GREAT LAKE TAUPŌ
Taupō District Council

THE FUNDING TOOLKIT

This is a resource for you.

The Funding Toolkit has been designed to support your organisation on its fundraising journey. Material has been developed by the Community Funding Team at Taupō District Council in response to increasing requests from groups and individuals for assistance.

The toolkit lists important information to compile when it comes to fundraising. It will become your customised funding resource, helping your committee members complete applications quickly and efficiently.

Allow time to customise templates and resources in your Funding Toolkit. We recommend working through page by page to find out and gather what is required. Once the information in this toolkit is complete, everything you need will be together, in one place, and the process of applying should not seem as overwhelming.

Funding is a fundamental piece of the puzzle, we recommend including the topic on all agendas for committee meetings (at the top!). It is a team effort and should be considered by all committee members on a regular basis. We also recommend your board or committee review the funding toolkit information every year to make sure everything is current.

The toolkit encourages you to think about diversifying your funding sources. This approach is much more sustainable.

There are many different funding streams available to groups in New Zealand, including;

•   Central Government
•   Local Government
•   Grant and Trust Funding
•   Partnership and Sponsorships
•   Membership and Koha
•   Community Fundraising and Events
•   In-Kind Support

Have questions? We're here to help!
Email: funding@taupo.govt.nz
Phone: (07) 376 0899

Taupō District Council Funding Team
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Contents.

Ten tips for funding success.

1. **Take time to prepare -** note the information in this toolkit will need to be updated at the beginning of every year or the beginning of a project. Done once and done well, the folder will help you to complete applications quickly.

2. **Be clear on your why -** being clear on your organisation's mission, vision, and the outcomes you are supporting in the community is the first fundamental step that will influence your approach to funding. There is a resource to support you to develop your 'why' on page six.

3. **Pre-plan your funding needs -** have a plan ready at the beginning of the year, for the whole year (multiple years). This will allow you to have a plan in place and check out all possible sources of funding ahead of their opening dates. You can start by looking at the Generosity NZ platform- available online or at your local library. See page 11 for more information.

4. **Request copies of application forms -** ask your possible funders if they have templates available and start working on them as early as possible. Some of what you need to do – for example, getting quotes – will take time.

5. **Prepare a funding proposal** to define your project and help you answer the funder's questions in your application.

6. **Ensure** that you have answered every question fully, with all of the information requested.

7. **Check and double check** that what you write in your application is accurate and easily understood. Remember that the people who read this may not have any prior knowledge of your organisation. The funding proposal template on page eight will help you with this.

8. **Make sure any documentation requested -** for example, proof of bank account, audited accounts, Certificate of Incorporation - is attached to your application. Do not think that you will get away with missing material out or sending it later.

9. **Always meet the funder's deadline -** for submitting and reporting back to the funder. To keep track of these deadlines you can use the template provided on page 11.

10. **Keep copies of applications you have made -** the information submitted may be helpful for applications to other agencies. Keep copies at least until you hear if you were successful and have followed up with a thank you and details of the completed project.

Step One.
YOUR DETAILS

We recommend you complete and update these details regularly.

Organisation Name

Year Established

Part of a National Organisation? Yes/No

Street Address

Postal Address

Organisation IRD Number

Organisation GST Number

Number of members

Contact Person #1

Phone Number

Email

Contact Person #2

Phone Number

Email

Step Two.
TELL YOUR STORY

Telling your story effectively is the first fundamental step when it comes to sourcing funding. It is important to put into words what your organisation does and why this support is important in the community. This is because funders fund for outcomes - the items they fund are the mechanism for you to achieve those outcomes.

The information you include below will help you to communicate the background on your organisation and outline why you do what you do.

Organisation Name:

What does your organisation do?
What makes you stand out? Who do you support in the community? Where are your geographical boundaries? What services do you provide?

What is your purpose?
A brief snapshot of what it is that you want to achieve/do/provide.

What are the values of your organisation?

What is the history of your organisation?
e.g. When did your organisation start? Are you a registered charity/ incorporated society? How many clients do you serve? What is your structure (paid and volunteer members)? What is your funding history? We recommend including a link to your website or brochure if you have one.

What has your organisation successfully delivered in the past?
Events? Projects? Initiatives? Activities?

What are your plans for this year?

Who do you work with?
Who are your clients? Are there statistics or examples you can use to support this? Do you have partnerships with other community groups, businesses, individuals etc?

