

PRACTICAL TOOLKIT

NZ/AU Grant Application Toolkit

Comprehensive Templates, Funder Profiles, and Best Practices for New Zealand and Australian Not-for-Profits

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For

NZ/AU NGO Sector

Funder Profiles

Application Templates

Budget Guidance

Outcome Frameworks

Quality Checklists

Common Questions

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Everything you need to write compelling, successful grant applications.

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Introduction

01

Who this toolkit is for and the key factors behind successful applications

About This Toolkit

This toolkit provides comprehensive resources to help New Zealand and Australian not-for-profits successfully apply for grant funding. Whether you're applying to community trusts, philanthropic foundations, government programmes, or gaming grants, this guide will help you understand what funders are looking for, structure compelling applications, and avoid common mistakes.

Who This Toolkit Is For

- **Small to medium NGOs** applying for project or operational funding
- **Community organisations** seeking their first grants
- **Established charities** wanting to improve their success rates
- **Staff new to fundraising** who need practical guidance
- **Board members** overseeing funding strategies

Key Success Factors

Top 5 Reasons Applications Succeed

- ✓ Clear alignment with funder priorities (87%)
- ✓ Well-articulated outcomes with measurable indicators (82%)
- ✓ Realistic, justified budget (79%)
- ✓ Strong evidence of organisational capability (76%)
- ✓ Compelling narrative with human impact (71%)

Top 5 Reasons Applications Fail

- ✗ Poor fit with funder criteria (62%)
- ✗ Unclear or unmeasurable outcomes (48%)
- ✗ Budget errors or lack of justification (41%)
- ✗ Incomplete applications or missing documents (38%)
- ✗ Lack of evidence for claims made (35%)

Understanding the NZ/AU Funding Landscape

02

Types of funders, eligibility requirements, and how to research funder priorities

Types of Funders — New Zealand

FUNDER TYPE	EXAMPLES	TYPICAL RANGE	KEY CHARACTERISTICS
Lotteries / Gaming	Lotteries Grants Board, NZCT, Pub Charity	\$5k–\$500k+	Regular rounds, specific priorities
Community Trusts	Foundation North, Trust Waikato, CTS	\$1k–\$250k	Regional focus, relationship-based
Philanthropic	Tindall, Todd, JR McKenzie	\$10k–\$200k	Strategic focus, often invitation-based
Government	DIA, MSD, Health NZ	\$20k–\$5M+	Contract-based, compliance-heavy
Corporate	Vodafone Foundation, ANZ Staff	\$5k–\$100k	Aligned to corporate priorities

Types of Funders — Australia

FUNDER TYPE	EXAMPLES	TYPICAL RANGE	KEY CHARACTERISTICS
Federal Government	DSS, NIAA, Health	\$50k–\$10M+	Competitive rounds, strong compliance
State Government	NSW Govt, VIC DHHS, QLD Dept	\$10k–\$2M+	State-specific, varied processes
Philanthropic Trusts	Ian Potter, Paul Ramsay, Sidney Myer	\$20k–\$1M+	Strategic priorities, multi-year
Gaming / Clubs	ClubGRANTS, Community Benefit Funds	\$1k–\$100k	Local focus, regular rounds
Corporate	BHP Foundation, Westpac Foundation	\$10k–\$500k	CSR aligned, partnership focus

Eligibility Fundamentals

New Zealand Requirements

Registered Charity	Charities Services Register
Incorporated Society	Companies Office Register
Charitable Purpose	Your constitution/rules
Current Annual Return	Charities Services

Australian Requirements

ACNC Registration	ACNC Charity Register
DGR Status	ABN Lookup
Incorporated Entity	State/territory registers
Current AIS	ACNC

Funder Research Checklist

- What outcomes/impact areas do they prioritise?
- What geographic regions do they fund?
- What organisation sizes do they typically fund?
- What types of activities do they support (projects, operations, capital)?
- What is their typical grant size range?
- Do they have any explicit exclusions?
- What is their current strategic focus?
- Who have they funded recently?
- Do they prefer first-time applicants or existing relationships?
- What is their decision-making timeline?

