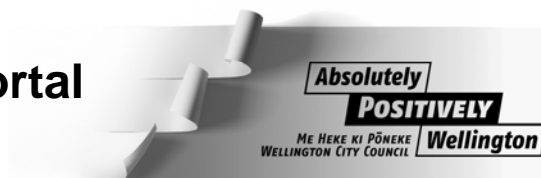


Wellington City Council Funding Portal

Quick Reference Guide for Applicants



Before you Begin

The intended audience for this document is a new user who is registering for the first time or for a returning user who needs assistance with registration, log in and getting started with our funding portal.

The Funding Process

Requesting funding from Wellington City Council can be done in a few easy steps via the Wellington Funding Portal.

1. Register / login to the Wellington Funding Portal
The first time you request funding via the Wellington Funding Portal you will need to register. You will select a username (your email address) and a password. Every time you log in you will use this user name and password.
2. Funding request
You can submit a funding request to Wellington City Council by completing the form for the fund that you want to apply to. You may need to attach some additional documentation as supporting evidence for your funding request.
3. Assessment and Approval
Your funding request will be acknowledged and you will be kept informed of its status within the portal. When a decision has been made, you will receive an email to advise whether or not your request has been successful. If your request is approved this will include details of the amount you have been granted and how the Wellington Funding Team expect you to use the funds.
4. Funding agreement
If your funding request is successful a funding agreement will be created within the portal, you will be informed by email when this is ready for you. You will then need to accept it in the Funding Portal.
5. Payment
Payment will be made into the bank account that you specified in the Funding Request. (Note: for some Funds e.g. Built Heritage Incentive Fund, payment will only be made after the accountability has been accepted – see step 6).
6. Accountability
You will need to return to the portal to submit your accountability outlining how you've used the funds. You will be expected to report back on how you have achieved the intended outcomes of your project using the funds.

Registration

The first time you use the portal you will need to register.

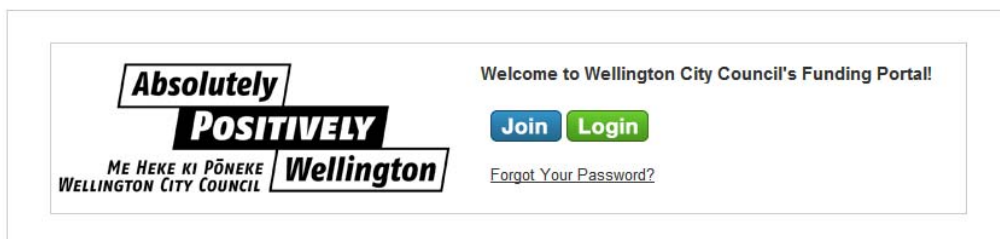
1. Open a browser window
2. Navigate to the following address:

<https://wellingtonfunding.secure.force.com>

(Alternatively click on the link in the Wellington City Council Website)

NOTE: It is generally a good idea to bookmark frequently visited pages and we recommend that you bookmark this page

The following will be displayed:



3. Click the Join button

The Registration Page will be displayed:

Funding Portal Account Registration

Welcome to the Wellington City Council Funding Portal Registration page! To get you started with the process, please fill in the registration form and hit submit when done.

Note: All fields with a red left border are mandatory fields. Please ensure that the appropriate information is provided.

If you have any difficulties with your registration please contact the funding team during office hours - [04 803 8562](tel:048038562). Outside of office hours please contact the Wellington City Council hotline on [04 499 4444](tel:044994444). The Call Centre staff will pass on your message to the Funding Team the next business day.

Personal Details

First Name Last Name

The email address will be the username for the login to the Funding Portal. Please ensure that this is a valid email address and note that you will only be able to register with this email address once.

Email Address (your user name)

Daytime Phone Number Alternate/Mobile Phone

Please provide a password with a minimum of 8 characters.

Password Confirm Password

Address Details

What is your address?

Street Suburb

City Postcode

Organisation Details

Are you registering to request funding on behalf of an organisation or group?

Please check all the information you have entered above before finally pressing the Submit button and register as an individual.

4. Enter your personal details

NOTE: The email address you enter will become your username for the Wellington Funding Portal.

