Welcome to this fundraising workshop. One thing we know about fundraising for good causes, is that whilst one size doesn't fit all, there are some principles and methodologies that can be applied across all types of 'good cause'

Today – Su and I are going to talk to you about what great grant applications look like from a VERY practical point of view. This isn't theory – it is a practical 'how to' workshop and hopefully at the end you will take away some great hints and tips that will help you to gain some much needed funding for your organisation.

Kate Russell ONZM, FFINZ
Programmes and Partnerships Manager – Christchurch City Council

Former CEO Cystic Fibrosis NZ, former CEO Canterbury Medical Research Foundation, former Commercial Director NZ Brain Research Institute.
Past President and Fellow Fundraising Institute of NZ
Founding Trustee – Learning City Christchurch
Board Member – University of Canterbury Foundation
Business Mentor – Business Mentors NZ

Su Marshall CFRE
National Manager – Grants, SPCA

Su has worked in fundraising for over 13 years. She has broad experience in both operational and capital campaigns, across many different types of NFPs. She has recently taken up the role of National Manager-Grants at RNZSPCA.

Before you go hunting for the best funders for your cause, it pays to have a critical look at the capacity, processes and the needs of your group.

Developing a list of your needs is a critical step for you to not only prioritise the order you need things in, but also what are your essentials, should haves and nice to haves.

You must be accurate and realistic in the budget you set for the items you need, be it staffing or office space and accurate quotes/ costings are an essential part of your readiness to look for grant funding. Gaming societies and some other funders require two quotes as a matter of course, for most items aside from wages and office rental.

It pays to do your homework on your funder. Priorities change etc

There are many places for you to do research on specific funders. It pays to develop a good working knowledge of who will fund what

DEVELOPING A TOOLKIT FOR APPLICATIONS

- TRUST DEED
- CONSTITUTION
- IRD STATUS
- CHARITY REGISTRATION
- LATEST ACCOUNTS
- LETTERS OF SUPPORT X 3 (RENEWED EACH YEAR)
- 1 PAGE PDF DESCRIBING WHAT YOU ARE AND WHAT YOU DO

SEARCHING FOR YOUR FUNDERS

- SOURCES OF INFORMATION
- CROSS MATCHED SEARCHES
- DEVELOPING A CALENDAR OF APPLICATIONS

https://www.dia.govt.nz/diawebsite.nsf/wpg_URL/Services-Casino-and-Non-Casino-Gaming-Funding-For-Community-Groups?OpenDocument#one

TOP TIPS FOR GRANT WRITING

- TIMING …
  - CALENDAR
  - CLOSING DATES
  - PLANNING
  - ACCOUNTABILITY

Calendar - Spreadsheet, wall planner, diary box – whatever works. Think about your needs, but also succession planning. Your Annual Grants Plan needs to be a 'living' document

Closing dates - include all known dates – gaming trusts can slot in to 'gaps'. Never be late (bad manners). Some Trusts change a little from year to year – keep an eye on these (eg end of month might be a weekend so it's brought forward)

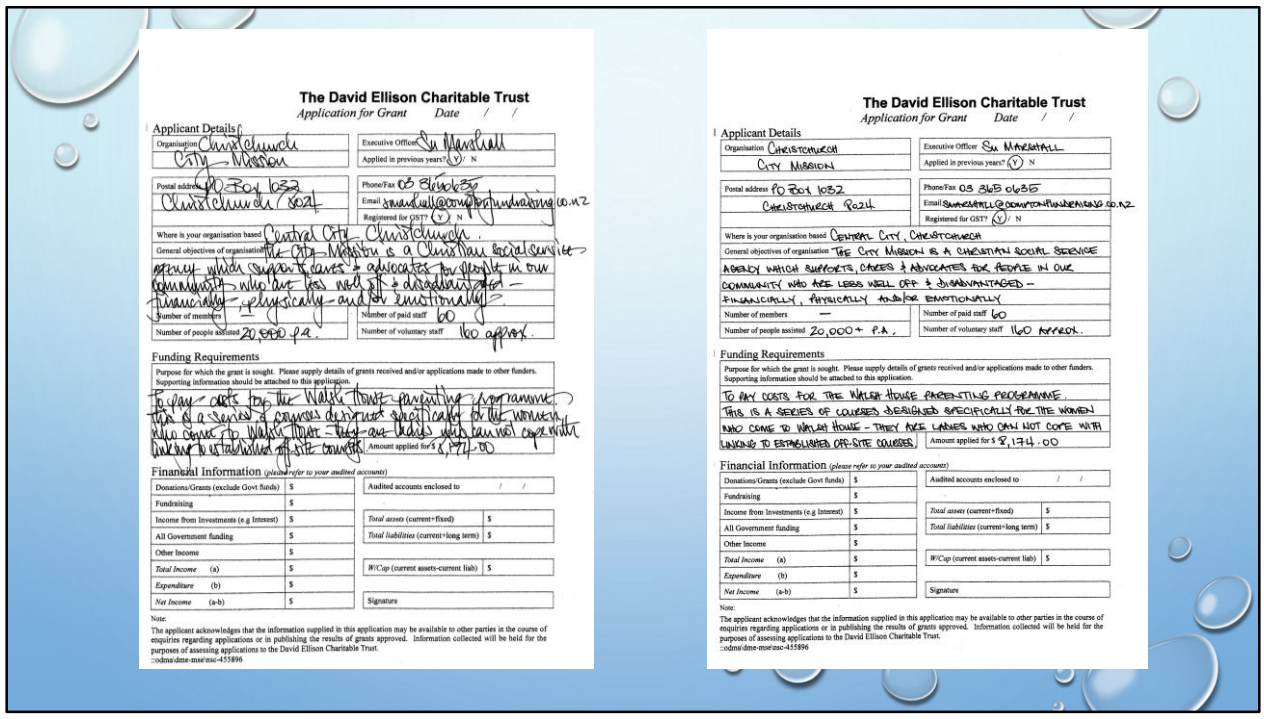
Planning - have quotes, contracts, supporting docs, resolutions, etc ready to go. Leave enough time for event funding (8 weeks) – no retrospective funding. Ensure your appln isn't conflicting with another – especially if your organization has several branches or people working on funding.

