

TSB Community Trust



Supporting You – Supporting Our Community

ANNUAL GRANTS AND SPECIAL
GRANTS UNDER \$50,000
APPLICATION FORM FOR GROUPS

FUNDING CRITERIA

Who can apply?

- Groups and organisations can apply if their application purpose is for charitable, cultural, philanthropic, or recreational benefits to the community within the TSB Community Trust's "specified area". The area runs from Mokau in the North, to Tahora in the East and Manawapou River in the South.

Who can't apply?

- Service organisations (i.e. Lions, Rotary, etc) do not usually qualify for grants, but the individual projects which they are fundraising for may apply directly to the Trust office.
- Political lobby groups.
- Church facilities will only qualify for special consideration if evidence is produced that their facility has greater community use.

General criteria

- Applicants must bank predominantly or solely with TSB Bank.
- Only one grant will be approved to any applicant in any one financial year, i.e. either an annual or a special grant – but not both.
- Schools applications must come from Board of Trustees.
- Where clubs have men's, women's, junior's, and master's sections using the same club facilities, only one grant will be approved. The Trust does not grant to groups who fragment in an attempt to qualify for multiple grants.
- Youth groups like Girl Guides and Scouts may make one application each under their respective district.
- With the exception of provincial representative teams, school and group travel is not generally funded.
- The Trust does not normally fund ongoing expenses like salaries or rent.
- The Trust does not fund retrospectively.

NINE PROGRAMME FUNDING AREAS

As of April 2009 all applications requesting funding over \$5,000 are assessed against the Trust's strategic objectives. You will need to describe and provide evidence as to how the project will meet these objectives where relevant. The nine programme funding areas are:

- **Learning** – facilitating improved educational outcomes for people in our region including innovative projects and lifelong learning
- **Health** – supporting and strengthening community organisations that improve health for the people in our region
- **Community Wellbeing** – supporting organisations that actively reduce the negative impact of social problems on our communities
- **Recreation and Sport** – supporting individuals and organisations that focus on participation in recreation, sport and provide for development and excellence
- **Arts and Culture** – supporting creative projects and organisations that aim to foster access to, engagement with and experience with the arts
- **Heritage** – supporting projects and organisations that preserve and promote the physical and cultural heritage of our region
- **Environment** – supporting projects and organisations that protect and enhance the environment in which we live
- **Community Led Enterprise** – working in partnership with key stakeholders to identify projects that will assist with social development and economic growth through developing community led enterprise
- **Rescue Services** – providing strategic support at a local and regional level for rescue services in our region

GRANT DEFINITIONS

Annual Grant

Groups meeting Trust criteria are eligible to receive an annual grant if they submit an application annually. Annual Grants may be used for general organisation administration or other purposes as the organisation requires.

Annual grant amounts vary depending on the type of group, and it is the Trust's policy to ensure consistency in that similar groups receive similar annual grants.

Special Grant

A special grant is a grant to any one group which is more than the group can expect to receive on an annual basis. Special grants will not be granted to any one group less than three years apart. Groups applying for a special grant are not eligible to also apply for an annual grant in the same financial year.

This form is for groups or organisations wishing to apply to the TSB Community Trust for an Annual or Special Grant under \$50,000. It details the information we require to assess your application. Section One covers general information about your group, Section Two covers Special Grant applications. Section Three covers a checklist of information required for all Grants, and on the back page you will find a declaration to sign. Please note all appropriate sections must be completed for your application to be processed. **Do not write "see attached"** in any areas as this will result in your application being returned.

If you are unclear about any aspect of your application – you can find more helpful information on our website www.tsbtrust.org.nz or you can contact our office by phoning (06) 769 9471 during business hours.

SECTION ONE – ALL GRANTS

Has your organisation applied to TSB Community Trust for a grant in the past?

- Yes No

What type of Grant is your organisation applying for?

- Annual Grant Special Grant under \$50,000

Name of organisation

State any other name your group/organisation has operated under

Contact name			Physical address of group/organisation
Mr/Mrs/Ms/Miss			
Title i.e. Secretary or Treasurer			
Address		Post Code	
Phone	Daytime	Cell Ph	
Email			Website address

Alternative Contact Name Title i.e. Secretary or Treasurer

Phone Daytime Cell Ph.....