NOTE: Make sure you populate all the required fields. Required fields have a red indicator | next to the field.

5. Enter your address details

NOTE: If applying on behalf of an organisation or non-legal entity, enter the street address here – you will be asked to provide postal address details later

If you are applying for funding as an individual

Click the **submit** button and you will be registered to use the Wellington Funding Portal. The Home Page will be displayed.

If you are applying for funding on behalf of an organisation with legal status (e.g. Charity, Incorporated Society, Body Corporate etc) or on behalf of a group / non-legal entity

- a) Tick the checkbox in the Organisation Details section

The following will be displayed:

Organisation Details

Are you registering to request funding on behalf of an organisation or group?

What is your organisation or group's name?

What is your organisation's legal status?

Press the button at the right to validate if your organisation is already existing.

- b) Enter your organisation or group's name and select your legal status from the drop down

NOTE: Depending on your selection you will be asked to provide further details as follows:

Legal Status	Details required
Charity	You must enter your Charity Registration Number in the box provided – enter a Charities Commission registration number or a NZ Companies Office registration number.

Legal Status	Details required
Incorporated Society	You must enter your Incorporated Society Registration Number in the box provided – enter a Charities Commission registration number or a NZ Companies Office registration number.
Limited Company	You must enter your organisation’s Company Number in the box provided.
Body Corporate	You must enter your organisation’s Body Corporate Number in the box provided.
Residents and Progressive Association	Make sure you tick the checkbox later in the form to confirm you are able to meet the Council’s requirements for a Residents and Progressive Association. Note: City Communities keep a current list of active residents and progressive associations in the City, contact funding@wcc.govt.nz

c) Click the **Search Existing Organisations** button

NOTE: The system will check to determine if your organisation has already been set up on the Wellington Funding Portal.

NOTE: The organisation must be entered exactly as it was registered under otherwise it will not be displayed. If you suspect that the organisation has been registered please contact a member of the Funding Team on 04 499 4444.

If a user has already registered from your organisation to use the Wellington Funding portal

The following will be displayed:

Your organisation was found in our database. Please submit to register yourself against this organisation.

Submit

Click the **submit** button and you will be registered to use the Wellington Funding Portal. The Home Page will be displayed.

If a user has NOT already registered from your organisation, or if we have insufficient details to validate your organisation

The following will be displayed:

Your organisation was not found in our database. Please enter the details below to create a new organisation.

What is your organisation's postal address, if different from above.

Postal Street Postal Suburb
Postal City Postcode

Are you GST registered?

If yes, please provide your GST number.

City Communities keep a current list of active residents and progressive associations in the City, contact funding@wcc.govt.nz

What is the key purpose of your organisation?

What community groups do you work with?

How are your services normally funded?

Are your services accessible?

d) Complete the remaining fields in the Organisation Details section

e) Complete the Primary Contact Details section

Primary Contact Details

The primary contact should be someone representing the governance body of your organisation - for example the Chair of the board, a trustee or committee member.

If no, please specify your organisation's primary contact.

Are you the primary contact?

Please check all the information you have entered above before finally pressing the Submit button and register in behalf of your organisation.

- f) Click the **Submit** button you will be registered to use the Wellington Funding Portal. The Home Page will be displayed.

Logging in

Once you have setup your password and logged in initially, all future logins will follow a different login process.

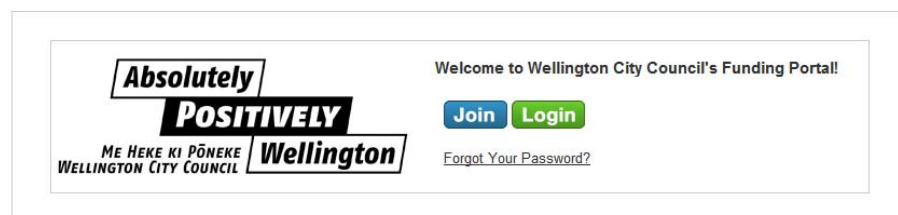
1. Open a browser window

Navigate to the following address:

<https://wellingtonfunding.secure.force.com>

NOTE: It is generally a good idea to bookmark frequently visited pages

2. You will be presented with a login page



3. Click the **Login** button
4. Enter your username and password and click **Login**

NOTE: If you do not remember your password you can click on “Forgot your password?” to reset your password. If you do not know your username then you can refer to the e-mail which was sent by support@salesforce.com when your account was created or you can contact the system administrator or Funding Advisor on 04 499 4444.