NZ Major Funders: Profiles & Requirements

Key funder profiles with application tips and budget guidance

03

Lotteries Grants Board (DIA)

FUND	FOCUS	TYPICAL RANGE	ROUNDS
Community Sector Grants	General community benefit	\$5k-\$150k	Rolling
Community Facilities	Buildings and equipment	\$10k-\$500k+	Rolling
Environment & Heritage	Conservation, heritage	\$10k-\$300k	Rolling
Sector Development	Capability building	\$10k-\$200k	Rolling

Success Factors

- ✓ Demonstrate clear community need with evidence
- ✓ Show how project addresses that need
- ✓ Provide realistic timeline and budget
- ✓ Include appropriate quotes for equipment/capital
- ✓ Show co-funding or in-kind contributions
- ✓ Articulate measurable outcomes

Things to Avoid

- ✗ Retrospective funding requests
- ✗ Operational costs without project focus
- ✗ Political or religious activities
- ✗ Activities for private benefit

NZ Community Trust (NZCT)

ASPECT	DETAILS
Typical Grant Range	\$500 - \$75,000
Decision Timeframe	4-6 weeks
Rounds	Monthly (1st of each month deadline)
Focus Areas	Sport, education, health, community wellbeing

Foundation North

One of NZ's largest philanthropic funders, focusing on Tamaki Makaurau Auckland and Te Tai Tokerau Northland.

STREAM	FOCUS	TYPICAL RANGE
Quick Response	Small projects, emergencies	Up to \$15,000
Community Grants	General community benefit	\$15k-\$100k
Sector Grants	Capacity building	\$50k-\$250k
Strategic Initiatives	Large-scale, multi-year	\$100,000+

Six Focus Areas

Safe, healthy, inclusive communities	Creative, vibrant, inclusive communities	Prosperous, sustainable, thriving communities
Maori aspirations and development	Pacific aspirations and development	Young people thriving

Foundation North — Te Tiriti Lens

Foundation North expects applicants to demonstrate: **(1)** Awareness of Te Tiriti obligations and recognition of Maori as tangata whenua, **(2)** Genuine engagement/consultation with Maori communities and mana whenua relationships, **(3)** Specific benefit to Maori and culturally responsive delivery, **(4)** Maori Data Sovereignty principles applied.

Other Key NZ Funders

<p>Tindall Foundation</p> <p>Focus: Families, environment, communities, employment, education</p> <p>Approach: Multi-year funding, flexible trust-based relationships, willingness to fund core costs</p>	<p>Todd Foundation</p> <p>Focus: Children and young people facing disadvantage</p> <p>Range: \$20k-\$150k</p> <p>Distinctive: Strong focus on evidence and outcomes, invitation-based for larger grants</p>	<p>JR McKenzie Trust</p> <p>Focus: Social justice, disadvantage, systemic change</p> <p>Range: \$10k-\$100k</p> <p>Distinctive: Willing to fund advocacy and systemic change work</p>
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AU Major Funders: Profiles & Requirements

Australian funder profiles, government grants, and application processes

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Ian Potter Foundation

STREAM	FOCUS	TYPICAL RANGE
Arts	Visual arts, performing arts, museums	\$25k-\$200k
Community Wellbeing	Disadvantage, social inclusion	\$25k-\$200k
Education	Innovation, access, quality	\$25k-\$200k
Environment	Conservation, climate, biodiversity	\$25k-\$200k
Health & Disability	Research, service improvement	\$25k-\$200k
Science	Research, STEM education	\$25k-\$200k

Paul Ramsay Foundation

Distinctive Approach — Breaking Cycles of Disadvantage

Focus areas: Education to employment pathways, strengthening families, mental health, place-based approaches, systems change.

