

# Applying for a Grant



## Our vision is Enhanced Lives.

We work to achieve that by providing grants to support the hundreds of community organisations which help make Auckland and Northland great places to live.

*We want it to make it simple to apply, so here is what you need to know:*



### Quick Response Grants Under \$25,000

Quick Response Grants are designed to meet your funding needs quickly and easily. When you apply for a Quick Response Grant we aim to give you a decision within two months of receiving a complete application.



### Community Grants Over \$25,000

Community Grants help community organisations with larger funding needs, and can be multi-year grants. If you are applying for more than \$100,000, you must first discuss your application with a Foundation North Funding Advisor. If you apply for a Community Grant, we aim to give you a decision within five months of receiving a complete application.

**We want our grants to support services, programmes and events that will enhance the lives of people in our communities.**

As a strategic grantmaker, looking to contribute towards better outcomes for present and future generations, we want our support to have impact in four key focus areas. From 1 April 2020 our funding decisions will be focused on:

## Ngā Hua | Our Focus Areas:



### Hāpai te ōritetanga Increased Equity

We will support approaches that achieve the aspirations of Māori and Pacific communities and address systemic and intergenerational inequalities in South Auckland and Northland. Children and young people will be our priority.



### Whakauru mai Social Inclusion

We will support approaches that reduce discrimination, racism and social exclusion. Former refugees, new migrants, the Rainbow community and people with disabilities will be our priority.



### Whakahou taiao Regenerative Environment

We will support holistic approaches that conserve, preserve and restore the natural environment in our region. Initiatives proposed by tangata whenua that connect social and environmental practices will be our priority.



### Hāpori awhina Community Support

We will support participation in positive activities that improve overall wellbeing and:

- bring communities together
- enhance skills and creativity
- build a sense of pride.

## Who can apply?

To be considered for funding your organisation needs to be:

- Able to demonstrate charitable purpose. This can be fulfilled by:
  - \* an organisation being a registered organisation - charitable trust, incorporated society, Marae, Statutory Body, Branch of an organisation, registered under an Act of Parliament, registered under relevant legislation or a Company with charitable status.
  - \* an organisation applying under the umbrella of a registered charitable organisation who will ensure that any grant is used for charitable purposes and that no private or individual gain is generated. Note: This will not exclude the umbrella organisation from applying for its own purpose within the 12-month timeframe.
  - \* funding being approved via a contract for services grant to unregistered organisations, companies or individuals directly, that specifies how the funds will be applied for charitable purposes.
- Able to provide us with annual accounts.
- Providing a service, project or programme of benefit to the communities of Auckland and/or Northland. Our boundaries, as defined by our Trust Deed, can be found [here](#).
- An organisation is generally not able to receive more than one grant in a 12-month period. Exceptions will be made, on a case-by-case basis, for organisations providing an umbrella function, where there is a demonstrated and urgent need for additional support or where flexibility in timelines are needed for organisations in transition or organisations engaged in prototype.

## When can you apply?

You can submit your application at a time of year that suits you - there are no closing dates for our Quick Response or Community Grants.

*However, please note:*

- Restrictions on public gatherings and events exist at all COVID-19 Alert Levels - refer to Ministry of Health guidelines [here](#) You may be required to supply confirmation that your project/event adheres to the guidelines of the time.
- If you are applying for an event, submit your application at least six months before the event date.
- We do not fund retrospectively.
- If you are applying for a Community Grant, we have six decision meetings a year.
- 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.
- Funds may be granted to successful applicants once every 12 months.
- Applications should not be submitted less than 10 months from the date of your last grant approval.
- Decisions for building requests for new facility developments over \$100,000 will be made in March 2023. We'll be welcoming expressions of interest in 2022 - please check our website in September 2021 for information about this process.

## How do we assess applications?

When you apply for community funding, either a Quick Response or Community Grant, your application will be assessed for the degree of fit your project or initiative has with one or more of our four focus areas.

We also look at the community need for your project or service, and how effectively your organisation can deliver, as well as your organisation's financial position, and alignment to good-practice principles.

- Does the service, programme or event fit with one of our focus areas? If so, in what ways does it fit?
- Are you meeting a community need? If so, is someone else already meeting it?
- Is there collaboration with other organisations?
- Is your organisation in good financial shape?
- Have you thought about risks, such as Health and Safety?
- What sort of evaluation is planned?
- Is your work aligned to good practice principles, if these are applicable?
- Can you effectively deliver?



