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Look B4 U Leap



First Steps:

1. Check criteria to apply – is your group:

- A not for profit organisation? - legal status may be required (Trust or Incorporated Society)
- Registered with Charities Services? (Registration may be required to get a Charities number.)
- Operating a bank account in the name of the group?
- A committee structure with Chairperson, Treasurer and Secretary? (It's important to have role separation.)
- Operating for a minimum of 12 months?
- Within the geographical location?
- The right sector to fit with the funder e.g. sport, education, environment.
- Seeking funding within the right timeframe? (Check closing dates and timeline for expenditure of grant.)

2. Check Funders priorities – does your project fit?

- What are the priorities of the funder?
- How does your project fit with those priorities?
- Will you be able to demonstrate the need for the project and the outcomes/ benefits to the community?

3. Check what you will need to complete the form – are they in an electronic format?

- Resolution and a copy of the minutes from your committee meeting?
- Financial information such as annual accounts, bank statement and bank deposit form?
- Chairperson report?
- Project information such as quotes, budgets etc?
- Was the accountability completed for a previous grant?

4. Check how to apply - Online applications

- Determine how the application needs to be submitted, usually online.
- Set up your user name and password.
- Log on and complete the application form.

5. Hints and tips for online applications:

- Some parts of the form may automatically populate with your organisation information, check that this is current.
- There may be compulsory fields and you will not be able to proceed without completing these fields. Some fields may have a limit on the number of words you can use.
- You may be able to save and come back to the application to complete.
- You may need to go through Chrome or Mozilla as Internet Explorer may not work as your browser.
- You will need to attach your other documents eg: minutes, quotes.

To upload documents:

- a) Click browse
 - b) Find file – excel, word, pdf, jpg
 - c) Click upload and save
- Remember once your form is complete, click send/submit to send the application form to the funder.



GRANT APPLICATION FORM

1. DETAILS

Organisation Name: _____

Postal Address: _____

Telephone: _____ Email: _____

Contact Person: _____

Position: _____

Phone: daytime _____ Mobile: _____

2. LEGAL STATUS

Are you a Trust, Incorporated Society or Other? If Other please specify:

☐ Trust ☐ Incorporated Society ☐ Other _____

Is your group affiliated with or part of a national organisation? ☒ Yes ☐ No

Is your group controlled by any other organisation? ☐ Yes ☒ No

If yes, please specify _____

Is your organisation registered for G.S.T?

☐ Yes ☐ No G.S.T Number ____/____/____

Are you registered with Charities Services?

☐ Yes ☐ No Charities Services No. _____

3. BACKGROUND

How long has your organisation been in existence? 20

How many members/clients? _____

Number of staff: _____ Number of volunteers: _____

What is the main purpose of your organisation? ccn.org.uk

What programmes and services does your organisation provide?

Notes:

legal name
name of
bank account

a person
talk about
the projects

own bank
account.

a line of
accountability

CAN IS

dead

fill in the
fields

short
description

4. PROJECT

Please describe the project this grant is being requested for:

- ① promotion ^{materials} ~~Cycling Action Warkato~~
- ② membership drive
- ③ Upgrade of online presence/website
- ④ to allow us to publish submission + other key documents

Which of the funder's priorities does your project meet?

What are the expected outputs and community benefits/outcomes of your project?

How will you measure and evaluate the outcomes and impact of your project?

Project starts: _____ Project finishes: _____ Ongoing ☐

5. BUDGET

Please provide a breakdown of the budget for this project. If you are registered for G.S.T do not include G.S.T in your figures

Expenditure	\$	Income	\$
all overheads here			
(A) Total cost of project is		(B) Total funds available	

Total cost of the project (A) \$ _____
 Less total funds available (B) \$ _____
 = Amount Applied for: \$ _____

spending windows under a year.

Notes:

promotion

what

operating costs?

↳ Well Trust

↳ ICC

↳ COGS

⑤ Only gamers Trust needs quotes, & like asset

▶ Data to collect

▶ Which out for retrospective fund grants application? decision maker

▶ We can add other grant applications from funder (pending) (accepted)

assets are owned by the applicant

6. FINANCIAL SUMMARY

Summary for financial year ending _____,
or period _____ to _____

Income \$ _____

Expenditure \$ _____

Surplus (deficit) \$ _____

Current funds in hand \$ _____ at ____/____/____

Indicate funds tagged for specific purposes:

What are your usual sources of funds?

Have you applied elsewhere for funding for this project?

(Please list organisations and amounts)

7. ACCOUNTABILITY

If you received a grant from us in the past have your accountability requirements been met? ☐ Yes ☐ No

Please note failure to provide accountability will lead to ineligibility for funding.

