Funding Hub Guidance

Using Foundation North's Funding Hub in Fluxx

FOUNDATION
NORTH
Pūtea Hāpai Oranga
Funding to Enhance Lives

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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'.

Nau mai, haere mai

Welcome to the funding journey. Choose which option suits you best!

It is my organisation's first time applying to Foundation North	I am a returning user	I would like to register a new user to an existing organisation*	I'm already registered on the Funding Hub, but am looking to register a new organisation
Start my journey ⧉	Funding Hub Login ⧉	Register here	Start my journey ⧉

*Note: Even if your organisation is already registered with us, you must still complete the eligibility quiz and enter your organisation's details to create your new profile. This won't create a duplicate of the organisation's profile but will help us to connect your new profile to the organisation you represent.

Registration

If your organisation wants to request funding from Foundation North **for the first time**, we'll ask you to start your journey using this form. The form will take around 30-45 minutes to fill in, and is where you can briefly explain about your organisation and what you want funding for. (This isn't the funding request.) Our team will use this information to see if there is a fit with our funding strategy. If so, you will get an email within 3 days inviting you to Stage 2 – Funding Request.

It is my organisation's first time applying to Foundation North

Start my journey ⧉

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

Start Your Funding Journey

Stage 1 – Basic Information Form
This form will take around 30-45 minutes to fill in and is where you can briefly explain about your organisation and what you want funding for. (This isn't the funding request.)

Our team will use this information to see if there is a fit with our funding strategy. If so, you will get an email within 3 days inviting you to Stage 2 – Funding Request.

Stage 2 – Funding Request

If your project fits our funding strategy, we'll email you within 3 days to invite you to login to our online Funding Hub to complete the full funding request. We'll also offer a 20-minute call with a Funding Advisor who can help with your first-time funding request.

Registration

If your organisation has applied before, but you're new to the Funding Hub, please complete a user registration <u>here</u>. We'll then give you a unique login and password, and connect you with the existing organisational profile in the Funding Hub. You'll then have access to all grant history, reports, and can create a new funding request on behalf of the organisation.

I would like to register a new user to an existing organisation*

Register here

t us ˅   Stories   News & reports ˅   Contact us   Search our site   Log in   Apply for funding

Nau mai, haere mai

Welcome to our funding registration process.

Before embarking on this process, make sure you have checked your eligibility. If you feel like you're ready to proceed, let's get started!

Already have a Funding Hub account?
Log in

Note: Even if your organisation is already registered with us, you must still complete the eligibility quiz and enter your organisation's details to create your new profile. This won't create a duplicate of the organisation's profile but will help us to connect your new profile to the organisation you represent.

① **Take our eligibility quiz**

② Create your profile

③ Next steps

Unsure about any of these questions?

Let's see if you're eligible, in five steps:

Has your organisation been registered as one of the following?

— Charitable Trust
— Incorporated Society
— Marae
— Statutory Body

— Branch of an organisation
— Under an Umbrella organisation
— Act of Parliament under relevant legislation

Registration

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

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

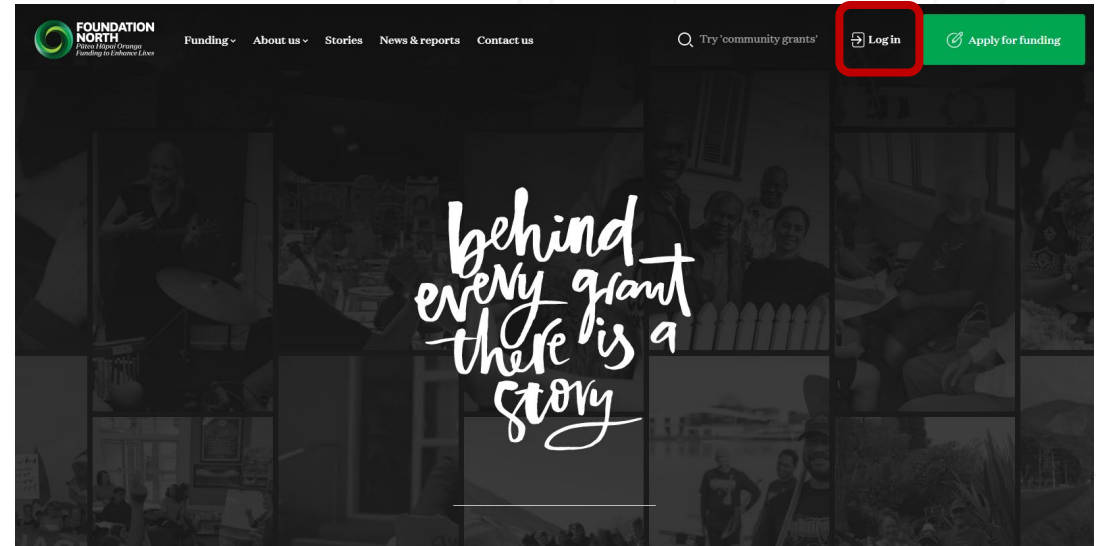Once you've registered through the website, you'll receive an email with your username and password within 3-5 working days.

