's (the Trust) Environmental Education grants program, including the types of organisations eligible to apply for funding and the types of 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.

## Funding available

Two Environmental Education funding tiers are available in 2021–22 as shown in Table 1.

**Table 1** Funding available by tier

Funding tier	Funding per project	Project timeframe	Total allocation for 2021–22
1	up to \$60,000	2-3 years	\$1 million
2	from \$60,001 to \$250,000	3-5 years	

## Getting started

- **Step 1**

Download and read the:

- Program Guidelines (this document)
- [Creating change through your environmental education project Practical Guide](#)

- **Step 2**

Check your eligibility. Is your organisation eligible? Refer to [Part 2: Eligibility](#)

- Are your activities suitable for this program? Refer to [Part 3: What can be funded the Developing your application guide](#) to assess your project's suitability for this funding program

- **Step 3**

Access the [Grants Management System \(GMS\)](#) to register and complete an application. The GMS will automatically assign a project reference number. This reference number should be used in any correspondence with the Trust.

**Closing date for applications: 5pm, Monday 8 November 2021**

## Enquiries

NSW Environmental Trust telephone: 02 8837 6093

Email: [info@environmentaltrust.nsw.gov.au](mailto:info@environmentaltrust.nsw.gov.au).

## Part 1: About the program

The Environmental Education Program (the Program) is a contestable grants program seeking to achieve long-term beneficial outcomes for the NSW environment. Funded by the Trust, the program supports projects that develop, broaden and transform the community's knowledge, skills, and intrinsic motivation to undertake sustainable behaviour and encourage participation in protecting the environment.

### Program objectives

Program outcomes will be delivered by achieving the following objectives:

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

### Important information for 2021–22

#### 2021–22 program priorities

To be considered for funding, applications must focus on at least one of the following immediate funding priorities:

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

These priorities were selected from the *NSW Environmental Trust Strategic Plan 2020–24*.

#### Applicant resources

To help prospective applicants, a Developing your application guide is available, providing advice on project planning, governance and budgeting, and step by step help with answering questions in the application form.

A Sample Workplan is also available to assist applicants identify and describe project outcomes, activities and measures.

#### Important timeframes for this round

- Applications close 5pm Monday 8 November 2021.
- Assessment of applications will commence in November 2021, with successful projects expected to be announced by May 2022.
- Projects should aim to commence from **1 July 2022**.

#### Program direction

The program was last evaluated in 2017–18 and updated to reflect contemporary best practice environmental education which incorporates transformative learning for sustainability principles and practices. Copies of the Evaluation and Administration response are available on the Trust's website.

## Part 2: Eligibility

### Funding tiers

Two funding tiers are available under the program which align with project complexity, length and funding available as noted in Table 1. 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 will fund grants of up to \$60,000 for projects running for 2 to 3 years.

This stream is best suited towards implementing local education-based projects that address a specific/small scale issue.

Tier 1 projects are expected to:

- achieve environmental outcomes involving either one or both of the immediate funding priorities
- engage with target groups in the development stage
- move beyond ‘workshops and educational materials’ towards engaging and experiential activities
- allow for innovative ideas and adaptive management
- measure and report on the rate of participation and satisfaction by target groups
- provide qualitative and quantitative evidence of the differences they have made to environments and/or human/organisational practices.

Tier 1 applicants are strongly encouraged to read and consider *Creating change through your environmental education project Practical Guide* before applying.

#### Tier 2

Tier 2 will fund 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:

- seek to achieve environmental outcomes involving either one or both of the immediate funding priorities
- address the systemic causes of problems
- include social research or 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 transformations 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 for up to 12 months investigating and planning their projects in line with these expectations, before implementing projects over the following 2 to 4 years.

Tier 2 applicants are also strongly encouraged to read and consider *Creating change through your environmental education project Practical Guide* before applying.

## Eligible applicants

Proposals must have a lead applicant and collaborators. The following organisation types are eligible for either of these roles:

- 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.

## Lead applicant

If successful in securing a grant, the lead applicant will hold primary responsibility for 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 administrator to auspice grant funds on their behalf.

The administrator must be a legal entity, and grant agreements are prepared in the name of the administering body. Grant payments are made payable to the administrator who is responsible for dispersing funds on the grantee's behalf and the preparation of financial reports. An agreement should be reached between the grantee and the administrator in relation to project management at the application stage. It is expected that the actual project implementation will be led by the applicant and not the administrator.

## Application limits

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

## Collaborators

Collaborators are key project partners. 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 targeted primary and secondary audiences. It is a requirement of the program that lead applicants 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.

## 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).

## Past performance

When assessing eligibility, the Trust will consider past performance in delivering previous grant projects, including compliance with statutory or regulatory obligations.