Navigation – Home Page

The following screen capture is of the Home page. The home page is the default page that is displayed when you log in to the Wellington Funding Portal and provides an overview of the Funding Pools that are open.

Wellington funding Wellington City Council

Home Funding Requests Funding Agreements Accountabilities Financial Documents

Welcome, Nicole Getuk [My Profile](#) | [Logout](#)

Messages and Alerts

Please note your session will time out after 4 hours. Please make sure you save a draft of any forms before this happens as we are unable to retrieve unsaved forms. If you receive an error at the top of the page your request has not been saved.

The recommendations to the Grants Sub-Committee are now available to view for the July 2013 Arts & Culture Fund, Our Living City Fund and the Social & Recreation Fund. [Click here](#)

Funding Help and Information

- [General Funding Information](#)
- [Funding Agreement Terms and Conditions](#)
- [Getting Started Guide](#)
- [FAQs](#)

Our Funding

- [Arts and Culture Fund guide](#)
- [BIDS Development Fund Guide](#)
- [Our Living City guide](#)
- [Social and Recreation guide](#)
- [Betty Campbell Accommodation Assistance Fund](#)
- [Built Heritage Incentive Fund](#)
- [CH Izard Bequest](#)
- [Community Venue Assistance Fund](#)
- [Creative Communities Local Funding Scheme](#)
- [Joe Aspell](#)
- [Safe And Sustainable Transport](#)
- [Tawa Community Grants](#)
- [Three year contract guide](#)
- [Wellington Venue Subsidy](#)

Welcome to The Wellington City Council's Funding Portal!

This is our online, self-service portal which provides a way for you to register your contact information, save and submit funding requests, attach documents, view the status of applications and submit accountability reports to tell us what happened. We have included funding help and information on the sidebar to your left, including specific criteria for each of the funds.

Please see the funding pools available for request below:

Funding Pool	Application End Date	Funding Pool Description	Create Request
Arts And Culture Fund	31/10/2013	This fund supports arts and cultural projects.	Create Request
Business Improvement District Development Fund	31/10/2013	This fund will operate initially for two years (July 2013 to June 2015).	Create Request
C H Izard Bequest	28/02/2014	C H Izard Bequest 2014	Create Request
Creative Communities Local Funding Scheme	28/02/2014	This is a partnership between Wellington City Council and Creative New Zealand. The fund supports local arts activities.	Create Request
Our Living City Fund	31/10/2013	This fund aims to improve Wellington's quality of life by strengthening urban-nature connections and building economic opportunities from a healthy environment.	Create Request
Social And Recreation Fund	31/10/2013	This fund aims to foster strong, sustainable communities and support building capacity in the community.	Create Request
Tawa Community Funding	28/02/2014	This is for projects and programmes in Tawa.	Create Request
Wellington Venue Subsidy	30/06/2014	2013-2014: To increase the accessibility of Positively Wellington Venues Limited facilities for Wellington-based community groups.	Create Request
Wellington Venue Subsidy	30/06/2015	2014-2015: To increase the accessibility of Positively Wellington Venues Limited facilities for Wellington-based community groups.	Create Request

#	Description	Notes
1.	Welcome panel – enables a user to manage their profile by clicking on the My Profile link or log out of the portal by clicking Logout	
2.	Side Bar – area of the screen that is displayed on all portal pages. Houses the Welcome, Funding Help and Information and Our Funding components where specific information about the specific funds can be found.	
3.	Messages and Alerts – reminds users that their session will automatically log out after 4 hours plus up-to-the-minute important information.	

