



# Mid Canterbury Community Funding Forum

13 March 2019



Advance  
Ashburton  
Community  
FOUNDATION

*give where you live... to build a stronger community*



**\$11m**

Net asset under  
management



**\$35m**

committed requests so far



**25**

volunteers

**3**

part time staff



**\$3.67m**

granted to local  
community causes

# HOW does a Community Foundation work?

It starts with the donor



Generous Individuals



Generous Businesses

With a **LOVE** for  
Our community



Education



Social Services



Youth  
Development



What do you  
love?



Arts



Environment



Te Ao Maori



Heritage

Whose **GIFTS** are used



Donations



Assets



Bequests

To **CREATE & BUILD**  
Funds for our community

With **INCOME** from these funds  
Going to the causes chosen by the donor



our community will be positively transformed **FOREVER**



# There's giving and then there's giving



## PHILANTHROPY VS CHARITY



**VS**



### Philanthropy

Long term solutions and social change

Proactive

Organised and strategic response

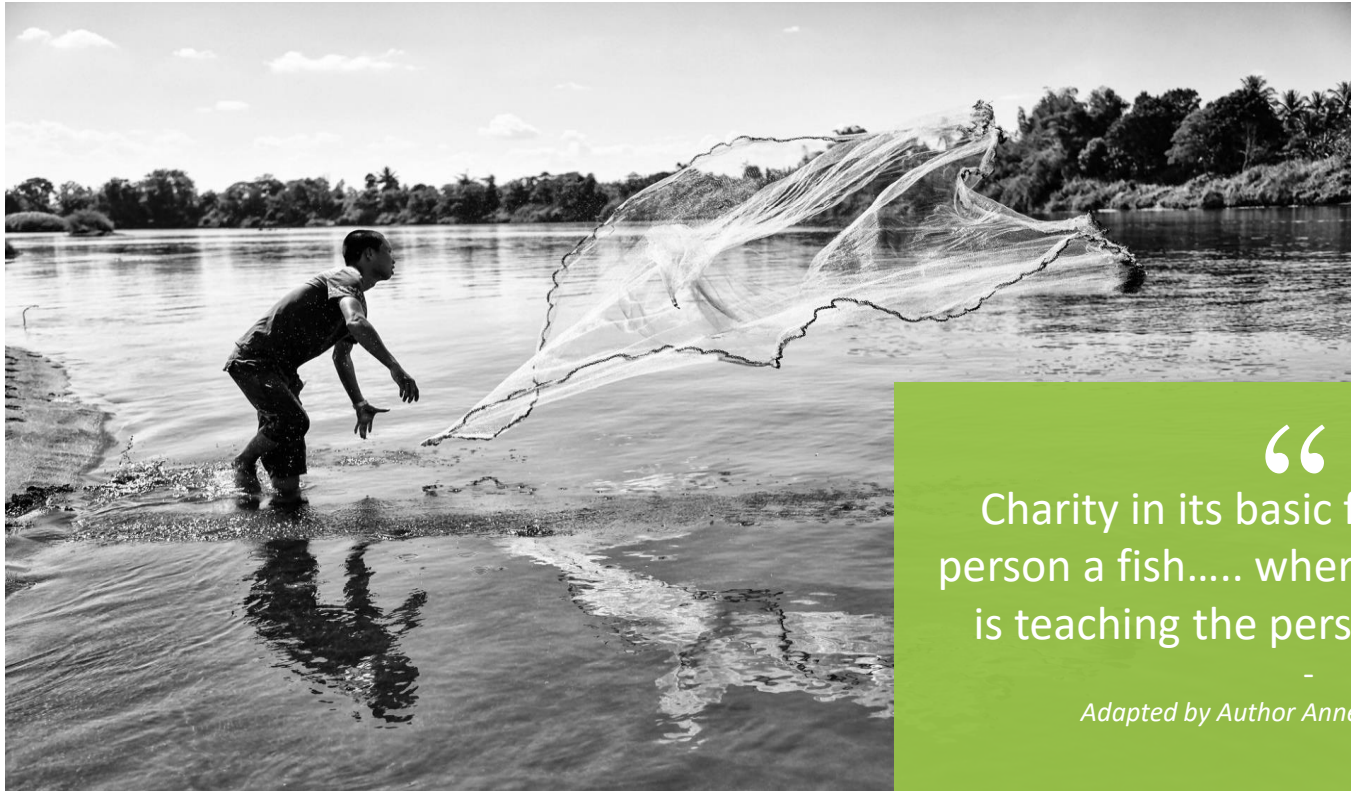
### Charity

Short term fixes

Reactive

Primarily emotional rescue and relief response





“

Charity in its basic form is giving a person a fish..... whereas Philanthropy is teaching the person how to fish.