8. ATTACHMENTS – please attach the following:

- ☐ Resolution
- ☐ Annual Accounts
- ☐ Chairpersons Annual Report
- ☐ Bank Deposit Slip
- ☐ Bank Statement
- ☐ Quotes and other supporting documents

9. DECLARATION – (Two office holders with red hair must complete)

We the undersigned, make a solemn declaration conscientiously believing the same to be true under and by virtue of the Tea and Bikkies Act 1923.

We certify that the information provided in this application was the best we could come up with at short notice.

We solemnly declare that, in the event of being so fortunate as to receive funds, we will hop up and down the main street for a period of time to be specified by your committee.

Name: _____

Signed: _____

Position: _____

Date: _____

Name: _____

Signed: _____

Position: _____

Date: _____

Notes:

a bit of
mix is
desirable.

~~you don't~~
you don't
need include
declined
grants.

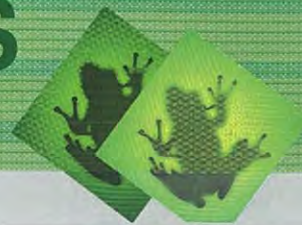
most
funder's
publish who
they gifted
the money
too.

2 quotes
Lib only
one, give
reasons.

F.R.O.G.S

Funding Reliable Organisations Giving Satisfaction

GRANT APPLICATION FORM



1. DETAILS

1 Organisation Name: Society of Hardworkers Inc

2 Postal Address: P O Box 953, Tamahere

Telephone: (03) 952 561 Fax: (03) 952 561

E-mail: hardworkers@ihug.com

3 Contact Person: Isabel Ringing

Position: Administrator

4 Phone: (03) 952 561 Mobile: 026 293 541

2. LEGAL STATUS

5 Are you a Trust, Incorporated Society or Other? If other please specify:
☐ Trust ☒ Incorporated Society ☐ Other _____

Is your group affiliated with or part of a national organisation? ☐ Yes ☒ No

6 Is your group controlled by any other organisation? ☐ Yes ☒ No
If yes, please specify _____

Is your organisation registered for G.S.T?
☒ Yes ☐ No G.S.T Number 52 / 964 / 721

Are you registered with the Charities Services?
☒ Yes ☐ No Charities Services No. CC52867

3. BACKGROUND

7 How long has your organisation been in existence? since 1924

How many members/clients? 294

Number of paid staff: 2 Number of volunteers: 12

8 What is the main purpose of your organisation?
Provide information, education and support services for hardworking
volunteers enabling them to provide optimum service to community
groups.

9 What programmes and services does your organisation provide?
Healthy eating programmes; Vacation homes; Relaxation classes;
Holiday schemes; Basic volunteer training courses and wellness
clinics

Notes:

- 1) Use Legal Name
- 2) Use reliable postal address
- 3) Who knows about the group and project?
- 4) Daytime contact
- 5) Does your group have a Trust Deed or members or neither?
- 6) Does your group control their own finances?
Does your group decide what projects to do?
Who is legally responsible for your group?
- 7) This indicates to the funder how many people benefit from your group.
- 8) Aims and objectives or mission statement; often found in Trust Deed or Constitution
- 9) What does your whole organisation provide for both members and the community?

General tips:

Apply online
Answer all questions
Be clear and concise
DO NOT TYPE "see attached"

4. PROJECT

Please describe the project this grant is being requested for:

1) Cost of holding 3 hardworkers wellness seminars for volunteers in the general community in the Waikato region. 2) Cost of printed information

Which of the funder's priorities does your project meet?

Our project supports volunteers and creates inclusive and resilient communities.

What are the expected outputs and community benefits/outcomes of your project?

Free seminars will be held at 3 locations around the Waikato and we expect 300 people to attend. They will educate hardworking volunteers on how to keep well so they can provide optimum service to volunteer organisations. The whole community benefits by receiving supreme service from the groups they seek assistance from. Volunteers who attend share information with members, family and friends on how to take care of themselves which in turns improves the general well-being of the whole community.

How will you measure and evaluate the outcomes and impact of your project?

The seminar participants will be given an evaluation form to complete before and after the seminar to measure their learning. We will also ask the organisations that the volunteers are from for feedback to gauge whether the quality of their service has improved and if volunteers are taking better care of themselves as a result of this training.

Project starts: **September** Project finishes: **November** Ongoing ☐

5. BUDGET

Please provide a breakdown of the budget for this project. If you are registered for G.S.T do not include G.S.T in your figures

Expenditure	\$	Income	\$
Seminar Tutors	3,000	Funds in hand	1,500
Venue & equipment hire	1,500	Sponsorship	500
Volunteer expenses	500	Raffle sales	100
Printed Brochures	1,800	Lotteries	1,500
		COGS(unconfirmed)	1,000
		Donated goods	500
(A) Total cost of project is	6,800	(B) Total funds available	5,100

Total cost of the project (A) \$ **6,800**
Less total funds available (B) \$ **5,100**
= Amount Applied for: \$ **1,700**

Notes:

10) Project is the thing you want the money for eg. operating costs

11) Show which of the funders criteria your project fits

12) Outputs - How many sessions will you hold, how many will attend? Outcomes - what was the result? How does your project benefit the wider community? Think beyond immediate benefit to your members.

