

Funding Hub Guidance

Using Foundation North's Funding Hub in Fluxx



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Document naming convention



Getting started

The Funding Hub is Foundation North's Fluxx partner portal where you can manage all your organization's funding requests, grants, and reports.

In the Funding Hub you can:

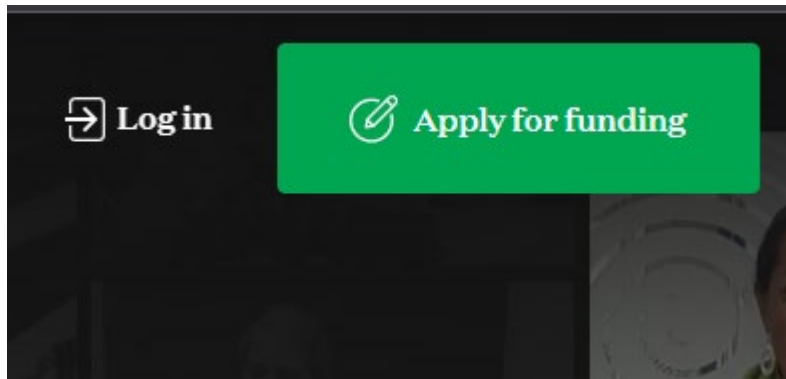
- Create a new Quick Response, Community Grant request, or work on an existing draft
- Complete an Impact or other funding request
- View details and documents for all existing requests and grants
- View report due dates for open grants and submit upcoming reports



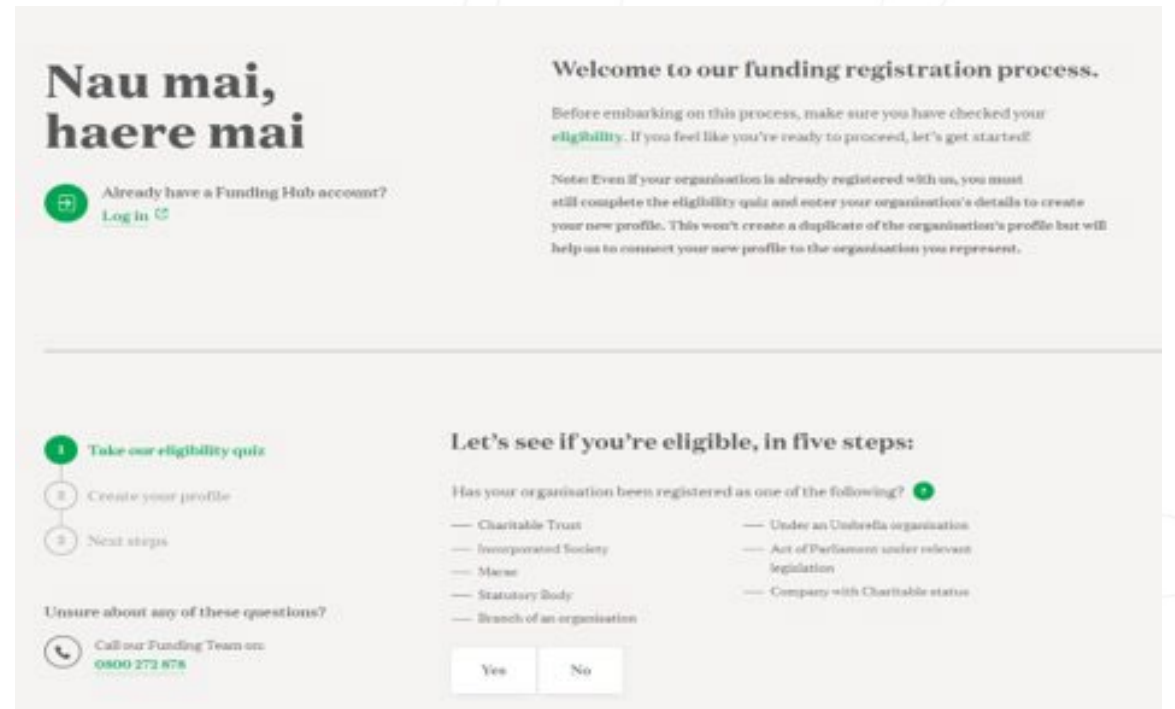


Registration

You can register to the Funding Hub via the Foundation North website, by clicking the big green button at the top right-hand of the screen that says: ‘Apply for funding’.