Accountability – note date due, docs required, detail required – some only want a narrative on your work, others need details - so allow time to gather. Ensure money is spent – ALL of it (grant fairies). Some don't require anything. Was some acknowledgement promised? Document it

BASICS

- **NEVER** DOUBLE DIP
- USE BLACK INK
- WRITE CLEARLY

Double dip – Trusts talk to each other
Black ink – not only photocopies best, but comprehension is better



The David Ellison Charitable Trust
Application for Grant Date / /

Applicant Details

Organisation Christchurch City – Mission	Executive Officer Su Marshall
	Applied in previous years? (Y) / N
Postal address PO Box 1632 Christchurch 8024	Phone/Fax 03 9656635
	Email smarshall@compassfundraising.co.nz
	Registered for GST? (Y) N
Where is your organisation based Central City – Christchurch.	
General objectives of organisation The City Mission is a Christian social service agency which supports, cares & advocates for people in our community who are less well off & disadvantaged – financially – physically – and/or emotionally	
Number of members —	Number of paid staff 60
Number of people assisted 20,000+ p.a.	Number of voluntary staff 160 approx.

Funding Requirements

Purpose for which the grant is sought. Please supply details of grants received and/or applications made to other funders. Supporting information should be attached to this application.

To pay costs for the Wahi House parenting programme. This is a series of courses designed specifically for the women who come to Wahi House – they are ladies who can not cope with linking to established off-site courses. Amount applied for $ 8,174.00

Financial Information *(please refer to your audited accounts)*

Donations/Grants (exclude Govt funds)	$	Audited accounts enclosed to / /	
Fundraising	$		
Income from Investments (e.g Interest)	$	*Total assets* (current+fixed)	$
All Government funding	$	*Total liabilities* (current+long term)	$
Other Income	$		
Total Income (a)	$	*W/Cap* (current assets-current liab)	$
Expenditure (b)	$		
Net Income (a-b)	$	Signature	

Note:
The applicant acknowledges that the information supplied in this application may be available to other parties in the course of enquiries regarding applications or in publishing the results of grants approved. Information collected will be held for the purposes of assessing applications to the David Ellison Charitable Trust.
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The David Ellison Charitable Trust
Application for Grant Date / /

Applicant Details

Organisation CHRISTCHURCH CITY MISSION	Executive Officer SU MARSHALL
	Applied in previous years? (Y) N
Postal address PO BOX 1632 CHRISTCHURCH 8024	Phone/Fax 03 365 0635
	Email SUMARSHALL@COMPASSFUNDRAISING.CO.NZ
	Registered for GST? (Y) / N
Where is your organisation based CENTRAL CITY, CHRISTCHURCH	
General objectives of organisation THE CITY MISSION IS A CHRISTIAN SOCIAL SERVICE AGENCY WHICH SUPPORTS, CARES & ADVOCATES FOR PEOPLE IN OUR COMMUNITY WHO ARE LESS WELL OFF & DISADVANTAGED – FINANCIALLY, PHYSICALLY AND/OR EMOTIONALLY	
Number of members —	Number of paid staff 60
Number of people assisted 20,000+ P.A.	Number of voluntary staff 160 APPROX.

Funding Requirements

Purpose for which the grant is sought. Please supply details of grants received and/or applications made to other funders. Supporting information should be attached to this application.