#	Description	Notes
4.	Funding Help and Information - Contains links to information and help about Wellington Funding.	Clicking on a link opens the information in a separate browser window
5.	Our Funding – contains links to detailed information about each funding pool that is available for requests.	Clicking on a link opens the information in a separate browser window
6.	Past Allocations – view previous successful applicants.	
7.	<p>7. Tabs – The tabs are a key navigational concept as they allow the user to navigate to the different areas within the portal. The following tabs are available:</p> <p>Funding Requests – contains funding requests that have been created by you, or another user in your organisation, in the Wellington Funding Portal. This tab enables you to view edit and attach documents to saved Funding Requests, and submit Funding Requests to the Wellington Funding Team for assessment and approval.</p> <p>Financial Documentation – this tab enables you to upload financial accounts for review by the Wellington Funding Team. This is a necessary step for all organisations that are GST registered.</p> <p>Funding Agreements – contains Funding Agreements that have been created by the Wellington Funding Team on approval of Funding Requests submitted by you or another user in your organisation. This tab enables you to view and accept Funding Agreements.</p> <p>Accountabilities – contains Accountability Forms that have been created by the Wellington Funding Team on approval of Funding Requests submitted by you or another user in your organisation. This tab enables you to view, edit and attach documents to saved Accountability Forms, and submit Accountability Forms to the Wellington Funding Team for acceptance.</p>	<ol style="list-style-type: none"> 1. Clicking on a tab navigates away from the Home screen 2. Clicking on the Home tab navigates back to the Home screen

#	Description	Notes
8.	Available Funding – contains details of Funding Pools that are available for Funding Requests. Click on a Create Request link to create a Funding Request.	If you have registered as an individual you will not see the funds only available to groups or organisations.

My Profile

To view your profile:

1. Click on the **My Profile** link in the Welcome panel

The My Profile page will be displayed:

The screenshot shows the 'My Profile' page with two main sections: 'User Information' and 'Contact Information'. At the top right, there are buttons for 'Edit' and 'Change My Password'.

User Information	
Username	nicole.geluk@gmail.com
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)
Locale	English (New Zealand)
Language	English
Nickname	Nicole.Geluk1735549571

Contact Information	
Name	Nicole Geluk
E-mail	nicole.geluk@gmail.com
Title	
Phone	0274695952
Address	710/72 Taranaki Street Wellington, Te Aro 6011 New Zealand
Extension	
Fax	
Mobile	0274695952

To edit your profile:

1. Click on the **Edit** button
2. Edit the data

NOTE: Make sure you populate all the required fields. Required fields have a red indicator | next to the field.

3. Click **Save**

To change your password:

1. Click on the **Change Password** button

The screenshot shows the 'Change My Password' page. It has a 'Password Information' section with a legend: a red vertical bar indicates 'Required Information'. The 'User Name' field is pre-filled with 'nicole.geluk@gmail.com'. The 'New Password' field is empty and has a red bar on its left side. Below it, there is a text instruction: 'Use at least 8 characters and include a combination of letters and numbers.' The 'Verify New Password' field is also empty and has a red bar on its left side. A 'Save' button is located at the bottom right.

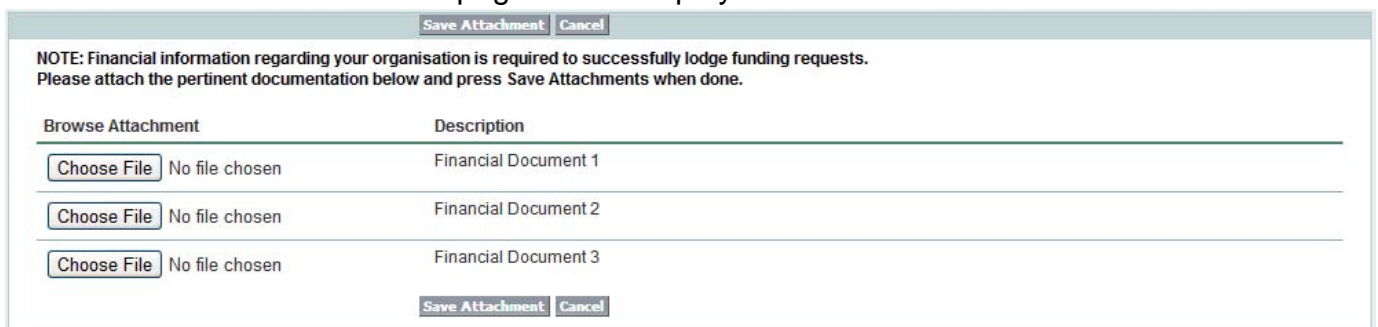
2. Enter your old and new passwords in the boxes provided
3. Click **Change Password**