First, you’ll be asked to complete the eligibility quiz below to help us determine if your organisation is eligible to apply for funding.





Registration

You'll then be asked to enter organisational details, followed by your own personal contact details.

The screenshot shows a registration form with three tabs: 'Registration', 'Address & contacts', and 'User registration'. The 'Registration' tab is selected and underlined. Below the tabs, there are two input fields. The first is labeled 'Organisation Name (This is the full legal name of your organisation):' and the second is labeled 'Other names your organisation may also be known as:'. Both fields are currently empty.

If your organisation already exists in the Funding Hub, we'll still need you to input all the organisational details when you register for your individual login details. This is to help us ensure we match you with the correct organisation profile and keeps our contact information for your organisation up to date.



Registration

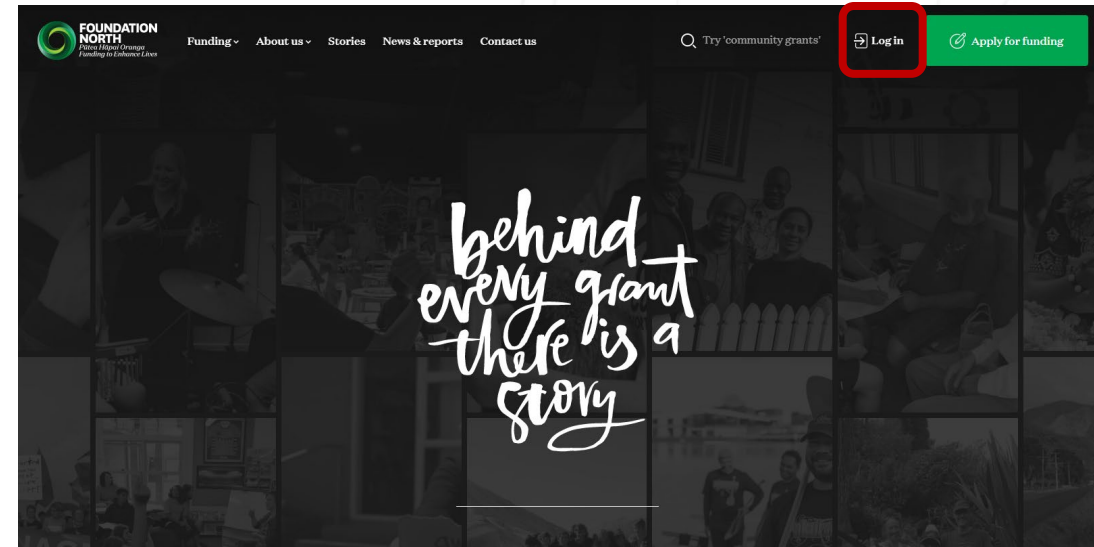
Once you've registered through the website, you'll receive an email with your username and password within 3-5 working days.

Each person from your organisation who wants to access the Funding Hub needs to register separately to have their own unique log in details.



Logging in

To log in to the Funding Hub, go to the Foundation North website, and click the button in the top right-hand corner that says: **‘Log in’**.





Logging in

Enter the username and password provided by email from Foundation North. Your username will be `firstname_lastname`.

You can reset your password with this link if you need to.

FOUNDATION NORTH
Patea Hāpai Oranga
Funding to Enhance Lives

Nau mai, haere mai, welcome to the Foundation North Funding Hub.

Login Now:

Username

Password

[Reset or create password](#)

New to the Funding Hub?

If you don't yet have an account, you will need to register for one by completing our eligibility quiz.

[Take the eligibility quiz now](#)

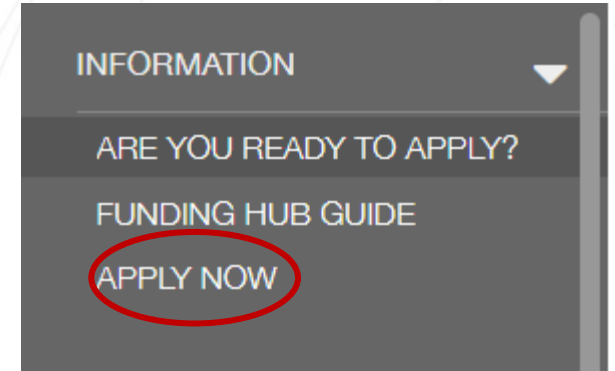
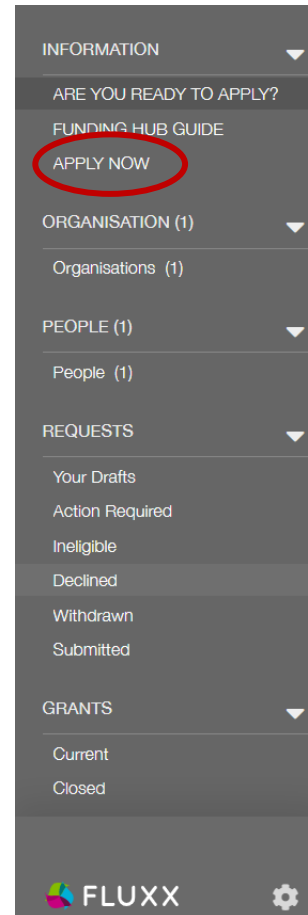
FLUXX