TO PAY COSTS FOR THE WAHI HOUSE PARENTING PROGRAMME. THIS IS A SERIES OF COURSES DESIGNED SPECIFICALLY FOR THE WOMEN WHO COME TO WAHI HOUSE – THEY ARE LADIES WHO CAN NOT COPE WITH LINKING TO ESTABLISHED OFF-SITE COURSES. Amount applied for $ 8,174.00

Financial Information *(please refer to your audited accounts)*

Donations/Grants (exclude Govt funds)	$	Audited accounts enclosed to / /	
Fundraising	$		
Income from Investments (e.g Interest)	$	*Total assets* (current+fixed)	$
All Government funding	$	*Total liabilities* (current+long term)	$
Other Income	$		
Total Income (a)	$	*W/Cap* (current assets-current liab)	$
Expenditure (b)	$		
Net Income (a-b)	$	Signature	

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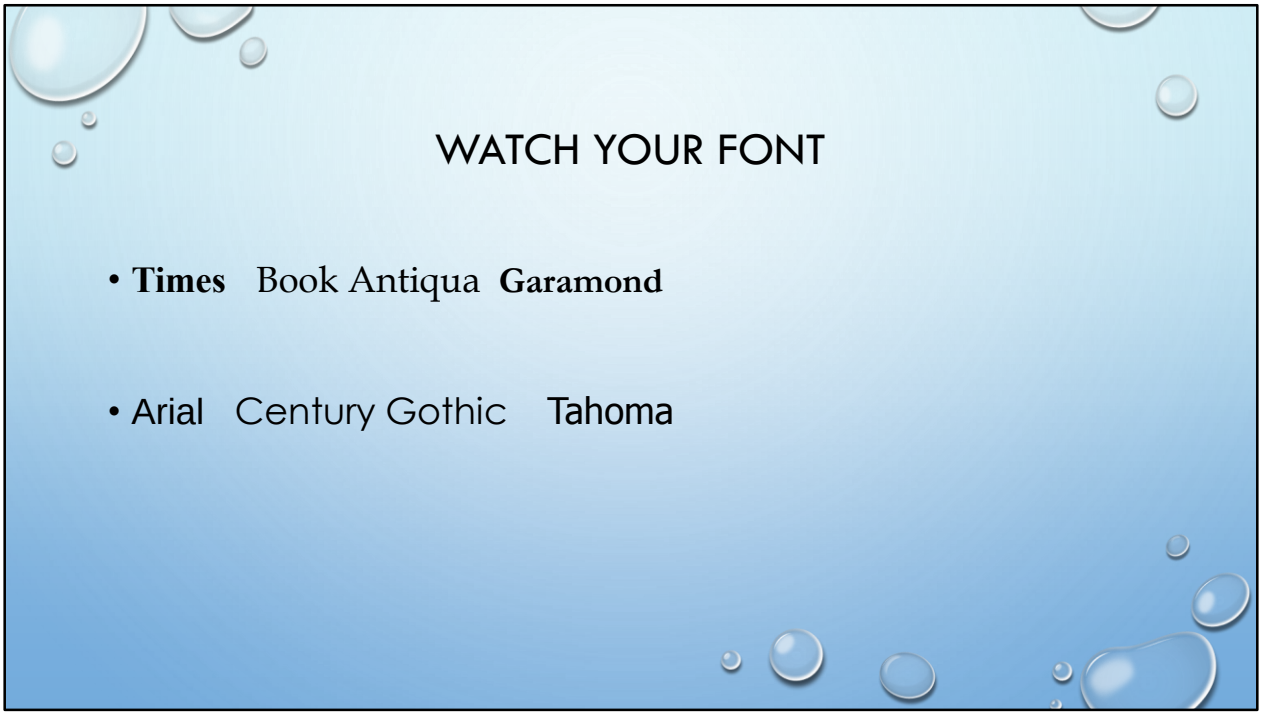
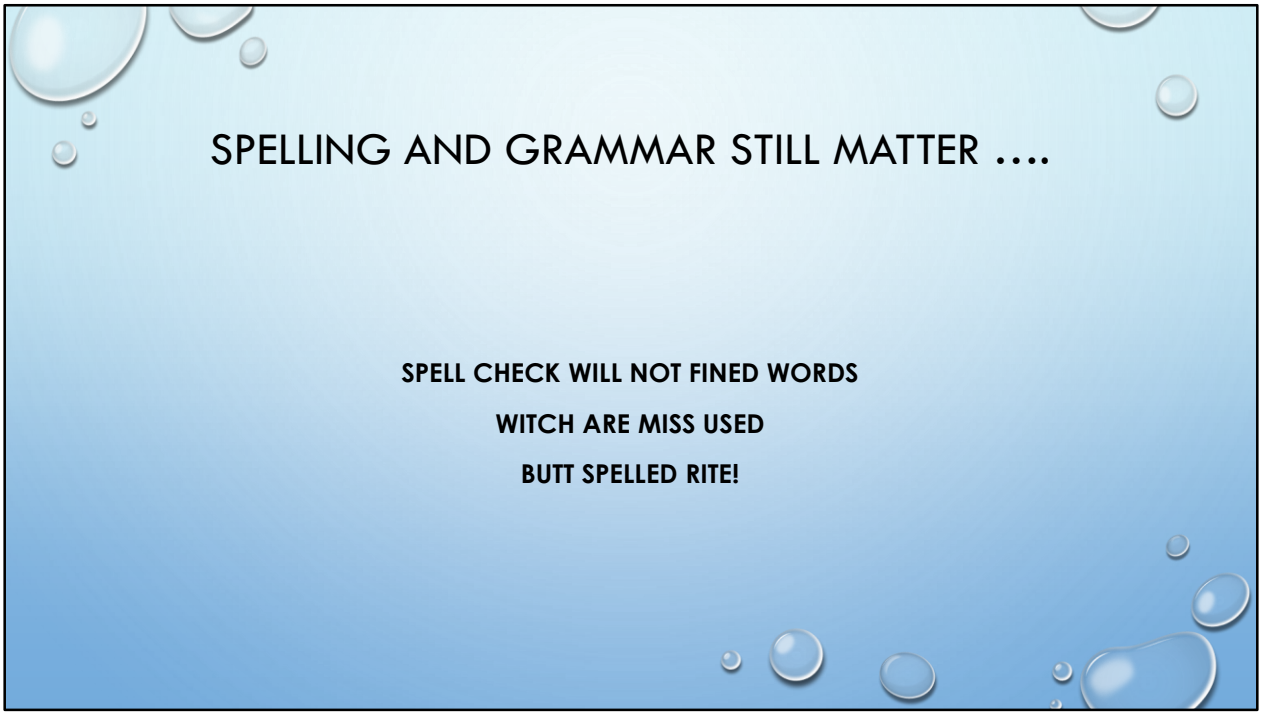
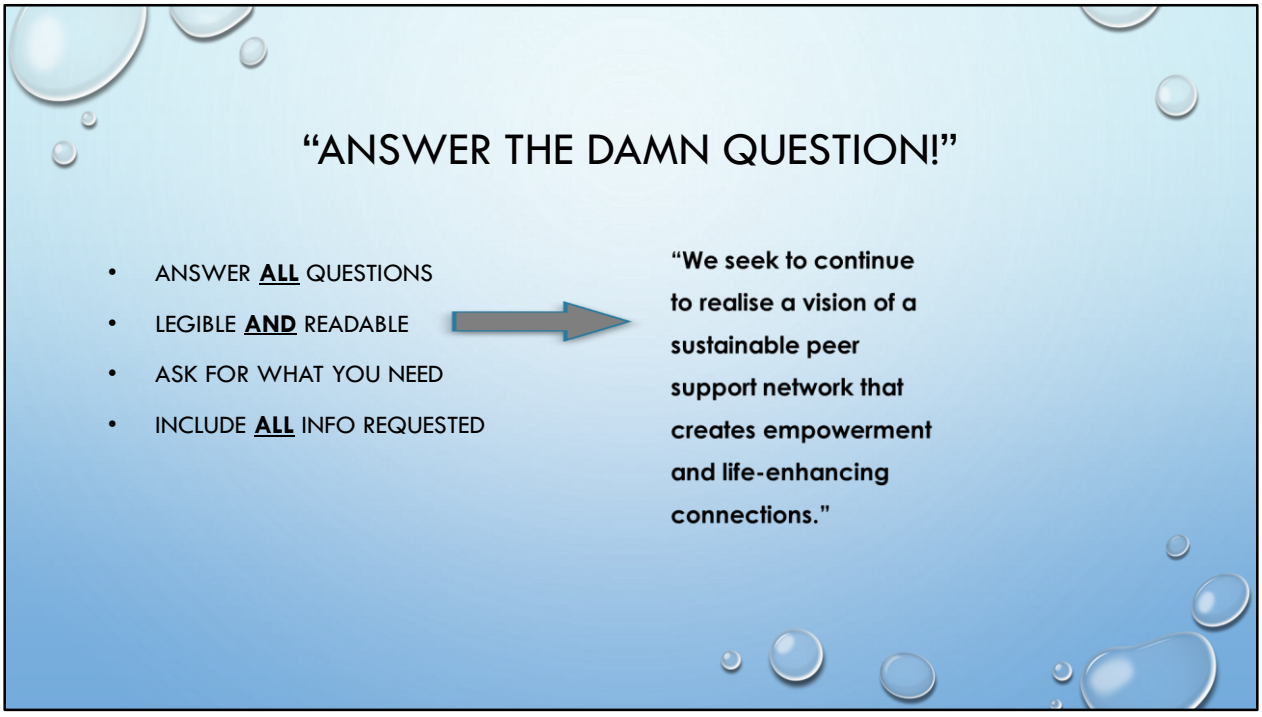
Write clearly – my writing's been called 'artistic' – good for birthday cards but NEVER applns – developed a tidy, legible style. May be have someone else write?