13) How will you collect data to show the impact of your project?

14) Plan ahead; check dates; make sure your project happens after the funder pays out the money

15) Budget is only for project – not whole organisation.

***Remember to include**

- a) Admin costs
- b) Power, phone, rent (if these things are used for your project)
- c) Volunteer expenses
 - reimbursements
 - petrol vouchers
 - refreshments
- d) In kind support

***Make sure your sums add up!**

***Show where other \$\$ will come from, don't expect 100% from the funder.**

***Be clear, honest and transparent.**

6. FINANCIAL SUMMARY

Summary for financial year ending 31st March (year),
or period _____ to _____

Income \$ 153,248

Expenditure \$ 122,632

Surplus (deficit) \$ 30,616

Current funds in hand \$ 28,514 at 10 / 05 / (year)

Indicate funds tagged for specific purposes

\$25k tagged for ongoing salary and operating costs.

What are your usual sources of funds?

Members fees; Fundraising; Rental income; Programmes fees; Grants and donations

Have you applied elsewhere for funding? (Please list organisation and amount)

COGS \$1,000 (unconfirmed)

Lotteries \$1,500 (confirmed)

Sponsor \$ 500 (confirmed)

7. ACCOUNTABILITY

If you received a grant from us in the past have your accountability requirements been met? ☒ Yes ☐ No

Please note failure to provide accountability may result in future applications being declined.

8. ATTACHMENTS – please attach the following

☒ Resolution

☒ Annual Accounts

☒ Chairpersons Annual Report

☒ Deposit Slip

☒ Bank statement

☒ Quotes and other supporting documents

9. DECLARATION – (Two office holders with red hair must complete)

We the undersigned, make a solemn declaration conscientiously believing the same to be true under and by virtue of the Tea and Bikkies Act 1923.

We certify that the information provided in this application was the best we could come up with at short notice. We solemnly declare that, in the event of being so fortunate as to receive funds, we will hop up and down the mainstreet for a period of time to be specified by your committee.

Name: _____

Signed: _____

Position: _____

Date: _____

Name: _____

Signed: _____

Position: _____

Date: _____

Notes:

16) This section is finance of whole organisation – Take figures from latest annual accounts.

Current funds from latest bank statement

17) Important to tag \$ in the bank a/c so funder knows why you need funds for this project.

18) Helps funder understand how your organisation gets their income.

19) Shows you have planned how project cost will be met, and are not expecting one funder to fund total project costs.

20) Make sure your group has accounted for any previous donations.

21) Make sure you attach everything the funder asks for -
* Resolution in minutes
* Latest annual accounts and financial information
* Quotes etc

22) Make sure you read what you are signing as it is a legal document.

23) Signed by office holders of your committee – Chair, Treasurer or Secretary.

* Copy application and keep on file

Please note this application is a sample only; characters, organisation and Frogs represented in this application do not exist and is for training purposes only.

NOTES

Tips and Templates



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Trust Waikato
TE PUNA O WAIKATO



**COMMUNITY
WAIKATO**

"Supporting strong communities"
Hei tautoko kia tuu pakari ai ngaa haapori



CREATIVE AUAHA
WAIKATO TAINUI

INTERNAL AFFAIRS
Te Tari Taiwhenua



D.V. BRYANT TRUST

Enhancing Human Welfare in the Waikato



Funding Tips for First Timers



Applying to the right place

Contact us before you apply

Tell us your project ideas – can we fund it? How much?

Any other funders?

Check out the Generosity New Zealand database: for a list of free sites in your area visit <http://generosity.org.nz/>



What funders need

Fill in every section of the whole form

Assume nothing – tell us everything we need to know

If it's not applicable say why

Attach non essential stuff only if it is relevant to your project
eg; background information, overview, photos etc



frog

Make it easy

Be clear and concise – use bullet points

Apply on-line; you may need to register your group first

Be prepared; plan ahead; don't leave it until the last minute

Application Budgets



A **budget** looks ahead to what is expected to happen. It includes what you expect to spend (expenditure) and what you expect or hope to receive (income).

A budget for a project is a smaller part of the organisation's whole budget.

Expenditure

You may need to get quotes to find out the actual costs of an item or project.

Income

Income can come from a number of sources:

-  Funds already held by the organisation which are set aside (tagged) for the project
-  Fund-raising
-  Other grants applied for but not yet received, note them as pending or confirmed.
-  Other sources such as course fees, donations etc.
-  In kind support such as donated goods, volunteers hours etc

Do you need to contribute to the project costs? This depends on the funder – check with them. Most prefer to see some contribution from the organisation.