[Privacy Policy](#) [Accessibility](#)



Creating a request

To submit a new request to Foundation North, click on **'Apply Now'** in the left-hand grey column.





Creating a request

Select either the Quick Response Grant or Community Grant pathway. Make sure you are selecting the appropriate pathway for your request.

Quick Response Grants are for requests of **up to \$25,000** and have a decision turnaround time of eight weeks.

Community Grants are for requests **over \$25,000** and have a decision time of three to five months.

Due to the current COVID-19 crisis, please ensure your application has considered which alert level your activity is able to proceed.

Quick Response Grant - up to \$25,000

Timeframes

Quick Response Grants have streamlined processes that see grants working in communities as quickly as possible. Applications can be submitted at any time and we will endeavour to give a response within two months of receiving a completed application. We do not consider urgent or retrospective applications so for community event related requests, we recommend that you submit your request at least four months before you need the grant.

Alignment

To achieve our vision, we want our funding to have impact in four focus areas. To be considered for a Quick Response Grant, your application must align to at least one of the four focus areas. To read about our vision and the four focus areas [go here](#).

To check if your organisation can apply for a Quick Response Grant [go here](#).

[Apply - Quick Response Grant](#)

Community Grant - over \$25,000

Timeframes

Community Grants help community organisations with larger funding needs and can be multi-year grants.

Applications can be submitted at any time, and because we do not consider urgent or retrospective applications, we recommend that you submit your request at least five months before you need the grant. For Community Grants, we have six decision meetings a year.

Alignment

To achieve our vision, we want our funding to have impact in four focus areas. To be considered for a Community Grant, your application must align to at least one of the four focus areas. To read about our vision and the four focus areas [go here](#).

To check if your organisation can apply for a Community Grant [go here](#).

Applying for more than \$100,000

Please note: if you are applying for more than \$100,000 you must first speak to a Foundation North funding advisor - call (09) 360 0291 or 0800 272 878.

[Apply - Community Grant](#)



Creating a request

The Organisation and Location fields will auto-fill. Ensure that your organisation is correct, and that “[organisation name] – HQ” is listed as the location.

Select a Primary Contact (as well as a Second and Third Contact, if you wish). These people will receive any update emails about the request going forward.

Beneath, you will be asked to confirm your organisation’s legal status and how long you have been in operation. Secondary questions may appear if your answer is ‘No’ to either of these questions.

▼ Contact Information

Who shall we contact about this funding request?

Organisation

Location

Primary Contact for this Application

Secondary Contact

Additional Contact

Are you registered as a charitable trust, incorporated society, Marae, Statutory Body, registered under an Act of Parliament, registered under relevant legislation or a Company with charitable status?

Have you been in operation for 12 months or more?



Drafting your request

Work your way through the **Grant request** section, adding the Cost Items for your request by clicking the green +, and answering the questions below.

Ensure that you enter only full dollar amounts and no cents. Your Cost Item table total should add up to the figure input in **Total Requested from FN**.

▼ Grant request

Click on the plus symbol ⊕ below and add the details of what you are applying for.

Cost Items ⊕

Shortfall:

Total cost item(s) requested: \$0

Total Requested from Foundation North

The fields above must be equal: 'Total Cost items Requested' and 'Total Requested'
Please use whole numbers – no cents!
Please adjust these to match.

The difference between these fields is: \$0

Are you applying for event costs?

What do you want funding for? (Please describe the current or planned activity or project, timings, etc). ⓘ



Uploading documents

▼ Documents to upload

All of the following documents listed below are mandatory. Click on the plus symbol (+) to upload.

