

# General Grants - \$75k and Under 2024/25

## Form Preview

### 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](mailto:info@communitytrustsouth.nz)*

### Organisation details

\* indicates a required field

**Legal name of organisation \***

As it appears in your constitution or registration with the Companies Office

**Name your organisation  
Is also known as**

If different from your legal name e.g. your trading name

**Organisation email**

### Contact for this application

**Name \***

First Name

Last Name

**Position \***

**Primary phone number \***

**Other phone number \***

**Email \***

# General Grants - \$75k and Under 2024/25

## Form Preview

### Organisation overview

**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.**

- 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

### 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.

**Where is your organisation at on its climate change journey?**

**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 Policies

**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

# General Grants - \$75k and Under 2024/25

## Form Preview

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.

*If you have any queries about applying please call us on 0800 500 185 or email [info@communitytrustsouth.nz](mailto:info@communitytrustsouth.nz)*

## Application overview

\* indicates a required field

**Provide a short title for your project.**

**Describe the need you are wanting to address and how have you identified this? \***

Word count:

Must be no more than 300 words.

Whose needs are being addressed, how great are their needs and try to use evidence such as relevant trend/statistics, research or other supporting information about the issue/need.

**Describe what you would like the funding for. \***

Word count:

Must be no more than 300 words.

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

**Describe the experience your organisation has to effectively deliver the project. \***

Word count:

Must be no more than 200 words.

Governance, operational, previous experience and other

## Alignment with our Strategic Pou and associated priorities

**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

# General Grants - \$75k and Under 2024/25

## Form Preview

### 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.

# General Grants - \$75k and Under 2024/25

## Form Preview

- ☐ 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.

## Priority Populations

**Please indicate if your project/programme specifically aligns with any of these priority populations.**

- ☐ Māori
- ☐ Pasifika
- ☐ Migrants
- ☐ Rangitahi (Youth)
- ☐ People living with disabilities
- ☐ Rainbow LGBTQIA+
- ☐ Older people
- ☐ None

## What is the difference you expect to make through your work or project?

Please describe **up to** two outcomes (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 resources and tools that may be useful.

### Outcome 1 \*

### Outcome 2

How will you know you are achieving the above outcomes?

i.e. what data/information will you collect that shows your progress, e.g. no of registrations, head count, satisfaction survey of participants, feedback from participants/members

### Your Outcomes

### Indicators

### Data Source

	What data/information will you collect that shows your progress?	Where will you get the data from?
Your Outcome 1		
Your Outcome 2		

## Duplication

**Are there any similar projects or services in your area?**

- ☐ Yes
- ☐ No

# General Grants - \$75k and Under 2024/25

## Form Preview

Avoiding duplication is important, therefore if there are similar facilities or services we need to know why your project is unique and whether collaboration with another group is feasible, and if not, why not.

### Detail how your project or service is unique or different.

### 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

### What type of grant are you applying for? \*

- ☐ A one-off grant for a community project or programme.
- ☐ An operating grant that supports the general expenses of operating your organisation.

**Total project costs/  
budgeted expenses**

\$

What is the total budgeted cost of your project or annual operating expenses?

**Amount you are  
requesting \***

\$

Maximum request permitted on this form \$75,000

### About your project budget

Please be aware that:

- Demand is often greater than funding available;
- Community Trust South is a partial funder and generally only funds between 15-30% of the total project cost;
- Your budget needs to be realistic for both costs and level of funding applied for;
- 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? \***

# General Grants - \$75k and Under 2024/25

## Form Preview

- ☐ Yes  
☐ No

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

Attach a file:

### Project Income (how you are going to pay for this project)

- If you have **not** uploaded a detailed budget, list all income you plan to get towards your project e.g. grants/donations, your own funds, fundraising.
- If you have already uploaded a detailed budget, please enter the total income here.
- Also include the grant amount you are applying for from Community Trust South.

Income/funding	\$
Community Trust South	\$
	\$
	\$
	\$
	\$

### Project expenses/costs (what it is going to cost)

- If you have **not** uploaded a detailed budget, please list all expense items/costs for your project e.g. cost of materials, equipment, labour, advertising.
- If you have already uploaded a detailed budget, please enter the total expenses here.