Font – if printed out use a serif font – leads the eye, easier to read, used in all printed books: if electronic use sans serif font, easier to read on a backlit screen



Spelling/grammar – remember your ‘audience’, good manners, respect. Never cross out or write over – start again (part of my banking background possibly!)



"See attached is NOT an answer – write what you can fit and then "See supporting material"
Legible – have to be able to read it: readable – would you WANT to read it? When there are hundreds to consider, make it easy to read – think about white space (resting) and photos. Make it human.
Ask for what you need – let them decide if they can fund it, be very clear if you are splitting the amount in two and applying to two trusts
ALL info – resolutions, quotes, contracts (even if they're "private"), accounts, legal status proof, etc

What's your
story?
TELLING YOUR STORY
GRANT WRITING FROM GOOD TO GREAT

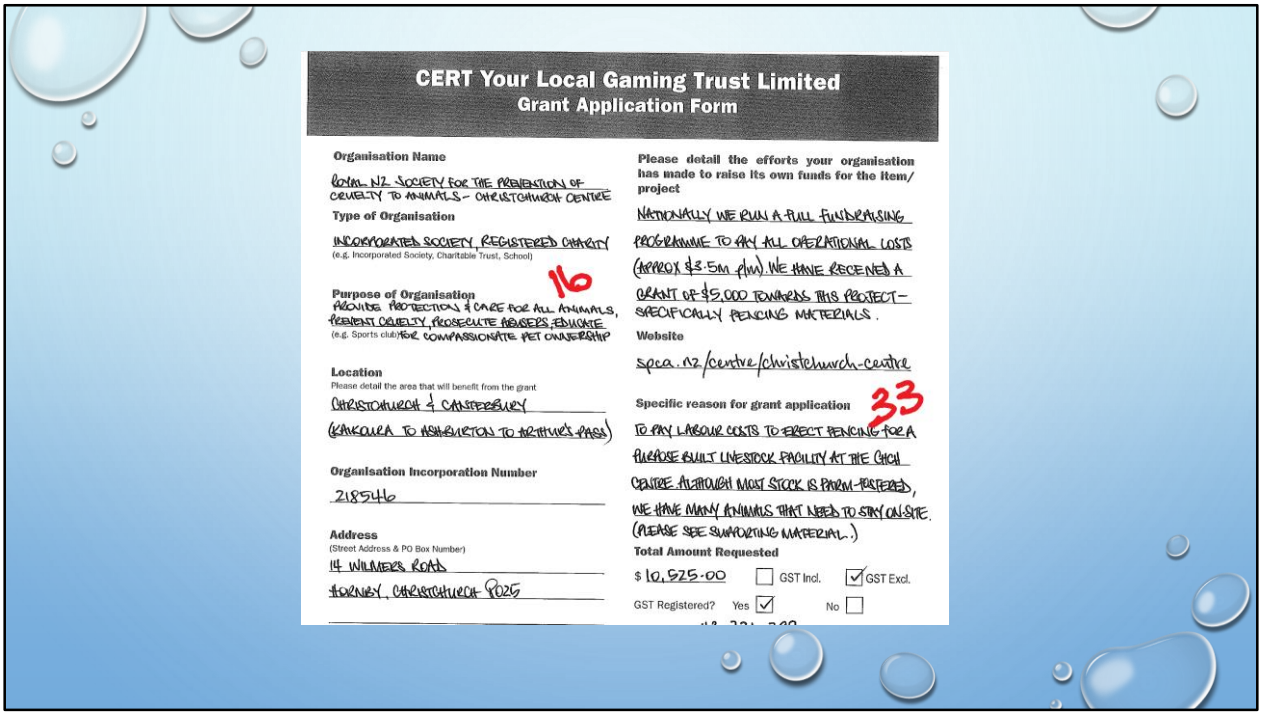
Inspire emotion. This isn't a science thesis – data can back up, but can't sell **WRITE A BRIEF PARA ON ONE SECTION OF YOUR WORK.**

NO JARGON! EVER! Easy to fall into it – maybe have someone outside of your work sphere read it?

You need to tell a story, but not War & Peace (68 page example). Gaming trusts have hundreds of applns to deal with each month – are they going to read them all if they're long and boring? Use pictures – 1000 words ☺ **Can you say it in 75 words?** Sometimes that's all you get!

Contradictory, but tell the whole story – general and specific

Never know who will read the cover story – might be office girl who talks to decision makers over the water cooler. RATA said the cover letter counts – starts the story – Lion Fdn ASKS for this



CERT Your Local Gaming Trust Limited
Grant Application Form

Organisation Name
ROYAL NZ SOCIETY FOR THE PREVENTION OF CRUELTY TO ANIMALS - CHRISTCHURCH CENTRE

Type of Organisation
INCORPORATED SOCIETY, REGISTERED CHARITY
(e.g. Incorporated Society, Charitable Trust, School)

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Purpose of Organisation
PROVIDE PROTECTION & CARE FOR ALL ANIMALS, PREVENT CRUELTY, PROSECUTE ABUSERS, EDUCATE
(e.g. Sports club) FOR COMPASSIONATE PET OWNERSHIP

Location
Please detail the area that will benefit from the grant
CHRISTCHURCH & CANTERBURY
(KAIKOURA TO ASHBURTON TO ARTHUR'S PASS)

Organisation Incorporation Number
218546

Address
(Street Address & PO Box Number)
14 WILMERS ROAD
HORNBY, CHRISTCHURCH 8025

Please detail the efforts your organisation has made to raise its own funds for the item/ project
NATIONALLY WE RUN A FULL FUNDRAISING PROGRAMME TO PAY ALL OPERATIONAL COSTS (APPROX $3.5M p/w). WE HAVE RECEIVED A GRANT OF $5,000 TOWARDS THIS PROJECT - SPECIFICALLY FENCING MATERIALS.