A risk rating will be applied to your organisation and/or administrator. The applied risk rating will form part of your project's assessment and will be used to determine any additional special conditions in the funding agreement.

## Regional representation

The Trust uses a merit-based assessment process for all applications, so does not allocate funding for specific areas or regions of the State. However, in recognition of the historically low allocation of grants to regional areas, we strongly encourage applications from regional and rural communities, or projects that incorporate regional collaborations or partnerships.

## Part 3: What can be funded

### Eligible activities

Table 2 below provides examples of activities that may be funded through the program.

Further guidance and examples to assist applicants with linking practical activities with either or both the immediate funding priorities is available in the [Developing your application guide](#).

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

Item	Description
Employment of project staff (either in-house through salary + on-costs, or an externally appointed contractor)	Staff may be employed with the use of project funds under one of two options. <b>Option 1:</b> a merit based, advertised, recruitment process for a new staff member or <b>Option 2:</b> 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. Alternatively, a contractor can be appointed to manage the project – see ‘Consultancies/Contractors’ below.
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 presenter, field event guest speakers, social researchers). Alignment with <i>NSW Government procurement standards</i> is expected to be followed when sourcing these services.
Facilities hire	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).
Transport and accommodation	Travel related logistics required for successful project delivery (e.g. overnight accommodation for guest speakers at events).
Internal capacity building	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).
Educational resources	Materials and production costs to create project specific resources (e.g. booklets, signage, app and website development). Note: General organisational app and website development costs, including ongoing maintenance of these platforms, cannot be paid for using Trust funding.
Promotion and media	Costs associated with promotion of a project event or outcome (e.g. local media advertising to promote a workshop).

Item	Description
On-ground activity demonstrations	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.
Other items	If uncertain whether a proposed item or activity is eligible for funding, please contact the Trust to discuss.

## Ineligible activities

Table 3 below describes activities which cannot be funded through the program.

**Table 3 Activities not eligible for grant funding**

Item	Description
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 as 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.
Organisational administration	Organisational administrative/operational costs not specifically related to the project.
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 life of the project. Costs for capital items should generally not exceed 20% of the total project budget.
Devolved grants	Projects that fund devolved grants (i.e. projects offering grants to other organisations). Trust funds must be managed directly by the applicant or their appointed administrator, and all financial transactions must be managed in line with the approved budget and NSW Government Procurement policy.
Existing commitments	Ongoing maintenance of projects to which organisations have committed as part of a previous grant or their core business operations.
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 <a href="#">Developing your application guide</a> )
Cost recoupment	Funding cannot be used on any activities that have commenced before the grant is offered and accepted, including application development. Activities should be planned to commence after 1 June 2022.

## Part 4: Program governance

### 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. Value for money in project delivery is also a significant priority for the Trust. Audits may be carried out by the Trust to monitor compliance with these requirements.

### Procurement

To conform to relevant governance and probity standards, the Trust requires all grantees to follow NSW Government Procurement Policy. 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 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, Industry and Environment Statement of Business Ethics. If you employ sub-contractors in your work, please make them aware of this statement and our expectation that they will abide by it.

### 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 procurement, grants, direct negotiations, sponsorships, partnerships, third party service provisions, etc. Examples of conflict of interest are found in the Developing your application guide.

### Staff recruitment and employment

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

- a range of applicants can compete for Trust funded employment opportunities
- recruitment using Trust funds is transparent and accountable

- the Trust is not effectively reimbursing an organisation for salaries it has already budgeted for, or for work that is part of its core business.

Refer to [Table 2](#) for further information on recruitment of project staff using Trust funds.

## Reporting on the recruitment process

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 your first progress report or in subsequent progress reports if new staff are either recruited or replaced. Information required (where relevant) will include:

- evidence of advertisement (either external or internal)
- number of applicants interviewed, and 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.

## Third party assistance

- Applicants are encouraged to collaborate with project partners during developing and implementation of a project, however, careful consideration is required around establishment of any commercial relationships. Applicants 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. In particular, grantees must demonstrate that third parties gained no competitive or commercial advantage 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.

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.

## General obligations

Signing the funding agreement commits the grantee to the following general obligations. The standard conditions of the funding agreement will not be changed at the request of grantees.

- 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 being aware that 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 Trust's reporting guidelines.
- 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.