*Adapted by Author Anne Isabella Ritchie*



### **3 community grant rounds per annum**

January, May, September

### **Scholarships**

- tertiary, industry trade, personal development – open September
- Leaders' scholarship – open February

If you need advise or have a question, don't hesitate to phone  
027 577 5875

[www.advanceashburton.org.nz](http://www.advanceashburton.org.nz)

# Ashburton District Council

- Range of Council-grant funding available
- Focused on Community Groups and Organisations
- Main funding round in February
- [www.ashburtondc.govt.nz](http://www.ashburtondc.govt.nz)
- Manage Creative Communities Scheme (Creative NZ) and Rural Travel Fund (Sport NZ)

# Ashburton Licensing Trust

- Who are we?
- Where do our funds come from?
- Braided Rivers Community Trust



## Funding Pools

- |                  |             |            |
|------------------|-------------|------------|
| • Quick Response | \$10,000pa  | Bi-monthly |
| • Annual         | \$30,000pa  | 6 monthly  |
| • Multi-Year     | \$30,000pa  | Annually   |
| • Big Projects   | \$30,000pa  | Annually   |
| • Total          | \$100,000pa |            |

## Criteria for Funding

- Complete Application form
- Granting Policy
- Transition Plan
- Exclusions
- Acknowledgement



**Community**  
**TRUST**  
Mid & South Canterbury

[www.comtrust.org.nz](http://www.comtrust.org.nz)



# What, When and How?

- Not-for-profit community organisations (c.a. \$1.5m p.a.)
- Both project and programme/operational costs
- Eligibility criteria – see our Grants Policy
- 4 rounds up to \$10,000; 2 rounds over \$10,000; one round by invitation only (c.a. 2 month turn around)
- Tightly structured online form/process/due diligence – appropriate/compelling information for our Trustees; equal consideration for all applicants; legal/audit requirements



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# What do we look for in a successful application?

- **Evidence of local/regional support and impact, eg**
  - Who exactly is going to use/benefit from your proposal? How?
  - How do you know that these people will engage/achieve these outcomes? *or*
  - Evidence of an environmental need/appropriate response/sustainable impact
- **Absence of risk factors, eg**
  - Do you have the governance/professional capability and capacity to deliver?
  - Do you have appropriate financial/project management processes in place?
  - Is any one else already offering something similar? Are you working together?



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# What do we look for in a successful application?

- **Evidence that a hand up is required**
  - Trustees will consider any government contracts you hold, other fundraising you have tried, your reserves and investments, contributions made by your members and volunteers.
- **Equity/comparative factors**



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# Ask the Community Relations Manager about

- Eligibility (organisation or project)
- Timing (grant rounds)
- Previous grants and outcomes
- Online application process
- Application questions and attachments
- Telling your story, identifying outcomes
- Accountability reporting and acknowledgement



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# Immediate Steps (IMS) Funding \$100,000 per year

\$50,000 is pre-allocated to multi year protection scale projects.

