

# Community Fundraising Toolkit

Designed to help you to plan, apply for, and manage your funding with **confidence.**





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# WELCOME TO YOUR FUNDING TOOLKIT

## Your go-to-guide for navigating the world of funding with confidence and clarity.

Inside, you'll find everything you need to build strong funding applications. From telling your story to tracking your progress, with **easy-to-use templates and helpful tips**, this toolkit will become your personalised resource, helping you and your team with your funding goals.

We recommend working through the toolkit step by step, taking time to tailor each section to your organisation. Once completed, you'll have a **central hub of information ready to support your funding efforts** all year round.

**Funding is a shared responsibility.** Make it a regular agenda item on your committee meetings and review your toolkit annually to keep everything current and aligned with your goals.

Let's make your funding journey smoother, smarter and more successful.

## Top 10 tips for funding success

### 1. Start strong with preparation

Set yourself up for success by updating your toolkit at the start of each year or project. Being well-prepared will mean faster, smoother applications.

### 2. Know your 'why'

Be crystal clear about your mission, vision, and the impact you're making. Funders want to support outcomes, so tell them why your work matters.

### 3. Plan ahead

Map out your funding needs early. A yearly (or multi-year) plan helps you stay ahead of deadlines and identify the best opportunities. Tools like the Tararua Grant Finder (page 12) can help you get started.

### 4. Get the right forms early

Reach out to funders for application templates and start gathering quotes and supporting documents as soon as possible.

### 5. Build a strong proposal

Your proposal is your sales pitch. It defines your project and answers key questions funders will ask. Use the toolkit templates to create a strong one.

### 6. Answer every question

Don't leave anything blank. Provide complete, clear responses to every question, this shows professionalism and respect for the funders process.

### 7. Review for clarity

Double-check your application for accuracy and readability. Assume the reader knows nothing about your organisation, make it easy to understand.

### 8. Attach all required documents

Include everything requested: bank details, financial reports, certificates, missing documents can delay or disqualify your application.

### 9. Stick to deadlines

Submit your application and reports on time. Use the toolkit tracking template to stay on top of key dates and requirements.

### 10. Keep a record

Save copies of every application. They're a valuable reference for future funding and help you build a consistent, professional approach.



# STEP ONE:

## YOUR DETAILS

**Keeping a copy of the key details about your organisation makes filling out applications so much easier.**

We recommend you keep these details updated and save them in a place that you and other people from your organisation can **easily** find.

**Organisation Name**

**Year Established**

**Part of a National Organisation? If yes:**

**Street Address**

**Postal Address**

**Organisation IRD Number**

**Organisation GST Number**

**Number of members**

**Number of volunteers**

**Contact Person #1**

Phone Number

Email

**Contact Person #2**

Phone Number

Email



# RECORD YOUR LOG-IN DETAILS

**Keep these details safe and secure in your organisation and make it easy for other members – now and in the future!**

Keeping records like this helps **avoid confusion** if people change roles or if time has passed since the account was last used. Clear, shared details mean you won't need to rely on one person's memory. **Update this record regularly** so the information stays accurate and reliable.



## Funder / Funding Platform

## Username / Email

## Password

## Date Created / Last Updated

## Person(s) responsible for account

## Security question(s)

## Other details (recovery email or phone, etc)

## Funder / Funding Platform

## Username / Email

## Password

## Date Created / Last Updated

## Person(s) responsible for account

## Security question(s)

## Other details (recovery email or phone, etc)

**Funder / Funding Platform**

**Username / Email**

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**Other details (recovery email or phone, etc)**

**Funder / Funding Platform**

**Username / Email**

**Password**

**Date Created / Last Updated**

**Person(s) responsible for account**

**Security question(s)**

**Other details (recovery email or phone, etc)**

# STEP TWO:

## TELL YOUR STORY

**Your story is the heart of your application. It's your chance to show the funders who you are, what you do, and **why** your work matters.**

Funders invest in outcomes, so help them **see the impact** your organisation is making in the community.