Website
spca.nz/centre/christchurch-centre

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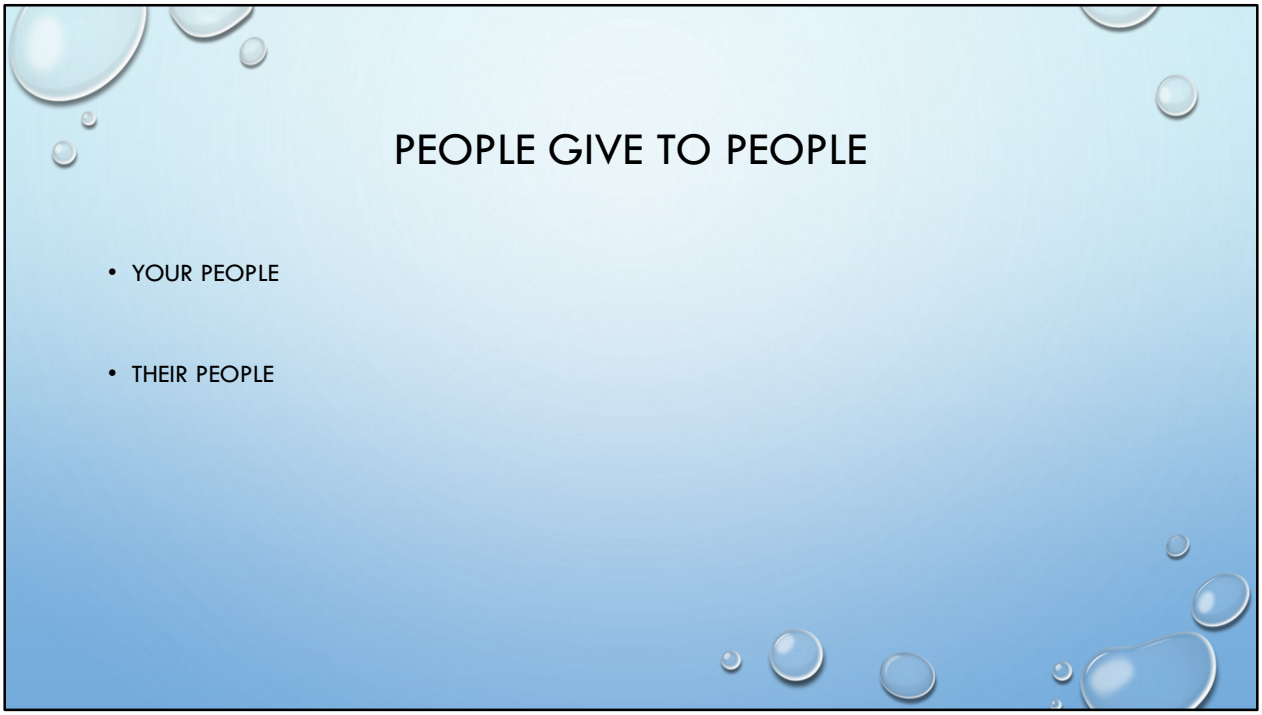
Specific reason for grant application
TO PAY LABOUR COSTS TO ERECT FENCING FOR A PURPOSE BUILT LIVESTOCK FACILITY AT THE CHCH CENTRE. ALTHOUGH MOST STOCK IS FARM-FOSTERED, WE HAVE MANY ANIMALS THAT NEED TO STAY ON-SITE. (PLEASE SEE SUPPORTING MATERIAL.)

Total Amount Requested
$ 10,525.00 ☐ GST Incl. ☑ GST Excl.
GST Registered? Yes ☑ No ☐

Show backgrounder



People give to people
Use your people to tell the story – clients, family, volunteers, workers, - it needs to be personal (not an invasion of privacy personal) – use photos and names (not real names!)
Their people – **HAVE** to give this money away – they **do not have to give it to you** - make it easy for them. Build relationships and invite them to visit work in action – make it real
Ensure the relationship is with the **charity** – don't want that relationship to disappear if you do….