What makes them different: Interest in root causes (not just symptoms), willing to fund advocacy and policy work, multi-year partnerships with significant investments (\$500K+ common), active engagement with grantees.

Government Grants (Federal)

PROGRAMME	FOCUS	TYPICAL RANGE
Volunteer Grants (DSS)	Volunteer-involving organisations	\$1k-\$5k
Stronger Communities	Local infrastructure	\$2.5k-\$20k
Indigenous Advancement Strategy	Aboriginal & Torres Strait Islander communities	Varies widely

Federal Government Grants Process

- 1 Registration**
Register on grants.gov.au, ensure ABN and ACNC details current
- 2 Expression of Interest**
Brief initial application assessing eligibility and fit
- 3 Full Application**
Detailed proposal with budget, financial info, and supporting documents
- 4 Assessment**
Eligibility check, merit assessment, value for money, due diligence
- 5 Contracting**
Grant agreement negotiation, work plan finalisation, payment schedule
- 6 Delivery & Reporting**
Activity reporting, financial acquittal, outcome measurement

Other Key AU Funders

Sidney Myer Fund

Range: \$5k–\$100k · **Rounds:** Two per year (March & September)

Focus: Arts, education, poverty relief, environment, health

Minderoo Foundation

Range: \$100k–\$5M+ · **Approach:** Strategic, often invitation-based

Focus: Cancer, early childhood, environment, modern slavery

Application Structure Template

A universal framework adaptable for most funders

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Universal Application Framework

Section 1: Organisation Summary

1.1 Organisation Details

Legal name and trading name, registration numbers (ACNC, Charities Services, ABN), address and contact details, authorised contact for this application.

1.2 Organisation Background

Mission and vision, brief history with key milestones, current activities and reach, geographic scope, size (staff, volunteers, budget).

1.3 Governance and Capability

Board composition, key staff relevant to this project, relevant experience and track record, previous grants from this funder (if any).

Section 2: Project Overview

2.1 Project Title

Clear, concise title that captures the essence of your project.

2.2 Project Summary (100–150 words)

Elevator pitch covering what, why, who, where, when, and expected outcomes.

2.3 Project Description

What you plan to do (activities), how (methodology), when (timeline), where (locations), and who will deliver it (team).

2.4 Target Beneficiaries

Primary beneficiaries (directly), secondary beneficiaries (indirectly), numbers expected, demographics and characteristics.

Section 3: Need and Rationale

3.1 What need/problem does this address? Evidence for this need (data, research, consultation). Why this need is not currently being met. Consequences if need remains unaddressed.

3.2 Why your approach is appropriate. Evidence for your approach. How it builds on existing work.

3.3 How you identified this need. Consultation undertaken with beneficiaries. How feedback shaped the project.

Sections 4–7: Outcomes, Implementation, Budget, Sustainability

SECTION	KEY CONTENT
4. Outcomes & Impact	Outcome statements with indicators, baselines, targets, data sources. Alignment with funder priorities. Evaluation approach.
5. Implementation	Project timeline with phases, key milestones, risk management table (risk, likelihood, impact, mitigation).
6. Budget	Total project cost, amount requested, co-investment. See Budget Templates section.
7. Sustainability	Beyond-funding plans, future funding strategy, scaling potential, organisational financial position.

Budget Templates

Standard budget structure, justification template, and funder-specific requirements

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Standard Project Budget Template

CATEGORY	ITEM	CALCULATION	TOTAL
1. Personnel	Project Coordinator (0.8 FTE)	$\$65,000 \times 0.8 \times 12\text{mo}$	\$52,000
	Programme Facilitator (0.5 FTE)	$\$55,000 \times 0.5 \times 12\text{mo}$	\$27,500
	Admin Support (0.2 FTE)	$\$50,000 \times 0.2 \times 12\text{mo}$	\$10,000
2. Programme Delivery	Venue Hire	24 sessions x \$150	\$3,600
	Materials and Resources	Lump sum	\$4,500
	Participant Transport	50 x \$25	\$1,250
	Catering	24 x \$180	\$4,320
3. Operating	Office, comms, insurance, travel	Various	Varies
4. Administration	Overhead (10–15% of direct costs)	As permitted	Varies
5. Evaluation	Design, data collection, external eval	Various	Varies
6. Contingency	Typically 5% of direct costs	—	Varies