Rangitata River, Canterbury



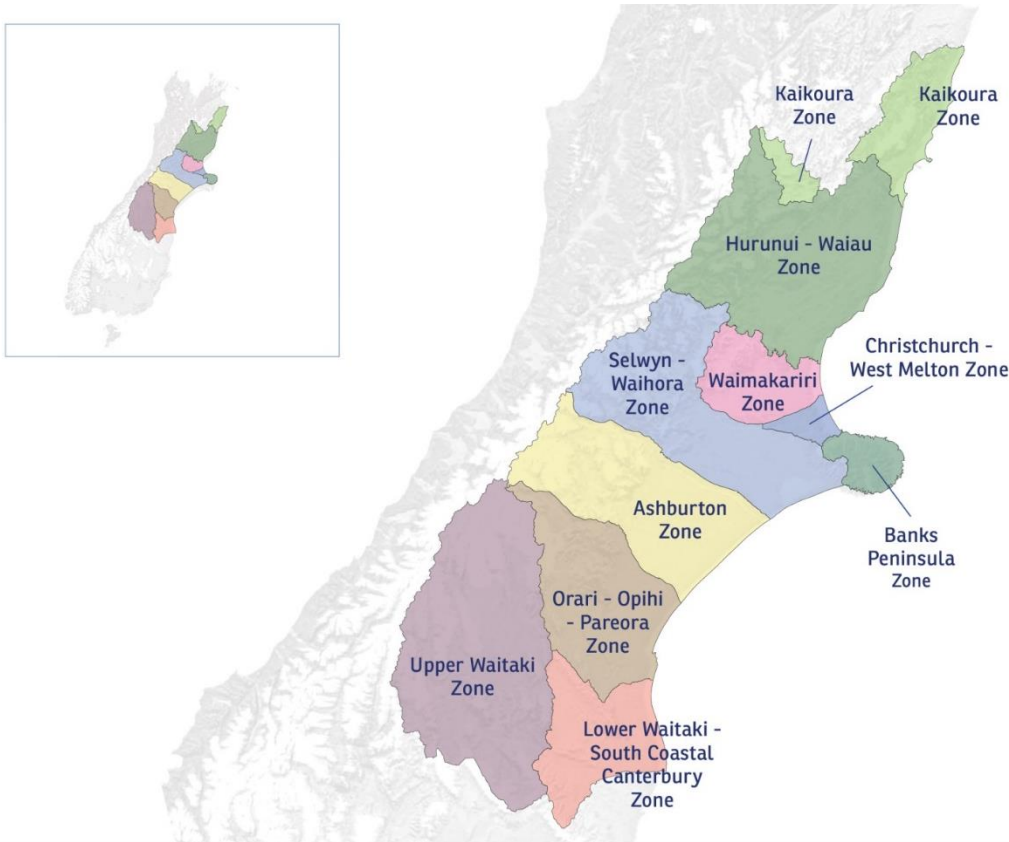
# Funding projects that support the goals of the Canterbury Water Management Strategy (CWMS)



## CWMS:

- A collaborative, community-led approach to environmentally-sustainable water management, through 'Zone Committees'.
- A partnership between Environment Canterbury, Canterbury's city and district councils, Ngāi Tahu and water stakeholders.

# 10 Water Zone committees



Each Water Zone Committee approves up to \$100,000 per year of IMS biodiversity funding.

**Priority given to protection of biodiversity that is there already**

- Wetland enhancement
- Weed control
- Planting projects



Protecting and enhancing what is there already







Weed control of Holly in Foothills forest





Riparian planting along Harding Stream. Ki uta ki tai  
Mountains to the sea



# BIODIVERSITY

## Funding Application

Environment Canterbury - helping you to help the environment

Contact Customer Services on 0800 324 636 or go to [www.ecan.govt.nz/biodiversity](http://www.ecan.govt.nz/biodiversity) to check eligibility criteria before applying.

Project Name:	
Name of person/organisation/group or school undertaking the project:	
Key contact person: (person responsible for overall leadership of the project)	
Address:	
Phone No: Private ( )	Business ( )
Fax No: ( )	Email:
Project Location:	Grid Reference:
Local District: Council:	OWMS zone:
Does the site have legal protection? <input type="radio"/> no <input type="radio"/> yes Type:	
Are you or your organisation GST registered? <input type="radio"/> no <input type="radio"/> yes GST number:	

Site description (habitat, vegetation, current management and threats to biodiversity)

--

Donna Field

[Donna.Field@ecan.govt.nz](mailto:Donna.Field@ecan.govt.nz)

Ph 0800324636

Sarah Heddell

[Sarah.Heddell@ecan.govt.nz](mailto:Sarah.Heddell@ecan.govt.nz)

Ph 0800324636



**TREVORWILSON**  
CHARITABLE TRUST

- Founder – Trevor Wilson
- Established in 1992
- Capital base of \$24,000,000
- Funding decisions made upon application





**Grants can be made for purposes aligned with the following organisations:**

- Order of St John Mid Canterbury
- Presbyterian Support upper South Island

The Trust is currently developing systems and processes to manage the granting process and is currently only dealing with major one off requests.