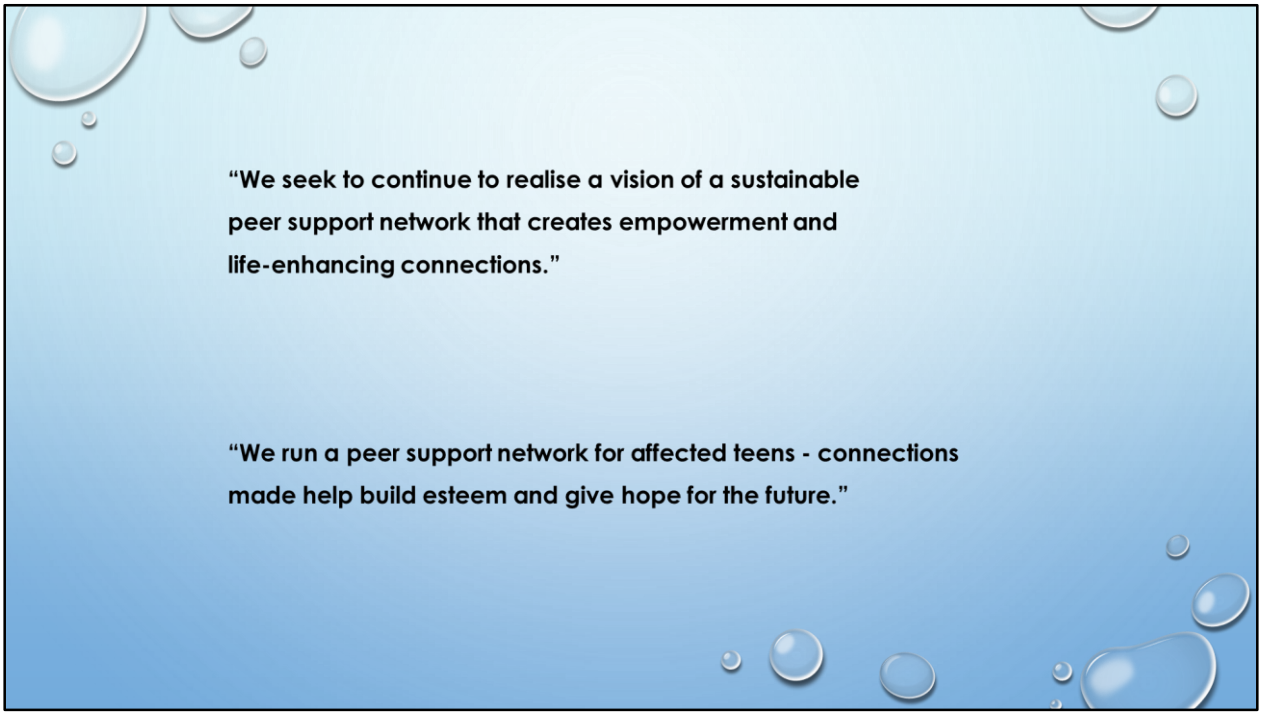
Spreadsheet – which trust, which project, when, how much, decision? Accountability? Details of the appln (the copy you said you've kept for your records)

Visits – invite trustees/staff on a client visit, a presentation, ask them to address a group, invite for a cuppa, etc – this is not shmoozing – it's showing them what your organisation does. And then record the visit in your records.

Accounts – bank stmts of deposit and outgoings, receipts, invoices, IRD slips, etc – all needed for accountabilities.

Correspondence – keep it all (recommend scanning and filing) – never know when you'll need to refer back.

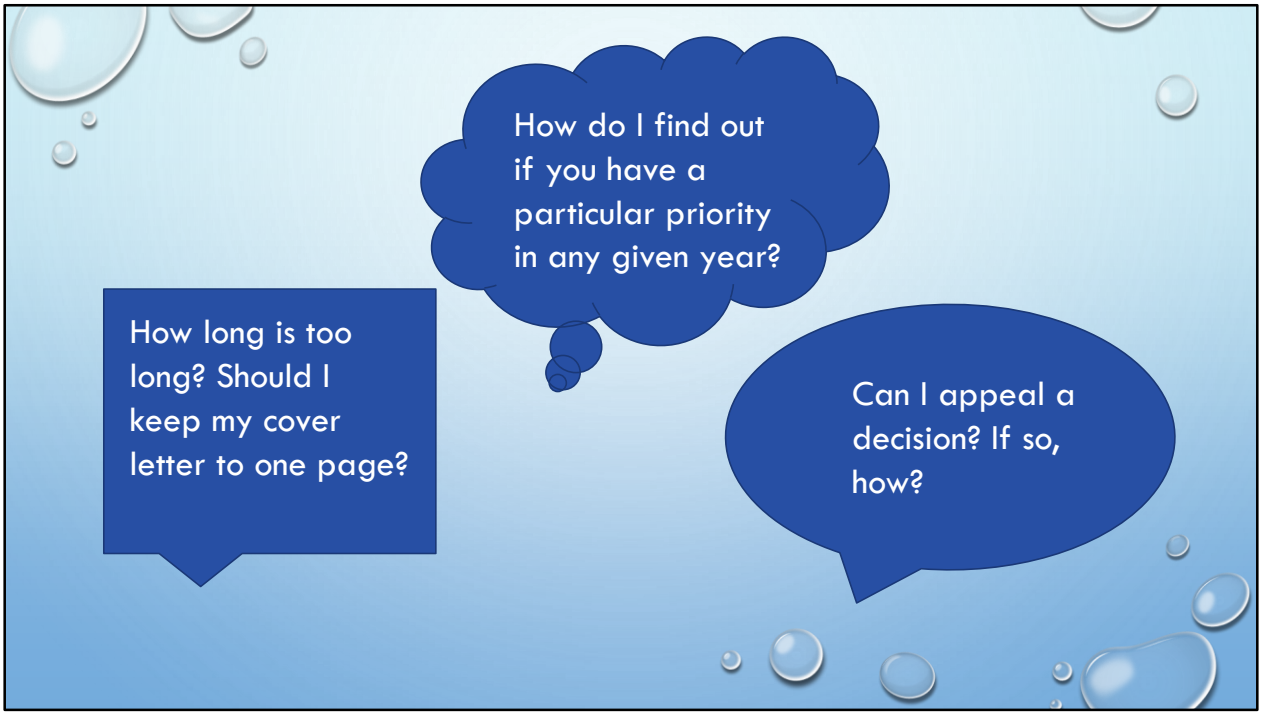
Good records are vital to your succession planning ☺


"We seek to continue to realise a vision of a sustainable peer support network that creates empowerment and life-enhancing connections."
"We run a peer support network for affected teens - connections made help build esteem and give hope for the future."