Email

Chairperson/President

Secretary/Treasurer

Board/Management Committee

Explain briefly the aims of your organisation

How many years/months has your organisation existed Years Months

Is your organisation responsible to/or controlled by any other organisation/authority? (Please specify)

Total membership numbers

(please list various divisions, teams, men's/women's etc)

What is the estimated number of people who will benefit from this grant?

Please indicate the age group of members of your organisation/group

- Pre-school Youth Adult Aged Other/All

SECTION THREE – CHECKLIST FOR SPECIAL & ANNUAL GRANTS

NOTE: If you have not fully completed the application form in accordance with the grant you are applying for and all required documentation is not attached, your application can not be processed by the Trust Office and will be returned. For further information and examples refer to our website www.tsbtrust.org.nz

CHECKLIST OF REQUIRED DOCUMENTATION

Please tick

All Applications

- All first time applicants must provide a copy of the group’s Trust Deed/Constitution/Rules/Certificate of Incorporation. These documents are only required to be submitted to the Trust with the first application or resubmitted if they are amended in any way.

- *If you are a newly formed group*
 - A) Budget showing projected income and expenditure for group for a minimum of one year
 - B) Copy of most recent signed meeting minutes

- *If your group has been in existence for more than one year*
 - C) Annual report and/or Chairs report
 - D) AGM minutes
 - E) Financial Statements (that have been audited or signed by an independent person)

- **Special Grant Applications require the above as well as:**
 - F) Projected income and expenditure budget for the entire project with quotes attached to support expenditure
 - G) Business plan showing the organisation’s projected income and expenditure for the next three years may be required; please contact the Trust office to discuss prior to submitting the application
 - H) Cover letter outlining
 - Description of project
 - Fundraising initiated to support project
 - How your project supports the TSB Community Trust’s funding areas
 - How much wider community use will this project have



PLEASE ENSURE THE DECLARATION OVERLEAF IS READ AND SIGNED

FOR TSB BANK USE

DATE OPENED..... AVERAGE ANNUAL BALANCE \$..... CURRENT BALANCE.....
 ACCOUNT ACTIVITY MINIMAL AVERAGE HIGH
 LAST TRANSACTION DATE
 TERM INVESTMENTS HELD.....

 AVERAGE ANNUAL BALANCE OF ALL ACCOUNTS/TERM INVESTMENTS \$

Date Stamp

DECLARATION

This application has the formal approval of our controlling Board/Community/Authority, and

- To the best of our knowledge the information provided herein and in supporting documents is true, correct and complete – and further information provided to the TSB Community Trust during the course of assessment of this application will be true and correct.
- We understand that any funds provided by the Trust will be for the specific purposes outlined in this form and the Trust may seek confirmation that any grant has been properly applied.
- We agree that any grant received from the TSB Community Trust will be utilised within two years of being received into our group's TSB Bank Account. We agree to return any part of the grant that is not used.
- We agree to provide TSB Community Trust with such information and reports as it may reasonably require regarding the use of any grants it makes to this organisation.
- We agree to complete an Accountability Report if the TSB Community Trust requests. (An Accountability Report sample is available from the Trust office or website www.tsbtrust.org.nz)
- We understand that failure to complete an Accountability Report on request may affect our eligibility to apply for further funding.
- We authorise the TSB Community Trust to request any banking details that may be required to process this application.
- PRIVACY:** We authorise the TSB Community Trust to make such enquiries as it deems fit in considering the application and we accept and agree that details of any grant the Trust makes to our organisation may be made public.
- We agree to acknowledge the TSB Community Trust in any press releases, editorials relating to the project, or whenever our organisation acknowledges/thanks supporters.
- We accept that any decision made by the TSB Community Trust in relation to this application is a full and final decision and the Trust is under no obligation to enter into correspondence relating to the decision.

Name

Signature **Title** **Date**



Completed applications should be delivered to a TSB Bank Branch.
If not fully completed, including all necessary attachments, applications will be returned.

Close off dates

Applications for grants **under \$50,000** will be considered quarterly, and the closing dates in any given year are
15 May, 15 August, 15 November, 15 February at 4pm.

Applications for grants **\$50,000 and over** will be considered once a year and have a close off date of
15 August at 4pm.

(If one of these dates falls on the weekend, the close off date will be the following Monday)

NOTE: this form is for grants under \$50,000

For best results

Submit your application early so that the office can contact you if required. If you leave it to the last week and further information is needed your application will not proceed that funding round.



Office location
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