- Annual accounts (signed/audited) - no older than 16 months at the time of application
- Community support letter
- Detailed budget

Depending on the level and type of funding you are seeking, additional information may be required e.g quotes. Please see the "What to send" section of our website [here](#)

📄 Documents From Applicant

Click to

Upload files

Select or drag files then start upload

Filename	Size	Status
Drag files here.		

Add files Start upload

To upload files, click on the green + next to each of the required documents. Then either drag the file to the grey window that appears or click **Add files** and choose the file you wish to upload.

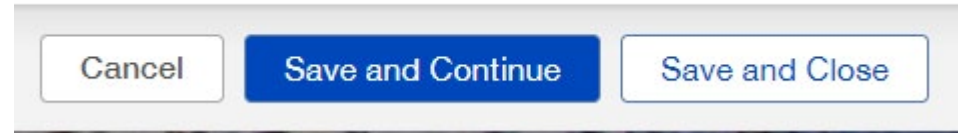
If you have any other documents to upload, click the green + next to **Documents from Applicant**.



Saving a draft request

At any point in the process of working through your draft request, you can click **Save and Continue** or **Save and Close** to save your work. We recommend doing this often in order to avoid losing your work.

To continue working on the draft request, log into the Hub, find the request under **Drafts**, and click **Edit** in the top right-hand corner of the page, next to a printer icon.



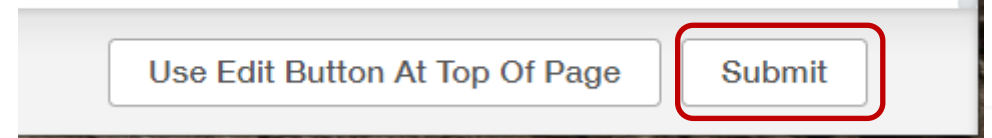
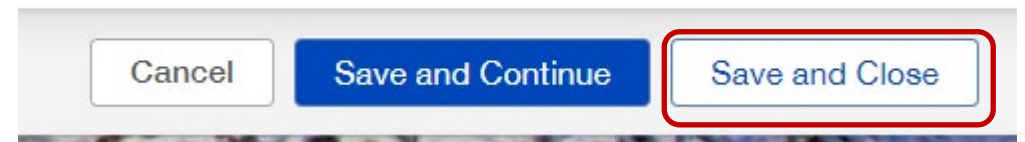
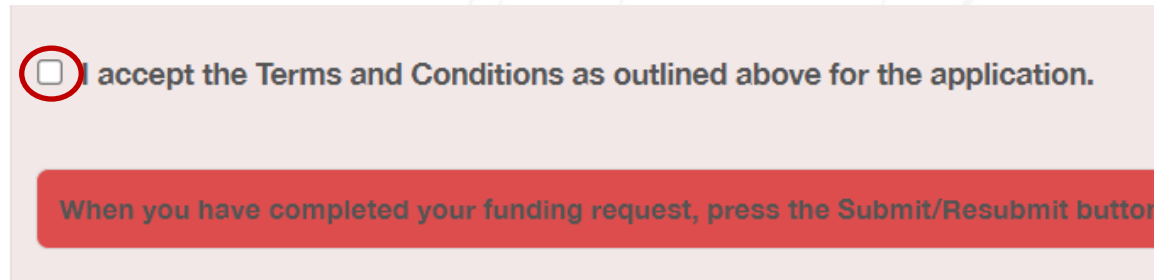


Submitting a request

Ensure that you've reviewed the T&Cs, and ticked the box to accept.

When you've finished entering all the request details and uploading documents, click **Save and Close** at the bottom of the page. This will take you to a saved version of the request.

When you've checked your request and are ready to submit, click the button at the bottom right-hand corner that says: **Submit Request**.





