



Fundraising Guide

2012

Funding Portfolio

In order to successfully raise funds to continue with work and carry out special projects within the community, it is easier if there is a clear idea of what you will need and how you will do it. Below is a brief checklist of steps that will assist with preparing successful funding applications.

Gather information about your organisation:

- | | |
|--|--|
| <input checked="" type="checkbox"/> Tax exemption Status, IRD exemption Tax letter | <input checked="" type="checkbox"/> PR, including brochures |
| <input checked="" type="checkbox"/> Certificate of Incorporation (or like) | <input checked="" type="checkbox"/> Current Activities |
| <input checked="" type="checkbox"/> Incorporated Society Number (Legal status) | <input checked="" type="checkbox"/> Services offered and effect/ benefit to community |
| <input checked="" type="checkbox"/> Charitable purposes registration number | <input checked="" type="checkbox"/> Accreditation/ Quality audit proof |
| <input checked="" type="checkbox"/> Legal name of organization | <input checked="" type="checkbox"/> Organizational map |
| <input checked="" type="checkbox"/> Annual Reports/ Accounts if over 6 months old - copy of Profit Loss reports and Balance sheets | <input checked="" type="checkbox"/> Personal Profiles Board/key staff |
| <input checked="" type="checkbox"/> Organisation Budget | <input checked="" type="checkbox"/> Contact person/s authorized to sign application |
| <input checked="" type="checkbox"/> GST number and bank account details | <input checked="" type="checkbox"/> Patrons and supporters of organization |
| <input checked="" type="checkbox"/> Deposit slip | <input checked="" type="checkbox"/> Affiliation to national organization? |
| <input checked="" type="checkbox"/> Organisational history, including vision, mission, and usage statistics | <input checked="" type="checkbox"/> Staff numbers/ volunteers |
| <input checked="" type="checkbox"/> Letters of support - referees | <input checked="" type="checkbox"/> Constitution |
|
 | |
| <input checked="" type="checkbox"/> Cover letter template | <input checked="" type="checkbox"/> Thank you letter template |
| <input checked="" type="checkbox"/> Funding Application. Cover sheet- recording what, when, outcomes of applications | <input checked="" type="checkbox"/> Official Address of organization, phone number, fax number and email |

Gather information about the project(s) and activities:

- List dates and times;
- Select appropriate venue(s);
- Registration costs / deposit;
- List all equipment / uniforms required;
- Volunteer details and job descriptions;
- Flight and travel details;
- Accommodation details and food arrangements;
- Insurance policies;
- Written quotes and letters of support.

List all possible sources of funding and fundraising activities:

- Check funding criteria;
- Background information on the source – previous recipients;
- Note closing dates and create funding calendar.

Develop a fundraising plan (see calendar and spreadsheets below) and timeline:

Implement fundraising plan by sending out applications and completing activities:

- Photocopy forms (to keep) before sending away;
- Request acknowledgement that application has been received;

Account for all funding received and evaluate your plan:

- Keep all receipts, acknowledge funders and file accountability reports.

Store the following information for review purposes:

- ☒ Information on previously applied for funding, dates of funds received and purpose
- ☒ Funding Resolution
- ☒ Projects/ funders to be contacted - annual funding strategy
- ☒ Purpose of application – instructions given to fundraiser
- ☒ Copies of previous applications for referral
- ☒ Letters of community support –
i.e. Mayor, DHB, Trusts
- ☒ Needs analysis, if required
- ☒ Budget for project/ programme
- ☒ Project information

National Funding Calendar

January	February	March	April
May	June	July	August
September	October	November	December

Funding Spreadsheets

Below are two basic spreadsheets that can be used to plan and document the history of funding organisations applied to:

Sources of funding	Activities that need funding						
		Venues	Registration	Equipment	Uniforms	Flights	Accommodation
	Grants						
	Membership fees						
	Donations						
	Fundraising						
	Other income						

Organisation applied to	Address	Contact person	Contact details	Purpose of funding	Date applied	Amount applied for	GST Incl.?	Amount received / declined	Date received	Report due	Date report sent	Notes

Grant Application Tips

Below are some guidelines to successful grant application writing:

