

Applicants please note

Before completing this application please ensure you have read and understood -

- Our [Strategic Aspiration](#) which includes our funding priorities.
- Our [Before You Apply](#) information.
- Information about our [General Grants](#).

Please note: If you are an unincorporated organisation you can apply for up to \$2,000, otherwise you will need to work with a [Funding Partner](#).

We are here to help if you have any queries about applying or completing the application form. Please call us on 0800 500 185 or email info@communitytrustsouth.nz

Organisation details

* indicates a required field

Legal name of organisation *	<input type="text"/>
Name your organisation Is also known as	<input type="text"/>
	If different from your legal name e.g. your trading name
Organisation email	<input type="text"/>

Contact for this application

Name *	First Name	Last Name
	<input type="text"/>	<input type="text"/>
Position *	<input type="text"/>	
Primary phone number *	<input type="text"/>	
Other phone number *	<input type="text"/>	
Email *	<input type="text"/>	

- Are you a Kaupapa Māori organisation/service that is recognised as such by Iwi, a Government Agency or Act?
- Kaupapa Māori services are those services that have been specifically developed 'by Māori for Māori' and are delivered by providers who identify as Māori.

- ☐ Yes
☐ No

Organisation overview

Briefly describe your organisation's purpose and tell us about the types of services, programmes or activities you provide? *

If you are affiliated to a local, regional or national organisation please provide the name of that organisation

Climate Change

We recognise that climate change is one of the most urgent issues of our time and that the implications of climate change are significant, representing risk to cultural values, the environment, society, and our economy, and therefore to the Trust's ability to achieve its strategic vision of a Thriving South. Our aspiration is to achieve net zero carbon emissions by 2050 or sooner across our operations, governance, investments and granting.

We are interested in understanding how your organisation is responding to climate change and/or any measures you are taking to help reduce your carbon emissions.

Child Protection

Does your project or organisation involve working with children and young people under the age of 18 years? *

- ☐ Yes ☐ No

Does your organisation have documented child protection policies in place?

- ☐ Yes ☐ No

We would require you to have Child Protection Policies in place, prior to consideration of this application.

Please [click here](#) for details of resources and training opportunities.

Application overview

* indicates a required field

Provide a short title for your project

How you know there is a need for this event? *

Word count:

Must be no more than 150 words.

Please describe what you want the Guarantee Against Loss for *

Word count:

Must be no more than 150 words.

It pays to assume we know nothing about your event so please describe it clearly, detailing what exactly you want the guarantee against loss for. The amount of information you should provide depends on the project i.e. a larger or more complex project will require more detail.

Our Pou

Which pou (pillar/s) does your project align with?

- ☐ Strong Foundations - Enabling the conditions for our communities to thrive
- ☐ People & Places - Supporting people and places which enhance communities so that people can lead fulfilling lives
- ☐ Sustainability & Climate - Supporting communities to connect to their environment so that it can thrive for future generations

Strong Foundations - Enabling the conditions for our communities to thrive

Which priority(s) does your project most closely align with?

- ☐ Housing - working to address the lack of supply and increasing access to quality, warm, dry and affordable homes that meet people's needs at different life stages.
- ☐ Economic & Workforce Development - contributing to regional strategic priorities to diversify the economy, grow innovation and create opportunities for everyone to thrive economically, in a carbon zero future. Contributing to efforts to develop, attract and retain a skilled workforce in the South. A particular focus will be on priority populations and supporting future pathways for rangitahi (youth) into new future focused industries and quality jobs with real progression opportunities.
- ☐ Learning & Insights - supporting communities to participate in life long learning, with a focus on priority populations. Facilitating access to data and insights, supporting knowledge

sharing and collaborative community action. Supporting organisations, institutions and communities to have cultural confidence, knowledge and acceptance.

☐ Transport - Supporting communities to access a range of low-cost reliable transport options to increase their ability to take advantage of life's opportunities, access necessary services and participate in social activities and community networks.

