

## **Grant-Seeking Essentials and Grants Calendar Filtering**

Provided by Ruapehu District Council,  
in partnership with Strategic Grants

### **Grant-Seeking Essentials**

#### **Step 1: Prepare Your Project**

Work with others involved in planning your project to identify:

- The goal
- The need, including evidence
- The target group, with as much detail as possible
- The objectives
- The timeframe
- The budget
  - consider the total costs of your project, including staff time and volunteer time.
  - Get quotes where possible and use real figures.
  - DON'T make costs up! It is very obvious to a funder when a budget has been guessed.
- The outputs
- The outcomes
- How they will be sustainable
- How you will evaluate your success
- The project risks and how you'll overcome them

#### **Step 2: Research prospective funders, match grants to your projects and engage with funders**

1. Use the **filtering process** provided below to look at the grants you are eligible for and which fit the type of work you do.
2. Research your shortlist of funders further on their websites. Ensure that you meet the funder guidelines! If you are not eligible, don't apply. In particular check that:
  - a) Your organisation meets ALL of the eligibility requirements
  - b) They provide grants to your geographic area
  - c) They fund the TYPE of project you are seeking funding for

- d) You aren't asking for more money than the grant limit. That is, if grants are up to \$5000, don't ask for more than that.
3. If there is opportunity to talk to the funder or email an enquiry, do so, to clarify any questions you may have, AFTER reading the guidelines.

### **Step 3: Write your Application!**

1. Make sure you have someone with strong writing skills to put together the grant application. Grant applications have short word counts so it's essential the information is provided in a way that is **clear, concise, current, correct and compelling!**
2. Check the closing date on the funder's website BEFORE commencing your application.
3. Ensure that applications always contain the most relevant and up to date information about the work your organisation does.
4. Ensure your application answers are clear about what the need for the project is and what the outcomes will be. That is, what will change for your group and how will your organisation's work benefit, as a result of the grant.
5. When talking about the need, use statistics wherever possible. Local Council websites often contain local area stats and facts.
6. Provide information on how you will measure the success of your project, e.g.
  - a. Can you count how many people / projects will be helped by the project the grant is for?
  - b. Can you ask for feedback at functions? Put a small survey together?
  - c. Can you provide usage statistics for a piece of funded equipment?
7. Spell & Grammar check your application!
8. Ensure all formatting is consistent throughout the document and adheres to any funder guideline specifications
9. Proof read and get someone else to proof read it for you. Do they understand it all clearly and have you answered all the questions as best you can?

## **Step 4: After applying**

1. Keep records on who you have applied to, for what project, and what amounts – and the outcome of the application! That way you have an organisational memory bank of your grants history and aren't relying on one individual's memory! You can do this by setting up a GEM Local account free of charge, provided by Ruapehu District Council. Just go to <http://gemlocal.com> and subscribe using the access code RUAPEHUCC19.
2. Always make sure to phone the funder when you're successful and ask them how they like to be acknowledged and thanked. Or if you've been unsuccessful, call them to ask if they can provide any feedback and thank them for the opportunity to apply.
3. Ensure you keep the funder informed about any changes or delays in the project, as well as when things go right. Treat them as your partner in delivering this project to the community!
4. The better you can report back on how you spent the funding and the outcomes (benefits) that were achieved, the more likely you will get more funding in the future!

## **Notes on Closing Date Status**

When you are prospecting in the Grants Calendar, note the closing date status. Below are the meanings of the closing date status entries:

**Blank:** When the closing date status is blank, it means the grant closing date has been confirmed. Always check the funders' website as the ultimate source of information for the closing date before applying.

**TBC:** When the grant round closing date is yet to be confirmed (Strategic Grants' researchers base each future round on the previous year's closing dates to help you plan ahead)

**By Invitation:** This funder does not have open grant rounds but rather makes their grant decisions based on their own research, or by relationship with the organisation. If you think their funding mission aligns perfectly with your organisation's mission, look for a connection. Run the list of trustees by your staff, volunteers and board members to see if they have any connections. Talk to your existing funders to see if any of them can provide an introduction.

**EOI:** The funder invites applicants to put forward a smaller Expression of Interest as a first step to applying, rather than requiring a full application. This is intended to save time for both the applicants and the funder.

## **Grants Calendar Filtering**

In the excel Grants Calendar provided by Ruapehu District Council each month, you can use filters to find the grants that are relevant to your organisation.

If you set up a GEM Local account, you can also use the below tips to undertake more detailed prospecting in the down loadable excel version of your Customised Grants Calendar.

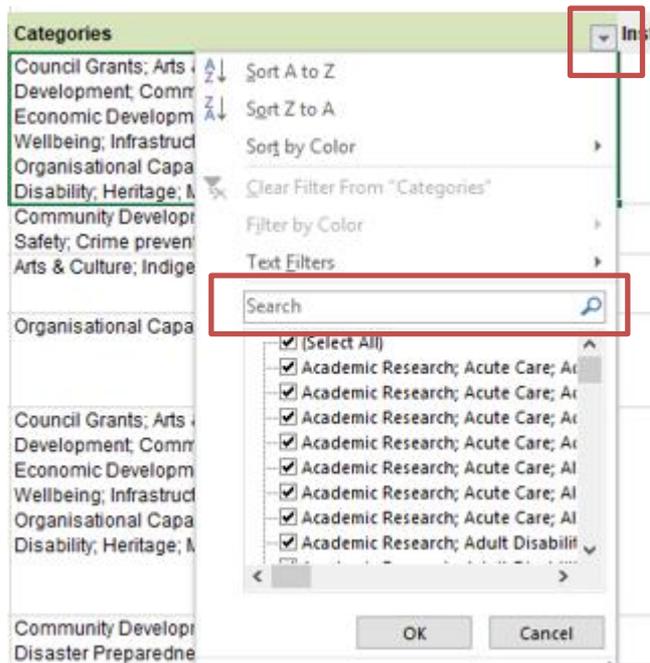
### **Filtering by Categories**

Every grant record within the **GEMS** grants calendar is categorised with one or more **Grant Categories**.