Budget Justification Tips

For each major category, explain: **why** the cost is necessary, **how** the amount was determined (quotes, market rates, historical data), and **what value** it provides to the project. Always attach quotes for items over \$1,000.

Lotteries (NZ) Budget Rules

- Itemise all costs over \$500
- Provide quotes for items over \$1,000
- Separate salary from wages
- Include GST in totals (if registered)
- Show other funding sources clearly
- No retrospective costs

Government (AU) Budget Rules

- Use provided template/categories exactly
- GST exclusive amounts (usually)
- Specify in-kind contributions
- Detailed activity-based costing
- Salary packaging breakdown
- On-costs itemised

Outcome Frameworks & Logic Models

Distinguishing outputs from outcomes, logic model templates, and indicator frameworks

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Outputs vs Outcomes

Outputs = What You Deliver

- Number of workshops delivered
- Number of participants
- Resources produced
- Hours of service provided

Outcomes = What Changes

- Knowledge or skills gained
- Attitudes changed
- Behaviours modified
- Conditions improved

Outcome Indicator Example

Example: Community Wellbeing Programme

Outcome 1: Participants increase social connections

INDICATOR	BASELINE	TARGET	DATA SOURCE	FREQUENCY
% reporting reduced loneliness	75% lonely	50% lonely (25% reduction)	UCLA Loneliness Scale	Pre/post
Social interactions per week	2.3/week	5.0/week	Self-report check-in	Weekly

Outcome 2: Participants improve mental wellbeing

INDICATOR	BASELINE	TARGET	DATA SOURCE	FREQUENCY
Average WHO-5 score	42/100 (poor)	60/100 (moderate)	WHO-5 Wellbeing Index	Start, mid, end, 3mo

Common Outcome Domains

DOMAIN	OUTCOME	POSSIBLE INDICATORS
Mental Health	Improved wellbeing	WHO-5 score, K10, PHQ-9
Social Connection	Reduced isolation	Loneliness scale, social network size
Knowledge	Increased knowledge	Pre/post testing, certification rates
Skills	Skill development	Demonstrated competency, assessment
Employment	Job readiness	Employment outcomes, interview success
Community	Increased engagement	Attendance, volunteer hours

Common Questions Library

Model answer structures for the most frequently asked grant application questions

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Organisation Capacity

Q: "Describe your organisation's experience and capability to deliver this project."

Structure your response:

- **Relevant track record (40%):** What you've delivered, outcomes achieved, previous grants managed
- **Staff/team capability (30%):** Lead person's experience, qualifications, team composition
- **Organisational infrastructure (20%):** Financial management systems, governance, quality assurance
- **Partnerships (10%):** Partner contributions and how they strengthen capacity

Need and Rationale

Q: "What need does this project address? Provide evidence."

Structure your response:

- **The problem (25%):** Statistics, affected population, comparison data
- **Evidence base (35%):** Research sources, local data, key findings
- **Consequences (15%):** What happens without intervention
- **Gap in services (15%):** Why current services are inadequate
- **Consultation (10%):** Community voice confirming the need

***Example:** One in four young people (25%) in the Waikato region experience significant anxiety, compared to the national average of 18%. Our community needs assessment found 73% of surveyed youth would access support if available locally. As one young person told us: "I'd go if there was something here. But I'm not going to Hamilton — it's too far."*

Sustainability

Q: "How will the project/benefits continue beyond this funding?"

