



# Toukley Neighbourhood Centre

Ph: 02 43961555 / Email: [admin@tnc.org.au](mailto:admin@tnc.org.au) / Website: [www.tnc.org.au](http://www.tnc.org.au)  
PO Box 55, Toukley NSW 2263 / ABN: 64 997 484 484 / Association No: Y02437-47

*TNC is the heartbeat of a connected, supported, empowered, inclusive and thriving community. We partner with the broader community to share what we can and provide a hand up to those in need, so they can Wallamba-bayn (come back) and join us in delivering our vision.*

## POLICY - GRANTS

### 1. Policy Information

<b>Title:</b>	Grants
<b>Effective Date:</b>	08-Dec-2025
<b>Policy Owner:</b>	Chairperson
<b>Oversight:</b>	Grants Committee
<b>Next Review Date:</b>	Dec-2026

#### 1.1. Definitions

This policy uses the terms defined in the [TNC Master Definitions Table](#), available on the Toukley Neighbourhood Centre website ([www.tnc.org.au/policies](http://www.tnc.org.au/policies)).

Policy-specific definitions are listed below (if required).

Term	Explanation
Grant Opportunity	A funding opportunity offered by a government, philanthropic, or corporate body that TNC may apply for.
Qualification	The assessment of a grant opportunity to determine alignment, eligibility, capacity, resourcing needs and likelihood of success.
Acquittal	The reporting process required by the funder to demonstrate that grant funds were used as approved and all conditions were met.
Salesforce	TNC's authoritative system of record for grants, including project documentation, approvals, obligations, monitoring and acquittals.
Grant Documentation	All documents relating to a grant, including assessments, proposals, approvals, agreements, obligations, evidence, and acquittals.

#### 1.2. Context

At Toukley Neighbourhood Centre (TNC), policies are developed in alignment with the [TNC Policy Framework](#) and support the delivery of safe, effective and accountable community services.

TNC policies are developed to:

- Assist TNC to meet its organisational objects and manage risk effectively
- Support staff and volunteers in performing their duties
- Demonstrate how TNC meets its governance, compliance and quality expectations
- Provide clarity, transparency and consistency across all areas of TNC operations.

This policy forms part of TNC's governance system and applies to the full lifecycle of grants, including qualification, submission, approval, monitoring and acquittal.

Salesforce is the authoritative system of record for all grants, including documentation, approvals, obligations, risks and acquittals.

TNC is bound by the [Australian Charities and Not-for-profits Commission Act 2012 \(Cth\)](#) and regulated by the [ACNC](#).



### 1.3. Related Documents

- Risk Management Framework
- Compliance Policy
- Records Management Procedure
- Contract Management Procedure
- Funded Program Delivery Procedures
- Grants Committee Terms of Reference.

### 1.4. Change Control

Effective Date	Author	Approver	Comments
09-Dec-2024	Donna Tudman	BoM	Initial document
08-Dec-2025	Bronwyn Evans	BoM	<ul style="list-style-type: none"> <li>Annual review completed.</li> <li>Measurement criteria removed across all principles.</li> <li>Policy updated to establish Salesforce as the authoritative system of record for all grant documentation, assessment, approvals, obligations, monitoring, and acquittal.</li> <li>Clarified requirements for resource planning, documentation storage in SharePoint, governance approvals, and alignment with the Risk Management Framework.</li> <li>Strengthened process steps and responsibilities for end-to-end grant management.</li> </ul>

## 1.5. Contents

1.	<i>Policy Information.....</i>	<i>1</i>
1.1.	<i>Definitions</i>	<i>1</i>
1.2.	<i>Context</i>	<i>1</i>
1.3.	<i>Related Documents</i>	<i>2</i>
1.4.	<i>Change Control</i>	<i>2</i>
1.5.	<i>Contents</i>	<i>3</i>
2.	<i>Policy Overview.....</i>	<i>4</i>
2.1.	<i>Purpose</i>	<i>4</i>
2.2.	<i>Overview</i>	<i>4</i>
3.	<i>Principles.....</i>	<i>5</i>
	<i>Principle 1: All grant activities must support TNC's mission and strategic goals</i>	<i>5</i>
	<i>Principle 2: Grants must be qualified and planned before committing resources</i>	<i>5</i>
	<i>Principle 3: All grants require review by the Board-appointed Grants Committee.</i>	<i>5</i>
	<i>Principle 4: Grant applications should be accessible to relevant TNC personnel</i>	<i>5</i>
	<i>Principle 5: Each grant application has documented final approval from the Grants Committee</i>	<i>5</i>
	<i>Principle 6: Grant applications must be recorded as Salesforce opportunities for Board reporting</i>	<i>5</i>
4.	<i>Roles and Responsibilities .....</i>	<i>6</i>
4.1.	<i>Overview</i>	<i>6</i>
4.2.	<i>RACI</i>	<i>6</i>
5.	<i>Policy Guidelines.....</i>	<i>8</i>
6.	<i>Processes.....</i>	<i>9</i>
6.1.	<i>Grant Processes</i>	<i>9</i>
6.2.	<i>Recordkeeping Requirements</i>	<i>9</i>



## 2. Policy Overview

### 2.1. Purpose

This policy establishes TNC's approach to the qualification, preparation, approval, submission, monitoring and acquittal of grants. It ensures all grant activities are aligned with TNC's mission and strategic goals, are supported by appropriate resources, and are managed in a transparent and accountable manner.