## Part 5: Developing your project concept

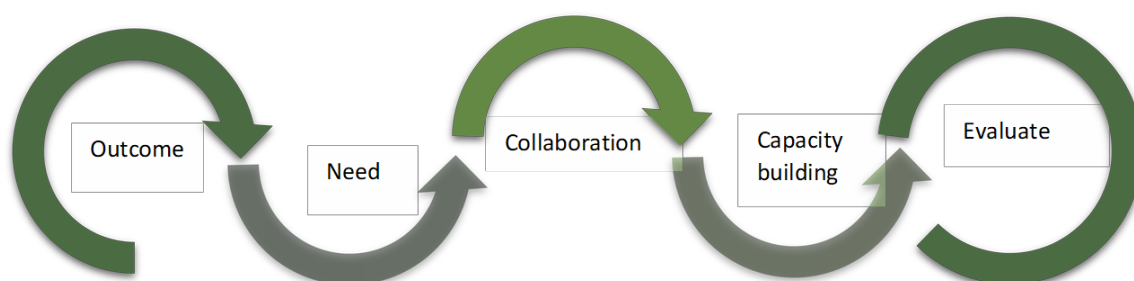
In recent years, the program has focused on funding projects which seek to create a consciousness shift in target audiences toward adopting lasting, environmentally sustainable behaviours. Rather than using traditional approaches based on incentives or regulations which often only result in temporary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

### Transformative learning for sustainability

Transformative learning is about eliciting changes in the identity of the learner<sup>1</sup> 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.<sup>2</sup> An overview of the Theoretical Framework Behind the Program is provided in the [Developing your application guide](#) to help guide the thinking behind an application.

### Guiding principles of environmental education projects

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



**Figure 1** Guiding principles of environmental education projects

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<sup>1</sup> Illieris K 2014, Transformative Learning and Identity, Journal of Transformative Education, vol.12(2), pp.148-163.

<sup>2</sup> Meziro J et al. 2000, Learning as Transformation, Critical Perspectives on a Theory in Progress. Jossey-Bass, San Francisco pp. 3-33



**Table 4 Guiding principles of environmental education projects**

Environmental outcome
<ul style="list-style-type: none"> <li>• Identify and understand the environmental problem being addressed</li> </ul>
<ul style="list-style-type: none"> <li>• Understand and clearly demonstrate the theory of change underlying a project (i.e. how the project proposal will improve the environmental problem)</li> </ul>
<ul style="list-style-type: none"> <li>• 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 best practice environmental education project, applicants are encouraged to read the <i><u>Creating change through your environmental education project Practical Guide</u></i>.</li> </ul>
Community need
<ul style="list-style-type: none"> <li>• Know the target audience (e.g. Who are they? Where are they located? Why target them?)</li> </ul>
<ul style="list-style-type: none"> <li>• Explore and build evidence on the target audience needs (e.g. What are their typical behaviours, characteristics, values, and worldviews?)</li> </ul>
<ul style="list-style-type: none"> <li>• Understand appropriate ways to engage and educate the target audience to inform the project design and delivery.</li> </ul>
Collaboration
<ul style="list-style-type: none"> <li>• Identify relevant collaborators (or partners)</li> </ul>
<ul style="list-style-type: none"> <li>• Establish how collaborators can add value to the scoping, implementation, evaluation and dissemination of the project</li> </ul>
<ul style="list-style-type: none"> <li>• Indicate how collaborators will be actively involved in the project.</li> </ul>
Capacity building
<ul style="list-style-type: none"> <li>• Consider how the project will enhance the skills and capacity of the target audience or collaborators</li> </ul>
<ul style="list-style-type: none"> <li>• Capacity building and training is integral in developing sustained behaviour and skills.</li> </ul>
Evaluation and dissemination
<ul style="list-style-type: none"> <li>• Identify evaluation techniques that will: <ul style="list-style-type: none"> <li>○ 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?)</li> <li>○ ensure continuous improvement based on findings</li> <li>○ share education and engagement outcomes (e.g. approaches, tools, resources).</li> </ul> </li> </ul>

## 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, socio-economic status, specific needs, values, drivers, and interests.

Applicants are strongly encouraged to read 'Theory of change' in the [Developing your application guide](#) when considering the target audience.

## Part 6: Assessing your application

### Timeline of assessment process

The assessment and grantee notification process is outlined in Table 5 below.

**Table 5 Assessment timeline**

Step	Timeframe	Process
1	November 2021	Applications are submitted via the Trust's online <a href="#">Grants Management System</a> and assigned individual project reference numbers.
2	November 2021 - January 2022	The Technical Review Committee score each application using the assessment criteria and make recommendations for funding to the Environmental Trust Board. Trust staff may also contact applicants or their nominated referees for further information about an application.
3	February - March 2022	The Trust approves projects for funding, after considering the recommendations. Decisions by the Trust are final.
4	April 2022	Successful applicants are advised. Successful applicants may not receive the full amount requested and funding may be subject to special conditions.
5	May 2022	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. Successful applicants work with Trust staff on finalising project workplans and executing their funding agreement.