- **Project continuation (40%):** Specific future funding sources, revenue generation, cost reduction strategies
- **Benefit sustainability (30%):** Capacity/skills built, systems created, relationships established
- **Organisational capacity (20%):** Diverse funding base, strong governance, track record
- **Risk mitigation (10%):** Contingency approach, knowledge transfer, exit strategy

Maori & Indigenous Engagement

NZ: Maori Engagement

- **Engagement:** Iwi/hapu consultation, Maori governance representation, cultural advisors
- **Benefit:** Specific benefits to Maori, culturally responsive delivery
- **Tikanga:** Culturally appropriate approaches, Te Reo integration
- **Data Sovereignty:** Maori governance of Maori data
- **Te Tiriti:** Partnership, Protection, Participation

AU: Indigenous Engagement

- **Community-led:** Aboriginal and Torres Strait Islander leadership, community consultation
- **Cultural safety:** Cultural safety frameworks, staff training
- **Benefit:** Employment/economic opportunities, capacity building
- **Closing the Gap:** Alignment with specific priorities
- **Data Sovereignty:** Community governance of data

Supporting Documents Checklist

Standard documents required for NZ and AU applications

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New Zealand Applications

DOCUMENT	ALMOST ALWAYS	OFTEN	SOMETIMES
Charities Services Registration Certificate	✓		
Latest Annual Accounts (audited/reviewed)	✓		
Constitution / Rules / Trust Deed	✓		
Board Member List	✓		
Certificate of Incorporation	✓		
GST Registration / Quotes / Letters of Support		✓	
Needs Assessment / Project Plan / Staff CVs			✓

Document Readiness Checklist

Governance Documents

- Constitution/Rules — current version
- Certificate of Registration — less than 12 months old
- Board Member List — current with contacts
- AGM Minutes — most recent

Financial & Project Documents

- Latest Audited Accounts — signed with audit report
- Management Accounts (if year-end >6 months ago)
- Board-approved budget
- Quotes — at least 2 for items over \$1,000
- Letters of Support — signed, on letterhead

File Naming Convention

[Organisation]_[DocumentType]_[Date] — Example: TeWhareOra_AuditedAccounts_2024.pdf

Application Timeline & Planning

Ideal timelines, time investment estimates, and planning guidance

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Ideal Application Timeline

Week 1–2: Preparation

- Read all funder guidelines thoroughly
- Confirm eligibility for this round
- Identify all required documents
- Assign application lead
- Schedule writing time in calendar

Week 3–4: Drafting

- Complete first draft of narrative sections
- Draft budget with finance input
- Gather quotes for significant items
- Request letters of support
- Develop logic model/outcomes framework

Week 5–6: Refinement

- Second draft incorporating feedback
- Finalise budget (check totals!)
- Collect all supporting documents
- Internal review by CEO/Manager
- External review by trusted peer

Week 7–8: Finalise & Submit

- Final proofreading (fresh eyes)
- Check word/character limits
- Verify all attachments are ready
- Board approval if required
- Submit before deadline!
- Confirm receipt from funder

Time Investment Guide

15–25

HOURS — SMALL GRANT (<\$20K)

30–50

HOURS — MEDIUM GRANT (\$20K–\$100K)

50–100+

HOURS — LARGE GRANT (>\$100K)

Quality Review Checklist

Pre-submission quality checks and common mistakes to avoid

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Pre-Submission Quality Check

Eligibility & Completeness

- We meet all eligibility criteria
- Request is within stated range
- Applying in correct round/category
- All questions answered
- All required attachments included
- Word/character limits observed

Clarity & Accuracy

- Project description is clear and specific
- Outcomes are measurable and realistic
- Timeline is achievable and logical
- Budget totals are correct
- Financial info matches audited accounts
- No spelling or grammatical errors

Alignment & Persuasion

- Project aligns with funder priorities
- Language echoes funder's goals
- Need is clearly evidenced
- Solution is compelling
- Value for money is clear
- Sustainability is addressed

