

Principals' Discretionary Fund Application 2025

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About the Principals' Discretionary Fund & Guidelines

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Purpose of fund

Community Trust South allocates funding to all 94 schools in our area through the Principals' Discretionary Fund.

The purpose of the fund is to ensure every student has the opportunity to achieve their potential.

The fund is made up of three components with the following goals:

- **Part A: Providing essential foundation in students' lives for them to thrive.**
- **Part B: Supporting students to learn and participate**
- **Part C: Enabling the conditions for students to thrive despite location.**

A total of approximately \$600,000 per annum is available for allocation to schools.

Part A - Providing essential foundation in students's lives for them to thrive.

Is available to be used, at the Principal's discretion, towards **resources and/or extra curricular activities** (*not normally considered payable from schools' operational funding*), for an **individual student** whose **family financial circumstance might preclude** them from otherwise taking part.

The funds may be used, in whole or part, for the following purposes:

- providing essential support, equipment where there are no other funding available e.g. **personal items** such as **glasses**, sport equipment to enable participation in a school team.
- paying for **school uniform, stationery, meals** for a students.
- paying **fees** where no other financial assistance exists, so that a student may gain appropriate academic qualifications.
- support involvement in curricular activities, such as out of classroom education (**camp or trips**).

Please note that funding cannot be used to purchase school equipment.

If you are uncertain as to whether or not a subsidy for any particular activity is appropriate, please either phone us to discuss on **0800 500 185** or **03 218 2034**, or email **ngaire@communitytrustsouth.nz**

Part B - Support students to learn and participate

Is available to be used at the Principal's discretion, in pursuit of any of the following [Community Trust South strategic aspirations](#):

Can be used for the following activities:

- addressing issues of **inequality** that present **barriers to learning and participating**.

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- supporting students identified by their school as being at **risk of disengaging**.
- supporting the **preparation** of students for **life after their schooling**.
- encouraging students to **lead healthy active lifestyles**.
- support students to **access art, heritage, cultural, sport and recreation** experiences.
- support **Māori** to thrive through strong **connection to their cultural ancestry**.
- supporting **Tamariki to have Mana Motuhake (self determination)**.

If you have any questions about uses of Part B funding please phone us to discuss on **0800 500 185** or **03 218 2034**, or email **ngaire@communitytrustsouth.nz**

Part C - Reducing isolation

Can be used for activities or **costs** that provide enhanced equity of opportunity because of a school's **isolation**. Examples include:

- Supporting **social cohesion**
- Supporting communities to access **transport** for students

If you have any questions about uses of Part C funding please phone to discuss on **0800 500 185** or **03 218 2034**, or email **ngaire@communitytrustsouth.nz**

Please note Parts A, B & C funding cannot be used for capital items or for facilities.

Closing date for applications

Your application needs to be completed and submitted **by Monday 10 March 2025** in order to receive payment.

Accountability reporting

To receive future Principals' Discretionary Fund payments, in late November 2025 Principals are required to account for how their discretionary funding allocation has been used including detailing:

- purpose for which the funding was used i.e. which of the Community Trust South activities or priorities the funding aligned with;
- amounts of funding spent on various activities/purposes;
- number of students benefiting.

Acknowledgement

I have read and understood this information *

Yes

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School details

* indicates a required field

Name of school *

Principal's name *

First Name

Last Name

Principal's email *

Contact person

This is the person at your school who we will contact if we have any questions or require further information about your Principals' Discretionary Funding.

Primary contact *

First Name

Last Name

Contact email *

Contact phone number *

Bank account details

Please provide school's bank account number, please DO NOT use any hypens, colons or spaces when entering your account number. *

Please provide school's bank account name *

Please upload verification of your school's bank account details *

Attach a file:

Privacy Statement & Declaration

* indicates a required field

Privacy Statement

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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 or committed to;
- any grant 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;

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- 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 grant 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 individual's, to be used as set out in this Privacy Statement and Declaration.

Principal's name *

First Name

Last Name

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.

You need to review your form before you can submit it - you won't be able to submit your form until all required questions (marked with an *) are completed.

Once reviewed you can submit your form by clicking on '**Submit**' at the top of the screen or on the navigation box.

Once submitted, you will receive an email from SmartyGrants acknowledging receipt of the form. If you do not receive this email please check you have clicked the submit button at the top of the form. No further editing of your form or uploading of support material is possible once submitted.

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