- a grant for funding projects for children with a vision disability would be categorised with: "Child Disability – Vision"
- a grant for domestic abuse funding would be categorised with: "Social Welfare -Domestic Abuse"
- a grant that potentially funds projects for children with a vision disability or domestic abuse or education for disadvantaged communities, would be categorised with: "Child Disability – Vision", "Social Welfare -Domestic Abuse", "Disadvantaged Community Education".

**Utilising the Grant Categories that best fit your organisation's work, you can filter on the Categories column to narrow down the list of grant records in your calendar to find those grants that will potentially fund your project.**

In the top right hand corner of the **Categories** column, click the drop down option to open the Search filter.



Type a category description in the Search field (e.g. Organisational Capacity Building):

Click OK

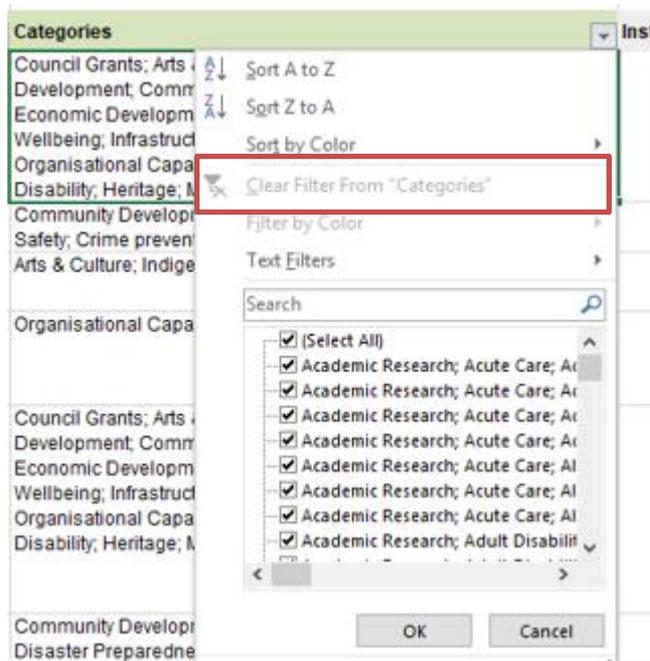
The list of grants in your Excel grants calendar will be filtered down to those where the Funder has said they will fund Organisational Capacity Building activities.

### Removing a Filter

To remove a filter to return to the full set of grant records, click the top right hander corner filter button.

Select the **Clear Filter** option.

The Excel list is reset back to the full set of all grant records.



### Multiple filters

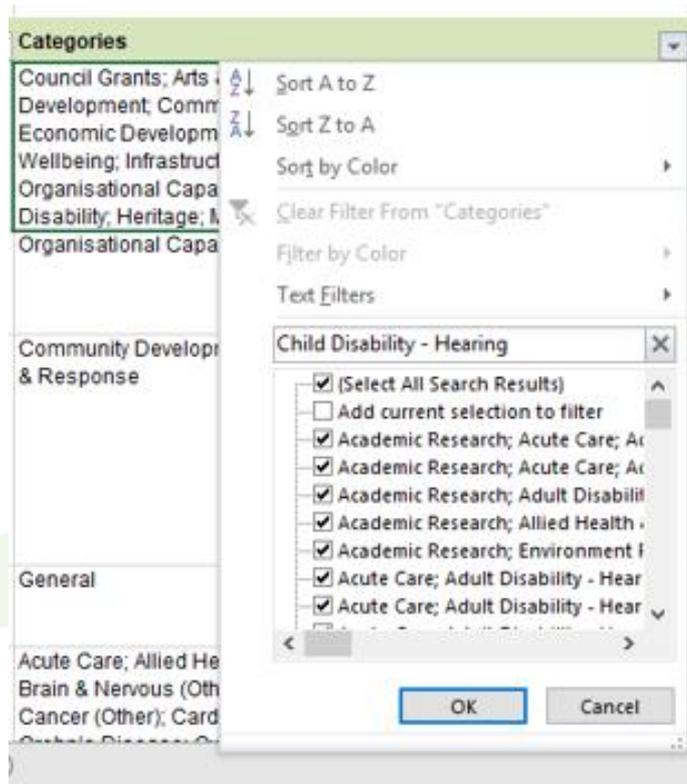
So far, we have applied a filter on a Geographic Region. We then reset the grants list back to the full set. We then applied a filter on Categories.

It is possible to apply multiple filters across the Excel calendar.

In our hypothetical project, we are seeking grant funding for a project with **children with a hearing disability that costs over \$5000**.

First select the filter on **\$ Range** and untick 'Under \$5000'. Hit Ok. Now you should be seeing just those grants with a dollar range above \$5000 (and also grants with unspecified amounts).

\$ Range	Grant Range Note
\$50,001 - \$100,000	US\$10,000 - US\$100,000
\$250,001 - \$500,000	Apply for small projects: less than \$250,000 or large projects: \$250,000 or more.
Under \$5,000	Usually range from \$300 to \$2,000
Under \$5,000	Up to \$5,000



Then apply the second filter to Categories and click OK.

The resulting filtered records have combined the 2 filters:

The filter graphic  indicates on which column(s) the filters are currently applied.

Now that the list has been filtered down to a manageable set, you can research in detail those grants closing soonest to find a grant(s) to fund your project.