20 words

WHAT ARE OUR FUNDERS LOOKING FOR?

ASK YOUR QUESTIONS OF OUR FUNDING PARTNERS


How do I find out if you have a particular priority in any given year?
How long is too long? Should I keep my cover letter to one page?
Can I appeal a decision? If so, how?

EXERCISE

- BREAK INTO GROUPS
- COME UP WITH YOUR TOP THREE CHALLENGES WITH GRANT WRITING
- FEED BACK TO THE GROUP
- BRAINSTORM SOLUTIONS

KATE'S CONTACT DETAILS

KATE.RUSSELL@CCC.GOVT.NZ

HTTPS://WWW.LINKEDIN.COM/IN/KATE-RUSSELL-ONZM-FFINZ-7011391

A WORD ABOUT SPONSORSHIP

- SPONSORSHIP VS PHILANTHROPY – KNOW THE DIFFERENCE
- YOU NEED TO BE FAR MORE 'READY' FOR SPONSORSHIP THAN ANY OTHER FUNDRAISING
- EVENTS ARE ONE THING – ONGOING SPONSORSHIP IS ANOTHER
- THINK ABOUT YOUR BRAND, YOUR CAUSE, YOUR WORTH IN A COMPETITIVE MARKET
- NEGOTIATE AS EQUAL PARTNERS
- DON'T GIVE THE FARM TO THE FIRST FRIENDLY FACE

SPECIAL EVENTS

WORTH THE EFFORT OR JUST TOO MUCH HARD WORK?

THINK ABOUT

- GOLDEN RULES
- RESEARCH
- BUDGETING
- BUMS ON SEATS
- HIDDEN COSTS
- PROMOTION
- CHIEF AND INDIANS
- PRODUCTION PLANNING
- HEALTH AND SAFETY

WHY SPECIAL EVENTS?

- PROFILE
- FRIEND-RAISING
- PRECURSOR TO SPONSORSHIP
- MEDIA ATTENTION
- MONEY

DOWNSIDE

- LABOUR INTENSIVE (3 MONTH PLAN TIME MINIMUM AND AT LEAST 100 HOURS)
- HIDDEN COSTS
- FINANCIAL RISK
- RELIANCE ON VOLUNTEERS
- COST/ BENEFIT

GOLDEN RULES - RAPS

- RESEARCH – WHY, WHO, WHEN, COMPETITION
- AUDIENCE – WHO, CAN THEY AFFORD TO ATTEND? WILL THEY COME?
- PLANNING – PRODUCTION PLANNING AND UNDERSTANDING OF ROLES
- SALES – BUMS ON SEATS

RESEARCH

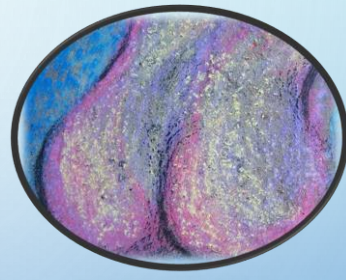
- ORIGINAL OR COPY
- AUDIENCE
- TEST MARKET
- PRICE POINT
- COSTS
- VOLUNTEER CAPABILITY
- SEEK ADVICE

BUDGETING

- BRAINSTORM ALL COSTS (WITH MULTIPLE PEOPLE)
- INCLUDE ANY PAID STAFF TIME
- VOLUNTEER COSTS
- GETTING STUFF FOR FREE
- IF IT'S ADVERTISED AS A FUNDRAISER AND IT DOESN'T MAKE MONEY IT HAS **FAILED**

BUMS ON SEATS

- IT WILL NEVER BE AS EASY AS YOU THINK
- PRICING – BE REALISTIC BUT DON'T UNDERSELL YOURSELF
- SELLING TICKETS MUST BE A PRIORITY
- THE EARLIER YOU START SELLING THE BETTER
- NEVER BUDGET ON 100% ATTENDANCE



DO SWEAT THE SMALL STUFF

- LAST MINUTE PURCHASES
- STAFFING
- CONTINGENCY

PROMOTION

- MEDIA PLANS
- FREE STUFF
- MEDIA RELEASES
- COUNCIL WEBSITES
- SPONSOR WEBSITES
- PAPERS AND RADIO

PRODUCTION PLANNING

- EVENT MANAGEMENT
- 'GO TO' PEOPLE FOR ALL STAKEHOLDER GROUPS
- COMMUNICATION
- OWNERSHIP
- CONTRACTING - PRIOR PLANNING PREVENTS POOR PERFORMANCE
- REGULAR MEETINGS
- TICK OFF TASKS AS THEY ARE COMPLETE
- MAKE SURE EVERYONE HAS A COPY

HEALTH AND SAFETY

- BE CAREFUL
- IDENTIFY AND DOCUMENT ALL HAZARDS
- COMPLY WITH RULES RE ALCOHOL/ LICENSING/ ROAD PLANS ETC
- ALWAYS CHECK WITH YOUR LOCAL COUNCIL IF IN DOUBT