Use these prompts to build a clear, engaging profile of your organisation. This will help you communicate your purpose and passion with confidence.

### What do you do?

Describe your core activities, who you support and the services you provide

### What makes you unique?

Highlight your strengths, your community reach, and what sets you apart.

### What is your purpose?

Share a brief, inspiring summary of your vision or mission and the difference you aim to make.





**What is the history of your organisation?**

e.g. When did your organisation start? Are you a registered charity / incorporated society? How many clients do you serve? What is your structure (paid and volunteer members)? What is your funding history? Include a link to your website or brochure if you have one.

**What has your organisation successfully delivered in the past?**

List successful events, projects, initiatives, and activities that you have delivered.

**What are your plans for this year?**

What are your goals and activities for the coming year?

**Your people?**

Who are your clients or community members? Include any relevant statistics or examples, mention partnerships with other groups, businesses, or individuals.

**What are some challenges your organisation is facing?**

What obstacles are you currently facing?

**What are some opportunities for your organisation?**

What exciting possibilities lie ahead for your organisation?

**What difference would additional funding make in your ability to support the community?**

Explain how additional funding would help you grow your impact and better serve your community.

# STEP THREE:

## BUILD YOUR PROPOSAL

**Your funding proposal is your blueprint, it brings your project to life on paper and helps funders understand your vision, your impact and your needs.**

Use these prompts to build a clear, engaging profile of your organisation. This will help you **communicate your purpose and passion** with confidence.

Taking time to develop your proposal upfront will save you time later and improve your chances of success.

There is no “one-size-fits-all” format, but the key is to be clear, honest and outcome-focused.

**What does a strong proposal look like?**



### **Tells your story**

Let's the funder know who you are and what you aim to achieve.

*Use the “Tell your story” section of this toolkit on Page 8 to help guide this.*



### **Outlines your project clearly**

What it is, why it matters, and how it will be delivered.



### **Keeps your team aligned**

Everyone involved knows the plan and the purpose.



### **Supports your applications**

Attach it to funding forms or use it to shape your responses.



### **Strengthens sponsorship pitches**

A well crafted proposal builds trust and credibility.



### **Ensure consistency**

Use the same core information across all applications.



## **Tell your story**

Provide 3-4 paragraphs using the template on Page 8 to help.

## **Project information**

Summarise your project - make sure to cover what it is, who it's for, how and where it happens, and the benefits it brings.

## **Background**

Explain why the project is needed - support this with research, statistics, or evidence.

## **What is needed?**

Provide an outline of what your organisation needs, whether that's funding, equipment, or other resources, and if finance is required, include a budget showing all costs and be clear about exactly how much you are requesting.

## **List your benefits**

Explain what the funder will get out of supporting your organisation, including how you will help boost their reputation, make sure their grant, sponsorship, or donation is used well, and show how the partnership benefits both sides.

## **Line up with the funders goals**

Show how your project, initiative, or service aligns with the goals of the fund/funder you're applying to. Explain how supporting your work will help them achieve their own objectives.

## **Gather support for your project**

Letters of support help show your organisation's credibility and achievements in the community, and can come from people who have benefited from your work or from those who will benefit from the specific project, initiative, or service.

*For example, parents whose children will benefit.*

## **Contacts**

Always provide clear details on who to contact for further information, discussions or follow up.

# STEP FOUR:

## GO SHOPPING FOR FUNDING

### We've made it easy to find funding that suits you with the Tararua Grant Finder.

Tararua Grant Finder hand-picks funding opportunities specific to local businesses or community groups - depending on how you set up your account.

It's **free to sign up** and seek funding for your goals, projects, events, and/or services.

You can use keyword search to get started, and then apply a range of filters to **narrow down the results** and find options that might suit you.

Use the alerts feature to **get notified** about funding programs relevant to you as they become available, giving you time to plan and submit well-prepared funding applications.

There's a Getting Started guide on our website to help you make the most of this search tool.

#### One place for all your grant needs



##### Find

Start searching through hundreds of grants.



