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HELPING MAKE

NEW ZEALAND

BETTER
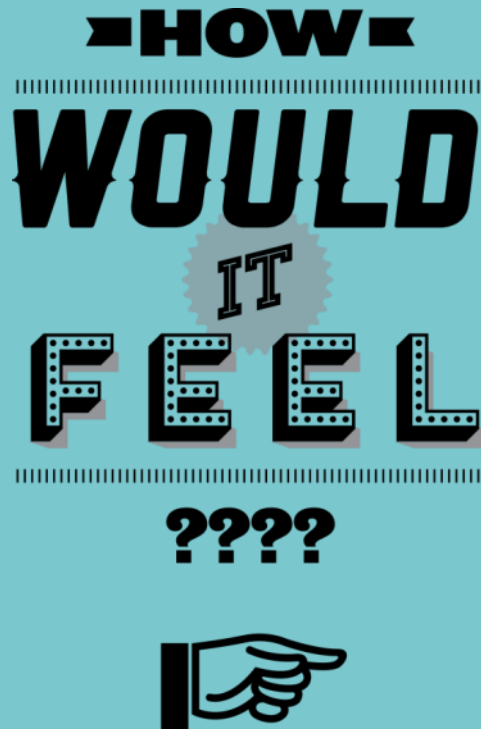
FOR

NEW ZEALANDERS

Project / Programme Planning and Funding GUIDE

New Zealand Government

Te Tari Taiwhenua
Internal Affairs

Good Governance…
(What funders look for…)

- **Organisation / Group**
  - ✓ *Purpose? / Vision? / Aim?*
  - ✓ *Good structure / systems in place i.e. COI?*

- **Committee**
  - ✓ *Chairperson, Secretary, Treasurer, Members?*

- **Regular Meetings & Minutes** *(incl. **AGM**)*
  - ✓ *Minutes – motions noted, signed off*
  - ✓ *Payments – passed at meetings*
  - ✓ *Funding Applications – agreed at meetings*

- **Legal Entity**
  - ✓ ***IF** funding request is **over** $10k, need to be registered with the Companies Office*
    - ✓ *(the Charities Services is a different function)*

HOW WOULD IT FEEL ????

Good Financial Management
(What funders look for…)

- **Good financial systems & recording in place**
  - ✓ *Bank Account with ORGANISATION NAME – at least 2 or 3 bank signatories*

- **Regular Treasurer financial reports in meeting minutes**
  - ✓ *Income & Expenditure*
  - ✓ *Payments motioned at meetings*

- **Annual Financial Accounts**
  - ✓ *Passed & signed at an Annual General Meeting (AGM)*
  - ✓ *Must be prepared inline with your constitution / rules i.e. Audited or Independently Reviewed*
  - ✓ ***IF** Registered with Charities Services (not compulsory), financial reporting must be inline with their standards.*
  - ✓ *NOTE: For Internal Affairs grants, groups must provide accounts that are under 18 months old*
  - ✓ *For New Organisations, Up to date Bank Statement (transactions for last year & balance)*

- **Accountability**
  - ✓ *Able to report on grants received and monies spent*

Project Planning

(& Programme)

Project / Programme Purpose

Explain to funders what you want to do and why...

1) **WHAT** do you want to do?

   a) *i.e. What do you want **funding for**?*

2) **WHAT** is the **community need** you propose to meet and how do you know this is needed? Is there anyone else delivering this?

3) **WHAT** are the expected **benefits / outcomes** and how will you achieve it?

4) **HOW** will you **show** / **measure** that you have achieved the intended outcomes / benefits?

A Clear & **POWERFUL** STRATEGY

Department of Internal Affairs

PROJECT Example #1 – Te Aroha Hall

1) **Funding for** – to install a disabled ramp and handrails for our front entrance.

2) **Community Need** – A number of elderly and special needs groups use the hall for their programmes. Access to the hall, moreso in bad weather, is not safe for users.

3) **Benefits / Outcomes** – The ramp and handrails will ensure our hall is both safe and easily accessible for all of the community.

4) **Measure** – Receipts, invoices, photos, written feedback from participants – written forms, photos, facebook?