What if we have funds in our bank account? Explain clearly what the funds in your bank account or term investments are to be used for. These may be tagged for a specific purpose such as operating costs or saving toward capital items etc.

How much to ask for?

This depends on the project and what the funder might fund. Check their average grants or ask the funder. Funders also look at the size and purpose of your group.

What if you receive less than you need?

You may need to hold the grant and raise other funds before the project can go ahead. If it is not possible to do the project, advise the funder. Ask if you need to return the money or if you could spend it on a similar project.

What if two funders fund you for the same project?

Ask one of the funders if you can use the grant for another eligible project.

What about volunteer costs?

Check with the funder whether volunteer input can be included as part of the income for the project.

-  Don't inflate – funders compare costs.
-  Don't forget indirect costs when you are costing a project e.g. overheads
-  Check your addition.



A note about GST – organisations with turnover of more than \$60,000 p.a. must register for GST (Goods and Service Tax) with Inland Revenue Department. Ask IRD for advice if you are unsure.

Accountability/Acquittal

Your organisation must report to the funder with an explanation of how you spent the funds and the outcome or results of the project or service that was funded. This is often called grant accountability or grant acquittal.

Why do we need to do accountability?

- Show that the project happened
- Transparency
- Being accountable and responsible for the grant received
- Required by the funder
- Meeting moral/legal obligation
- Funders themselves have to account for the grants
- Spending public money



Consequences of not doing accountability

- Request that the funds be returned
- Being blacklisted by the funder and potential for other funders to blacklist you
- Legal ramifications
- Unable to access further funding
- Loss of organisational reputation and integrity



When do you account for funding received?

- As soon as you have spent the grant, usually within a given time frame
- Time limit – check what funders expectations are eg: spent and accounted for within 3 months
- Different funders have different requirements, for example;
COGS grants must to be spent within 12 months of the date of the grant approval unless written approval for an extension is obtained from the COGS committee before that 12 months period ends.

How do we account for funding received?

- It is important that you keep track of grants. It is essential that you know what the grant covers. For example if it is for wages what period the grant for wages covers.
- Many accounting systems can set up coding for grants received and expenditure is then coded against these grants.
- Ensure you know which grants include GST and which grants are donations. Your grant letter will determine if it is a donation or includes GST.
- It is important that you keep invoices and a paper trail of how your grant was spent.
- Receipts must be attached when you return your accountability form.
- The grant must be spent for the purpose that it was granted.
- If you need to change the purpose of the grant you must gain permission from the funder to do this.
- Funders have different accountability requirements. Some require the accountability for a grant to be completed within 12 months of grant receipt, others such as pub charities require you to account for the grant within 3 months of receipt.

Examples of what could be included:

- Photographs before and after the project is completed.
- Receipts, copy of paid invoices
- Proof of transactions such as bank statements, reports from your financial system
- Evaluation summary, data collected, survey results
- Media articles, newspaper clippings
- Letters/comments from participants
- Stats on numbers participating, clients etc



Outputs and Outcomes

As part of your accountability some funders may ask your group to show the outputs and outcomes of your project.

Outputs capture the amount/quantity or size of your project e.g. how many people attended your event, how many clients did you provide a service to, how many workshops did you hold? Outputs are what you do, the services or activities you provide.

Outcomes capture the impact/changes that your project has made e.g. people are now more engaged in the community, have learnt new skills and are more independent, have improved their quality of life. Outcomes are the changes that have been made as a result of what you do.

If you stated the expected outputs and outcomes in your funding application you should report on those same key indicators as part of your accountability. The funder wants to know if your project achieved its goals. If it didn't, then explain why.

Resolutions

Often funders will ask you to include a copy of the resolution that has been recorded in the minutes of your organisation. This shows the decision has been made and approved by the committee.

Resolutions need to be specific and state:

Who is going to apply

The **name** of the Trust to apply to

The **value** to apply for

The **purpose**

When it will be done



Example of a resolution:

That treasurer Ross Webb will apply to FROGS for \$300 for a set of training snorkels by March 2016.

Moved by Lilly Pad
Seconded by Harry Fly
Passed unanimously

This should be recorded in your minutes which need to be signed by the Chairperson.

Remember:

Check what the funder asks for.

Include all the information requested.

Plan ahead – allow enough time to get a resolution ratified by your group so it is ready for your application.

Get the minutes signed by the appropriate person and include a copy of them in your application.

In some circumstances a resolution via email may be acceptable; check with the funder *and* make sure your group's constitution allows for this decision-making process.





In Summary...

