A GUIDE TO FUNDING APPLICATIONS:

Before you begin:-

- Have a funding plan. Most funders do not allow you to apply to two organisations for the same project at the same time. The funding network talks; some funding panel members are on more than one board. Do not risk losing out on funds because it is known that you are "double-dipping".
- The funding process is approximately 8 – 10 weeks. Funders will not pay out on projects or activities that have already occurred. Make sure you allow plenty of time between the application closing date and the need for funds.
- Read the funding criteria thoroughly before applying. If after reading the criteria you are still unsure whether your project / organisation is eligible, contact the funder to ask for more details. Don't apply if you don't meet the conditions.
- Never ask questions that are covered in the grant-making guidelines. Make sure you have read the guidelines that generally come with the application. You might save yourself a lot of time.
- Do not send proposals blindly to funders in the hope of being successful. Misdirected proposals are a key reason why some funders stop accepting, or place limits on, unsolicited proposals. Therefore a scatter-gun approach may ultimately hurt other organisations chances as well as your own.
- Do your homework and make sure you are not the "10th cab off the rank". Funders will know what else is happening in the community and if you are simply duplicating someone else's service, they probably won't fund it. Consider being collaborative in your approach, funding collaborative projects or services is more cost effective for a funder. Make a list of your partners.
- Check with other members of your organisation who may be involved with sourcing funding for other projects. Some funders only allow you to apply for funding once a year, so you need to coordinate applications with other members of your team.

Step two:-

- Be proud of what you are doing and be prepared to emphasise the value of your project and where it is changing lives in the community. This is your one chance to sell yourself and be better than the next application the funder looks at.
- Share your dream for your organisation, what birthed it and where you are heading. Inspiring words are life-giving.
- Keep the balance right – don't include five pages of history about your organisation but only manage a paragraph about what you intend to do with the funds.
- Be very clear about what your vision is and how you can communicate that in such a way that the funder feels drawn in to your project.
- Be very clear on what your outcomes will be for this project, learn how to tell good stories.
- Make your point succinctly but don't be brief to the point of obscuring what is important eg: don't write your whole application in bullet points!
- Use plain language, without jargon or unexplained acronyms that the funder may not understand.
- Be respectful, neither too familiar nor over-the-top in flattering praise or pleading language to the funder.
- Enclose all the necessary documents and check that those documents are up to date. It is a good idea to have a funding documents file, so that each time you apply for funding, you can

find everything you need in one place. If you can't supply particular documents, provide a reason in writing and tell the funder when it will come.

- Answer every question on the application form in the space provided. You can add attachments if necessary (unless the funder expressly forbids it), but make sure you summarise your response on the form itself – "see attached" is unacceptable.

- Clearly index any attachments so that funders know exactly which parts relate to which questions.

- If references are required, make sure they are fresh and up to date. Giving an out of date reference gives the impression that you can't find anyone to comment positively on your recent work. Generally references should be no more than 6 months old.

- Try and do your application in electronic format or scan it onto your computer and then type in your responses. It looks better than handwritten applications. If you have no choice but to handwrite it, make sure the writing is neat and legible – use a black pen as your application may need to be photocopied for other members of the funding panel.

- Add some relevant statistical evidence to support your proposal for funding. There should be evidence that you have identified actual need with up to date research – not just had a good idea that needs money to fund it. Check with other organisations including local government, for up to date needs assessments, research, mapping, community engagement and feedback. You may want to run your own community survey or hold a community hui to hear what the needs are in your area.

- If you are applying for funds to supplement a salary, it is a good idea to include a job description and relevant qualifications of the person you are looking to employ. Your HR department may be able to supply you with some information around how you will review this person's effectiveness. Include a copy of your review process. Make sure your application is selling the project though, not the person.

Step three:-

- Provide an accurate and un-inflated budget, don't just ask for the highest value allowed. Funders process thousands of applications every year and the have a pretty good idea of what expenses are fair. Don't forget to include any volunteer expenses and administrative costs. As a general rule, you can allow 15 – 20% of the project or programme cost for administration.