PROJECT Example #1 – Te Aroha Hall Budget
1 July 2017 to 30 June 2018 *(A MUST!)*

ANTICIPATED EXPENDITURE			
ITEMS	*QUOTE #1*	*QUOTE #2*	**Final Budget**
Builder	$ 3,320.00	$ 4,500.00	$3,320.00
Building Materials	$ 6,800.00	$ 7,100.00	$6,800.00
TOTALS	$10,120.00	$11,600.00	**$10,120.00**

ANTICIPATED INCOME	
Trust Waikato (approved)	$ 1,000.00
Te Aroha Hall Committee (fundraising)	$ 1,000.00
Lottery Funding *(this request)*	$ 8,120.00
TOTAL	**$10,120.00**

PROGRAMME Example #2 – Huntly Seniors Group

1) **Funding for** – Seniors Day Trip

2) **Community need** – A high number of elderly on low incomes who are either living alone and/or require transport assistance to connect with others. Social isolation and loneliness are one of the main issues for the elderly / disabled. There are no senior programmes in town.

3) **Benefits / Outcomes** – The day trip will provide an affordable opportunity for elderly / seniors to socialise as well as enjoy fellowship and friendship.

4) **Measure** – Invoices, receipts, written feedback from participants – written forms, photos, facebook?

PROGRAMME Example #2 – Huntly Seniors Group
Day Trip - Programme and Budget
1 Apr 2017 to 30 Mar 2018

Programme		Resources	Budget / Quote	Applcn COGS	COGS Actual	Applcn Trust Waikato	TW Actual
8am	Depart on Bus (30 ppl)	Transport	$600	600	600		
10am	Morning Tea						
11am	**Activity #1:** Museum Visit	Museum Entry	$150			150	100
1pm	Lunch	Meals	$300	300	0		
2pm	**Activity #2:** Hamilton Gardens	Free Entry					
3pm	Return on Bus						
			$1050	**900**	**600**	**150**	**100**

ANNUAL PLANNER

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Governance				AGM				Grant received				ACCOUNT ABILITY
Financial			End of Financial Year						Approve final budget		Invoices / receipts paid	

PROJECT PLANNER

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Day Trip	Plan Programme	get quotes	complete budget identify funders	approve by committee submit funding request					Confirm prog & costs	Day Trip	Photos / report of trip	

FUNDING PLANNER

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
COGS				*Opens*	**Closes**		**Meeting $$**	Grant received				

PLANNING is IMPORTANT

- **ALWAYS** have your **Project Plan** and **Budget** completed **BEFORE** looking for funding

- **SEARCH** funders database
  - **Generosity NZ** *(free access at local libraries)*
  - ***Philanthropy NZ*** website

- **CONTACT** funders **WELL BEFORE** submitting an application
  - **CHECK** their funding criteria / requirements i.e. documentation.
  - Ensure you show alignment with funders **priorities**

- **CHECK** closing and meeting dates – do an ANNUAL funding calendar (if not 18 months forward)

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Key Points when applying for funding

Things to have in place….

- Good Governance

- Good Financial Systems

- An Overall Project Plan with a clear Project Purpose / Outcome(s)

- A Budget outlining resources required

Then *you are ready to search for the right funder….*

- **TALK** to funders individually!

FURTHER INFORMATION:

- www.communitymatters.govt.nz

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Department of Internal Affairs

Lottery Community
&
Community Organisations
Grants Scheme (COGS)

Lottery Community

Lottery Community grants are available for not-for-profit organisations with a community or social service focus for ongoing operating costs or projects which help improve the quality of people's lives in their communities.

A Lottery Community committee looks at the outcomes of your project or services and how they will benefit your community and help:

- *support volunteers*
- *help people to help themselves*
- *promote community wellbeing*
- *promote community or cultural identity*
- *support vulnerable people*
- *help people feel that they belong and can take part in their community.*

Each Lottery Community committee determines the outcomes and priorities it wants to achieve from the investment of the grant money available in its area.

Lottery Community Committee priorities are on the following link:
https://www.communitymatters.govt.nz/lottery-community/

Two funding rounds for each 12 months

Community Organisations Grants Scheme (COGS)

Provides grants to non-profit organisations delivering community-based social services that contribute to achieving locally-determined outcomes.

- *Funding Round is **once a year***
  - *Usually - April - opens, May - closes, July – decision meetings*
  - *check www.communitymatters.govt.nz for dates & details*

  ***DO** Fund:*
  - *Community Activities / Programmes, Operating costs*
    - *E.g. Elderly / Youth / Families / Children*

  ***DO NOT** Fund*
  - *Capital Items*
  - *Duplication Existing Services*