

A Guide to...

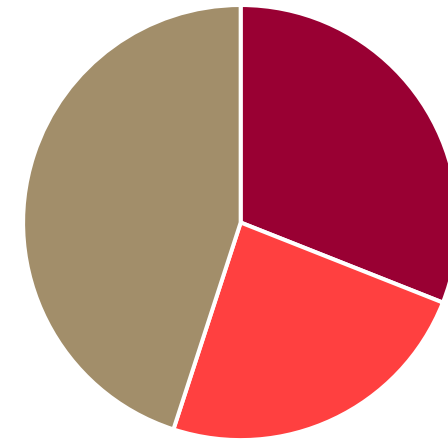
Successful grant applications and management



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NFP Sector and Grants funding NZ

NFP Funding Sources 2016



■ Government ■ Philanthropic ■ Other

- 31% Government funding (Lotto etc.)
- 24% Philanthropic funding. + now Crowd funding e.g., Give a little.
- 45% Fees/other sources.

- The NFP sector in 2017 was a **NZ \$60 billion industry (95,000 NFP's)**.

- In August 2018 there were **27,152** registered Charities (1 for every 170 Kiwis).

- **This means the NFP sector is BIG...so that's good but you have a lot of.....**
- **COMPETITION! And most of them you would give money to...they are so worthy it would break your heart to hear their story.**

The good news is a Charitable Aide report said NZ was the.....

2nd most charitable country in the World!



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Philanthropy in NZ

- According to the Charities Register there are 7,500 funders.
- 50% of the 7,500 give away < \$10,000
- 2400 (32%) give away > \$10,000 to \$50,000
- 956 (13%) give away > \$50,000 to \$250,000
- 296 (4%) give away > \$250,000 to \$1 million
- **Only 89 (1%) give away > \$1 million**



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The 80/20 rule

The **KEY** to writing a good funding application is ...well HELLO....it's not about the writing.

80% strategy, relationship building
and project planning and reliability.

20% writing!

Most people do it the other way around.



Yes, there are examples of well written documents that have made a difference but often that will be because you have a track record of success with the funder, you are reliable, honest and do what you say you are going to do.



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What do funders want?

They want.....**OUTCOMES!**



They want.... **CHANGE** or **CHANGES** that have occurred as a result of the activity or activities they have funded, and you need to tell them what that is.

Go the extra mile when you are doing their accountability and tell them about the great outcomes you got from their grant (and send photos too).



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Know your funder(s)!

- Relationships are vital/crucial.
- Face to face meeting is preferable, but not always practicable or wanted – phone next best or extensive reading of their website but DON'T send in applications without either. Most funders these days will refer you to their online application portal.
- Make sure your project is aligned to their **purpose**. EVERYTHING is on their websites! And make sure you write in their language – not yours.
- Listen hard to what they say. Often, they will be coaching you how to win - but you don't know it.
- Be concise in project name, outcomes, outcomes and outcomes, geographic location(s) and amount needed. Ask any questions where clarity is needed. Don't be shy. Don't die wondering or make excuses why you weren't successful.
- Finish with – do you think this is something that the Trustees would be interested in hearing more about?



Different funders = different expectations. All funders are not the same

Government – looks for accountable, best-practice organisations with proven track records, to deliver services in areas it has identified as priority needs.

Gaming – legally must give certain %. Looks to tick boxes on eligibility, need, benefit to communities.

Corporate – **partnerships/ sponsorships**: generally, require a commercial arrangement where corporate expects an estimated value of promotional benefit and / or staff volunteering opportunities.

Philanthropic Support – is more like venture capital – able to take risks and be innovative, as it has no stakeholders or voters to please! Expectation of a SOCIAL ROI.

In all the above good triggers for success are youth involvement, diversity (ethnic and gender), giving opportunity to those who without your help would not have been involved.

REMEMBER: Trusts and Foundations are not-for-profit entities too, with the key mandate to make grants for charitable purposes.



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Key processes and strategies of grants success



Have a good idea but back it up with....



- Proven track-record.
- Effective governance & financial management.
- Capacity to manage project delivery.
- Paperwork submitted has to be correct, up to date and on time.
- Have conversations with the funder.
- A realistic/well thought out budget.
- Sustainability of project has been considered.

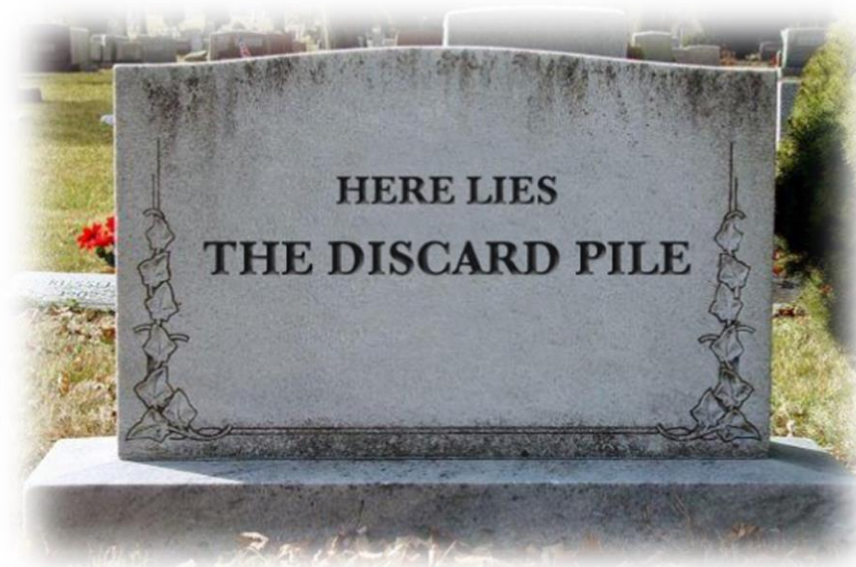


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Create a key messages document

Funders have hundreds of applications to read.