What are some challenges your organisation is facing?

What are some opportunities for your organisation?
What difference would additional funding make in your ability to support the community?

Step Three.
BUILD YOUR PROPOSAL

A funding proposal:

- Explains who you are (use the 'Telling your Story' template on page six)

- Provides details on your project.

- Is a way of making sure that everyone involved with the project, including your committee, have the same information and is singing from the same songbook.

- Can be attached to funding application forms.

- Is a key document when you approach potential sponsors.

- Ensures all of your applications are consistent and use the same information.

Once you have developed your proposal you will have most of the information needed to complete funding application forms or seek sponsorship. In the long run, this effort put in at the beginning will save you time.

There are no rules about writing proposals. The following is a guide on how you might choose to set yours out. As long you include the relevant information, you will be on track.

[ORGANISATIONS] FUNDING PROPOSAL

1.	**Tell your story**	Provide 3-4 paragraphs using the template on page six to help.
2.	**Project Information**	Detail about your project/initiative/service • What is it? What is your purpose?' • What outcomes are you supporting in the community? • How will you go about providing/achieving it? • Who is or will be involved? • When will it start, finish, be completed? • Where will it happen? And what area will the people who benefit come from? • Who specifically is the target group and how will they benefit? • Who will provide the service/do the work/make it happen?
3.	**Background**	Background on how you have come to the decision to undertake this project/initiative/service. You might include, for example: • Why the project/initiative/service is needed/important. • Official statistics from Statistics New Zealand • Results of your own research and/or statistical information • Relevant media coverage related to your project.
4.	**What is needed?**	An outline of what your organisation needs to succeed with this project/initiative/service. Is it finance? Or Equipment? Or other resources? • If you need finance, include a budget itemising all funding and detailing what you are asking for. • If you need resources other than funds, identify these and explain why you need them.
5.	**List your benefits**	You should identify the benefits to them of becoming associated with your organisation. • How will you support the funder to enhance their reputation? • What will you do to ensure that they get value for their grant, sponsorship or donation?
6.	**Attachments**	Letters of support are useful. They give your organisation credibility in terms of what you have already achieved in the community. These might be letters from clients who have benefited from your organisation. Or they might be specific to the project/initiative/service for which you are seeking funding – for example, parents whose children will benefit.
7.	**Contacts**	Always provide clear details on who to contact for further information, discussions or follow up.

Step Four.
GENEROSITY NEW ZEALAND

The Generosity New Zealand website includes a database with comprehensive information about funding available for New Zealand community groups and individuals.

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1.	**Create an account**	Head along to taupo.govt.nz/generosity to find the sign-up link. To create an account, you will need an: • Email address • Password
2.	**Verify your account**	Generosity NZ will send you an email to verify your account and login.
3.	**Pick your database**	**GivMe -** offers access scholarships and awards for individuals. This is used by those seeking to pursue: • Education, research, and fellowships • Arts, cultural and sporting activities • Career change, professional or personal development **GivUs -** offers access to grants and schemes for communities, volunteer organisations, schools, groups, sport clubs and Iwi. Find assistance for nearly everything, including: • Operational costs • Building redevelopment • Project based resources
4.	**Get Searching!**	There are several filters you can choose from when entering information about your kaupapa. • Location • Kaupapa/purpose of group or project • Sector After selecting relevant filters, hit "search" and the funding agencies who meet your criteria will be displayed. You can print the necessary details or go direct to funders' websites for further information. If you have questions about a particular fund, please contact the funder directly.

generosity
NEW ZEALAND

# Are you looking for funding to support your kaupapa/ great idea?

A good place to start is by signing up to Generosity New Zealand, a digital search engine for funding information across Aotearoa.

The searchable database will give you the best matches for funding you are eligible for, along with closing dates, application requirements and contact info. And the best news. It's free for our communities to use!

