

FUNDING APPLICATIONS - LET'S GET STARTED...

WHO WILL DO IT?

Very few people like preparing funding applications but there should be a single person with overall responsibility. This person may be a committee member **or** a staff member.

The responsibilities of that person:

- preparing a funding calendar
- ensuring that a funding file is set up with copies of all necessary documentation such as annual reports, business plan, certificate of incorporation, tax exemption certificate
- knowledge of the projects and needs of the organisation

When the applications are being prepared other people may then become involved. It may be necessary to involve staff members to contribute information, the Chairperson to sign the form, the accountant to provide financial information. At this stage it becomes more of a team effort but still the person who has the overall responsibility must ensure that the application is completed and is submitted on time.

Too often funding applications, particularly for salaries, are left to the staff to prepare with no input from the committee. This means the staff are raising their own salaries and does not increase the committee's awareness of the needs of the staff or the organisation.

Who actually takes overall responsibility for fundraising is often an issue that is not addressed by committees but it is a very important issue. To prepare professional funding applications takes time and unless the effort is put in at the application stage there will be little result.

Before any start is made on a fund-raising campaign, some thought must be given to the particular project you want support for. The following questions need to be answered:

- Why would anyone want to give to your organisation?
- How urgent is your project?
- How much support for the project is within your organisation?
- Does your project have community support?

Much time and effort can be saved by letting your fingers do the walking (and waiting). Nothing is more frustrating than spending many hours preparing a funding application only to find that the application is declined because "your project does not fit the criteria of this organisation".

Telephone the funding organisation before preparing your application to clarify their criteria and ask whether your project would fit their criteria. If they agree it does you are not guaranteed funding but you know that you will at least get past first base.

THE APPLICATION FORM

When you apply using a printed application form, what do you do first?

Reach for a pen? NO! Your first action should be to read the accompanying covering letter. There are usually certain criteria to follow - and don't say you know what they are because you have done it before - things change - often annually.

Firstly the form will usually say what the agency won't fund - so don't waste their time (and yours) if your organisation doesn't qualify.

Secondly, if it is requested that you use a black pen, then do so, it copies or scans better.

Have you taken a photocopy of the form so that you have a rough copy on which to work? An untidy application, with parts crossed out and rewritten is not a good advertisement. Think carefully what you are asking for. Have you phrased your request clearly? Is your request convincing?

Consider TV advertisements; if the advertisers want you to purchase something, they show you exactly how it works don't they? And if they appear totally convincing, then you will be prepared to buy it, won't you? That is how advertisers make their money - because they have persuaded the viewer that he/she really needs the product.

You must do the same with your funding application. You must demonstrate, as well as you can, why the funding should go to your organisation, not some similar group down the road. Why your service is superior. It is no good saying "Mary Jane said the service provided was wonderful for her daughter". What does that convey? Think about the recipient (remember the TV ad - the purchaser of your product). Would you give your money to this person (purchase their product)?

Don't underestimate the value of comments from your clients and community support. These comments may be contained in letters of support, notes written with cheques for subscriptions or general comments (which you can ask for in writing). It is important that you keep a scrapbook of all the positive comments people make about your service and use them in funding applications. These comments show that the community values your service.

You must state clearly the type of service you offer, how it benefits the recipients, why it is different from the service some other organisation may supply. You should also have some concrete statistics to support your application - don't be vague e.g. "60% of recipients". If you have done your homework, you should be able to state the actual number of clients you have.

Before you post the application check to see that you have supplied everything required? Your Incorporated Society registration number? Your GST Number? Are your (audited) accounts neatly presented or are they hand-written on a scrap of paper?

If a brief summary is required on the front page have you given this? Filling in this space with “refer to letter attached” is guaranteed to send your application to the bottom of the heap!

Thirdly, when asked for financial information, don’t say “refer to accompanying accounts” these could have been detached before reaching the trust members, but as well, why should you expect busy people to look through several extra pages for the information they need? If a covering form says “don’t supply extra material or letters of testimonial” then don’t - it certainly won’t help your application and may hinder it.

Lastly, post it to be received before the closing date!

In New Zealand there are now more than 30,000 welfare organisations and charitable bodies all competing for the ever-diminishing dollar. Will yours be lucky?

Source: FINZ on Fundraising Autumn 1998 No 31

The only way to ensure your application has the best chance possible is to do your homework and follow the steps outlined in these *Fact Sheets*. They are prepared in a series which will help you through the planning process which will in turn give you analytical information to complete your funding application.

CHECK LIST

Before making the application make sure that the following has been checked:

- The criteria of the funder
- The closing date for the application

When making the application, make sure that:

- The funder knows who you are and what you do
- All the questions are clearly answered
- The application is legible and tidy
- Contact people identified
- Referees are contacted prior to the application (and know what the application is for)
- The reason for the application is clearly indicated (outcomes, research, objectives, procedures, evaluation)
- Supporting documents are enclosed
- All requested documents are sent
- The correct number of copies are sent
- A covering letter is written
- A copy is retained for your organisation.

FURTHER RESOURCES

Fundview database - available through your local library

Lottery Welfare 0800 824 824

Community Advisors at your Local Authority

Fundraising Institute of New Zealand

If you would like a list of our other community resources, or to be put on our mailing list, contact us at:



Phone (09) 486-4820

Fax (09) 486-4823



Visit North Shore Community and Social Services Inc.
Mary Thomas Centre, 3 Gibbons Rd, Takapuna



Write P.O.Box 33 284, Takapuna, North Shore City



email info@nscss.org.nz

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