1. Plan ahead: know what projects your group want to do and when, then plan how to fund them and which funders to apply to.
2. Make sure your project fits the criteria for each funder.
3. Get organised; know when various funding rounds close; mark them on a calendar.
4. Collect an application from all the funders you will be applying to.
5. If you are handwriting, write neatly; use a black pen.
6. Answer all the questions; complete the whole form.
7. Summarise information in the space provided; use bullet points; **Do Not Type** "SEE ATTACHED".
8. Be clear, concise and realistic with your request.
9. Clearly state the benefit of your project to your group or clients **and** the wider community.
10. Mention volunteer input, number of people attending etc.
11. Show evidence of sound planning (timing, budgets etc).
12. Make sure that your sums add up.
13. Show your contribution to costs (funds in hand, other funders, in kind support etc).
14. Include attachments the funder has requested. Attach quotes, bank statements, annual accounts, reports etc. Make a copy of these documents.
15. Include accountability for any previous donation.
16. Include photos and press clippings (optional).
17. Have the application signed and checked; get your application in on time, before the closing date; copy before you send it to the funder; know when you will get a response and mark it on a calendar.
18. If your application is successful, note on your funding calendar the \$ amount and when the accountability is due.
19. Complete your project: take photos; send in your accountability with receipts, statements etc as required.
20. Celebrate your success.



Developing a funding kit

If your group is requesting funding from more than one funding organisation, a funding kit will save you time, and make applications easier to prepare.

A funding kit holds general information about your organisation which most funders request each time you apply.

Contents – what do you already have?	Yes	No – where can I get it from?
History of your organisation		
Aims and activities		
o Strategic plan		
o Business plan		
o Deed of constitution or trust deed		
o Annual plan or goals		
Legal status		
o Copies of Certificate of Incorporation, constitution or trust deed		
o Updated list of Trustees		
o Copies of Maori Land Court minutes or gazette notices		
o Marae Charter		
Management Systems		
o List of names and contacts of management committee / trustees		
o Financial systems		
o Copies of any financial policies		
o Copies of audited accounts		
o Bank account details		
o Treasurer's name and contact details		
o GST and IRD number		
o Annual budgets		
o Latest financial reports/updates		
o IRD tax exemption letter		
Community Support		
o Copies of letters of support, newspaper articles etc		
Client group		
o Annual statistics		
Reporting and evaluation		
o Annual reports		
o Summary of client satisfaction survey		
o Summary of project or service evaluation		



Sample funding calendar

Funder	Date open	Date closed	Amount applied	Received	Project	Accountability due (actual date)
Cogs	March	13-May	1000	500	Wages & operating exp	Within 12 months
Creative Communities	February	March	2000	pending	Mural for wall	Within 2 months of completion
D V Bryant Trust Board	Continuous	Two monthly	5000	pending	Office Furniture	Next application
HCC Well Being	February	31-Mar	5000	3000	Audit of Accounts	Within 12 months
Lottery Grants Board	November	9-Dec-15	25000	10000	Wages & operating exp	Within 12 months
Lion Foundation	Open	Various	25000	5000	Pre school programmes	Within 3 months of completion
Sky City	July	August	1500	1000	Wages	Within 12 months
Trust Waikato	August	September	15000	10000	Wages	Next application
Wel Energy Trust	May	June	20000	10000	Salary	Within 12 months



Waikato

Funding calendar template

Funder	Date application closes	Amount applied for	Amount received	Project funding for	Accountability due
ANZ New Zealand Staff Foundation	February August				
Catholic Caring Foundation	Check dates with funder				
Chinese Poll Tax Heritage Trust (DIA)	March				
Community Conservation Partnership Fund	February				
Community Organisation Grants Schemes (COGS)	Possibly May				
Community Waikato Tindall Fund	October				
Creative Communities Scheme	Check local council website				
Department of Conservation Community Fund	TBC				
D V Bryant Trust	Bi-monthly Register anytime				
Everyone Charitable Trust	Feb April July				
Fonterra Grass Roots Fund	March August				
Gallagher Trust	Applications considered in February, May, August and November				
Grassroots Trust	End of each month				
Harcourt's Foundation	January, April, July, October				
HCC Community Single year grant (Check your local Council for community grants)	March				
Jet Star Flying Start Programme Grant	March, June, September, December				
J R McKenzie Trust	February				
Len Reynolds Trust	June				
Lottery Community Committee	July Dec				
Lottery Community Facilities & Lottery Marae Heritage and Facilities	February September				
Lotteries Environment & Heritage	Feb				

Mazda Foundation Trust	March				
Medibank Community Fund	Early October				
Microsoft NZ	Register anytime				
Ministry of the Environment Community Environment Fund	April				
Norah Howell Charitable Trust	March September monthly				
NZ Community Trust	December				
Sargood Bequest	August				
Sky City	May				
Support for Volunteering Fund (DIA)	Check website monthly				
The Fletcher Trust	December				
The Lion Foundation	April				
The Lou & Iris Fisher Charitable Trust	monthly				
The Page Trust	March July October				
The Southern Trust	February August				
The Working Together More Fund	December				
Todd Foundation General Fund	monthly				
Trans power Community Care Grant	February June September				
Trillian Trust	April October				
Trust Waikato % funder.	February April June August October				
Waikato Regional Council Environmental Initiatives Fund	March June September				
WEL Energy Trust Quick response grants For grants \$5000 & under	March June September				
WEL Energy Trust Community Support Grants For grants \$5,000 & over					

Disclaimer: Dates are an indication only. It is important that you visit the funder's website for current opening and closing dates.