☐ Mana Motuhake (Self Determination) - Supporting mana motuhake and tino rangitiratanga (self-determination) through solutions that are led by and for communities.

People & Places - Supporting people and places which enhance communities so that people can lead fulfilling lives

Which priority(s) does your project most closely align with?

☐ Healthy & Happy - encouraging healthy active lifestyles leads to improved wellbeing and positive community outcomes.

☐ Basic Needs are Met - targeted support will be given to priority populations and places that require additional support to meet basic needs in order to provide an essential foundation in people's lives for them to thrive.

☐ Vibrant Spaces and Places - activating spaces and places that bring joy and connection for all people and ages including supporting building community through access to art, heritage, cultural, sport and active recreation programmes and events.

☐ Community Connectedness - supporting social cohesion by building networks and promoting inclusivity. Helping to build volunteer capacity and support communities to be self determining and empowered to co-design solutions.

☐ Whakapapa (Genealogy and Cultural Identity) - supporting Māori to thrive through strong connections to their cultural ancestry and tangata whenua (local people born of the land). Māori are visible and their identity is woven into the fabric of communities and place.

Sustainability & Climate - Supporting communities to connect to their environment so that it can thrive for future generations

Which priority(s) does your project most closely align with?

☐ Carbon Zero Future - working with communities to support awareness and effective responses to climate change and ensuring that everyone has access to the opportunities in a carbon zero future.

☐ Restoration & Protection - supporting community led approaches which contribute to the protection and restoration of our natural environment.

☐ Food Sovereignty - enabling communities to develop low cost alternative food sources to provide security to whānau and delivering lower environmental impacts.

What is the difference you expect to make as a result of holding this event?

Please describe an outcome (i.e. changes or differences) you want your work or project/activity to achieve for participants and/or others.

If you need help with setting and writing your outcomes [click here](#) for a useful resource. We also have [other links on our website](#) to evaluation resources and tools that may be useful.

Outcome 1 *

How will you know you are achieving the above outcomes?

What data/information will you collect that shows your progress, e.g. number of registrations, head count, satisfaction survey of participants, feedback from participants/members

Timeline of project

Please note that we do not fund projects or programmes retrospectively i.e. projects that have commenced or have been completed before your application is submitted.

Project start date:

Project end date:

Financial details and budget

* indicates a required field

About your budget

Applicants are asked to take particular care in determining their costs to ensure your event is viable, i.e. that your projected ticket sales and any other income meets the costs of running the event.

Community Trust South is a partial funder and Guarantees Against Loss will generally be between 15 - 30% of total budgeted ticket sales.

Guarantees Against Loss are only available to cover any loss of income arising from not meeting budgeted ticket sales and cannot be used to offset any cost overruns over and above the budgeted costs submitted with an application.

- If your organisation is registered for GST, please ensure that your budget is GST exclusive;
- If your organisation is not registered for GST, please ensure that your budget is GST inclusive

Is your organisation registered for GST?

- ☐ Yes
☐ No

If you prefer you may upload a more detailed budget here and enter total income and expenses only below.

Attach a file:

Event Income

Write down all the income you anticipate you will generate for the event including all funding sources e.g. ticket sales, sponsorship, grants etc.

Do not include the Guarantee Against Loss you are applying for from Community Trust South (your budget should balance without it).

Income/funding	\$
	\$
	\$
	\$
	\$

Event expenses/costs

Please write down all the expense items/costs associated with your event.

Expense/cost details	\$
	Must be a dollar amount.
	\$
	\$
	\$
	\$

Budget Totals

The income and expenditure totals should balance.

Total event income
\$
This number/amount is calculated.

Total event expenditure
\$
This number/amount is calculated.

Income - expenditure
\$
This number/amount is calculated.

Amount of Guarantee Against Loss (GAL) you are requesting: *

\$

Details of projected ticket sales

Please provide a breakdown of projected \$ ticket sales

	\$
	\$
	\$
	\$

Total projected ticket sales\$

This number/amount is calculated.