- Your budgets should show that funds from grants will be a hand-up not a hand-out. If you can show that some money has already been raised either in cash, volunteer hours or work in kind, it shows a greater passion for your cause.

- If quotes are asked for, make sure they are no more than 3 months old and on company letterhead. As a general rule, funders will not accept items circled in a catalogue or trademe enquiries. You should supply at least two quotes, however if there is only one supplier of the items you are requesting funding for, make sure you provide a written explanation in support of the one quote.

- Alert your treasurer early in the process if you are going to need audited accounts or financial advice. You don't want to miss an application deadline because financial information is not available.

- Make sure you have completed any accountability requirements for funding you have previously received. You will not be eligible for further funding until this is done.

- Present the application in a professional manner, just as you would a job application. If it's a hard copy application, don't staple or bind the pages together. Generally the funder will need to make multiple copies for panel members and removing staples or spiral binding is

time-consuming and annoying. To keep pages in a neat order, use paper clips, plastic L pockets or a punch-less presentation folder.

Finally:-

- Leave enough time to prepare and post your application, so that it arrives long before the closing date. This allows the funding advisor time to read through your application and contact you if they need further information or clarification. Leaving your application until the last minute means there is no possibility of discussion or amendments before the funding round closes. Remember that NZ Post is not always reliable. If you have any doubt that it will arrive on time, courier your application with a track and trace number.
- Get someone else to review your application. Does it make sense, is everything included? You often don't read your own mistakes.
- Keep a photocopy of the application. If the funder contacts you with questions, you need to know what you wrote!
- Include a brief covering letter summarising your project and thanking the funder for the opportunity to apply for funding.
- Be accountable. Send in thanks, receipts and accountability reports and pictures. Even better if you can send it in without prompting.

ATTRACTING FUNDS FROM ELSEWHERE

Sometimes you may be in a position to apply for funds from organisations that do not have a formal funding process. Examples of these may be Rotary, Lions Club, Jaycees, local business sponsor. These applications need to be dealt with differently but in a similar professional manner.

It is a good idea to try and find someone within those organisations who will champion your cause. Build a relationship with them and help them to see the benefits to them in supporting your project.

Once you have identified the person who will take your application forward and you have a clear guideline of what they may be able to offer, the following format may be helpful.

Suggested application format
Try to use no more than three pages.

- Introduction. You need to clearly identify yourself and your project. Cover off details such as who are you and how can you be contacted, why are you set up, your membership, staff and volunteer numbers, what do you do and with whom, who benefits, what other groups do this work in your area, who do you network with, what is your specific project.
- Provide background as to your legal status and current financial background. If you are a legal entity (eg a charitable trust, incorporated society or company) supply details and your GST registration.
- Identify the relevant community need that needs to be addressed. Give specific details, using your research, statistics, official documents and any references.
- Give specific details about your project. Provide an outline that shows how the problem will be addressed, why your plan is better than some alternatives. Outline the support you are wanting from the funder. You may want to give some options so that the funder can think about what the best fit is for them.
- Provide an outline of how the project will be implemented and what the measurable outcomes and objectives will be. Make sure they are specific and give the time frame for achieving these.

- Provide some information on the evaluation process. How you will evaluate your project? Who will evaluate it? What criteria will you use to base the evaluation on? What will you learn, whatever the outcome?
- Give a clear budget for your project. Provide quotes if you can. Attach as a separate page.
- Provide a list of any supplementary information – other applications you have made and their outcomes, any relevant press cuttings, letters of support or references. Include your Certificate of Incorporation and/or Charities Commission Certificate.

Hints

- make your application look professional, type it out don't handwrite.
- be realistic in what you seek
- keep a copy of the application
- get someone else to read the application and check it makes sense.
- don't ask for unspecified amounts
- make sure financial information is current
- use plastic folders for easy photocopying
- don't quote the funding organisation's philosophy
- ring if your application isn't acknowledged