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.

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

Login Now:

Username

Password

Sign in

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.
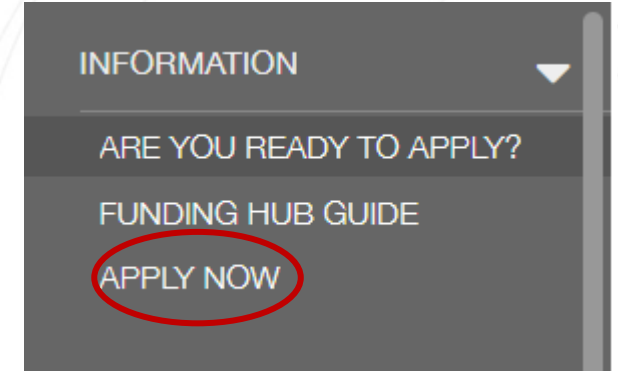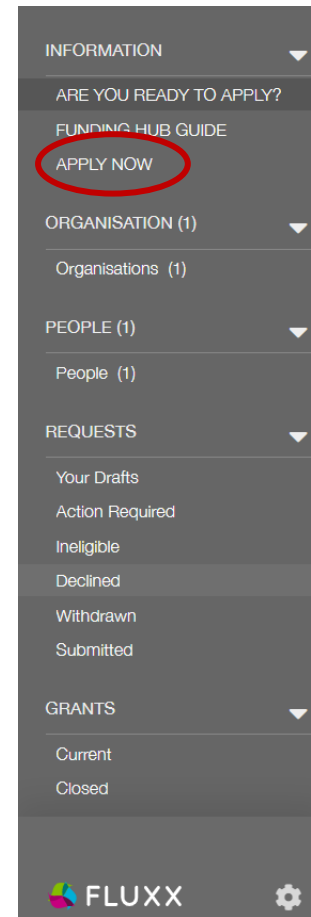
Take the eligibility quiz now

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.
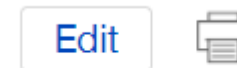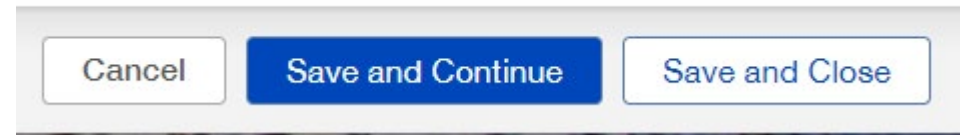
Saving a draft request

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.

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**.

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 th

Upload files   X

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**.

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.**

☐ I accept the Terms and Conditions as outlined above for the application.

When you have completed your funding request, press the Submit/Resubmit butto

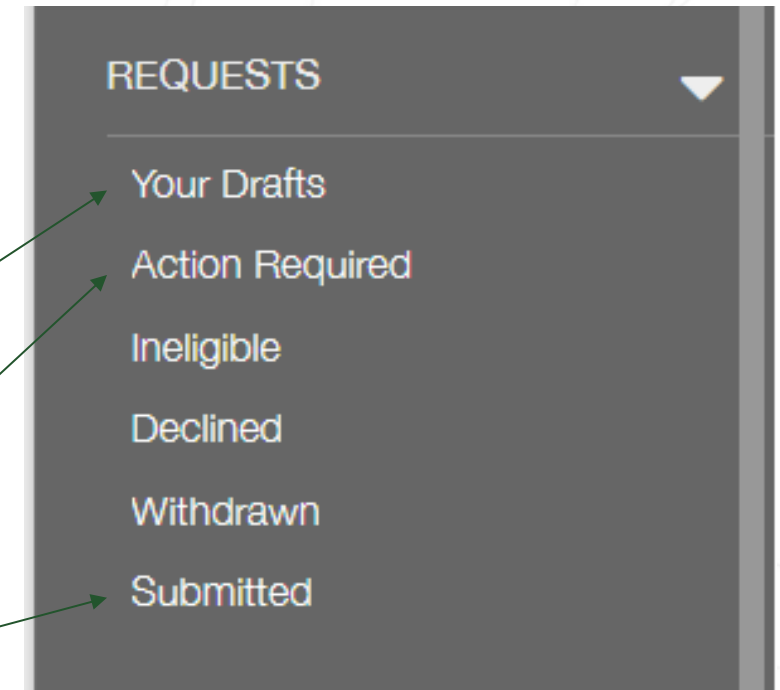| Cancel | Save and Continue | Save and Close |

| Use Edit Button At Top Of Page | Submit |

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**.