Top 10 Application Mistakes

Mistakes 1–5

- 1. Not reading the guidelines** — Eligibility criteria matter
- 2. Submitting at the deadline** — Systems crash. Submit 1–2 days early
- 3. Budget errors** — Have someone else check the maths
- 4. Unmeasurable outcomes** — "Improve wellbeing" is not measurable
- 5. Claims without evidence** — Every claim needs backing

Mistakes 6–10

- 6. Copy-paste from old applications** — Funders can tell
- 7. Overcomplicating the narrative** — Simple, clear writing wins
- 8. Asking for everything** — Focus on what this funder supports
- 9. Ignoring relationship** — Meet with funder before applying
- 10. No internal review** — Fresh eyes catch errors

Post-Submission Guide

What to do after you submit, and how to handle outcomes

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After You Submit

Immediately After

- Confirm receipt from funder
- Save confirmation for records
- File complete copy of submission
- Update funding pipeline tracker
- Note decision date in calendar

If Successful

- Send thank you to funder
- Review grant conditions carefully
- Set up financial tracking
- Brief delivery team
- Plan acquittal requirements

If Unsuccessful

- Request feedback
- Document learnings
- Consider reapplication timing
- Review whether fit was right
- Thank funder for consideration

Feedback Request Template

Sample Email — Requesting Feedback

Subject: Feedback Request — [Organisation] Application to [Programme]

Dear [Contact Name],

Thank you for advising the outcome of our application to [Programme Name]. While we are disappointed not to have been successful on this occasion, we greatly value the opportunity to apply and remain committed to [shared goal].

We would appreciate any feedback that could help us strengthen future applications. Specifically, we would welcome insights on how our application compared, areas that could be stronger, project fit, and suggestions for other funding sources.

Nga mihi nui / Kind regards,
[Your Name], [Position], [Organisation]

Appendix: Templates & Resources

Quick reference contacts, glossary, and useful links

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NZ Funder Contact Information

FUNDER	WEBSITE	CONTACT
Lotteries Grants Board	communitymatters.govt.nz	grants@dia.govt.nz
Foundation North	foundationnorth.org.nz	Via website
Trust Waikato	trustwaikato.co.nz	Via website
NZ Community Trust	nzct.org.nz	grants@nzct.org.nz
Tindall Foundation	tindall.org.nz	Via website
Todd Foundation	toddfoundation.org.nz	Via website

AU Funder Contact Information

FUNDER	WEBSITE	CONTACT
GrantConnect	grants.gov.au	Via portal
Ian Potter Foundation	ianpotter.org.au	Via website
Paul Ramsay Foundation	paulramsayfoundation.org.au	Via website
Sidney Myer Fund	myerfoundation.org.au	Via website

Glossary

TERM	DEFINITION
Acquittal	Process of reporting to a funder on how grant funds were used
Baseline	Starting point measurement before intervention
Co-investment	Funding from other sources contributing to the project
DGR	Deductible Gift Recipient (Australian tax status)
EOI	Expression of Interest (initial short application)
FTE	Full-Time Equivalent (measure of staff time)
In-kind	Non-cash contributions (volunteer time, donated goods)
Logic Model	Visual representation of how a programme creates change
Outcome	Change that occurs as a result of activities
Output	What is produced/delivered by activities

Useful Resources

NZ Funding Databases

- FundView: fundview.org.nz
- Community Matters: communitymatters.govt.nz
- Philanthropy NZ: philanthropy.org.nz

Grant Writing Support:

- Exult: exult.co.nz
- The Grant Plant: thegrantplant.com

AU Funding Databases

- GrantConnect: grants.gov.au
- Our Community: ourcommunity.com.au
- Philanthropy Australia: philanthropy.org.au

Grant Writing Support:

- GrantReady: grantready.com.au
- Our Community: ourcommunity.com.au/granhelp

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This toolkit is provided as a general resource and does not constitute professional advice. Always refer to specific funder guidelines.