Benefits

* indicates a required field

Please be specific about the information you provide on this page as it helps us to understand your project better.

Approximately how many people in the Trust's region will directly benefit from your project? ***Additional comments on numbers benefiting****How do you ensure your service/project is inclusive?**

e.g. being inclusive entails understanding that there may be barriers to some people, identifying those and addressing those barriers, e.g. people of all ages, cultural backgrounds, LGBTQIA+ communities and/or people with a disability

Please be specific as to what age group will mainly benefit? *

- ☐ Early years (prenatal-4yrs)
- ☐ Children (5-13yrs)
- ☐ Youth (14-24yrs)
- ☐ Adults (25-64yrs)
- ☐ Older persons (65+)
- ☐ All

Please be specific as to what is the main ethnic group/s in our region that will benefit most? *

- ☐ NZ European
- ☐ Maori
- ☐ Pacific peoples
- ☐ Asian
- ☐ Middle Eastern/Latin American/African
- ☐ All
- ☐ Other:

Please be specific as to what part of our area will benefit most? *

- | | |
|--|---|
| <input type="checkbox"/> Bluff | <input type="checkbox"/> Stewart Island |
| <input type="checkbox"/> Central Southland | <input type="checkbox"/> Wakatipu |
| <input type="checkbox"/> Eastern Southland | <input type="checkbox"/> West Otago |

- ☐ Fiordland
- ☐ Invercargill
- ☐ Northern Southland
- ☐ Southern Southland
- ☐ Western Southland
- ☐ All of Community Trust South Area
- ☐ All of Southland
- ☐ Other:

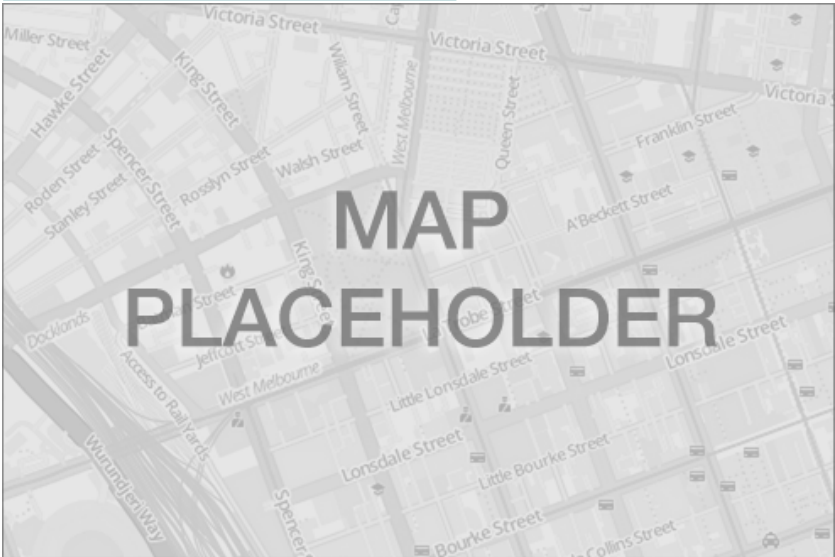
Please refer to our detailed [map](#) for a breakdown of these areas.

