Are you ready to apply?

FOUNDATION NORTH
*Te Kaitiaki Pūtea ō
Tāmaki ō Tai Tokerau*

> *This document is a **checklist only** to help prepare you for the on-line funding process. Print out this document and check off when you have what you need in each section. Make notes in the margin on information you still need, conversations you need to have etc.*

Before you apply in the Funding Hub

Notes:

Here are some initial things for you to think about before you submit an application:

○ Is your organisation eligible to receive a grant from Foundation North?
Please note: you can only receive one grant in a 12 month period.
You can apply within that 12 month period but will not be eligible to get
a grant within 12 months of your last grant.

○ Can your organisation apply? **www.foundationnorth.org.nz/funding/who-can-apply**

○ Have you checked the list of what we don't fund? Our list of funding
exclusions and limitations: **www.foundationnorth.org.nz/funding/what-we-dont-fund**

○ Which funding programme do you wish to apply for
– Quick Response Grant or Community Grant? Check our funding approach:
www.foundationnorth.org.nz/funding/our-funding-approach
*Please note: if you are applying for more than $100,000, you must first discuss
your application with a Foundation North funding advisor. Call 0800 272 878.*

○ Have you completed your reporting requirements for a previous Foundation North grant?
Go to the Funding Hub or call us to find out if any reports are due.

○ Do you have a clear idea of the difference *(the changes or benefits)* that your project/service
will achieve or start to bring about? **www.foundationnorth.org.nz/funding/what-we-fund**

*If you have any questions, or need help with
your application, please give us a call on 0800 272 878*

How we assess an application

The questions below are to help you understand what we look for when we assess an application:

○ Does the project/service fit with one or more of the outcomes Foundation North
is looking to support?

○ Does your project/service fit with one or more of our priorities?

○ Is there also a fit with our Māori or Pacific strategies?

○ Is there a need for what you want to offer the community?

○ Can your organisation effectively deliver the project/service for which you want funding?

○ Is another organisation already providing this project/service?

○ Is your organisation in a good financial position?

○ Have you thought about risks, such as Health and Safety?

○ Is your work aligned to good-practice principles, if these are applicable?

○ What sort of evaluation is planned?
(This question does not apply to Quick Response Grant applications)

○ Is there collaboration with other organisations?
(This question does not apply to Quick Response Grant applications)

For more information on how we assess applications:
www.foundationnorth.org.nz/funding/how-we-assess

Questions you will be asked when making an application

This section tells you about the questions you will be asked in our online application form to help you prepare your answers before you start the online process. Note that some text boxes in the online form limit the number of characters that can be typed in them. Please note that this is not the application form.

To apply, you will need to log into the Funding Hub. Your Moderator should first check that your organisation details are correct before you apply.

You will be guided through the application form in the Funding Hub - if you need help, refer to the FAQs on our website or the Funding Hub Guide inside the Hub.

Still need help? Contact us 0800 272 878.

Quick Response Grant Application Questions

Organisation Information

◯ Organisation Name

◯ Organisation Location

◯ Application Contact
(Drop-down list: select the main person our staff should contact about this application)

◯ Application Secondary Contact
Drop-down list: the person our staff can contact in the absence of the main application contact)

◯ Umbrella Organisation. If you are applying under an umbrella organisation tell us whether your organisation is related to other organisations under the same umbrella organisation. Tell us the name and Charities Registration number of the umbrella organisation *(Text box).*

Grant Request

◯ Total $ requested from Foundation North.

◯ Cost Line Items – enter the name of each item you want funding for, the cost and how much you are requesting for each item.

◯ Describe overall what you would like funding for.
– Text box 2500 characters: describe the project or service you want to offer and/or the items you want to purchase.

◯ When using the grant, who will benefit, what needs will be met and when?
- Text box 2500 characters: tell us who the initiative is aimed at, the needs and/or wants that will be met and when your initiative will happen.

◯ When using this grant, what will be the differences you expect to see?
- Text box 2500 characters: tell us about the differences or benefits you expect to see, or the change that will happen (or start to happen).

◯ Is there a cost to participate in your programme or event or to access your service? Please give details of the cost to participants. (*Text box: 750 characters*)

Grant Demographics

◯ What region will benefit most from this grant? *(Drop-down list)*

◯ Which primary area will you be working in when using this grant? *(Drop-down list)*

◯ Tell us who will benefit from this grant. *(Text box: 2500 characters)*
Then use the table to estimate *(in numbers)* the ethnicities and ages of those who will benefit.
You must enter a value even if it is zero.