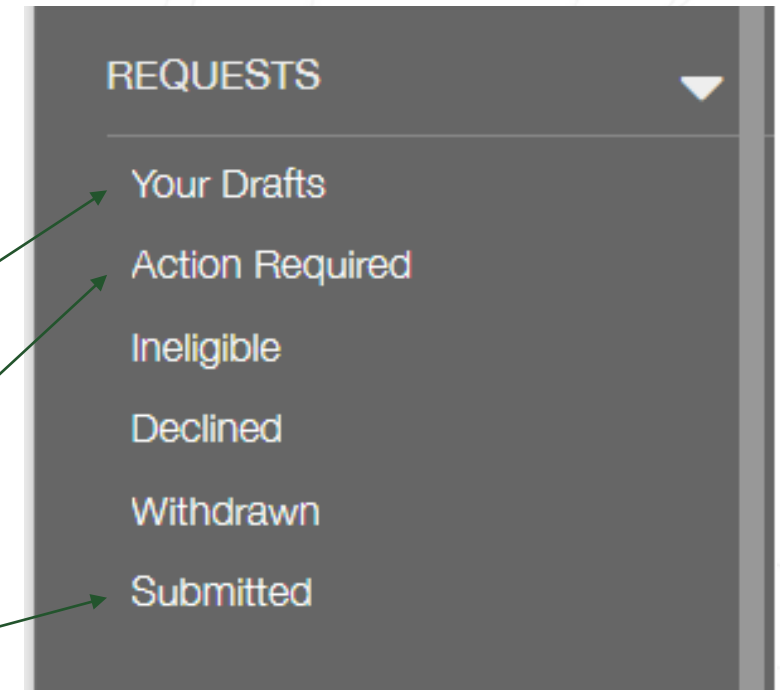
Navigating requests

If you want to check up on a request and see how it is progressing, you can navigate through the **Requests** section of the Funding Hub.

Active drafts will appear next to **Your Drafts**.

Any requests that have been sent back for further information will appear next to **Action Required**.

Requests that are currently under assessment will appear next to **Submitted**.



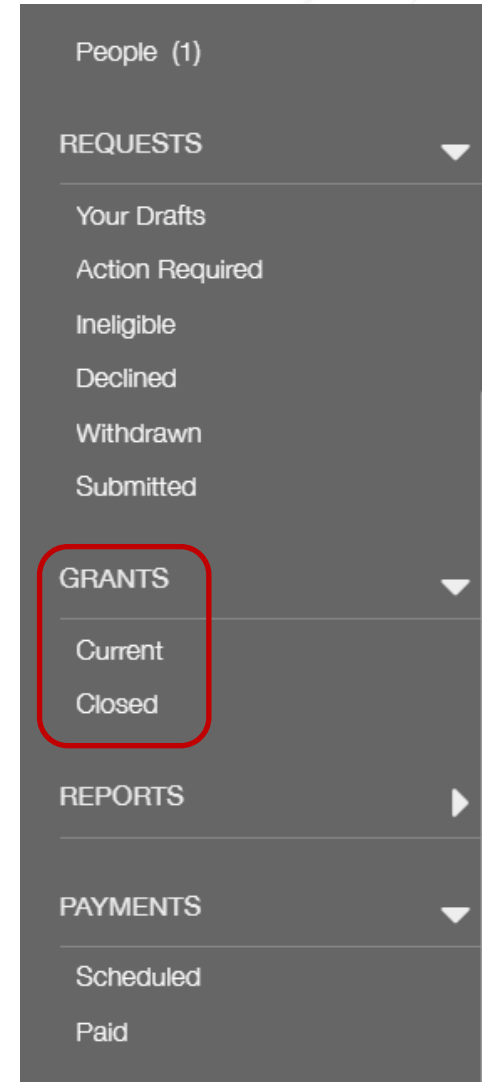


Grants

All open and closed Foundation North grants can be found under the **Grants** section in the menu.

You can click on each grant to view all the details, documents, and reports associated with each grant.

If a request has been declined or withdrawn, it will appear under the Requests section under either **Declined** or **Withdrawn**.





Reports

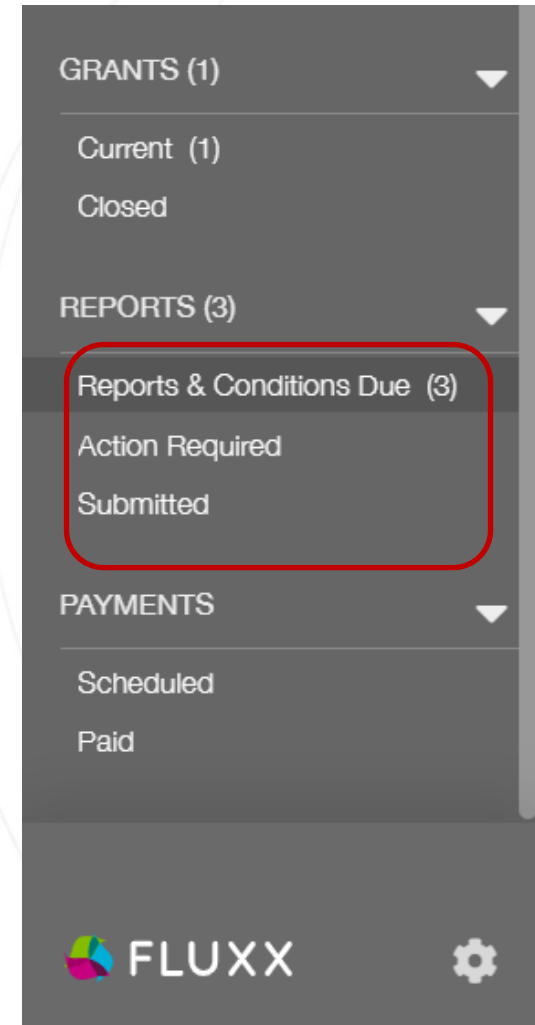
All associated reports for each of your organisation's grants can be found in the **Reports** section in the left side menu. A report is created when we need your organisation to provide something pertaining to your grant.