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### Our funding hub online application process:

When you are ready to apply, go to our website: [www.foundationnorth.org.nz/funding](http://www.foundationnorth.org.nz/funding)

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### If you have any questions, or need help with your application:

Give us a call 09 360 0291 or 0800 272 878 – Mon-Fri 9am-5pm.

# Quick Response Grant Under \$25,000



*This document is a checklist only to help prepare you for the online 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

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? [www.foundationnorth.org.nz/funding/eligibility](http://www.foundationnorth.org.nz/funding/eligibility)
- Have you checked the list of what we don't fund? Our list of funding exclusions and limitations: [www.foundationnorth.org.nz/funding/about-our-funding/funding-exclusions-and-limitations/](http://www.foundationnorth.org.nz/funding/about-our-funding/funding-exclusions-and-limitations/)
- Which funding programme do you wish to apply for - Quick Response Grant or Community Grant? Check our funding approach: [www.foundationnorth.org.nz/funding/](http://www.foundationnorth.org.nz/funding/)
- 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. Please note: you can only receive one grant in a 12 month period.
- 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/about-our-funding/what-we-fund/](http://www.foundationnorth.org.nz/funding/about-our-funding/what-we-fund/)

## How we assess a Quick Response Grant application

The questions below are to help you understand what we look for when we assess a Quick Response Grant application:

- Does your project/service fit with our focus areas?
- 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?

## Quick Response Grant Application Questions

### Contact 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). [Click here for more information.](#)

## 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/](http://www.foundationnorth.org.nz/privacy-policy/)

### Terms and Conditions:

[www.foundationnorth.org.nz/terms-and-conditions/](http://www.foundationnorth.org.nz/terms-and-conditions/)

### Frequently Asked Questions:

[www.foundationnorth.org.nz/funding/faqs/](http://www.foundationnorth.org.nz/funding/faqs/)

### General funding webpage:

[www.foundationnorth.org.nz/funding](http://www.foundationnorth.org.nz/funding)

## Grant Request

- Cost Line Items – enter the name of each item you want funding for, the cost and how much you are requesting for each item.
- Total \$ requested from Foundation North.
- Are you applying for event costs? (Drop-down list)

*If yes, please add the date.*

- What do you want funding for? (Text box)
- Please describe the current or planned project / service, and applicable timings.
- Why do you want to deliver this project / service? (Text box)
- Please describe the need for this project / service and your motivation for delivering it.

Who will benefit from this project / service? (Text box)

*If there are multiple aspects to your project / service, please provide the numbers of people who will benefit for each. If there are specific audiences, please include this information.*

- Select the focus area your application most aligned with (Drop-down list)  
Click here for more information about our focus areas.
- How does your project / service align to the “focus area” selected above? (Text box)
- Is there a cost to participate or access your project / service? (Drop-down list)

*If yes, please give details of the cost to participants.*

- What region will benefit most from this grant? (Drop-down list)
- What is the primary area you will be working in when using this grant? (Drop-down list)
- What sector does your application primarily align to? (Drop-down list)

## Grant Demographics

- Use the tables to estimate (in numbers) the ethnicities of those who will benefit from this grant. You must enter a value even if it is zero.
- Tell us about how you gathered the ethnicity related data (Drop-down list)
- Please tell us whether this is information that you have collected or your best estimate.
- Use the tables to estimate (in numbers) the ages of those who will benefit from this grant. You must enter a value even if it is zero.
- Tell us about how you gathered the age related data (Drop-down list)

*Please tell us whether this is information that you have collected or your best estimate.*

## Documents you must submit with a Quick Response Grant application

**Annual Accounts - these accounts must:**

- be no older than 16 months at submission of the funding request
- be signed by the Chair
- meet the content requirements of New Zealand's reporting standards for not for profit organisations. These content requirements can be found at [www.xrb.govt.nz/accountingstandards/not-for-profit](http://www.xrb.govt.nz/accountingstandards/not-for-profit).

*\*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 funding request.*

*Where audited accounts are required, the Management Letter that accompany the audited accounts must be submitted.*

### One letter of support

This must be on applicable letterhead, signed, dated and no more than six months old, from a community organisation 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.