If you have a project you wish to discuss please contact one of the Trustees to discuss any projects



**Address:** C/- Gabites Ltd, 54 Cass Street, Ashburton

**Phone:** 308 5099

**Trustees:** Gary Leech, Alister Argyle, Trevor Croy

**Secretary:** Ross Gibson



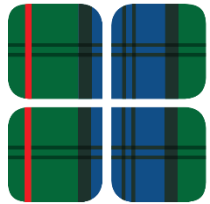
# **ASHBURTON BENEVOLENT TRUST**

**Address:** C/- Croys Ltd, 161 Burnett Street, Ashburton

**Phone:** 308 8353

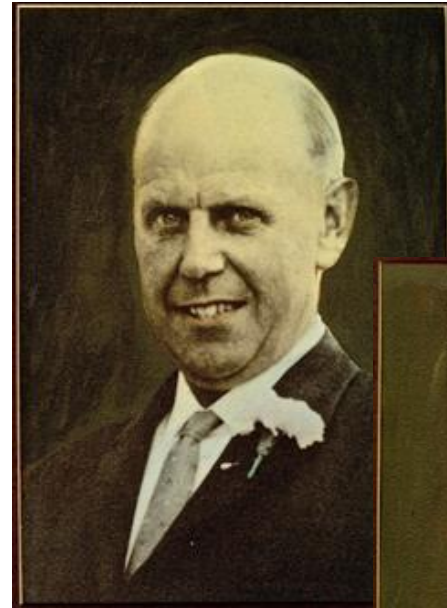
**Trustees:** Anne Fleming, Jackie Girvan, Stephen Millichamp

**Secretary:** Wendy Severins



Mackenzie  
CHARITABLE FOUNDATION

- Founders – Alan and Don Mackenzie
- Founded in 1976
- Capital base of \$13,000,000
- Funding decisions made quarterly





**Supporting the District of Canterbury in the following areas:**

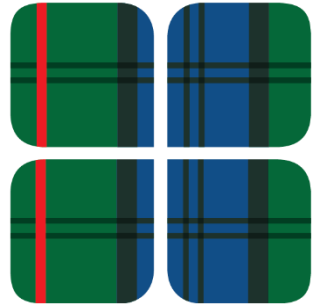
- **Cancer**  
research, treatment, provision of equipment, and the education and training of trained people.
- **Agriculture**  
research, development, education for, and training and expansion the science and practice of agriculture.
- **General Charitable Purpose**  
supporting the needs of young people with disabilities or have less chance in life than many of their peers.

Alan



Don





Mackenzie  
CHARITABLE FOUNDATION

**Email:** [www.mcf.org.nz](http://www.mcf.org.nz)

**Address:** C/- Advance Ashburton, Level 2, 161 Burnett Street,  
Ashburton

**Trustees:** Don Church, Graham Kennedy, Don McFarlane, Mary Ross

**Secretary:** Trevor Croy



# Internal Affairs

Julia Cleland  
Community Advisor  
[Julia.Cleland@dia.govt.nz](mailto:Julia.Cleland@dia.govt.nz)

New Zealand Government



Te Tari Taiwhenua  
Internal Affairs

## Nau mai, haere mai

Helping build successful communities

What do you want to know?

