

**NOT FOR PROFIT**

**CLASS 4 GAMBLING OPERATOR** – regulator Department of Internal Affairs -Gaming Machines in Hotels

**PHILOSOPHIES** – Excellence and Participation

70% Amateur Sport

30% Health, Education, Arts, Community

**100% LOCAL**

**COMMUNITY FUNDER**



Adding value to local communities  
by enhancing community and  
economic benefits



TRUST  AORAKI







Enhancing amateur sport in local communities, including sporting infrastructure







Promoting sport, activity and wellbeing

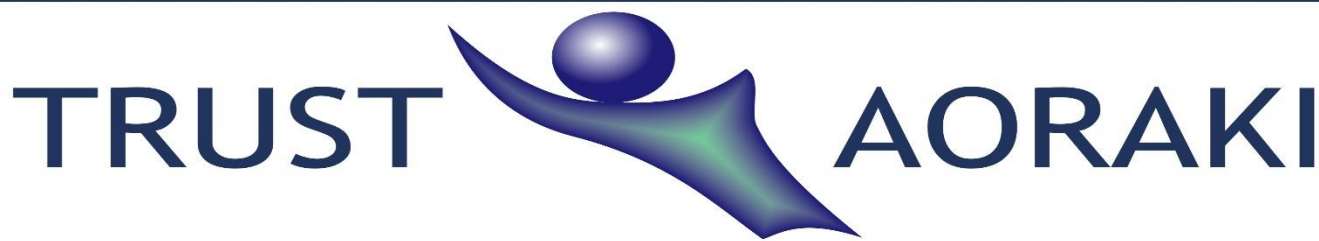






Supporting  
Excellence  
and  
Participation  
and promoting  
role models





## MAKING A GOOD GRANT APPLICATION – HINTS

- 1) Give us a call and have chat;
- 2) PLAN well ahead;
- 3) Consider a MIX of fund raising initiatives;
- 4) COMMUNICATE – by providing as much relevant information associated with application as possible;
- 5) Consider our Funding Schedule and Donation Criteria –  
BI-MONTHLY BOARD MEETINGS.

03 688 9930

25 Royal Arcade, TIMARU

[www.trustaoraki.co.nz](http://www.trustaoraki.co.nz)



## **Timaru District Council Community Development Fund**

**Close in March and September**

- **For Community Organisations for Public Events, Rural Community Hall Maintenance, Community Services and Heritage/Historic. \$120,000.**
- **Substantial Donations over \$10,000 to Community Organisations to improve/develop facilities. \$30,000.**
- **Community Development Loans to Community Organisations to improve/develop facilities. \$400,000.**
- **Sport & Recreation Loans to Community Organisations for facilities and major plant items. \$400,000.**



**The following are considered by Community Development Chairperson – no closing date.**

- **NZ Representative Donations \$250. Must be a resident of the District and officially selected to represent NZ.**
- **Minimal Donations \$500. Community Organisations for Public Events, Rural Community Hall Maintenance, Community Services and Heritage/Historic.**

## **Youth Entertainment Fund**

**For public events, entertainment or activities that benefit youth (aged 12 to 25 years). Close in March and August. \$10,000.**


## Other Funding Schemes Council Administers

**Albert Daniel Hally Trust** (on behalf of Perpetual Guardian) 

Close April and October. For organisations with charitable purposes for projects that benefit the SC community. Funds via investment return - \$30,000 ave.

**Thomas Hobson Trust** (on behalf of Public Trust) 

Close October. For organisations in the former Geraldine Country area for capital projects that are public and charitable. Funds via investment return - \$37,000 ave.

**Creative Communities Scheme** (on behalf of Creative New Zealand) 

Close February, May, August and November. For individuals, businesses, organisations. For art projects that benefit the Timaru District community. \$36,000.





## We have two types of sponsorship:

- Organisational, for groups and community organisations, open year round
- Personal development, for individuals striving to attain excellence in their field of endeavour, two rounds, March and September





## Organisational

Each year we distribute hundreds of thousands of dollars to help with projects and events that contribute to growth and promotion of the region.







## Personal development

We focus on assisting people in their area of excellence, sporting, cultural or community activities.

As we're local first, the grants are given out to those who reside in the Alpine Energy electricity distribution area.

Grants are awarded within a mix of cultural, sporting or community activities, but not for tertiary education studies or school sports teams.

Over the years, thousands of locals have seen their personal development goals boosted through our assistance and financial support.





## Community initiatives.

- Being available
- Working with like minded companies
- Pooling our available resources
- Making a difference, in a sustainable way







**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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Mid & South Canterbury



# 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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## United Way New Zealand Funding for Community Organisations





**United Way New Zealand mobilises the caring power of communities around South Canterbury and New Zealand, to improve peoples lives. The 3 main focus areas are:**



## Health & Wellbeing

**When it comes to accessing health & wellbeing services ,** many people are disadvantaged by their financial situation. We believe there should never be a barrier to improved health and work with community partners to provide necessary services.



## Education & Skill Development

**Success in life begins with a quality education.**

And yet, many children and young people lack the support they need to strengthen their literacy, stay on track in school, graduate, develop their skills and find a career.



## Financial Stability

**Chronic unemployment. Financial illiteracy. Homelessness.**

In our communities, individuals and families are facing financial obstacles that prevent a good quality of life.