- ☒ Answer questions properly
- ☒ Use black pen (it is easier to fax)
- ☒ Type or write clearly
- ☒ Give descriptions to someone who knows nothing to make sure you are providing enough information
- ☒ Say what you mean. Make sure you explain what you're applying for. Stick to the point. Does what you're doing make sense?
- ☒ Don't just use "please see attached" or summarise. Be clear about attaching details e.g. See Appendix A
- ☒ Make sure everything is included. If you say "not applicable", explain why. It might be useful to explain your annual accounts if they do not look straight forward. If you promise to send more information, make sure you do.
- ☒ If your organisation is known to have some issues or has lots of conflict, be honest - ask for some funding to help you.
- ☒ Absolutely keep to the application deadline.
- ☒ Make sure you apply for an amount of funding that fits the size and age of the group and project. New groups will often get smaller amounts.
- ☒ Show the project is well planned out and thoughtful. Show that it is part of the strategic plan and researched - not just "dreamed up".
- ☒ Put the right amount of time into preparing the application. Last minute applications are obvious and do not present your organisation in the best light.
- ☒ Show the funder how your project will make a difference - tell them what you want and tell them why it is important to you. State clearly the type of service you offer, how it benefits the recipients, and why it is different from the service some other organisation may supply. Do your homework and have some valid and concrete statistics to support your application.
- ☒ Account for the money. When you get the funding write in and thank them.
- ☒ Send copies of press clippings to funders.
- ☒ Show that you are collaborating and sharing resources with other organisations. Duplication of services is an issue for funders.
- ☒ Letters of support and recommendations from your clients or community can add a lot of weight to your application. Keep a file of comments, emails or letters you receive. Don't underestimate the value of comments from your clients and community support.
- ☒ Always keep a copy of your application – and make sure the person listed as the contact person has a copy in case the funder calls for further information.

Sponsorship Requests

Below are details that you should include in a proposal for attracting sponsors:

- Who you are
- What support you are asking for
- How you know there is a need for your project
- What type of support or how much money you are seeking
- A budget of the project
- A project plan
- How they can be involved in the project if they choose to
- How you will be evaluating the success of the project
- Key individuals in the organisation
- And most important . . . What's in it for them!

Funding resolution:

It was resolved that a request be made to the **[ABC Trust]** for funding towards the costs of ...

I certify that the above is a true and correct copy of the resolution of the Executive Committee of the **[XYZ Organisation]** dated ...

Signed ...

Name of Secretary ...

Date ...

Proposal checklist:

COVER LETTER

- A clear, concise overview of the organisation, purpose and reason for and amount of the funding request.
- Shows how your proposal furthers the funder's mission and goals and matches the funder's criteria.
- Should be typed on letterhead.

TITLE PAGE

- Title of project
- Name of organisation
- Name of a contact person and full contact details

EXECUTIVE SUMMARY

- Summarize all of the key information and convince the funder to consider your proposal for funding.
- Clearly describes the project goal
- Identifies the need/problem the project is addressing
- Outline of what you need the funding for
- Total project cost and total amount requested
- A short statement of who your organisation is

STATEMENT OF NEED

- Facts/evidence that support the need
- How your organisation has consulted or found out what the needs are
- How your organisations came about to develop the strategies you have considered to address the needs
- Background rationale for the project – what is the community context and overall goals?
- How these goals link with the funder's goals (e.g. poverty alleviation, sustainability, gender equity, institutional strengthening)
- Is there a special reason why you and/or your organization are uniquely suited to carry out the project? (Geographic location, language expertise, prior involvements in this area, close relationship to the project clientele, etc.)
- How the target group has been involved in the development of the project proposal

PROJECT DESCRIPTION

- SMART objectives
- Nuts and bolts of how the project will work
- Methods – what, when, why this approach
- Staffing/management – who and how
- Information on who will benefit and how
- Risks and how these will be managed
- There should be a very clear link between the methods you describe in this section and the objectives you have previously defined.
- Any collaboration with other agencies

- Time line of activities.
- How you will promotion of project (and funding source if appropriate) or share information about the project eg newsletters, workshops, radio broadcasts, presentations, printed handouts,

FINANCIAL INFORMATION

- Budget for the project
- Clearly show income and expenditure
- Provide notes to explain budget line items that need it
- Outline what contribution is coming from the community (eg volunteer effort)
- Include a statement how the project will be sustained in the long term
- List any items that are being donated or utilised from other parts of the organisation

EVALUATION PLAN

- The key success indicators for the project
- How you will collect information to measure the success indicators
- How you will use this information to modify your plan
- How you plan to report

ORGANISATIONAL INFORMATION

- Selling your organisation's ability to carry out this project
- How the project fits within the mission, structure, programmes, expertise of your organisation
- The people your organisation serves, current activities, past achievements
- Number of board members, full time paid staff, part-time paid staff, and volunteers.
- How the organisation is governed or managed to show how it will be accountable for the funds
- key staff members qualifications and experience.