##### Save

Easily create shortlists of grants that look fab.



##### Alerts

Get alerts for new grants as they enter the portal.



##### Calendar

Get organised and allow enough time to apply.



##### Manage

Make it easy to see what you are applying for.

<https://grantguru.com/nz/tararua>



# STEP FIVE:

## CREATE A FUNDING PLAN

### Identify and plan for the things you will need funding for.

Use the template below to record information about what you or your organisation needs funding for, where you've applied to, what success you have had and any reporting requirements.

Some funding agencies will ask you if you have a long-term fundraising strategy, and they will expect you to be looking at a range of different funding sources so make sure you're thinking about how else you could be raising funds.

**Handy hint:** You may prefer to create this template in a different system such as Word/Docs or Excel/Sheets.

Project/ Activity	Funder and fund name	Application Dates	Application Amount	Amount received	Payment received	Report Due	Report Submitted

# STEP SIX:

## SUPPORTING INFORMATION

### Strong applications are backed by solid documentation.

Funders want to know your organisation is credible, well-managed, and **ready to deliver**.

Having your supporting documents organised, both digitally and in hard copy, will save time and help you respond quickly to funding opportunities.

#### What types of supporting information might you need?

##### Annual Financial Report

Your most recent financial report showing transparency and accountability. It's often a key requirement.

##### Certificate of Incorporation or Certificate of Registration

Proof of your legal status as a trust, charitable society or incorporated organisation. If you're a registered charity or not-for-profit be ready to provide evidence.

##### Income tax status documentation

This will help funders to quickly confirm your eligibility and ensure any grants are distributed in line with tax rules.

##### Bank details

Many funders prefer to direct credit your grant into your bank account.

Keep a copy of your bank details as well as deposit slips or screenshots of your account, these are often requested in online applications.

##### Letters of Support

Letters of support from other organisations, clients, organisation members or prominent people in the community are sometimes requested by funders. You may like to include them with your application even if they are not asked for: they help prove that your cause is worthy of support.

**Hint:** you can ask your local council for a letter of support for your project, email [grants@tararuaadc.govt.nz](mailto:grants@tararuaadc.govt.nz)

##### Copies of previous applications

Keep a record of previous applications, they're helpful reference and can save time when applying for similar projects.



# STEP SEVEN:

## AFTER YOU GET FUNDING

**Securing funding is a big achievement, and what you do next is just as important.**

These tips will help you build a strong relationship with funders, maintain your organisations reputation, and **set yourself up for future success.**

### **Say thank you:**

A simple thank you goes a long way. Send an email or letter as soon as you receive confirmation of your funding. It shows appreciation and professionalism.

### **Send a photograph:**

Send a photo of your completed project or the people involved. Visuals help funders see the impact of their support.

### **Do your best to make sure that your funder gets public recognition:**

Celebrate your funder publicly:

- ▶ Mention them in media or social posts.
- ▶ Display signage at your venue or event
- ▶ Add a 'proudly sponsored by...' message to your website or printed materials.
- ▶ Invite them to events and acknowledge them in speeches

### **Follow up:**

If your project takes time to complete, keep your funder updated. Let them know when milestones are reached and when the project wraps up.

### **Meet the funder's reporting requirements:**

Always submit reports and audit information on time. Missing deadlines can affect your eligibility for future funding, and your reputation.

**Things to keep in mind along the way...**

**Funders are people too.** They are faced with weighing up your needs against the needs of hundreds of others - and almost everyone is worthy.

Target your applications to the funders who deal with your kind of purpose/need.

**Tell your story** as well as you can.

Meet the funding agency's requirements as well as you can. And **persevere**. You believe in the importance of what your organisation is doing.

**Convince the funders** that your project is a worthwhile investment and that you will make the most of every dollar they grant you.

They want the best for the communities they work in, just like you. **Good luck!**



## Questions?

Email [grants@tararua.govt.nz](mailto:grants@tararua.govt.nz) or  
contact us on the details provided below.



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[www.tararua.govt.nz](http://www.tararua.govt.nz)

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