Grant Alignment

◯ Select the outcomes Foundation North wants to contribute to that best describe
the purpose of your application. *(Drop-down list: you can select one or more options)*
www.foundationnorth.org.nz/funding/what-we-fund

◯ Which do you think is the main outcome your application is aligned with?
(Drop-down list: you can select only one option)

◯ Outline how your application fits these outcomes. *(Text box: 750 characters)*

◯ What sector does your application primarily relate to?
(Drop-down list: you can select one option from our list)

◯ If your application targets any of the Foundation North priorities,
select those that best describe the purpose of your application.
(Drop-down list: you can select one or more options)
www.foundationnorth.org.nz/funding/what-we-fund/

◯ Select the main priority your grant aligns with *(you can select only one option)*.

◯ Outline how your application fits these priorities. *(Text box: 750 characters)*

Community Grant Application Questions

Organisation Information

◯ Organisation Name

◯ Organisation Location

◯ Application Contact
(Drop-down list: select the main person our staff should contact about this application)

◯ Application Secondary Contact
(Drop-down list: the person our staff can contact in the absence of the main application contact)

◯ Umbrella Organisation. If you are applying under an umbrella organisation tell us
whether your organisation is related to other organisations under the same
umbrella organisation. Tell us the name and Charities Registration number of the
umbrella organisation. *(Text box)*

Organisation Information

◯ Total $ requested from Foundation North. *(Include any multi-year requests here)*

◯ Cost Line Items – enter the name of each item you want funding for,
the cost and how much you are requesting for each item.

◯ Describe overall what you would like funding for – *Text box 2500 characters:*
describe the project or service you want to offer and/or the items you want to purchase

○ Does your organisation receive funding through a government contract?
If yes, please explain what this contract is for. *(Text box: 750 characters)*

○ Do you anticipate any significant change in your organisation's financial situation
in the next 12 months? If yes, please explain the changes you expect.
(Text box: 750 characters)

○ Is there any tagged funding in the most recent annual accounts or bank statements?
If yes, please explain what the funds are tagged towards. *(Text box: 750 characters)*

○ When using the grant, who will benefit, what needs will be met and when?
*Text box 2500 characters: tell us who the initiative is aimed at, the needs and/or wants
that will be met and when your initiative will happen.*

○ Describe the experience your organisation has to effectively deliver the initiative.
You may wish to include any operational, governance and financial planning documents
with your application. *(Text box: 2500 characters)*

○ Which organisations do you work and collaborate with, and how? *(Text box: 750 characters)*

○ When using this grant, what will be the differences you expect to see?
*Text box 2500 characters: tell us about the differences or benefits you expect to see,
or the change that will happen (or start to happen).*

○ How will you measure or evaluate the differences of your initiative?
You may wish to include information on the tools you will use and activities
you will undertake to help you understand how you are achieving your outcomes
e.g. your evaluation plan. *(Text box: 2500 characters)*

○ Is there a cost to participate in your programme or event or to access your service?
Please give details of the cost to participants. *(Text box: 750 characters)*

Grant Demographics

○ What region will benefit most from this grant? *(Drop-down list)*

○ Which primary area will you be working in when using this grant? *(Drop-down list)*

○ Tell us who will benefit from this grant. *(Text box: 2500 characters)*
Then use the table to estimate *(in numbers)* the ethnicities and ages of those
who will benefit. *You must enter a value even if it is zero.*

Grant Alignment

○ Select the outcomes Foundation North wants to contribute to that best
describe the purpose of your application. *(Drop-down list: you can select one
or more options)* **www.foundationnorth.org.nz/funding/what-we-fund**

○ Which do you think is the main outcome your application is aligned with?
(Drop-down list: you can select only one option)

○ Outline how your application fits these outcomes. *(Text box: 750 characters)*

○ What sector does your application primarily relate to?
(Drop-down list: you can select one option from our list)

○ If your application targets any of the Foundation North priorities,
select those that best describe the purpose of your application.
(Drop-down list: you can select one or more options)
www.foundationnorth.org.nz/funding/what-we-fund

○ Select the main priority your grant aligns with. *(You can select only one option)*

○ Outline how your application fits these priorities. *(Text box: 750 characters)*

Notes:

Documents you have to submit

If you are applying for a grant of *up to $25,000* you will need to include:

○ **Annual Accounts** - These accounts must:

- be no older than 16 months at submission of the application. If the constitution, rules or trust deed stipulates the organisation must have compiled, reviewed or audited accounts, the organisation must provide that report with their application.

- be signed by two organisation representatives (e.g. two Trustees, or a Chair and Committee member)

- meet the content requirements of New Zealand's reporting standards for not for profit organisations. These content requirements differ by size of organisation and further details can be found at **www.xrb.govt.nz/accounting-standards/not-for-profit**

○ **One letter of support** - this must be signed, dated and no more than six months old, from community organisations you work with. This must confirm what kind of reputation your organisation has beyond the service you provide and the benefits your service or programme delivered.

○ **Trustee mandate/resolution** - a resolution must include approval to apply for funding from Foundation North for the purpose and amount for which the organisation is applying. This resolution must be signed by the Chair and one other member of the organisation.