Take particular care in determining your total project costs i.e. do not understate what your project is likely to cost but equally don't overstate the likely costs either as:

- we can only consider an application for the same project once and any increases in costs will be the responsibility of the applicant; and
- any significant decrease between your budgeted costs and your actual costs will generally result in an approved grant subsequently being reduced proportionately

Expense/cost details	\$
	\$
	\$
	\$
	\$
	\$

### Budget totals

**The income and expenditure totals should balance.**

Total Income Amount

\$

Total Expenditure Amount

\$

Income - Expenditure

\$

# General Grants - \$75k and Under 2024/25

## Form Preview

This number/amount is calculated.

This number/amount is calculated.

Your budget should balance - this number should be zero.

### Please detail any in kind support for this project?

i.e. the number of volunteer hours and/or a description of value of any donated goods or services

### How do you plan to pay for any future operating or ongoing costs arising from the project?

Organisations are expected to plan their projects carefully, including developing a plan for meeting any ongoing operating costs - independent of our support. Planning could include such things as asset management plans, a three year operating budget etc where appropriate

## Quotes

Organisations should obtain two quotes (where practical) for capital items such as equipment and building related projects.

### Have you sought alternative quotes?

☐ Yes

☐ No

Organisations are expected to obtain two quote, where possible

### Please upload quote/s.

Attach a file:

### If you have answered no and uploaded one quote only, please explain why you have not sought alternative quotes.

## Operating costs

Support for operating costs is generally between 5-15% of an organisation's total annual expenses.

Please upload your annual operating budget for the forthcoming year.

If you are a national organisation please ensure this budget relates to services delivered in the Community Trust South's area.

### Please upload budget. \*

Attach a file:



# General Grants - \$75k and Under 2024/25

## Form Preview

**Please upload your organisation's strategic plan and/or current business plan.**  
Attach a file:

**Why are you requesting an operating grant?**

**What other community organisations do you work, partner or collaborate with?**

i.e. how are people referred to your services and what networks do you connect with?

**Describe how you ensure your services are current and relevant to the needs of your clients/community?**

### Overview of organisation's funding

Knowing how your organisation and its services/programmes are funded helps us understand the overall operation.

Please provide details of any significant funding you receive from local or central government and any other funding agency.

<b>Funded by e.g. Te Whatu Ora, MSD, ILT, Lotteries, MOE, SportNZ etc</b>	<b>What is the funding for?</b>	<b>Total grant/contract funding per annum</b>	<b>Contract/grant end date</b>
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### Benefits and impact

**\* 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/event/activity? \***

# General Grants - \$75k and Under 2024/25

## Form Preview

Please don't use commas e.g. write 1000 not 1,000

### Additional comments on numbers benefiting.

### How do you ensure your service/project is inclusive and accessible to people from diverse backgrounds?

e.g. people of all ages, different cultural backgrounds, LGBTQIA+ communities, people with a disability, low income earners

### 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                        |
| <input type="checkbox"/> Fiordland          | <input type="checkbox"/> Western Southland                 |
| <input type="checkbox"/> Invercargill       | <input type="checkbox"/> All of Community Trust South Area |
| <input type="checkbox"/> Northern Southland | <input type="checkbox"/> All of Southland                  |
| <input type="checkbox"/> Southern Southland | <input type="checkbox"/> Other: <input type="text"/>       |

