

## Unit Fundraiser Job Description

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**Responsible to** the Unit Board/Committee

### Key Relationships

- Unit board members and all unit volunteers
- Regional Manager and other regional staff
- Local Trusts
- Local sponsors

### Purpose of the Position

The Fundraiser is responsible for preparing funding applications to trusts and local sponsors, for promoting the Coastguard Supporter scheme locally and managing local fundraising events.

### Responsibilities

1. In consultation with the Treasurer identify local trusts to apply to for budgeted expenditure for the financial year and assist with the identification of other fundraised income for inclusion in the income budget.
2. Prepare a funding application calendar that lists which trusts will be applied to, what you are applying for and the closing dates for these applications. Ensure that all funding applications are prepared and sent on time.
3. Ensure all accountability reports for Trusts and other funders are completed on time.
4. Prepare thank you letters for all individuals, trusts, businesses and any other funders along with a donation receipt. Ideally this should be sent within 48 hours of receipt of the funding.
5. Work with unit members to ask all members of the public, that are assisted by Coastguard, to become a Coastguard Supporter. Distribute Coastguard Supporter brochures to local businesses for display on counters etc. Create or find other opportunities to promote Coastguard Supporter membership to your community.
6. Manage the relationship with local Sponsors by maintaining regular contact, inviting them to visit, attend the AGM or other Coastguard events.
7. Seek opportunities to become the charity of choice at local events that include a fundraising component i.e. fun runs. Making sure that use of Coastguard logo etc is in keeping with brand policy and that the event is appropriate to associate with Coastguard.
8. Make contact with local service clubs and others seeking donations towards identified budgeted costs.

## **Knowledge and Skills Required**

Ideally the Fundraisers someone who

- Can communicate effectively both verbally and in writing
- Is well organised
- It's an advantage to have some experience in sales or marketing
- Ability to see things from the funders viewpoint

## **Supporting Information for Fundraisers**

### **Donor Bill of Rights**

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organisations and causes they are asked to support, we declare that all donors have these rights:

1. To be informed of the organisation's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
2. To be informed of the identity of those serving on the organisation's governing board, and to expect the board to exercise prudent judgement in its stewardship responsibilities.
3. To have access to the organisation's most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgement and recognition.
6. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organisations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organisation or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organisation may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

*Endorsed by the Fundraising Institute of New Zealand*

### **Do's and Don'ts of Fundraising Applications**

1. Grant applications are low resource input and high outcome level
  - a. Grant makers need grant seekers to fulfil their mission
  - b. Grant applications are a cost effective means of fundraising

2. Types of Funders
  - a. Statutory trusts - COGS, Energy trusts, Community Trusts, Lottery Grants Board
  - b. Philanthropic trusts
  - c. Gaming machine societies
  - d. Local bodies
  - e. Licensing Trusts
  
3. Finding out who may fund your organisation
  - a. FIS -Funding Information Service [www.fis.org.nz](http://www.fis.org.nz)
  - b. Philanthropy New Zealand [www.philanthropy.org.nz](http://www.philanthropy.org.nz)
  - c. DIA - Department of Internal Affairs [www.dia.govt.nz](http://www.dia.govt.nz)
  - d. Charities Commission [www.charities.govt.nz](http://www.charities.govt.nz)
  - e. Internet
  - f. Talk to everyone you know
  
4. Preparation
  - a. Create a funding calendar
  - b. Gather documents
    - i. Constitution
    - ii. IRD letter
    - iii. GST number
    - iv. Certificate of Incorporation
    - v. Charities Commission Registration
    - vi. Audited accounts
    - vii. Annual report
    - viii. Bank deposit slip
    - ix. Bank statement
    - x. Budget
    - xi. Support letters
    - xii. Feedback from people who you have assisted
  
  - c. Know your funder – ring and check their criteria, average gift etc
  - d. Make sure your application meets the funders criteria
  - e. Be sure that you will be able to account for your expenditure of the grant
  
5. Completing the Application
  - a. Be clear - don't waffle or use service delivery type language
  - b. Make sure the contact person is contactable
  - c. Get someone else to proof read
  - d. Remember the Trustees often see only the application form
  - e. Always use a black pen to complete the application form
  - f. Putting 'See attached' on the form isn't a good look
  - g. Whilst 'copy and paste' is extremely useful make sure you check thoroughly
  - h. What to attach to your application
  - i. Get the application in on time
  
6. What matters to the funder
  - a. What community need are you hoping to address?
  - b. What are you asking for?
  - c. Why do you need it?
  - d. Who benefits?

- e. How do they benefit?
  - f. What are the outcomes?
  - g. How will you know you have been effective?
7. When the letter arrives
- a. Read the whole letter, don't stop at the dollars
  - b. Say thank you
  - c. Note accountability requirements
  - d. Talk to the person who is spending the money
  - e. Note time frames and ensure you carry funds into new financial year if necessary

For a comprehensive guide to funding applications visit the Trust Waikato website and access their resources page - <http://www.trustwaikato.co.nz/page/resources>