Salesforce is the authoritative system of record for all grant documentation, approvals, obligations, monitoring, risks and acquittals.

### 2.2. Overview

Grants provide important opportunities for TNC to expand programs, strengthen community impact and support organisational sustainability. Effective management of grants requires that all opportunities are assessed carefully, approved appropriately and monitored throughout their lifecycle.

TNC's Grants Committee provides oversight and governance of all grant-related activity. All grants must be qualified before resources are committed, reviewed and approved by the Committee, and documented accurately in Salesforce. Supporting documentation must be stored in the designated SharePoint location and linked to the relevant Salesforce record.

Grant performance, risks, obligations and acquittals are monitored through Salesforce and reported regularly to the BoM to support informed decision-making and organisational accountability.

There is no circumstance under which TNC may submit a grant application without qualification, Committee review or proper documentation.

### 2.3 Scope

This policy applies to all TNC staff, volunteers, contractors, students and any other individuals involved in grant-related activities.

It applies to all grant activities undertaken on behalf of TNC, including but not limited to:

- identification and assessment of grant opportunities
- preparation and review of grant applications
- approval and submission of applications
- documentation and storage of grant records
- monitoring of grant-funded activities, obligations and risks
- acquittal and reporting requirements
- use of Salesforce and SharePoint as the systems of record for grants.

Policy-specific scope considerations include:

- all grants must be recorded and managed in Salesforce
- supporting documentation must be stored in SharePoint and linked to the relevant Salesforce record
- all grants require review and approval by the Grants Committee prior to submission.

### 3. Principles

Policies always contain a set of principles that provide information relating to the rationale for the document. Staff and volunteers must consider and comply with these guiding principles when performing their duties.

#### **Principle 1: All grant activities must support TNC's mission and strategic goals**

All grant applications must clearly demonstrate how the proposed project aligns with TNC's mission and strategic goals.

Grant opportunity assessments must be recorded in Salesforce to demonstrate alignment with TNC's mission and strategic goals.

#### **Principle 2: Grants must be qualified and planned before committing resources**

Assessments are conducted for each grant opportunity before resource commitment. These cover whether TNC is eligible for the grant and weighing the submission effort against the likelihood of success.

Documentation of the due diligence process is maintained and reviewed by the Grants Committee.

Before commencing a submission, required staff and volunteer resources must be identified and agreed by the Executive Officer. All qualification and planning documentation must be recorded in Salesforce against the relevant opportunity.

#### **Principle 3: All grants require review by the Board-appointed Grants Committee.**

The Board-appointed Grants Committee reviews and approves all grant applications. Meeting minutes reflect the Committee's discussions and decisions on each grant application.

The Grants Committee review, discussion, and decision must be documented in OurCatHerder via the Grants Committee Meeting Minutes.

#### **Principle 4: Grant applications should be accessible to relevant TNC personnel**

Grant application records are stored in a centralised system accessible to authorised personnel.

All supporting documents must be stored in the designated SharePoint location and linked to the corresponding Salesforce record to ensure accessibility.

#### **Principle 5: Each grant application has documented final approval from the Grants Committee**

The Grants Committee provides final approval for each grant submission and the Chairperson is noted as the authorised person when required.

Final approval must be recorded in Salesforce, and the authorised Board member must be identified in the approval section of the opportunity.

#### **Principle 6: Grant applications must be recorded as Salesforce opportunities for Board reporting**

All grant applications are recorded in Salesforce as opportunities for Board reporting. Regular reports on grant applications and statuses are generated from Salesforce for Board review.

Salesforce is the authoritative source for grant status, obligations, milestones, risks, and acquittals, and all updates must be maintained within the system.

## 4. Roles and Responsibilities

### 4.1. Overview

Clear roles and responsibilities ensure that TNC policies are implemented effectively, monitored appropriately and aligned with governance expectations.

Accountability for policy application is shared across the organisation, with oversight provided by the designated committee identified in the Policy Information section.

The roles below outline who is responsible for complying with, implementing, and monitoring this policy. Specific responsibilities are clarified further through the RACI table.

Effective grant management requires coordinated responsibilities across TNC. All grants must be qualified, reviewed, approved and documented in accordance with this policy and the Governance Framework.

The EO ensures grant opportunities are qualified appropriately, resources are approved before work begins, and all required documentation is maintained in Salesforce and SharePoint.

The Grants Committee provides governance oversight, reviewing all grant opportunities, assessing alignment with mission and strategy, and approving all submissions. Committee decisions must be recorded in Salesforce and in the Grants Committee meeting minutes in OCH.

