



## APPLICATION FOR FUNDING

All sections need to be completed in order for your application to be considered. Please print out the completed application and send it to the FirstRand Foundation (address on back page) with the attachments requested in Section 6.

### **Section 1 – Organisation’s Details**

1. Name of organisation \_\_\_\_\_
2. Date of establishment \_\_\_\_\_
3. PBO number \_\_\_\_\_
4. NPO number \_\_\_\_\_
5. Physical address  
(including magisterial district) \_\_\_\_\_
6. Postal address  
(including postcode) \_\_\_\_\_
7. Telephone number \_\_\_\_\_
8. Facsimile number \_\_\_\_\_
9. Name of person  
submitting application \_\_\_\_\_
10. E-Mail address \_\_\_\_\_
11. Website address \_\_\_\_\_
12. Date \_\_\_\_\_

13. Please provide the names and details of your Board members or Trustees or Directors with their roles (eg, Chairman) and demographics:

Name	Role	Race	Gender	Disabled
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>



**Section 2 – Management and Staff**

14. Please provide the names and details of the management of your organisation together with their job titles (eg, Director):

Name	Job Title	Race	Gender	Disabled
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

15. Please provide a brief background of the Managing Director / Chief Executive of the organisation (time with organisation, previous roles, qualifications):

16. Please provide the numbers all staff members employed by your organisation in the following categories:

	Female	Male	Black	White	Coloured	Asian	Disabled
Full time staff							
Part time staff							
<b>Total staff</b>							
Volunteers							



**Section 3 – Organisation’s Objectives, Programmes and Impact**

17. Please provide a brief overview of the organisation – no more than 150 words (Date founded, primary objective, main activities and impact):

18. Please list the major objectives of the organisation (the change your organisation aims to bring about):

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19. In which broad sector(s) does your organisation operate (please check appropriate boxes)?

Education	<input type="checkbox"/>	Health	<input type="checkbox"/>
Social development	<input type="checkbox"/>	Job creation	<input type="checkbox"/>
Arts, culture and heritage	<input type="checkbox"/>	Environment	<input type="checkbox"/>

20. In which province(s) does your organisation operate (please check appropriate boxes)?

Eastern Cape	<input type="checkbox"/>	North West Province	<input type="checkbox"/>
Free State	<input type="checkbox"/>	Northern Province	<input type="checkbox"/>
Gauteng	<input type="checkbox"/>	Western Cape	<input type="checkbox"/>
KwaZulu-Natal	<input type="checkbox"/>		
Limpopo	<input type="checkbox"/>		
Mpumalanga	<input type="checkbox"/>		



21. Please describe the beneficiaries of your organisation's work and provide the numbers in each category. If you work with more than one group of beneficiaries (eg, children and educators, nurses and patients, schools and government departments etc) then fill out a table for each group.

Description \_\_\_\_\_  
Time Period \_\_\_\_\_

Total	Female	Male	Black	White	Coloured	Asian	Disabled

Description \_\_\_\_\_  
Time Period \_\_\_\_\_

Total	Female	Male	Black	White	Coloured	Asian	Disabled

22. How are the beneficiaries of your work involved in the planning and implementation of your work?

23. Please list the strengths and weaknesses of your organisation:

**Strengths**

**Weaknesses**

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24. Please fill in the below for each programme or project that the organisation runs (if you have many programmes or projects, please select the three largest or attach a sheet to the application with details of the others):

Programme name \_\_\_\_\_  
Programme objective \_\_\_\_\_

Annual cost \_\_\_\_\_  
(including overheads) \_\_\_\_\_  
Expected duration of \_\_\_\_\_  
programme \_\_\_\_\_  
Programme \_\_\_\_\_  
description (needs \_\_\_\_\_  
addressed, target \_\_\_\_\_  
group and activities) \_\_\_\_\_

Number of \_\_\_\_\_  
beneficiaries \_\_\_\_\_  
Intended impact \_\_\_\_\_

Evidence of impact \_\_\_\_\_  
(eg, evaluation \_\_\_\_\_  
results; changes in \_\_\_\_\_  
test scores; changes \_\_\_\_\_  
in health; measured \_\_\_\_\_  
changes in \_\_\_\_\_  
behaviour; changes \_\_\_\_\_  
in policy; case study \_\_\_\_\_  
of how an individual, \_\_\_\_\_  
household, \_\_\_\_\_  
community or other \_\_\_\_\_  
stakeholder has \_\_\_\_\_  
changed as a result \_\_\_\_\_  
of the project; waiting \_\_\_\_\_  
lists; testimonials) \_\_\_\_\_