Financial Documents

If you are applying for funding on behalf of an organisation that is GST registered you need to provide a set of financial accounts. To do this:

1. Click on the **Financial Documents** tab

The Financial Documents page will be displayed:



The screenshot shows a web interface for uploading financial documents. At the top, there are buttons for 'Save Attachment' and 'Cancel'. Below this is a note: 'NOTE: Financial information regarding your organisation is required to successfully lodge funding requests. Please attach the pertinent documentation below and press Save Attachments when done.' The main area contains a table with two columns: 'Browse Attachment' and 'Description'. There are three rows, each with a 'Choose File' button, the text 'No file chosen', and a description 'Financial Document 1', 'Financial Document 2', and 'Financial Document 3' respectively. At the bottom of the table, there are buttons for 'Save Attachment' and 'Cancel'.

Browse Attachment	Description
<input type="button" value="Choose File"/> No file chosen	Financial Document 1
<input type="button" value="Choose File"/> No file chosen	Financial Document 2
<input type="button" value="Choose File"/> No file chosen	Financial Document 3

2. Click the **Browse** button and select the file that you would like to attach
3. Click the **Save Attachment** button

The following will be displayed:

Financial documents have been successfully attached!
Please note that the attachments will be reviewed by the Funding team and you will be contacted for any questions.

NOTE: Your documents will now be available to the Funding Team to review, you will not be able to view the documents once uploaded.

NOTE: For organisations that request funding regularly from Wellington City Council - you will need to attach financial accounts for each financial year.

Funding Requests

To create and save a funding request:

Funding requests are created from the Home page. You can save a Funding Request for completion at a later date.

1. Click on the **Home** tab

The Home page will be displayed:

Welcome to The Wellington City Council's Funding Portal!

This is our online, self-service portal which provides a way for you to register your contact information, save and submit funding requests, attach documents, view the status of applications and submit accountability reports to tell us what happened. We have included funding help and information on the sidebar to your left, including specific criteria for each of the funds.

Please see the funding pools available for request below:

Funding Pool	Application End Date	Funding Pool Description	Create Request
Arts And Culture Fund	31/10/2013	This fund supports arts and cultural projects.	Create Request
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Social And Recreation Fund	31/10/2013	This fund aims to foster strong, sustainable communities and support building capacity in the community.	Create Request
Tawa Community Funding	28/02/2014	This is for projects and programmes in Tawa.	Create Request
Wellington Venue Subsidy	30/06/2014	2013-2014: To increase the accessibility of Positively Wellington Venues Limited facilities for Wellington-based community groups.	Create Request
Wellington Venue Subsidy	30/06/2015	2014-2015: To increase the accessibility of Positively Wellington Venues Limited facilities for Wellington-based community groups.	Create Request

2. Click on the **Create Request** Link for the funding pool that you would like to apply to

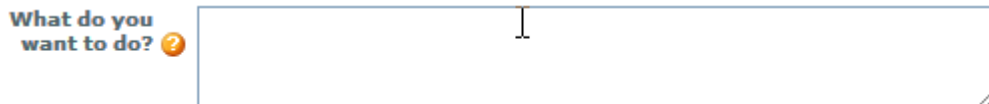
NOTE: Details for each funding pool can be found in the **Our Funding** panel in the side bar

3. A funding request form will be presented

4. Complete the form

NOTE: Make sure you populate all the required fields. Required fields have a red indicator | next to the field.

NOTE: Roll the mouse over the question mark next to a field to learn more about the information to be provided.



5. Read the declaration statement on the **Declaration** Section of the form and tick the box to confirm.

6. Read the information in the **Attachments** Section of the form. It explains how to attach documents to the form and what documents have to be attached.

7. Click the **Save** button

8. Attach documents to the funding request as follows:

- a. Scroll to Notes & Attachments section
- b. Click **Attach File** button
- c. Follow the instructions to select and attach the file
- d. Click the **Done** button

To submit a funding request:

When you are satisfied that the form is complete and all necessary documentation has been attached you need to submit the funding request to WCC for assessment and approval.