NOTES

Finding other sources of Income ...



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HELPING NON-PROFITS GROW

7 KEY INCOME STREAMS

Where does the money come from?

Membership

You have a membership package where people pay to receive specific services, benefits or privileges.

pace of inflation

Donations

People donate money or resources out of kindness, expecting nothing in return. Donations can be both large and small.

why?!
- feel good

Sponsorship

Parties (often businesses) give money or resources in return for specific rewards.

- believe in you.

Fundraising

Activities are organised for the sole purpose of raising extra funds. These activities usually rely on member or client involvement, and do not necessarily relate to the services you offer.

access to your membership - ask

- show commitment

Entrepreneurial Activities

Your organisation sells products or services in a traditional business model. These activities are not your core business, but they do make use of your existing resources. They usually cater for a market larger than your own client or member base.

- sell stuff

Grants

Your organisation applies to funding bodies to fund specific projects or costs. The organisation is accountable for spending the money where they said they would.

Contracts

Somebody (usually a government department) contracts your organisation to provide a specific service or programme and pays you for doing so.

→ taking over.

→ they might be

funding for services you are already doing.

CREATING A MEMBERSHIP PACKAGE

Members don't have to be your clients or users – members can also be your supporters. You just need to create a package for them to 'buy' in to.

You could offer:

- Use of your facilities
- Use of your equipment
- Regular newsletter or publication
- Discounted rates for your services
- Discounts at affiliated stores or organisations
- Pre-release tickets or premium seating at events



- Invitations to members-only events
- Access to a special area of your website
- Networking Opportunities
- Advertising Opportunities
- Voting Rights

REMEMBER: Members don't necessarily get everything for FREE.
Membership can simply buy them the right to participate.

MEMBERSHIP CHECKLIST

✓ **Charge a reasonable membership fee.**

If you are going to go to all the trouble of creating and 'selling' a membership package, make sure your membership fee is reasonable for both the member and you as an organisation. Don't make your fees so low that it ends up costing you money to administer.

✓ **Review your membership fees annually.**

Review your fees at every annual meeting to make sure they accurately reflect what you are offering your members. It is better to make small increases each year, than a massive increase every now and again.

✓ **Make it easy for people to pay.**

People lead incredibly busy lives, and like it or not, if it's not easy to do it won't get done. Make it clear how, when and where fees can be paid, and if possible, provide various payment options such as eftpos, internet banking or direct debit.

✓ **Allow for extra donations at the time of fee payment.**

The easiest time to get money from people is when they are already handing it over. Make sure you have a space on your remittance slip for an extra donation, and include tick boxes for specific amounts.

✓ **Keep track of who has paid and who hasn't.**

Membership fees are only useful if they are paid! Make sure you have a system in place so you can keep track of outstanding invoices, and chase them up straight away. If you don't ask you won't get paid.

✓ **Increase your membership numbers.**

Administering a membership package takes as much effort for 20 people as it does for 200. By continuously looking for ways to increase your membership numbers, not only will you generate more income, you will generate more activity and more interest in your cause.

SEEKING DONATIONS

Corporate Mail Outs

Ask a local business to include your donation slip or appeal envelope when they send out their monthly invoices. This is a simple way they can support you without writing out a cheque themselves.

Local Events

Ask to be the 'official charity' at a local event. Potentially you have thousands of people, all in a good mood, with ready change in their pocket.

Counter Boxes

Larger department stores usually have just one donation box on their counters, and each month the money is allocated to a different community group. If you want to be considered, you need to let them know.

Gold Coin Donations

If there are any services you currently offer for FREE – start encouraging a gold coin donation. If you are worried people will stop using your services, start by simply having a sign and an honesty box at the front door.

Newsletters

In every newsletter have an easy-to-use donation slip available. If you don't ask – you don't get.

Online Donations

If you can, add a facility for people to make donations on your website. If you don't have your own website, make use of online fundraising sites like www.fundraiseonline.co.nz and www.givealittle.co.nz.

Envelope Appeals and Street Collections

These donation campaigns still work really well, but you must be prepared to put in a lot of effort and publicity. To make the most of them, plan plenty of awareness-raising events and activities at the same time.

Direct Mail, Telemarketing, Pay Roll Giving and Bequests

All of these avenues are legitimate and effective ways to solicit donations, but the campaigns must be carried out carefully to ensure success. Before embarking on any of these methods, make sure you attend some specific workshops and get advice from a professional fundraiser.

Who makes a potential sponsor?

