General Grants - $2,000 & U 2024/25
Form Preview

Applicants please note

Who should use this form?

Non-profit organisations that are **unincorporated legal entities,** can use this form to apply for **up to $2,000**, otherwise they need to work with a Funding Partner.(i.e. who must meet our eligibility criteria).

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.

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

Name of organisation *

Full name of organisation

Organisation email

Contact for this application

Name *

First Name   Last Name

Position *

Primary phone number *

Other phone number *

Email *

Your organisation's legal structure

What is your organisation's legal structure? *

○ Unincorporated legal entity   ○ Other:

[   ]

Please upload your constitution or rules

Attach a file:

[   ]

If you are affiliated to another organisation - provide the organisation's name

[   ]

e.g. a regional or national organisation

Please indicate if your organisation primarily identifies as any of the following?

☐ Kaupapa Maori ☐ Pasifika ☐ Asian ☐ New Migrant

- Are you a Kaupapa Māori organisation/service that is recognised as such by Iwi, a Government Agency or Act?
- Kaupapa Māori serivces 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? *

[   ]

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 journey to be environmentally sustainable in response to climate change?

[   ]

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

If 'YES' we may contact you as part of our assessment process to discuss this with you.

If 'NO' we want to encourage your organisation to have appropriate policy and practices in place.

Please click here for details of resources and training opportunities.

Application overview

* indicates a required field

Please provide a short title for your project

Describe what you would like the funding for and how you know there is a need for the project? *

Word count:
Must be no more than 150 words.

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

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.s

☐ 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.

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 this project?

Please describe one 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 *

What data/information will you collect that shows your progress towards achieving the above outcome and where will you get the data from *

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

$

Must be a dollar amount.
What is the total budgeted cost of your project or annual operating expenses?

Amount you are requesting *

$

Maximum request permitted on this form $2,000

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

Project expenses/costs

List all expense items/costs for your project e.g. cost of materials, equipment, labour, advertising. 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 what your actual costs are will generally result in an approved grant subsequently being reduced accordingly.

Please include the amount you are requesting from Community Trust South.

If you prefer you may upload a more detailed budget here and enter a summary budget below.
Attach a file:

Budget

Income	$	Expenditure	$

	$		$
	$		$
	$		$
	$		$

Budget Totals

The income and expenditure totals should balance.

Total Income Amount

$

This number/amount is calculated.

Total Expenditure Amount

$

This number/amount is calculated.

Income - Expenditure

$

Your budget should balance - this number should be zero.

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

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 Grants

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 your budget
Attach a file:

Which other organisations do you work and collaborate with and how?

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? *

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, cultural backgrounds, LGBTQIA+ communities, people with a disability, low income earners

Please be specific as to what is the main ethnic group/s in our region that will benefit most? *
☐ 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? *
☐ Bluff ☐ Invercargill ☐ Wakatipu ☐ All of Community Trust South Area
☐ Central Southland ☐ Northern Southland ☐ West Otago ☐ All of Southland

☐ Eastern Southland   ☐ Southern Southland ☐ Western Southland ☐ Other:

☐ Fiordland   ☐ Stewart Island

Please refer to our detailed map for a breakdown of these areas.

About your organisation

* indicates a required field

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 minutes. *
Attach a file:

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 (if appropriate)?

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

Organisation financial details

Please upload organisation's latest annual financial statements *
Attach a file:

While we understand that 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?

$

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

Please comment on these reserves and if they cannot be used for this application please explain why

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

Organisation bank account details

Please provide 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.

Please provide 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

Attach any other information, e.g covering letter, letters of support, or other documents.

Please upload
Attach a file:

Any additional comments (if appropriate)

Communication

How did you find out about Community Trust South?
○ Have applied previously
○ Our website
○ Our facebook page
○ Radio
○ Newspaper
○ Online
○ Referred by e.g. other funders, Council
○ Word of mouth
○ Community Visits
○ Funding Forum

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 *

○ Yes   ○ No

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

○ 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 South Trust'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 South Trust'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