

Te Puaha o te Ako Funding Guide

Funding Readiness Checklist

This checklist is a resource to help you prepare to seek funding. It is designed to help you keep track of the key areas to consider when developing your funding application.

The checklist is not a pass/fail test - if some things aren't in place yet, that's useful to know. Use it to identify what to strengthen before you apply and come back to it at each funding round.

Section 1: Your organisation

Funders need to know you're a legitimate, well-run organisation before they read your application.

- ☐ We have charitable status or are clear on our legal status, e.g. Marae, statutory body, and its implications, or we are intending to apply under an umbrella or fundholder organisation (see [The Funding Guide](#) - Glossary)
- ☐ Our constitution or trust deed is current and signed
- ☐ Our governing body is active and roles are clear
- ☐ We have a bank account in the organisation's name
- ☐ We have a way to check and manage conflicts of interest (See [The Funding Guide](#) - Ethics and good practise)
- ☐ We have a basic conflicts of interest policy or register
- ☐ We have met our past reporting requirements (this affects future funding prospects)

Section 2: Your finances

Funders want to see that you can manage money responsibly.

- ☐ Our most recent annual accounts are complete and signed off
- ☐ We have a current year budget for our organisation
- ☐ We understand our full costs, including staff time, overheads and indirect costs
- ☐ We have the basic financial systems in place needed to receive and manage a grant
- ☐ We know whether we have reserves and can explain them if asked

Section 3: Your project

Clarity here makes your application much stronger.

- ☐ We can clearly describe the need or problem we're responding to
- ☐ We know who will benefit and how
- ☐ We can describe what we'll do (activities) and what will change as a result (outcomes and impact)
- ☐ We have a realistic timeline
- ☐ We have a project budget that matches what we're asking for and project costs
- ☐ We are not asking multiple funders for the same cost or items
- ☐ We have highlighted any collaborations or shared resources that will reduce costs and increase benefits beyond our organisation
- ☐ We've thought about how we'll measure and report on results
- ☐ We have considered risks, including health and safety

Section 4: Your funder research

Applying to the right funder saves time and increases your chances.

- ☐ We've identified funders whose priorities match our work
- ☐ We've checked that the funder's values and source of money align with our organisation's value
- ☐ We've read their guidelines carefully
- ☐ We've checked that we meet their eligibility criteria (org type, geography, project type, funding amounts, exclusions)
- ☐ We know the deadline and what's required for submission
- ☐ We've considered contacting the funder before applying (see [The Funding Guide](#) - Helpful Tips)

Section 5: Your supporting documents

Most funders will ask for these, so having them ready saves time.

- ☐ Most recent annual accounts
- ☐ Current year budget that shows the organisation's expected income and planned expenditure
- ☐ Funding requests to other funders and amounts applied for
- ☐ Governing document (constitution or trust deed)
- ☐ Proof of charitable status
- ☐ Letters of support (see [The Funding Guide](#) - Helpful Tips)
- ☐ Any required evidence of need or community support