A good target is someone who....



Wants Exposure to Your Market

Who can you put your sponsor in touch with?
What type of businesses do your members frequent?
What type of business would like your members as customers?

Has a Personal Connection

Who do you know in business?
Who can you get to know in business?
Who do your volunteers know in business?

Trusts Your Organisation

Are there businesses that refer people to you?
What businesses are you already involved with,
or have you been involved with in the past?

Has Similar Values and Beliefs

Are there businesses in the community who have marketing campaigns that strike a cord with you?
Are there businesses involved with programmes you support?

Has the Capacity to Support You

Don't underestimate the capacity of small businesses.
Avoid businesses which already have sponsorship commitments with other organisations.



How do you make sponsorship ongoing?

Have a Contract Term

One sponsorship fee doesn't necessarily last a lifetime. By all means give them 'first right to renew' but remember to reassess what the sponsorship contract looks like each time.

Under Promise Over Deliver

You might be able to convince them once to 'give it a try', but you won't be able to convince them twice. Always give your sponsor more than they were expecting.

Stay in Touch

Your sponsor wants to feel like they are a part of your team and that their contribution is truly appreciated. Don't just call them when you need more money – work hard to become their friend.

Support Them Back

Use your sponsors products or services whenever you can and make sure they are aware that you do.
Do you really think they will sponsor you again if they see you shopping with their competition?



In a nutshell:

Build a relationship with your sponsor so that next time you ask them for support, you are asking a friend. It is much harder to say no to a friend.

Why should we bother with Fundraising Events?

1. Events are a great way to get some publicity

Well run fundraising events are newsworthy, especially if there is some sort of celebrity angle. Send a press release to local media, use online social networking and generally make a song and dance about what's going on. This will in turn put the spotlight on your organisation generally.



2. Events give you a chance to engage face-to-face with potential supporters

If someone goes to the trouble of attending your event, then chances are they are at least a little sympathetic to your cause. Hosting an event means you get to speak to potential supporters face-to-face and truly engage them with what your organisation does.



3. Events show the community you 'work hard for your money'

Rightly or wrongly, there is a growing public perception that community organisations have always got their hand out asking for money. When you run an event, the perception is you are prepared to roll up your sleeves and work hard to support yourself. This makes it easier for others to support you as well.

4. Events provide tangible opportunities for your sponsors

Finding sponsorship for a specific event is usually easier than finding blanket sponsorship for your entire organisation. Event sponsorship is a great way to introduce new supporters to your cause, because you can give them tangible benefits in return. Once they are involved at that level, you can offer them other opportunities to support you as well.

Sustainable Fundraising Activities are...

Researched

Just because you think it's a good idea, doesn't mean everybody else does. There are times when you need to grab an opportunity and run with it – but for the most part Sustainable Fundraising Activities are researched well to ensure that they are viable first.

Resourced

Trying to create a fundraising event or activity without plenty of people to help, will only cause burn out in the long run. Even if you think you're super-human, resist the urge to plan a huge activity all on your own. Sustainable Fundraising Activities are as big as your people power will allow – not bigger!

Rewarded

Obviously Sustainable Fundraising Activities must reward you financially, but they must also reward your volunteers with a sense of achievement as well. If all they feel at the end of an event is worn out – they won't be back to help out again. Make sure both your volunteers and your organisation as a whole get back what they put in. A thank-you goes a long way!

Recorded

In theory, fundraising events and activities are supposed to get easier each time you do them, but that is only the case if you actually record the details so you have a plan to follow. Make sure you write down all the important contacts, sponsors, and information so that you don't have to re-invent the wheel next time around.

Repeated

Provided you have got the first 4 'R's right – fundraising activities can be repeated over and over creating ONGOING funds for a SPECIFIC purpose.



Why won't more people help out?

1. They don't know what you want them to do

People want to make sure they are completely capable of doing a job, before they volunteer to do it. When making requests for volunteers, tell them exactly what you need them to do, when it needs to be done, how long it will take, where it needs to take place, and who they will be working with. It is easier for people to say yes, when they know what they are saying yes to.

2. You haven't asked them personally

If you ask for volunteers in a newsletter or via a bulk email, you will usually only get replies from your hard-core volunteers. The remainder will assume that with so many people reading the request, somebody else will put their hand up to help. When you ask for help one-on-one, people know they are needed.



3. They have offered to help before and you turned them down

People volunteer to help out because they want to be of service, and if they are not being of service to you, they will go and be of service to somebody else. As soon as someone shows a desire to volunteer – find them a job – even if you have to create one!

4. They have helped before and they weren't appreciated

Very few people are so saint-like that they will continue to volunteer despite lack of reward or recognition. If they didn't feel appreciated the first time, chances are they won't volunteer for a second.

5. They CAN'T not WON'T

Not everyone has the skills or confidence to do certain tasks. Be sensitive to what people might be thinking or feeling, and offer opportunities to make it easier for them. Perhaps they need some extra training, or there is a different task which is better suited.