When viewing a saved Funding Request:

1. Click the **Submit** button

The following will be displayed:

DECLARATION	<small>Declaration</small> I am authorised to act on behalf of the organisation named above. The information supplied here and in the attached application is correct, and I consent to the information contained in our application being made available to the public. This consent is given in accordance with the Privacy Act 1993.
<small>Please Tick</small>	<input checked="" type="checkbox"/>

2. Tick the Ready for Submission? Checkbox
3. Click the **Save** button

NOTE: An email will be sent to the address you provided at registration to confirm submission of the funding request

What happens next?

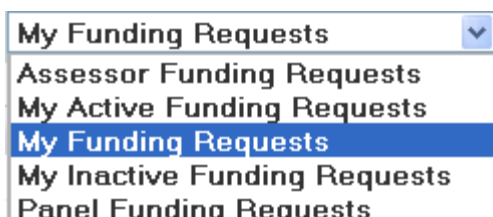
After you have submitted a funding request the following will occur:

1. You will receive an email confirming that your Funding Request has been submitted. If you are applying on behalf of an organisation the Primary Contact for that organisation will also be notified.
2. Your Funding Request will be reviewed and the WCC Funding Team will contact you if your request is incomplete or ineligible.
3. If your request is successful you will receive an email advising you of this and you will be asked to accept a funding agreement in the Funding Portal.
4. You will be required to submit an Accountabilities Form. You will receive an email to advise you of this.

To view saved Funding Requests:

The funding requests tab contains details of all funding requests that have created by you, or by other users in your organisation, in the Funding Portal.

1. Click on the **Funding Requests** tab
2. Select a view



A screenshot of a dropdown menu with the following options: My Funding Requests (selected), Assessor Funding Requests, My Active Funding Requests, My Inactive Funding Requests, and Panel Funding Requests.

Applicable views are as follows:

View	Description
My Funding Requests	This view shows <u>all</u> funding requests that have been created by you, or by other users in your organisation.
My Inactive Funding Requests	This view shows funding requests that have been created by you, or by other users in your organisation that have an <u>inactive</u> status (this includes Withdrawn, Ineligible, Declined and Complete funding requests).

NOTE: Please ignore the Assessor and Panel Funding Request views – these are for internal use only and do not contain any information.

A list of funding requests will be displayed:

Funding Request Number	Project/Event Title	Funding Pool	Amount Requested	Granted Total Amount	Request Status	Sender Name
201211-000977	Wellington Region High School B...	Wellington Venue Subsidy	\$5,215.00	\$3,150.00	Monitoring	Melanie Fowke
201211-000979	Wellington Region High School B...	General Grants	\$1,500.00	\$1,500.00	Monitoring	Melanie Fowke
201309-002074	asdf	Social And Recreation Fund		\$0.00	In Assessment	Nicole Geluk

To view an individual Funding Request:

1. Select the Funding Request you would like to view by clicking on the Funding Request Number (e.g. 201207-000150)

The Funding Request will be displayed:

Funding Request Detail

Project Detail

Project/Event Title	asdf	Request Status	In Assessment
Project Start Date	18/09/2013	Project End Date	18/09/2013

What do you want to do? asdf

Where will it take place? Aro Valley - Highbury

Who will be involved? asdf

Meeting the needs of Maori asdf

Target Population

% from Wellington rate paying area

Focus Areas

Focus Area Selection Please select at least one focus area from the options provided.

Focus Areas

How is the project accessible?

Physical access

Financial access

Target Age Group

Other Specific Group

NOTE: Saved Funding Requests that have not yet been submitted can be edited by clicking the **Edit** button.