### Detailed project/services budget

The budget is a "forward thinking" document that will need to provide details of income you are budgeting to receive (note all income sources including this funding request) and expenditure your organisation is budgeting to spend. Please ensure that the budget notes your organisation name and applicable budget date/s (we do not fund retrospectively, so ensure this is reflected in the budget date/s).

### 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.



## Our funding hub online application process:

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## If you have any questions, or need help with your application:

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# Community Grant Over \$25,000



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## Before you apply in the Funding Hub

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? [www.foundationnorth.org.nz/funding/eligibility](http://www.foundationnorth.org.nz/funding/eligibility)
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- Which funding programme do you wish to apply for - Quick Response Grant or Community Grant? Check our funding approach: [www.foundationnorth.org.nz/funding/](http://www.foundationnorth.org.nz/funding/)
- 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. Please note: you can only receive one grant in a 12 month period.
- 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/about-our-funding/what-we-fund](http://www.foundationnorth.org.nz/funding/about-our-funding/what-we-fund)

## How we assess a Community Grant application

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

- Does your project/service fit with our focus areas?
- 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?
- Is there collaboration with other organisations?

## Community Grant Application Questions

### Contact 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). <https://do6qmrbufqcd2.cloudfront.net/1002/19-fn-0096-application-umbrella-unregistered-guide-01.pdf>

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- Total \$ requested from Foundation North.
- Are you applying for event costs? (Drop-down list)  
*If yes, please add the date.*
- What do you want funding for? (Text box)  
*Please describe the current or planned project / service, and applicable timings.*
- Select the focus area your application is most aligned with (Drop-down list)
- Click here for more information about our focus areas.
- How does your project / service align to the “focus area” selected above? (Text box)
- Why do you want to deliver this project / service? (Text box)  
*Please describe the need for this project / service and your motivation for delivering it.*
- Who will benefit from this project / service? (Text box)  
*Tell us who the initiative is aimed at.*
- Which organisations do you work with and how do you work with them? (Text box)
- How will you know your project/service has made a difference?  
*Tell us about the differences or benefits you expect to see*
- Is there a cost to participate or access your project / service? (Drop-down list)  
*If yes, please give details of the cost to participants.*
- What is the primary area you will be working in when using this grant? (Drop-down list)
- What sector does your application primarily align to? (Drop-down list)
- Does your organisation receive funding through a government contract? (Drop-down list)  
*If yes, please explain what these contracts are for.*
- Do you anticipate any significant changes in your organisation’s financial situation in the next 12 months? (Drop down list)  
*If yes, please explain the changes you expect to see*
- Is there any tagged funding in the most recent annual accounts or bank statements? (Drop-down list)  
*If yes, please tell us what this funding is tagged towards*

## Grant Demographics

- Use the tables to estimate (in numbers) the ethnicities of those who will benefit from this grant. You must enter a value even if it is zero.
- Tell us about how you gathered the ethnicity related data (Drop-down list)  
*Please tell us whether this is information that you have collected or your best estimate.*
- Use the tables to estimate (in numbers) the ages of those who will benefit from this grant. You must enter a value even if it is zero.
- Tell us about how you gathered the age related data (Drop-down list)  
*Please tell us whether this is information that you have collected or your best estimate.*

## Documents you must submit with a Community Grant application

### Annual Accounts - these accounts must:

- be no older than 16 months at submission of the funding request
- be signed by the Chair
- meet the content requirements of New Zealand’s reporting standards for not for profit organisations. These content requirements can be found at [www.xrb.govt.nz/accountingstandards/not-for-profit](http://www.xrb.govt.nz/accountingstandards/not-for-profit).

*\*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 funding request.*

*Where audited accounts are required, the Management Letter that accompany the audited accounts must be submitted.*

### Two letters of support

This must be on applicable letterhead, signed, dated and no more than six months old, from a community organisation 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.

Where applicable, one letter of support can be from rūnanga/iwi trust board; regional/national organisation; council or government outlining how your project aligns to local, regional or national strategies.

A letter of support from Heritage New Zealand is required if your funding request is for a heritage project, including building restoration. If you are unsure, please call our office on 0800 272 878

### Detailed project/services budget

The budget is a "forward thinking" document that will need to provide details of income you are budgeting to receive (note all income sources including this funding request) and expenditure your organisation is budgeting to spend. Please ensure that the budget notes your organisation name and applicable budget date/s (we do not fund retrospectively, so ensure this is reflected in the budget date/s).

### 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.

### 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 consent - 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



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