Program and Volunteer Coordinators support the planning and development of grant applications within their areas, ensure evidence and documentation are complete, and assist in monitoring obligations and milestones.

Staff and volunteers involved in grant-related activities must follow this policy, maintain accurate records, use Salesforce and SharePoint appropriately, and report risks or issues promptly.

### 4.2. RACI

This RACI identifies who is **Responsible (R)**, **Accountable (A)**, **Consulted (C)** and **Informed (I)** for the activities required under this policy.

Oversighting Committee = Grants Committee for this policy.

Activity	BoM	Oversighting Committee	EO	Program / Volunteer Coordinators	Staff and Volunteers
<b>Generic Policy Activities</b>					
Understand and comply with the policy	I	I	C	R	R
Implement policy requirements in daily operations	I	I	A	R	R
Maintain procedures and records required by the policy	I	I	A	R	R
Monitor compliance and identify issues	I	A	R	R	R
Report incidents, risks or non-compliance	I	C	A	R	R
Review policy effectiveness and recommend improvements	I	A	A	C	I
Approve policy revisions	A	C	R	I	I
<b>Policy Specific Activities</b>					
Qualify grant opportunities	I	A, R	C	C	C
Approve resource requirements before application work begins	I	C	A	C	I

Activity	BoM	Oversighting Committee	EO	Program / Volunteer Coordinators	Staff and Volunteers
Review and approve all grant submissions	I	A, R	C	C	I
Record grant opportunity, documentation and approvals in Salesforce	I	A	R	I	I
Store supporting documents in SharePoint and link to Salesforce	I	A	R	R	I
Monitor grant obligations, risks, milestones and deliverables	I	A	R	R	C
Complete grant acquittals and ensure evidence is recorded	I	A	R	R	C
Report grant activity to the BoM	I	A	R	I	I

## 5. Policy Guidelines

The policy guidelines outline the rules, expectations and minimum requirements that must be followed under this policy. These guidelines apply to all individuals covered in the Scope section and support consistent, safe and compliant delivery of TNC operations. Policy-specific guidelines are listed below.

- All grant opportunities must be recorded and qualified in Salesforce before any work begins.
- Grant activities must align with TNC's mission, strategic goals and capacity to deliver the proposed work.
- The EO must approve required staff resources before the application process commences.
- All grant submissions must be reviewed and approved by the Grants Committee prior to lodgement.
- Grant documentation must be stored in SharePoint and linked to the relevant Salesforce record to ensure accessibility and accountability.
- All grant-related obligations, risks, milestones and deliverables must be monitored through Salesforce.
- Any issues, delays, risks or potential non-compliance relating to grant-funded activities must be reported promptly.
- Grant agreements, funding conditions and reporting requirements must be reviewed, understood and adhered to.
- Acquittals must be completed accurately and submitted within required timeframes, with supporting evidence retained.
- Any changes to grant-funded activities must be approved (with supporting documentation) by the EO and, where required, the funder.
- Grants must not be submitted under individual accounts; where possible, a TNC umbrella account must be used to ensure organisational access to submissions and correspondence.



## 6. Processes

The following processes apply.

### 6.1. Grant Processes

Grant Qualification and Planning:

- All qualification and planning actions must be recorded in Salesforce.
- Assess the grant opportunity to ensure alignment with TNC's mission and strategic objectives.
- Evaluate resource requirements and potential impacts on existing operations.
- Prepare a detailed project plan outlining objectives, deliverables, timelines, and budget.
- Identify required staffing resources and ensure approval by the Executive Officer before commencing the application.

Review by Grants Committee:

- Submit the project plan and grant proposal to the Grants Committee for evaluation.
- The Grants Committee will assess the proposal's feasibility, alignment with organisational goals, and compliance with relevant policies and regulations.
- Obtain written approval from the Grants Committee before proceeding.
- The Committee's review decision must be recorded in Salesforce.

Submission Process:

- Where possible, use a TNC umbrella account for grant submissions to ensure accessibility by relevant personnel.
- Reference admin@tnc.org.au in all submissions and ensure that supporting documents are stored in SharePoint and linked to the Salesforce record.

Final Approval:

- The Grants Committee or delegate must review the final grant application.
- Upon approval, the Board member will be noted as the authorised person on the grant application, if required.
- Final approval by the Grants Committee must be recorded in Salesforce as part of the opportunity approval workflow.

### 6.2. Recordkeeping Requirements

All grants must be entered and managed in Salesforce, including documentation, approvals, Records created under this policy must be stored in accordance with TNC's records management requirements. This includes ensuring that records are complete, accurate, accessible to authorised personnel and retained for the required period.

Records may include:

- qualification assessments and planning documents
- Grants Committee review notes and approvals
- grant applications, supporting documents and correspondence
- grant agreements, funding conditions and contractual obligations
- evidence of milestone completion, expenditure and deliverables
- risk assessments and updates recorded in Salesforce
- acquittal reports and supporting documentation.

All grant documentation must be stored in the designated SharePoint location and linked to the corresponding Salesforce opportunity to ensure transparency, accessibility and organisational oversight.