Is your project taking place in more than one location?
☐ Yes ☐ No

Project locations

**Please enter the address
of where the project is
taking place**

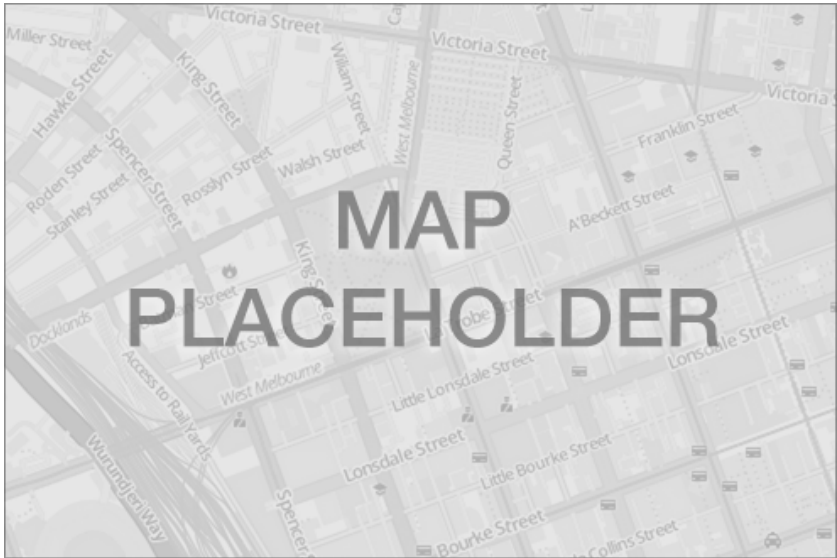
Address



Location of project

**Please enter the address
of where the project is
taking place**

Address



About your organisation

* indicates a required field

Your organisation's legal structure

What is your organisation's legal structure? *

- ☐ Incorporated Society
- ☐ Incorporated Charitable Trust
- ☐ Company with charitable purposes
- ☐ Local Authority
- ☐ Educational Institution

Please provide your NZ Business Number (NZBN)

The NZBN provided will be used to look up the following information. Click Lookup above to check that you have entered the NZBN correctly.

New Zealand Companies Register Information
NZBN
Entity Name
Registration Date
Entity Status
Entity Type
Registered Address
Office Address

Must be formatted correctly.

You can check your NZ Business Number (NZBN) and status at the Companies Office either [Charitable Trusts or Incorporated Societies](#)

Current officers of your organisation

Chair/President

First Name

Last Name

Secretary

First Name

Last Name

Treasurer

First Name

Last Name

Please upload a copy of your most recent AGM minutes. *

Attach a file:

If no AGM held please attach your latest Committee/Meeting minutes relating to this project

People involved in your organisation

This helps us to understand the size of your organisation, its operations and the number of people directly involved.

Paid full-time staff (in the Trust's region)

Must be a number

Paid part-time staff (In the Trust's region)

Must be a number

Volunteers (in the Trust's region)

Must be a number

Approximately how many volunteer hours are contributed to your organisation per year

- ☐ Less than 100 hours per year
- ☐ Between 100 and 500 hours per year
- ☐ Between 500 and 1000 hours per year
- ☐ Between 1000 and 2000 hours per year
- ☐ More than 2000 hours per year

How many members belong to your organisation (in the Trust's region), if appropriate

(e.g. number of club members, pupils/children on a roll, current clients etc)

Organisation financial details

For details on Community Trust South's financial statement and audit requirements [click here](#).

Please upload organisation's latest annual financial statements *

Attach a file:

Level of reserves

While we understand holding some cash reserves is an appropriate and important business practice we do however look very closely at the level of reserves held by an organisation and the type and level of funding requested.

What are your cash reserves as at the time of this application?

\$

All cash held, i.e. bank accounts and term deposits

Please comment on your reserves and if they cannot be used for this project please explain why

e.g. a grant/donation given for a specific purpose or other tagged funds etc

Organisation bank account details

Organisation's bank account number *

Your bank account number needs to include: BANK (2 digits) BRANCH NUMBER (4 digits) ACCOUNT NUMBER (7 digits) SUFFIX (2 or 3 digits). Also please don't use any hyphens or spaces when entering your account number.

Organisation's bank account name *

The account name that appears on your bank account

Please upload verification of organisation's bank account details *

Attach a file:

i.e. a bank coded deposit slip or bank verified account details

Supporting Documents and Feedback

*** indicates a required field**

Attach any other information, e.g. covering letter, [letters of support](#), general comments or other documents.

Attach a file:

Any additional comments (if appropriate)

Communication

How did you find out about Community Trust South? *

We are always looking to improve our grantmaking processes and your feedback is essential to helping us achieve this.