- Community Organisation Grants Scheme (COGS)
- **Lottery Community fund**
- Lottery Community Facilities fund
- Lottery Environment and Heritage fund
- Lottery Community Sector Research fund
- Lottery Health Research fund
- Lottery Outdoor Safety fund
- Lottery Significant Projects fund
- Community Internship Programme
- Community Leadership Fund
- Community-led Development Programme
- Disarmament Education UN Implementation Fund
- Racing Safety Development Fund
- Support for Volunteering Fund
- Chinese Poll Tax Heritage Trust
- New Zealand Winston Churchill Memorial Trust
- Norman Kirk Memorial Trust
- Peace and Disarmament Education Trust
- Pacific Development and Conservation Trust



**Te Tari Taiwhenua**  
**Internal Affairs**

# Understanding & Accessing Community Funding



# The Lion Foundation



- \$1.34 million has been returned to the Ashburton Community from 1<sup>st</sup> April 2018 to 12<sup>th</sup> Feb 2019.
- Funds are distributed by the Regional Grants Committee of the Ashburton Licencing Trust.  
(local people making the decisions on local funds).
- Funding is available for Community, Sport, Health and Educational initiatives or projects.



THE LION  
FOUNDATION  
*Here for good*

# Items We Can Consider



- Fixed & Measurable Operating Expenses
  - E.g. Rent and insurance
- Vehicle Leases
- Capital Projects
- Domestic Travel
  - Bus/Van hire or Air travel
- Accommodation in NZ
- Gear and Equipment
- Playing Uniforms
  - As long as they remain the property of the organisation
- Umpire/referee fee's



THE LION  
FOUNDATION  
*Here for good*

# Items We Can Consider



- Venue Hire
- Fixed Event Costs
  - E.g. Stage Hire, Security, Lighting, Sound
- Coaching – contracted only and on a case by case basis
- Computers, IT Upgrades and Website Development
- App's
- Affiliation Fees – Up to 75%





# Items we are unable to fund (by Law)



- Anything You've Already Paid For
- Variable Costs Like Petrol or Toll Calls
- Third Party Payments
- Fundraising Events
- Signage, Branding & Marketing
- International Travel
- First Aid Kits or Physio's
- Socks, Jackets, Tracksuits & Formal Wear
- Items That Involve the Funds Being Spent Overseas
- Professional Sport
- Tourism



# FAQ's



- Who can apply for funding? Schools, Reg'd Charities and Incorp. Soc's with a letter of IRD tax Exemption
- Can I apply to multiple Trusts for the same project? Yes as long as you don't double dip
- How do you apply. Either by collecting an Application Form from within one of our local venues ( Devon Hotel, Tinwald Tavern, Hotel Ashburton, Railway Tavern Rakia or Hinds Tavern ), or via our website [www.lionfoundation.org.nz](http://www.lionfoundation.org.nz).
- Is there a maximum or minimum amount? No we fund the full spectrum, but be realistic
- How many applications can I make? 1 successful application every 12 months
- How many things can I ask for funding towards? Multiple within the one application
- How long do applications take? We meet monthly but always allow for up to 8 weeks
- Is funding guaranteed? No, it will always depend on the availability of funds- Amounts often vary year on year



# Helpful Tips



- We look at:
  1. Impact at a local level
  2. Wider community benefit
  3. Your organisations track record (both financial and delivery of services)
  4. Quality of leadership
  5. Availability of funds
- Use the cover letter to promote the merits of your application
  - What are the barriers/opportunities
  - Who will this grant help & how
- We like to see your organisation contributing something as well
- Be realistic
- Take your time & Include everything
- If you're not sure, ask







# **Volunteering**

Mid & South Canterbury

## **We can help by**

- ❖ **Recruiting and referring volunteers**
- ❖ **Advocating, supporting and providing information to your organisation**
- ❖ **Promoting & celebrating volunteers and special days**
- ❖ **Providing free or subsidised training**
- ❖ **Giving recognition to your volunteers: including the Volunteering Mid & South Canterbury and the Hotel Ashburton Volunteer of the Month**

Our trainings this year are supported by Advance Ashburton Community Foundation



Community  
Accounts  
Service  
for Not for  
Profit  
Organisations





For all things volunteering - contact  
Dellwyn Moylan  
Mid Canterbury Co-ordinator  
Volunteering Mid & South Canterbury

Ph (03) 3081237

[volmidcant@gmail.com](mailto:volmidcant@gmail.com)

Office @ Community House Mid Canterbury

Like us on Facebook -

<https://www.facebook.com/Volunteering-Mid-South-Canterbury-366908120048279/>

Check out our website

<https://www.volunteering-msc.org.nz/>

# Mid Canterbury Community Funding Forum

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