Visit your local library or head along to our website to find out more: taupo.govt.nz/generosity or scan the QR code to take you straight there!
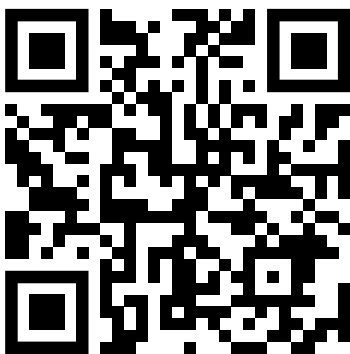
taupo.govt.nz/generosity
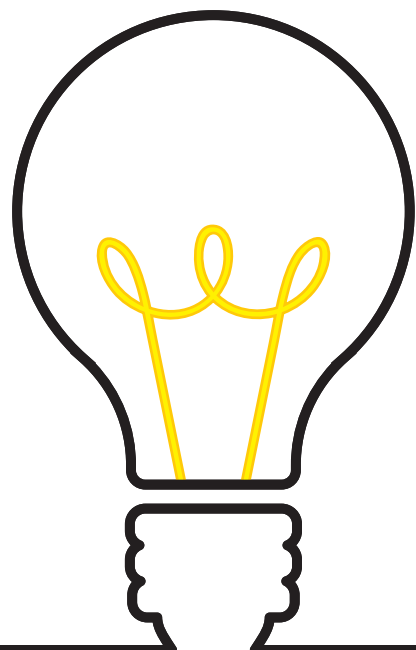
Step Five.
THE FUNDING PLAN

The below template will support your organisation identify and plan for the things you will need funding for.

It records information about what your organisation needs funding for, where you've applied to, what success you have had and any reporting requirements.

It should also encourage your organisation to think about diversifying funding sources- this is key for a sustainable funding approach.

Funding agencies usually require you to provide details like these in your application.

Handy hint – You may prefer to create this spreadsheet in a different system such as Excel.

Project/ Activity	Expense type (operational, people, capital, project etc.)	Funder and fund name	Application Dates	Application Amount	Amount received	Payment received	Report Due	Report submitted

Step Six.
SUPPORTING INFORMATION

You will need to provide additional information about your organisation when submitting applications. We recommend keeping both paper and electronic copies of the below.

Annual Financial Report	Your organisation's most recent annual financial report.
Certificate of Incorporation or Certificate of Registration	Your organisation's Certificate of Incorporation or Certificate of Registration as a trust or charitable society.
Rules/Constitution or Trust Deed	Your organisation's Rules/Constitution or Trust Deed.
Income tax status documentation	Your organisation's income tax status documentation. If your status is charitable, exempt, or non-profit, you may be asked to provide proof of this.
Bank Details	Many funders prefer to direct credit your grant into your bank account. Keep a copy of your bank details as well as deposit slips or screenshots of your account– these are often requested in online applications.
Letters of Support	Letters of support from other organisations, clients, organisation members or prominent people in the community are sometimes requested by funders. You may like to include them with your application even if they are not asked for: they help prove that your cause is worthy of support.
Copies of applications	Keep copies of your funding applications (or a note reminding you of where these are filed). These are a ready reference for other applications you may make for the same project.

Step Seven.
WHAT TO DO AFTER YOU RECEIVE FUNDING

It's important to remember that you may at some time go back to the agency which has given you funds, seeking support for another project. Keep this in mind and always spend a little time and energy saying thanks.

- **Say thank you** by writing as soon as you receive notification of your success.
- **Send a photograph** of your completed project or of the people involved, or people working on the project.
- **Do your best to make sure that your funder gets public recognition.** There are several ways to do this:
  - » Forward details of the funding and the project to local newspaper(s) or post on social media and ensure the funder's name is mentioned. Send the funder a copy.
  - » Put a sign thanking the funder on the office/clubhouse wall.
  - » Add a short statement to your website, social media, letterhead paper or any brochures or other written material – "Proudly sponsored by …"
  - » Display a poster or sign promoting the funder at any event/function connected with your project.
  - » Invite your funder to an event.
  - » Acknowledge the funder in speeches.
- **Follow up.** If there is a time lapse between receiving the funding and completing the project, make sure the funder is kept informed of progress and notified when the project is completed.
- **Meet the funder's reporting requirements.** This is a key part of the process. If you fail to return the necessary audit information within the timeframe set by the funding agency, that agency is unlikely to consider any future applications you make. Your organisation's reputation is important so be sure to take care of the details.

KEEP IN MIND...

Funders are people too. They are faced with weighing up your needs against the needs of hundreds of others - and almost everyone is worthy. Target your applications to the funders who deal with your kind of purpose/need. Tell your story as well as you can.

Meet the funding agency's requirements as well as you can. And persevere. You believe in the importance of what your organisation is doing. Convince the funders that your project is a worthwhile investment and that you will make the most of every dollar they grant you. They want the best for the communities they work in, just like you. Good luck!

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