Programme name \_\_\_\_\_  
Programme objective \_\_\_\_\_

Annual cost \_\_\_\_\_  
(including overheads) \_\_\_\_\_  
Expected duration of \_\_\_\_\_  
programme \_\_\_\_\_  
Programme \_\_\_\_\_  
description (needs \_\_\_\_\_  
addressed, target \_\_\_\_\_  
group and activities) \_\_\_\_\_

Number of \_\_\_\_\_  
beneficiaries \_\_\_\_\_  
Intended impact \_\_\_\_\_

Evidence of impact \_\_\_\_\_  
(eg, evaluation \_\_\_\_\_  
results; changes in \_\_\_\_\_  
test scores; changes \_\_\_\_\_  
in health; measured \_\_\_\_\_  
changes in \_\_\_\_\_  
behaviour; changes \_\_\_\_\_  
in policy; case study \_\_\_\_\_  
of how an individual, \_\_\_\_\_  
household, \_\_\_\_\_  
community or other \_\_\_\_\_  
stakeholder has \_\_\_\_\_  
changed as a result \_\_\_\_\_  
of the project; waiting \_\_\_\_\_  
lists; testimonials) \_\_\_\_\_



Programme name \_\_\_\_\_  
Programme objective \_\_\_\_\_

Annual cost \_\_\_\_\_  
(including overheads) \_\_\_\_\_  
Expected duration of \_\_\_\_\_  
programme \_\_\_\_\_

Programme \_\_\_\_\_  
description (needs \_\_\_\_\_  
addressed, target \_\_\_\_\_  
group and activities) \_\_\_\_\_

Number of \_\_\_\_\_  
beneficiaries \_\_\_\_\_  
Intended impact \_\_\_\_\_

Evidence of impact \_\_\_\_\_  
(eg, evaluation \_\_\_\_\_  
results; changes in \_\_\_\_\_  
test scores; changes \_\_\_\_\_  
in health; measured \_\_\_\_\_  
changes in \_\_\_\_\_  
behaviour; changes \_\_\_\_\_  
in policy; case study \_\_\_\_\_  
of how an individual, \_\_\_\_\_  
household, \_\_\_\_\_  
community or other \_\_\_\_\_  
stakeholder has \_\_\_\_\_  
changed as a result \_\_\_\_\_  
of the project; waiting \_\_\_\_\_  
lists; testimonials) \_\_\_\_\_



25. Please provide the names and describe the nature of the relationship (eg, member, partner on specific project, working group, fund etc.), to organisations with which you are affiliated, or with whom you network on a regular basis.

Organisation	Nature of relationship

26. What are the biggest challenges/risks that may limit your organisation's ability to achieve its objectives?





**Section 4 – Funding Request**

27. Please provide a list of *current* donors of more than R20 000 (private sector, public sector, institutions, embassies, etc.) and amounts contributed for the current financial year, as well as donors approached and any amounts anticipated (please indicate whether approved or pending).

	<b>Name of donor</b>	<b>Amount</b>	<b>Approved / Pending</b>
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

28. If you are requesting unrestricted / operating funding, please describe the first three things you would spend it on ie, what are your priority needs (eg, management salaries, office costs, training, a vehicle, stipends etc)?

	<b>Brief description of need</b>	<b>Amount needed</b>
1		



2		
3		

29. If you are requesting funding for a specific project, please complete the table below and attach a copy of the project's budget. *Please also ensure that you have included the project in your response to Question 24.*

Name and description of project	
Total budget for the organisation	
Total project budget	
Project budget shortfall	
Funding amount requested and what it would be used for	



### **Section 5 – Monitoring and Evaluation**

30. Please describe your current monitoring and evaluation systems.

31. Please complete the following table for the organisation/ project for which funding is requested. Please note that you will be required to report on these indicators at the end of each year of funding. If you are requesting funding for a specific project, please complete the table according to the project within its specified time-frame. If the funding request is towards organisational expenses; please complete it for the overall objectives of the organisation. The first table is a description with an example. Please complete the second table (If you need more space, attach an extra sheet to the application).