○ **Detailed project/services budget** - actual cost and confirmed funds. A budget is regarded as a key management tool for planning, monitoring, and controlling the finances of a project or organisation. The budget will need to provide details on estimates of income and expenditures for a set period of time for your project or organisation.

○ **Quotes (s) for specific equipment or services where applicable.** A quote for the item/s you want to be funded. Please note if your organisation is GST registered any approved grant will exclude GST.

Documents you have to submit

If you are applying for a grant of *more than $25,000* you will need to include:

○ **Annual Accounts** - These accounts must:

- be no older than 16 months at the time of the application. If the constitution, rules or trust deed stipulates that the organisation must have compiled, reviewed or audited accounts, the organisation must provide that report with their application.

- be signed by two organisation representatives (e.g. two Trustees, or a Chair and Committee member)

- meet the content requirements of New Zealand's reporting standards for not for profit organisations. These content requirements differ by size of organisation and further details can be found at: **www.xrb.govt.nz/accounting-standards/not-for-profit**

- be audited if the application is for more than $40,000, even when the rules of the organisation state that they do not require an audit.

- applications for over $100,000 will be required to provide their Management Letter from their Audited Accounts.

○ **Bank statements** - no older than 6 months from the submission of the application, showing all account balances.

○ **Two letters of support** - these must be signed, dated and no more than six months old, from community organisations you work with. These must confirm what kind of reputation your organisation has beyond the service you provide and the benefits your service or programme delivered. Where applicable these may include; how your project aligns to local, regional or national strategies. Eg. letters from rūnanga/iwi trust board; regional/national organisation; council or government. If you are a Heritage organisation, please provide a letter of support from Heritage New Zealand.

○ **Detailed project/services budget** - actual cost and confirmed funds. A budget is regarded as a key management tool for planning, monitoring, and controlling the finances of a project or organisation. The budget will need to provide us with details on estimates of income and expenditures for a set period of time for your project or organisation.

○ **Quotes (s)** for specific equipment or services where applicable. A quote for the item/s you want to be funded. Please note if your organisation is GST registered any approved grant will exclude GST.

○ **Trustee mandate/resolution** - a resolution must include approval to apply for funding from Foundation North for the purpose and amount for which the organisation is applying. This resolution must be signed by the Chair and one other member of the organisation.

If applicable to your application

○ **Project evaluation report or plan** - describe the tools you will use and activities you will undertake to help you understand how you are achieving your outcomes. You may want to attach your evaluation plan with your application.

○ **Government contracts** - If you hold Government contracts provide a summary of your most recent government contract audit report.

○ **Resource/building consen**t - provide evidence that resource or building consent has been lodged, or approved.

○ **Feasibility study/report or conservation plan or condition report** - provide a copy of your feasibility study/ report completed by an architect or suitably qualified professional. If it is for a heritage organisation or project, a heritage restoration plan must be included.

○ **Land Ownership** - provide evidence of the land ownership. This could include, a lease agreement, land title in the name of the applicant, Maori/Marae Reservation and gazetted in the Maori Land Court.

○ **Detailed Project Plan** - this should include a project timeline, how the project will be managed, who the stakeholders you will work with are, how they have been consulted and how they will be involved.

○ **List of current or potential users** - Provide a list of the current or potential users.

○ **Environment related requests** - you must provide the following:

- documentation that states whether or not your project is located on public land (or covenant land) or private land

- Council map - showing us the location of your project

- Threatened species - a threatened species classification list related to your project

- Ecological awareness - evidence that you have considered how to be ecologically friendly and reduce your energy consumption

Other documentation you wish to include may also be attached. Examples include:

- The most recent annual report

- Governance and operational policies

- Statement of Service Performance for registered Charities.

- Constitution/Marae charter

Additional Notes:

1. Privacy Policy

Where Foundation North collects your personal information, we do so with care and respect.
The information collected on, or through, our website is stored on secure servers.
Please be aware that the Fluxx system *(which has been used to build our Funding Hub)*
allows Foundation North grants advisors to see a saved application in its draft state
(i.e. an unsubmitted application).

Read our Privacy Policy **www.foundationnorth.org.nz/privacy-policy**

2. Terms and Conditions

- Our general Terms and Conditions: **www.foundationnorth.org.nz/useful-guides**

3. Frequently Asked Questions

- Some frequently asked questions: **www.foundationnorth.org.nz/funding/faqs**
- General funding webpage: **www.foundationnorth.org.nz/funding**

Contact Details

If you have any queries, please contact us:

General Enquiries:
9am to 5.00pm, Monday to Friday
Phone: (09) 360 0291
Freephone: 0800 272 878
Email us: info@foundationnorth.org.nz

Grant Payment Queries:
DDI: (09) 361 8223
Email: grantpayments@foundationnorth.org.nz

If you have any questions, or need help with your application,
please give us a call on 09-360 0291 or 0800 272 878