

FUNDING PORTFOLIO

Create a set heading which is relevant to your group. Here are some examples:

- **History of the organisation**

Why did your group start?

Who was involved at the beginning - and since?

Where did the group begin?

What has been achieved

What changes has the group experienced?

- **Aims and Objectives**

What are the group aims

What are the current objectives

What is the kaupapa of the group

If you have a mission statement, what is it?

- **Management**

What is the management structure?

Names and contact addresses of management committee/trustees

How are decisions made?

What powers do management have?

- **Legal Status**

Copies of Certificate of incorporation/ Trust Deed/ Umbrella Agreements

Evidence of Charitable status with IRD

Copies of Constitution/Rules

Trustees names and addresses

- **Financial information**

Copies of audited accounts

Certificates of Income and Expenditure

Business Plans

Bank account details

Treasurer's name and contact address

GST registration number

Details of sources of funding and yearly budgets

- **Support**

Which groups do you work alongside to complement your work?

Copies of letters of support

Do you meet with any networks?

Are there any other groups offering a similar service?

Checklist - are you ready to apply for funds yet?

- How much money do you need?
- What is the money needed for?
- Can you achieve your objectives?
- Are there any alternatives?
- How will the project be managed?
- How will you monitor progress?
- Where is it all leading?

Are you applying to the right people?

- Where did similar projects get their funding?
- Do you fit the criteria?
- Can you speak to anyone?
- Are there strings attached?
- Have you tried local service clubs and churches?

What you need to do

- Check closing dates and allow plenty of time
- Find out whether there is an application form
- Research using statistics and social knowledge:
- Prove the need for this project
- The people you apply to
- Make contact with the funder ask questions
- Identify your project and organisation
- Contact local service groups, Lions, Rotary, etc and find out whether they would like to be involved. You may offer a speaker for their monthly meeting.

If you have an application form:

- Read the form and any instruction sheets
- If you don't understand, ring the Funding Organisation
- Provide a return address
- Provide two day/night telephone contacts

If there is no application form:

- Provide a 1 page budget
- Provide a 1 page project description
- Provide references
- Provide research summary

Suggested Application Format (Use three pages or less if you can)

- Introduction
- Who you are?
- Why you are set up?
- Your membership, staff and volunteer numbers.
- Who benefits?
- What other groups do this work in your area?

- Who do you network with?
- What is your project? Briefly
- Get application in well before the closing date
- Don't quote the funding organisation's philosophy
- Ring the funder if your application isn't acknowledged after 3 weeks.

THE GOLDEN RULES

Always provide clear, current, and organised financial statements

Following the instructions and provide what is requested

Show what support your project has in the community

People to contact:

City Council community workers

Citizens Advice Bureau

Internal Affairs Link Centre field staff

Internal Affairs COGS staff

The funding agency to whom you are applying

Local clubs eg Rotary, Lions, Kiwanis, Jaycees, Soroptimists, Masons, Licensing Trusts

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Additional Information

If you have any of the following it will add to the validity of your application.

- **Community needs analysis**
- **Management Plan of the complete project**
- **Financial viability = Cashflow project**
- **List of other users - commitment from all parties**
- **Audited Financial Statements**
- **Social Audit**
- **Occupancy or Leasehold Agreement**

HINTS FOR SUCCESSFUL FUNDRAISING

1. Spread the workload. Don't rely on the dependable few.
2. Invest time in your supporters/helpers. Make sure they understand the project and have a commitment to it.
3. Remember the need for effective publicity. How to promote your activity.
4. Select fundraising methods that relate to what you want to achieve and do not alienate people.
5. Budget for income, expenses and profit.
6. Make fundraising fun for those involved.
7. Make fundraising do more for your organisation than just raise money, e.g.. make it bind members together, attract publicity about your work.
8. Be prepared for disaster but don't expect it! Plan how to manage a complaint from the public.
9. Check legal responsibilities (eg. if you run a raffle).

FUNDING CALENDAR

Set up a funding calendar listing organisations to whom you are applying during your calendar year. This does not need to be complicated just use headings similar to the ones listed below:

Organisation applied to:

Date applications close:

Date Committee meetings:

Project Applied for:

Amount:

Amount received:

Date received:

Accountability required by:

If you plan ahead you will be able to see at a glance when applications close, when you are likely to receive a response and plan accordingly.

GOOD LUCK!!

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

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