<b>Objectives</b>	<b>Activities</b>	<b>Resources</b>	<b>Outputs</b>	<b>Outcomes</b>	<b>Data collection</b>	<b>Risks</b>
<p>What are the main objectives of the organisation / project (refer back to Q18 for organisational objectives)?</p> <p>These need to be Specific, Measurable, Achievable, Relevant, Time-bound (SMART)</p>	<p>What actions will be carried out in order to achieve the objectives?</p>	<p>What are the resources that you need in order to accomplish each activity (financial, human – staff and volunteers, facilities etc)?</p>	<p>What are the realistic outputs of each activity?</p> <p>These are the short term results of the activities and are usually expressed numerically eg. 16 educators trained and accredited, 120 houses built, 54 children fed five</p>	<p>What are the realistic outcomes of each activity?</p> <p>Have conditions <i>changed</i> for the beneficiaries? These can be quantitative/ or qualitative in nature eg. change in test scores, improved satisfaction, improved confidence, decline in</p>	<p>What records/ tools/ instruments will you use to measure the outputs and outcomes?</p> <p>Will it be part of your routine data collection?</p>	<p>What setbacks could arise to prevent you from achieving your objectives?</p>



			times a week etc.	malnourishment etc.	
<b>EXAMPLE</b>					
To provide quality palliative care to 200 terminally ill patients in Soweto per month as measured by patient records	Train 10 home-based carers	One chief professional nurse/trainer Training venue and materials	Number of home-based carers completing training with accreditation	Increased patient coverage to 200 Increase in quality of palliative care	Training records & results Patient records Patient and family surveys
	Provide daily home based care to all stage 3 patients	Vehicle for home visits monitoring Equipment for home based carers Care givers stipends	Number of patient visits per day	Quality care provided on daily visits	Difficulty in identifying all stage 3 patients Community accessibility Funding lapses Difficult to record quality of care

Objectives	Activities	Resources	Outputs	Outcomes	Data collection	Risks



Objectives	Activities	Resources	Outputs	Outcomes	Data collection	Risks



## **Section 6 – Attachments**

**All applicants** need to attach the following documents:

	<b>Document</b>	<b>Attached? (check)</b>	<b>Reason (if not attached)</b>
1.	Latest annual report	<input type="checkbox"/>	
2.	Latest set of audited financial statements	<input type="checkbox"/>	
3.	If your organisation has an associated Trust, or any other body, that contributes to the finances of the organisation, please submit the audited financial statements of this body	<input type="checkbox"/>	
4.	Most recent management accounts	<input type="checkbox"/>	
5.	Latest budget showing operating and capital expenditure, as well as income	<input type="checkbox"/>	
6.	Budget of the specific project(s) that you are requesting funding for (if applicable)	<input type="checkbox"/>	
7.	One <i>recent</i> letter of reference for your organisation or project	<input type="checkbox"/>	

If you have not received funding via Tshikululu Social Investments (from Anglo American Chairman's Fund, De Beers Fund or the FirstRand Foundation) before please attach the following additional documents:

8.	A copy of your NPO registration certificate	<input type="checkbox"/>	
9.	A copy of your PBO registration and details of your tax status e.g. Section 18A, 10(1)f or Section 30 organisation	<input type="checkbox"/>	
10.	Any other relevant registrations e.g. with Government Departments	<input type="checkbox"/>	
11.	A signed copy of your constitution	<input type="checkbox"/>	
12.	Banking details typed on organisation letterhead, signed by two senior members of your organisation and stamped by the organisation's bank	<input type="checkbox"/>	
13.	Three recent letters of reference for your organisation or project from community leaders or organisations that are familiar with your work	<input type="checkbox"/>	



And if any of the additional information supports your proposal, please attach it:

14.	Photographs of your work that could be used to better explain or motivate your proposal	<input type="checkbox"/>	
15.	Plans or diagrams that would assist in the evaluation of your appeal. If your appeal is for a building project, you must submit the relevant drawings and plans to support the proposal.	<input type="checkbox"/>	
16.	Quotations for materials, training, equipment etc that you are requesting funding for in this proposal	<input type="checkbox"/>	
17.	Any internal or external evaluations of the impact of the work of the organisation	<input type="checkbox"/>	
18.	There may be special circumstances or information that has not been requested in this document that may be relevant to the proposal and assist in its evaluation. If this is the case, please submit any additional information that may assist in the evaluation of the proposal	<input type="checkbox"/>	

Please print out the completed application form and send it, together with the attachments, to:

**By Hand:**

FirstRand Foundation  
6<sup>th</sup> Floor  
28 Harrison Street  
Marshalltown  
Johannesburg

**By Post:**

FirstRand Foundation  
PO Box 61593  
Marshalltown  
2107

**By email:** [firstrandfoundation@tsi.org.za](mailto:firstrandfoundation@tsi.org.za)

The FirstRand Foundation is administered by Tshikululu Social Investments.