Funding Agreements

A Funding Agreement will be created when a funding request is successful. You will be notified via email that a Funding Agreement is ready for acceptance in the Funding Portal. To confirm acceptance of a Funding Agreement complete the following steps:

1. Click on the **Funding Agreements** tab

Funding Agreement Number	Organisation Name	Project Title	Funding Request	I Accept
FA-000189	Wellington Young Singers In Harmony Committee	Wellington Region High School Barbershop Contest	201211-000977	✓
FA-000211	Wellington Young Singers In Harmony Committee	Wellington Region High School Barbershop Co...	201211-000979	✓

2. Select the Funding Agreement you would like to view by clicking on the Funding Agreement Number (e.g. FA000085)
3. Tick the **I accept** checkbox beneath the declaration
4. Review the funding agreement
5. Click on the **Edit** button
6. Click the **Save** button.

Funding Agreement
FA-000211
[Printable View](#)

< Back to List: Funding Agreements

Funding Agreement Detail
Edit

Funding Agreement Number	FA-000211	Granted Amount	\$1,500.00
Funding Request	201211-000979	GST Amount	\$0.00
Project Title	Wellington Region High School Barbershop Contest	Total Amount (Incl GST)	\$1,500.00
Bank Account	38-9001-0518734-000		
Organisation Name	Wellington Young Singers In Harmony Committee		

Outcomes

Outcome 1	Produce a smooth, enjoyable contest for competitors
Outcome 2	Grow audience
Outcome 3	Run a profit to build towards self-sustainability
Outcome 4	
Outcome 5	

Conditions

Conditions

Funding Terms and Conditions

Funding Terms and Conditions Please refer to the Funding Agreement Terms And Conditions document in the Funding Help and Information sidebar for full details.

DECLARATION

Declaration of Agreement Please refer to the Funding Agreement Terms And Conditions document in the Funding Help and Information I hereby agree to the information supplied in this funding agreement as true and correct. In the event that this funding agreement is

I Accept

Edit

Notes & Attachments
New Note Attach File

No records to display

NOTE: Once you have accepted the funding agreement payment can be made (providing you have supplied an appropriate tax invoice if required). You will not be able to retract your acceptance of the Funding Agreement via the Customer Portal.

Accountabilities

Accountabilities forms will be created in draft form and you will need to complete the Accountability form and submit it prior to the due date. You will receive an email 5 days prior to the accountability due date to remind you to submit the form.

To view an Accountabilities form:

1. Click on the **Accountabilities** tab

My Accountability Forms				
Ac...	Accountability Number	Funding Request	Project Title	Status
	AN# 00000480	201309-002074	asdf	Draft
				Granted Amount
				\$0.00

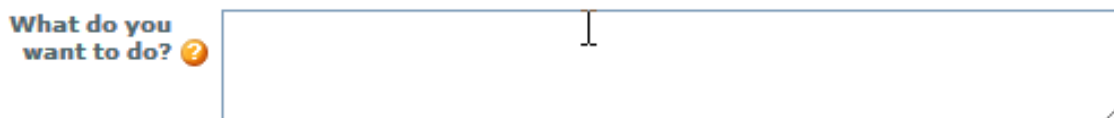
2. Select the Accountabilities Form you would like to view by clicking on the Accountability Number (e.g. AN#00000084)

To complete an Accountabilities form:

1. Click on the **Edit** button
2. Complete the Accountability form

NOTE: Make sure you populate all the required fields. Required fields have a red indicator | next to the field.

NOTE: Roll the mouse over the question mark next to a field to learn more about the information to be provided.



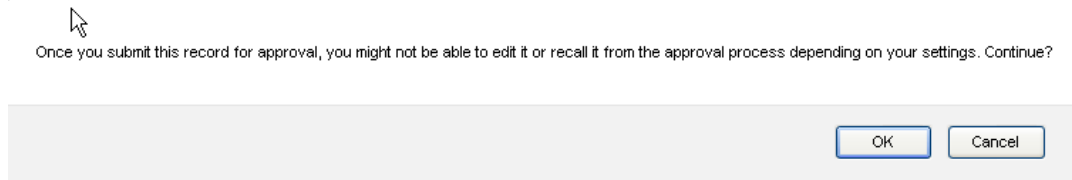
3. Read the declaration statement on the **Declaration** Section of the form and tick the box to confirm.
4. Click the **Save** button

To submit an Accountabilities form:

When viewing a saved Accountabilities Form:

1. Click the **Submit for Approval** button

The following will be displayed:



2. Click **OK**

NOTE: You will be notified if for any reason further information is required.