### Assessment criteria

Selection for NSW Environmental Trust grants is a statewide, merit-based process. Eligible applications will be assessed by an independent Technical Review Committee (TRC) using the assessment criteria set out below in Table 4. These committees are made up of people with skills, knowledge and experience relevant to each program and include at least one representative from community and industry, supported by Trust Administration secretariat.

**Table 6 Assessment criteria**

Criterion 1: Environmental outcome (scored out of 10 points)
<ul style="list-style-type: none"> <li>• 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).</li> </ul>
<ul style="list-style-type: none"> <li>• Likelihood the project will make a difference to this problem. Clear description of the theory of change underlying the project and the inclusion of more systemic and transformative approaches (considering practices, values, worldviews, and systemic change).</li> </ul>
<ul style="list-style-type: none"> <li>• 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).</li> </ul>
<ul style="list-style-type: none"> <li>• Degree of originality or innovation of a proposed approach (not essential).</li> </ul>

**Criterion 2: Target audience (scored out of 10 points)**

- Clear specification and understanding of target audience.
- Likely impact of target audience communication and engagement strategy.
- Extent to which project activities build capacity of target audience.

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

- Strength and appropriateness of the collaboration.
- Demonstrated engagement of collaborators in developing proposal and commitment to involvement in project.
- Relevance of project team expertise.
- Relevance of expertise of collaborators.

**Criterion 4: Project planning (scored out of 10 points)**

- Quality of the project plan to show how the proposed activities will facilitate behavioural and systemic changes.
- Proposed changes in behaviours and systems, and the activities and resources that facilitate these are measurable, either quantitatively and/or qualitatively.
- Clear explanation of how the project, including research and testing phases, will be evaluated and disseminated.
- How well the project plan incorporates measures to monitor and address identified risk factors.
- Feasible timeframe for achieving proposed outcomes and outputs.

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

- 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.
- Appropriateness of the mix in the total budget for materials and other direct project costs and in-kind contributions to the project.
- Demonstrated commitment of the applicant to continue to support the project's outcomes beyond the life of the grant.
- Transferability for dissemination of project outcomes.

## Part 7: Managing your grant

### Starting work

Successful grantees will be notified by May 2022. Project activities can commence from 1 July 2022.

During May and June 2022, grantees will be contacted to arrange formalisation of the grant via a funding agreement. Trust staff will also work with grantees to further develop their project workplan, including a research and testing phase.

### Funding Agreement

Before works commence, grantees are required to sign a funding agreement that sets out the terms and conditions of the grant and a schedule of significant milestones including reporting and funding instalments.

### Workplan

Applicants are required to submit a draft workplan including project outcomes and associated activities, measures and associated outputs, dates and budget amounts for each activity in their application. Successful grantees are then asked to review and refine the workplan during the research and testing phase. The workplan is designed to help grantees and the Trust gauge the impact of a project and be used as a reference point for annual milestone reporting to the Trust. It will also build on the findings from the research and testing phase.

### Research and testing plan

The Trust encourages grantees to incorporate a research phase into their project to provide an evidence base from 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.

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

The Trust's Grants Administration team are available to answer questions and help with preparation and development of all required documentation. The Trust can be contacted on **02 8837 6093** or via email at **info@environmentaltrust.nsw.gov.au**.

### During the project

#### Monitoring and evaluation

The Trust requires effective and consistent evidence-based monitoring of project activities. Grantees must demonstrate how they will monitor project activities by identifying and building monitoring techniques into their workplan. The use of 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 the following:

- Consistent monitoring methods are used to measure activity implementation and progress, e.g. participant surveys, data audits, photo monitoring, etc.
- Benchmarks/baseline data at the commencement of projects and individual activities that may be used to clearly demonstrate the outcomes being achieved over the life of a project. The Trust has developed a Monitoring Directory to clearly explain the required monitoring methods for all the different types of activities a grantee may undertake in their project.

Evaluation methods may vary between projects, however, they should occur as part of the project's annual review (incorporating adaptive management concepts) and reporting process. This may involve working with relevant stakeholders/partners to examine the implementation of a project workplan over the previous stage, assessing strengths and weaknesses, then integrating improvements (for both activities and timing) into a revised work plan for the following year.

## Reporting

Grantees are required to prepare and submit milestone reports periodically throughout their projects 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. A report on the outcomes from the research and testing phase will also be required at its conclusion.

Each milestone report allows grantees to provide details on activities, achievements and expenditure. It also provides the opportunity to reflect on the implementation of the project workplan. 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 via the online GMS throughout a project. 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 achievements of the project's expected outcomes. As with all milestone reports, the final report will be reviewed by a representative of the Trust.

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.