CONCLUSION

- Brief, concise summary of your proposal that states your case, problem, solution and sources/uses of project/program funds.

APPENDICES

- Additional attachments are usually required at the funder's discretion. Typical appendices generally include:
 - Verification of tax-exempt status
 - Certificate of Incorporation.
 - Listing of officers and Board of Directors.
 - Financial statements for last completed fiscal year (audited, preferred).
 - Current general operating budget and special project budget (if applicable).
 - List of clients served (if appropriate).
 - List of other current funding sources and uses.
 - Biographies of key personnel or resumes (only if requested).
 - Support letters or endorsements (limited number).
 - Descriptions of other agencies you are collaborating with on the project
 - copies of evaluation questionnaires

Advice and Support

Below is a list of organisations' websites that offer support by ways of financial advice, training opportunities, processes for funding, and volunteer assistance:

Bartercard Foundation

<http://nz.bartercard.com/index.php?mact=News,cntnt01,detail,0&cntnt01articleid=107&cntnt01returnid=63>

BP Petrol Vouchers

<http://www.bp.com/sectiongenericarticle.do?categoryId=9015082&contentId=7027951>

Charities Commission

<http://www.charities.govt.nz/>

Community Connect

<http://www.communityconnect.co.nz/>

Community Matters

<http://www.communitymatters.govt.nz/Funding-and-grants>

Community Net

<http://www.community.net.nz/how-toguides/>

Companies Office – Societies and Trusts

<http://www.societies.govt.nz/cms>

Department of Internal Affairs

<http://www.dia.govt.nz/DIA/CurrLice.nsf/ALLNZLIST?OpenView>

Fundraise Online

<http://www.fundraiseonline.co.nz/>

Fundraising Information Service

<http://www.fis.org.nz/>

Fundraising Institute of New Zealand

<http://www.finz.org.nz/>

Maitland and Associates

<http://www.maitlandassociates.co.nz/>

New Zealand Community Foundations

<http://www.nzcommunityfoundations.org.nz/>

Office for the Community and Voluntary Sector

<http://www.ocvs.govt.nz/>

Sport New Zealand Clubkit

<http://www.sportnz.org.nz/en-nz/communities-and-clubs/Toolkit-for-Clubs/>

Volunteer Net

<http://www.volunteernet.org.nz/index.php>

Volunteering New Zealand

<http://www.volunteeringnz.org.nz/>

Potential Funding Sources

Below is a sample list of funding agencies that regularly support national-based initiatives:

National Funding

AMP National Scholarships:

<http://www.doyourthing.co.nz>

First Sovereign Trust

<http://www.firstsovereign.co.nz/GrantApply.htm>

Lottery Community Committee and Lottery Minister's Discretionary Fund

<http://www.communitymatters.govt.nz/Funding-and-grants>

Newman's Own Foundation

<http://www.paulnewmansown.co.nz/charity/criteria.html>

NZ Community Trust

<http://www.nzct.org.nz/>

Pub Charity

<http://www.pubcharity.org.nz/index.php/publications>

Sargood Bequest

<http://www.sargoodbequest.org.nz>

The Lion Foundation

<http://www.lionfoundation.org.nz/>

The Southern Trust

<http://www.southerntrust.org.nz/>

Below is a sample list of funding databases that support regional-based initiatives:

Regional Funding

Funding Directory

<http://www.sportnz.org.nz/en-nz/funding/Directory-of-Potential-Funding-Sources/Start-search-from-beginning/>

Local Government Funding

[http://www.localgovt.co.nz/site/Local Government/find a council/by region/byregion menu.aspx](http://www.localgovt.co.nz/site/Local%20Government/find%20a%20council/by%20region/byregionmenu.aspx)

Regional Sports Trusts - Kiwisport

<http://www.sportnz.org.nz/en-nz/our-partners/Regional-Sports-Trusts/List-of-all-RSTs/>