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

### Is your project taking place in more than one location?

- ☐ Yes ☐ No

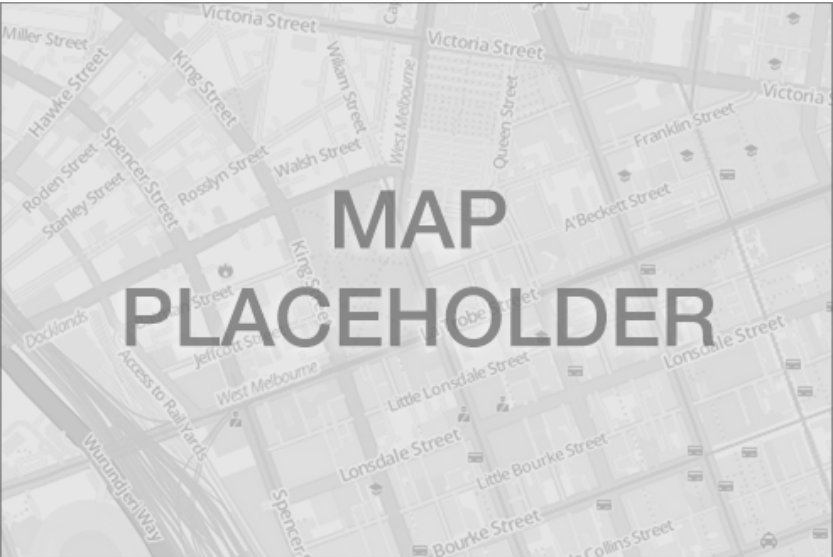
### Project locations

# General Grants - \$75k and Under 2024/25

## Form Preview

**Please enter the address of where the project is taking place (click on add more for other locations).**

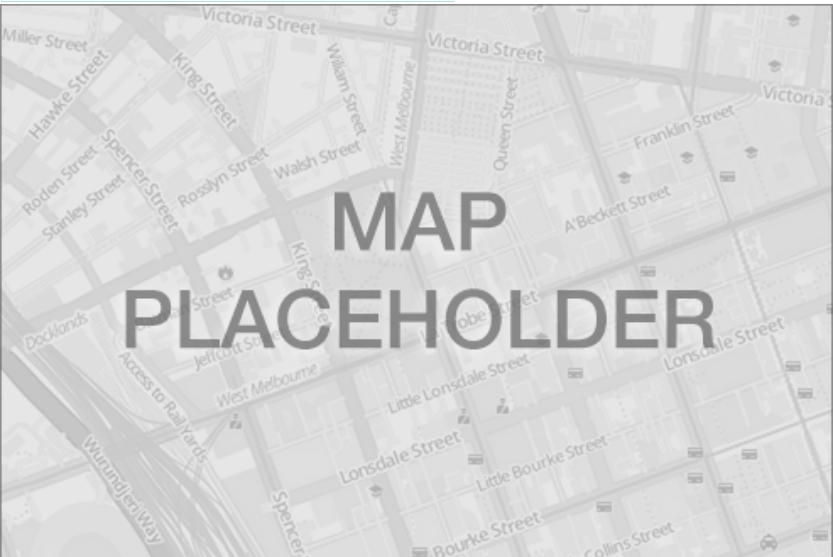
Address



Location of project

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

Address



About your organisation

\* indicates a required field

# General Grants - \$75k and Under 2024/25

## Form Preview

### 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.

**[Click here to find your NZBN](#) or you can find it through the Companies Office in 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

# General Grants - \$75k and Under 2024/25

## Form Preview

### People involved in your organisation

*This helps us to understand the size of your organisation and its operations in the [Trust's region](#).*

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

#### **Paid part-time staff (in the Trust's region)**

#### **Volunteers (in the Trust's region)**

#### **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)?**

(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 statements and audit requirements [click here](#).**

#### **Please upload organisation's latest annual financial statements \***

Attach a file:

**If it is more than six months since the end of your previous financial year, please upload a year to date financial report.**

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 at the time of this application? \***

# General Grants - \$75k and Under 2024/25

## Form Preview

\$

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

**Please comment on your cash 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 hypens 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.

Also please note that depending on the type of project (i.e. capital projects, etc) we may also require some additional information such as resource/building consents, feasibility study, land ownership etc.

Attach a file:

**Any additional comments (if appropriate).**

## Communication

# General Grants - \$75k and Under 2024/25

## Form Preview

**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

# General Grants - \$75k and Under 2024/25

## Form Preview

**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



# General Grants - \$75k and Under 2024/25

## Form Preview

**Position in organisation**

\*

**Authorised person's 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](mailto: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](mailto:info@communitytrustsouth.nz)