You can navigate through the **Reports** section of the Hub using the menu on the left-hand side of the page.

Reports & Conditions Due – All upcoming reports associated with an open grant are found here.

Action Required – Any outstanding grants that need to be completed can be found here.

Submitted – All submitted reports can be found here.





Reports

There are different types of reports, including:

Impact Reports (completed at the end of a grant)

Progress Reports (completed partway through a grant, often to release a second tranche of funding)

Balance of funds (providing evidence that a project has received sufficient funding from other sources to proceed)

Audited accounts (providing up to date accounts if these were not available in the originally submitted request)

The screenshot displays the Foundation North Funding Hub interface. At the top center is a green circular logo. On the left is a dark grey sidebar menu with a search bar at the top. The menu categories are: People (1), REQUESTS (with a dropdown arrow), GRANTS (1) (with a dropdown arrow), and REPORTS (3) (with a dropdown arrow). Under REQUESTS are: Your Drafts, Action Required, Ineligible, Declined, Withdrawn, Submitted. Under GRANTS (1) are: Current (1), Closed. Under REPORTS (3) are: Reports & Conditions Due (3), Action Required, Submitted. The main content area on the right has a search bar and lists three report entries. The first entry is a blue bar, QRG-[redacted], Bank deposit slip (digital copy), Status: New / Pending Submission, Due date: 13/6/2022, Updated at: 13/5/2022. The second entry is a green bar, QRG-[redacted], Balance of Funds, Status: New / Pending Submission, Due date: 13/6/2022, Advisor: Simon Vincent, Updated at: 13/5/2022. The third entry is a blue bar, QRG-[redacted], Impact Report, Status: New / Pending Submission, Due: 13 May 2023, Updated at: 13/5/2022.



Navigating reports

To edit a report, click on the subheading showing a number next to it to see all reports outstanding.

Then, click on the report you wish to work on and click **Edit** in the top right-hand corner. Complete the prompts and upload any documents that are necessary. When you're finished, make sure you **Save and Close**, then **Submit** (lower right-hand corner).

The screenshot displays a web interface for managing reports. On the left, a search bar is followed by a list of reports. The first report is 'Bank deposit slip (digital copy)' with status 'New / Pending Submission', due date '13/6/2022', and updated at '13/5/2022'. The second report, 'Balance of Funds', is highlighted in green and has a blue box with the number '1' next to it. Its status is 'New / Pending Submission', due date is '13/6/2022', advisor is 'Simon Vincent', and updated at '13/5/2022'. The third report is 'Impact Report' with status 'New / Pending Submission', due date '13 May 2023', and updated at '13/5/2022'. On the right, the detailed view of the 'Balance of Funds' report is shown. It includes a header with the report title and details: 'Grant Id: [redacted]', 'Grant Amount: \$15,000', and 'Due Date: 13/6/2022'. An 'Edit' button is circled in red in the top right corner. Below this is a 'Documents' section with a prompt to upload relevant documents. A 'Balance of Funds' sub-section has a plus sign icon. A 'Documents' sub-section also has a plus sign icon. At the bottom, there is an 'Email Alerts Sent' section. A 'Submit' button is circled in red in the bottom right corner. A pagination bar at the bottom left shows '1 - 3 of 3'.



Questions?

If you come across any technical issues or questions while navigating through the Funding Hub, you can contact our Funding Support team for assistance at **info@foundationnorth.org.nz** or **09 360 0291**.

Ngā mihi nui from the Foundation North whānau