Survive the 'tick and flick'



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Key messages define

- What your organisation is all about.
- Your key POINT OF DIFFERENCE.
- How your project WILL MAKE A DIFFERENCE.
- Are not too aspirational: what can you actually deliver.



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What to include in key messages

- Key message statements are 150 to 300 words.
- Organisation description.
- Vision, mission and purpose.
- Organisation structure.
- Organisational history.



What to include in key messages

- Niche offering.
- Partnerships.
- Examples of successful projects/case studies.
- Up-to-date research that supports your approach / clarifies **the need** your organisation addresses.



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What to include in key messages

- Top strategic priorities for next 12 months and three years; or for your projects lifecycle.
- Organisational efficiency and effectiveness KPIs – how you measure your performance.
- How you measure project / programme performance.



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What to include in key messages

- Key achievements – track record.
- Scope
 - size and nature of target group(s),
 - geographical coverage.
- Number of staff and volunteers.
 - and profiles of key staff.
- Funding breakdown.
 - percentage Govt income.
 - percentage fundraising.
 - other income sources?



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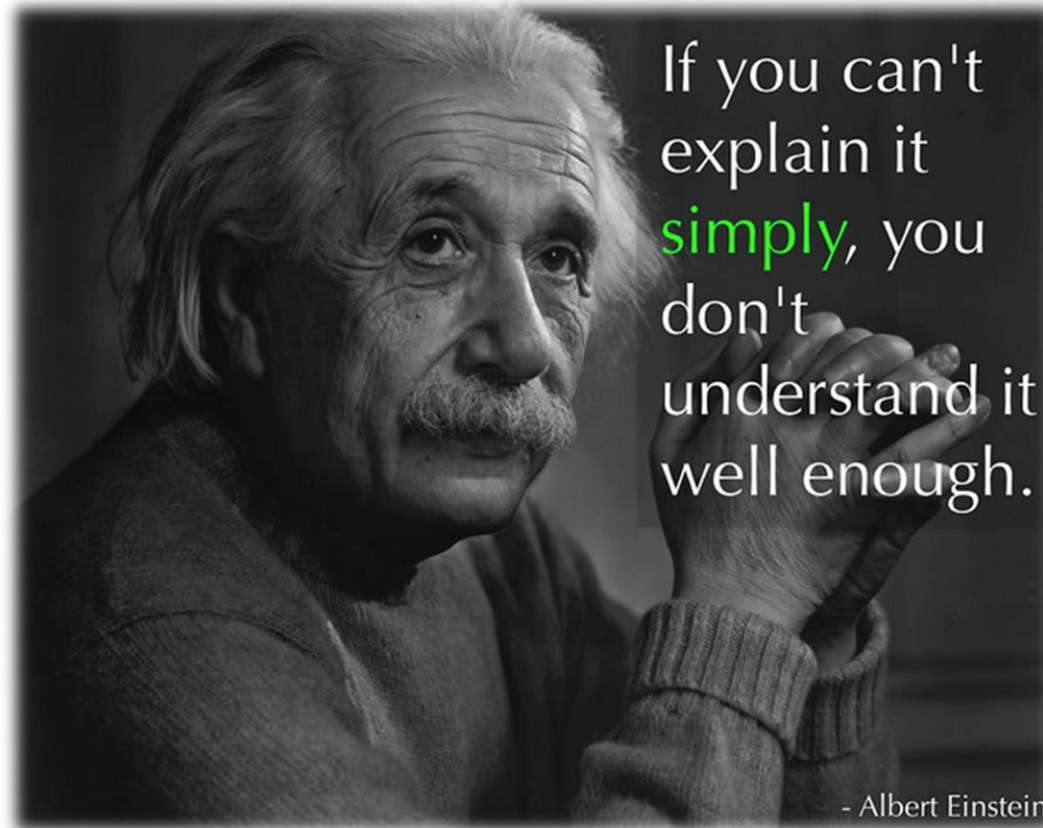
The 7 C's of Key Messaging

- be - Clear.
- be - Compelling.
- be - Concise.
- be - Consistent.
- be - Correct.
- be - Certified.
- be - Current.



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And... Best of all keep it simple



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Funder Frustrations

- Applicant didn't **read the guidelines** – *check funding criteria.*
- Applicant didn't **answer the questions.**
- Applicant didn't **stay within word limits!**
- Applicant had bad **proofing, grammar and spelling.**
- Applicant demonstrated poor **timeliness.**



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Creation and Maintenance

- Ensure you work with your team or key stakeholders to agree on what information to include, where to find it, who will write them and who will sign off?
- Draft, seek feedback, refine, re-draft.
- Ensure they are approved before use.
- How often will the stakeholders be updated (at least quarterly) and who is responsible?
- Make SURE you regularly update your funder – even if things aren't going so well – but don't overcommunicate (they are busy too).



Final Messages

- Don't overlook the basics – know the processes and documents that must be in place before you seek grant funding.
- Be strategic and develop strong relationships with funders.
- Be robust and put forward impressive projects.
- Focus on getting great outcomes and let the funders know about them.
- Treat funders with respect.
- **Be honest.** Funders are not fools. They are experts doing it every day. **Don't make stuff up.** They can spot cracks in your application a mile away – and quickly. They are the experts – you are not...so don't bullshit.
- Show passion and that you have skin in the game.
- Write, re-write, rewrite, re-write.
- **Persevere!**



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