ENTREPRENEURIAL ACTIVITIES

Entrepreneurial activities are activities which generate income over and over with little extra effort. In the non-profit sector, they usually involve creating products to sell, or hiring out existing equipment or resources.

Some examples include:

Hiring of your facilities

eg. clubrooms, meeting rooms

Hiring of your equipment

eg. projectors, chairs, boogie boards

DVD recordings or souvenir books of your events

eg. concerts, exhibitions

Educational resources related to your organisation

eg. how-to books, planners

Products required by your clients or members

eg. first-aid kits, uniforms

Useful contacts include:

First Edition Publishers

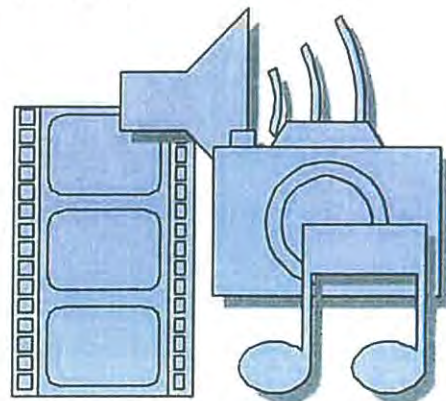
www.books4life.co.nz

Amstore CD and DVD Duplication

www.amstore.co.nz

Hire Things

www.hirethings.co.nz



What do you need to know about contracts?

Contracts Exist

The first step in securing a contract is knowing that the contract exists. Register with www.gets.govt.nz and browse the thousands of contracts which are up for tender with the NZ Government. You can also sign up to receive email alerts of contracts which relate to your skills and expertise.

How to Tender

Most contracts require you to 'tender' for them – which means you need to tell the owner how you will fulfil the contract and what price you will charge for doing so. The tender process will vary from contract to contract, so make sure you read the tender information carefully before you submit your application.

Contracts Will Not Make You Rich

Contracts very rarely cover the true cost of delivering a service, so don't look to contracts as an easy way to raise funds. You should only ever tender for a contract if it is a service you would ordinarily deliver, and it truly fits with your mission statement.

The Accountability is Enormous

Contracts, particularly government contracts, require an enormous amount of accountability. Be prepared for this, and make sure to factor the wage-hours into your contract price.

There is No Guarantee

Even after investing many hours in the tender process, there is no guarantee you will get the contract. The same is also true when it comes to renewing a contract you already have.

Where does **YOUR** money come from?

Membership	Donations	Sponsorship	Fundraising	Entrepreneurial Activities	Grants	Contracts
eg. Membership Fees, Term Fees	eg. Street Appeals, Bequests	eg. Event Sponsors	eg. Raffles, Sausage Sizzles, Auctions	eg. Venue Hire, Related Products	eg. Lion Foundation, NZCT, COGS, Pub Charity	

Willing to volunteer money
→ Volunteering money

Contact Details and

Community Waikato Phone 07 838 158

Creative Waikato Phone 0508 427 8

Sport Waikato Phone 07 858 538

Volunteering Waikato Phone 07 839 319

Dept Internal Affairs Phone 07 839 996

D V Bryant Trust Phone 07 838 052

Trust Waikato Phone 07 838 266

WEL Energy Trust Phone 07 838 009

Generosity NZ Phone 04 471 890

Exult Phone 07 871 881

Charities Services Phone 0508 242 7

Community Matters Phone 0800 824 8

Inland Revenue Phone 0800 377 7

Te Puni Kokiri Phone 07 834 710

Community Law Phone 07 839 077

CommunityNet Aotearoa

**The Tangata Whenua Community
& Voluntary Sector Research Centre**

Waikato Biodiversity Forum



Trust Waikato
TE PUNA O WAIKATO



C

"Su
H

d Useful Websites

3 www.communitywaikato.org.nz

92 www.creativewaikato.co.nz

8 www.sportwaikato.org.nz

1 www.volwai.org.nz

0 www.dia.govt.nz

2 www.bryanttrust.co.nz

0 www.trustwaikato.co.nz

3 www.welenergytrust.co.nz

0 www.generosity.org.nz

9 www.exult.co.nz

48 www.charities.govt.nz

24 www.communitymatters.govt.nz

74 www.ird.govt.nz/non-profit

0 www.tpk.govt.nz

0 www.communitylaw.org.nz

Search community-law-manual, then browse A-C
to select Community Organisations & the Law.

www.community.net.nz

www.communityresearch.org.nz

http://whatworks.org.nz/

www.waikatobiodiversity.org.nz

general search

*use your HCU
your library
card*

COMMUNITY
WAIKATO

Supporting strong communities"
Te tautoko kia tuu pakari ai ngaa haapori



CREATIVE AUAHA
WAIKATO TAINUI