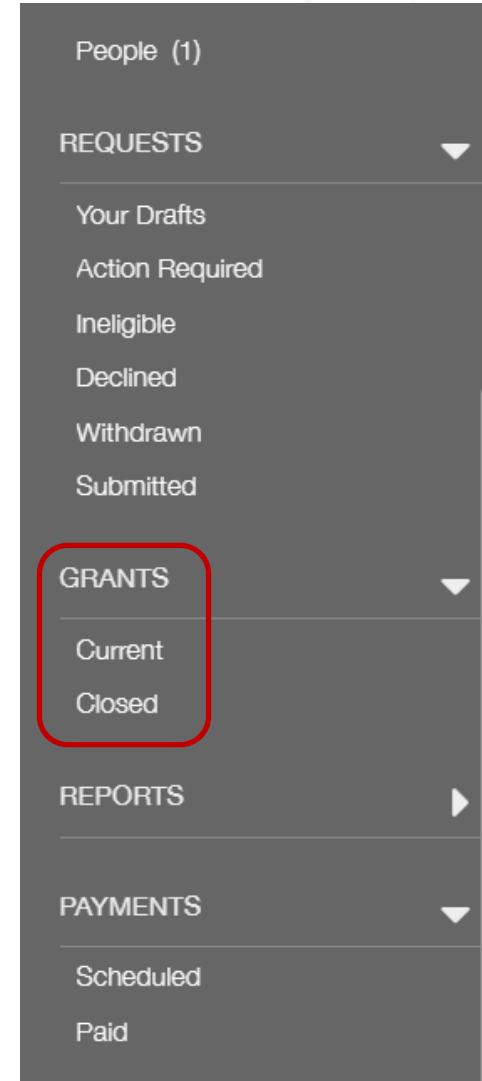Requests that are currently under assessment will appear next to **Submitted**.

REQUESTS

Your Drafts

Action Required

Ineligible

Declined

Withdrawn

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**.
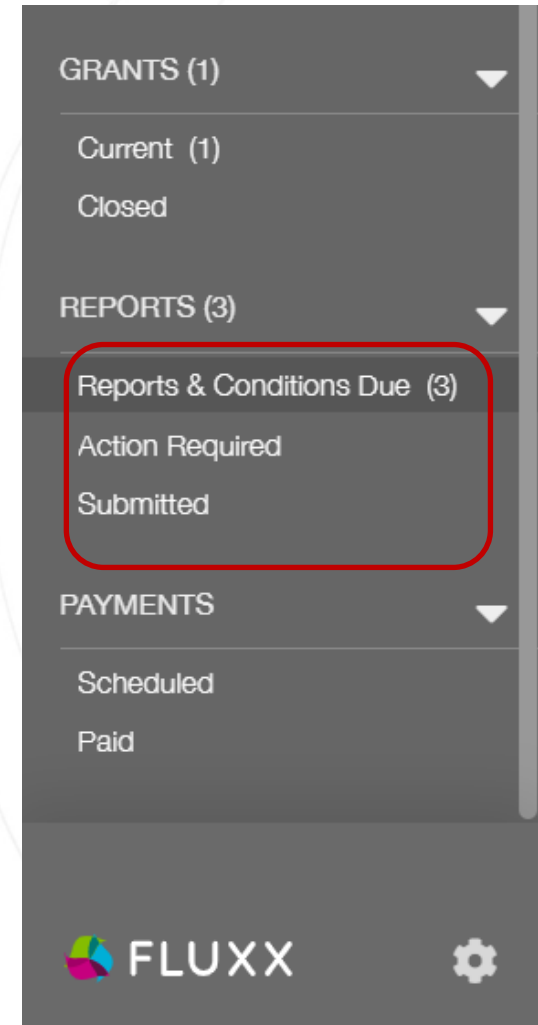
Reports

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)

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).

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