Please rate the following statements:

The time required to prepare and complete the application was reasonable

The application process is very straightforward

Please let us know any suggestions about any improvements we could make to our application process.

e.g. layout of application form, length of form, did you understand the questions and what was required, was able to access assistance

Privacy Statement and Declaration

*** indicates a required field**

Privacy Statement

Community Trust South's [Privacy Policy](#) governs our collection, storage, use and disclosure of personal information. Any personal information you provide us in connection with this application, including any information you are subsequently required to provide such as in our Accountability and Payment Forms, is subject to the Privacy Policy and you agree that we may use and disclose that information in accordance with the Policy, or as otherwise stated in this Privacy Statement and Declaration.

Where you are making this application on behalf of an organisation, information you provide for the purposes of this application that is not personal information is not subject to our Privacy Policy and we may use and disclose that information as permitted by law and as further set out in this Privacy Statement and Declaration.

Information provided by you in connection with this application (including personal information) will be used and held by the Trust, and we may share this information with other relevant third parties, for the purposes of administering and assessing your application.

Please indicate if you agree to Community Trust South using your personal information for the following purposes:

Sending you Community Trust South newsletter or email updates relevant to you or your organisation *

☐ Yes ☐ No

Sending you information on behalf of other organisations which in the opinion of Community Trust South is relevant to you or your organisation *

☐ Yes ☐ No

Declaration

This declaration and authorisation relates to all information in this application, attachments and information received by Community Trust South, from you or the organisation you are making the application on behalf of, during the assessment of the application and anytime thereafter.

I hereby declare that:

- the information supplied in this application and any attachments is true and factual;
- the project has not already been started;
- any funding received will be used for the purpose for which it was approved;
- I have read, understood and agree to be bound by Community Trust South's Privacy Policy and this Privacy Statement and Declaration.

I hereby authorise Community Trust South to:

- use the information supplied as part of this application and any attachments for the purposes outlined in the Community Trust South's Privacy Policy and this Privacy Statement and Declaration;
- make any enquiries of any relevant third parties (which may involve disclosing information supplied as part of this application) which Community Trust South deems appropriate for the purposes of assessing and administering this application;
- undertake audits of our organisation/group for the purposes of assessing and administering this application, including compliance with the terms on which any funding is approved;
- Provide to other funding agencies and advertise or publish, including for marketing and promotional purposes (including on our website, facebook page, annual report and other promotional material), the name of the funding recipient (individual or organisation), the amount of any funding approved and any photographs or videos supplied by me to Community Trust South.

I acknowledge that any decision made by Community Trust South in relation to this application is final and that Community Trust South has the right to withdraw any funding approved or demand the return of funds already paid if it is discovered that any statement made in this application is incorrect, incomplete or misleading in a way that may have affected the funding decision.

Where completing this application on behalf of an organisation/group I declare that I have all necessary approvals and authorisations to complete this application, including approval from the individuals concerned (and that individual's guardian if the individual is a minor) for any personal information provided with this application, or subsequently in connection with the grant, including any photographs or videos containing identifiable individuals, to be used as set out in this Privacy Statement and Declaration.

Authorised Person's Name *

First Name

Last Name

Position in organisation *

Email *

Date of declaration *

Submitting your form

There is a **'Review and Submit'** button at the bottom of the navigation box to the right of the screen. By clicking this your form will be reviewed to ensure all required questions (marked with an *) are completed.

Once reviewed and all required questions are completed you can then submit your form by clicking on **'Submit'** at the top of the screen or in the navigation box.

Once submitted, you will receive a confirmation email from SmartyGrants (service@smartygrants.com.au) acknowledging your form has been received. If you do not receive this email please go back into your application and check you have clicked the **'Submit'** button at the top of the screen.

Once submitted no further editing of your form or uploading of further support material is possible.

If you have any queries or experience any problems please phone us on **0800 500 185** during business hours or email info@communitytrustsouth.nz