**October 2019 - United Way NZ accept funding applications**

**February 2020 - UWNZ regional volunteers visit charities**

**March 2020 - Successful applicants will be notified**



**“Our strength is grounded in our  
ability to work together”**

For Further Information please go to [www.unitedway.org.nz](http://www.unitedway.org.nz) or email [admin@unitedway.org.nz](mailto:admin@unitedway.org.nz)

# Immediate Steps Funding

Supporting the  
Canterbury Water Management  
Strategy (CWMS)

Up to \$100,000 per year

Rangitata River, Canterbury





# Canterbury Water Management Strategy (CWMS)

- A partnership between Environment Canterbury, Canterbury's city and district councils, Ngāi Tahu and water stakeholders.
- A collaborative, community-led approach to environmentally-sustainable water management, through 'Zone Committees'.
- **CWMS recognised the need for “Immediate Steps” protection and restoration of fresh water related biodiversity (variety of plant and animal life in a particular habitat).**

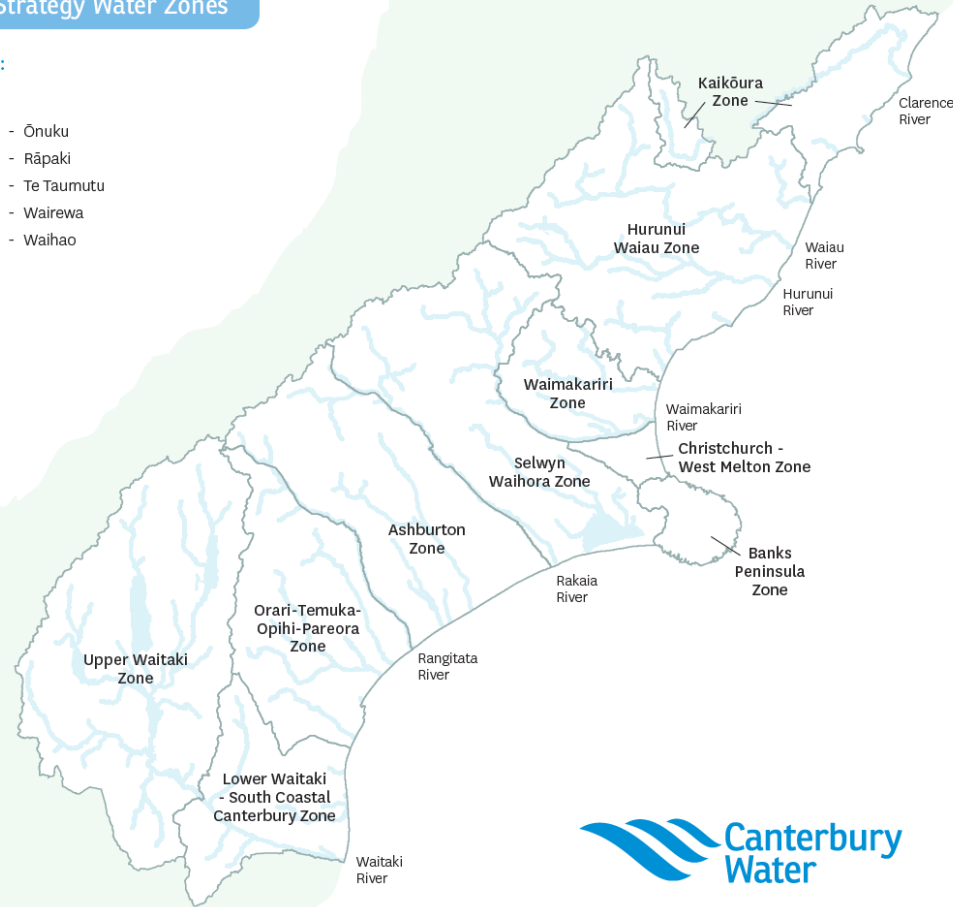


# 10 Water Zone Committees

Fig 1: Canterbury Water Management Strategy Water Zones

A collaborative Canterbury process brought to you by:

- Ashburton District Council
  - Christchurch City Council
  - Environment Canterbury
  - Hurunui District Council
  - Kaikōura District Council
  - Mackenzie District Council
  - Selwyn District Council
  - Timaru District Council
  - Waimakariri District Council
  - Waimate District Council
  - Waitaki District Council
  - Canterbury Mayoral Forum
  - Te Rūnanga o Ngāi Tahu
- Papatipu Rūnanga
    - Arowhenua
    - Kaikōura
    - Koukourārata
    - Moeraki
    - Ngāi Tūāhuriri
  - Ōnuku
  - Rāpaki
  - Te Taumutu
  - Wairewa
  - Waihao



Cover photo:  
Taken from above the  
Rangitata River looking  
towards Peel Forest.



Priority given to  
protecting and  
enhancing what is  
already there

- Wetland enhancement
- Weed control
- Planting projects







Weed control of Holly in Foothills forest





Riparian planting.  
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:	CWMS 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)

--

Rob Carson-Iles

Biodiversity Officer

Environment Canterbury

Robert.Carson-iles@ecan.govt.nz

Ph 0800324636



# *The* Ask

## Perpetual Guardian Grant Applications

Martin Reynecke

Client Manager

2 Sefton Street East Timaru

# ABOUT US

- 2014 merger between  
**Perpetual Trust and Guardian Trust**
- 135 years of experience
- Perpetual Guardian manages almost  
600 charitable entities,
- Largest trustee for Charitable Trusts  
in New Zealand,
- Look after over \$150 billion and make  
grants between \$20- \$35M annually.





# Our Granting Process

In response to a rapidly and dramatically changing world, Perpetual Guardian implemented a new online grants administration system in 2018.

The new framework is designed to save you some time, and provide more meaningful information for our Trustees to make their decisions.

# Our Granting Process

## STEP ONE

### THE ONUS IS ON YOU!

We recommend that you diarise a monthly review of the granting schedule online to determine whether there is a strategic match to your work.



*Online Granting Schedule 2019*

<https://www.perpetualguardian.co.nz/philanthropy/grants-and-scholarships>

# Our Granting Process

## STEP TWO

On the opening date Perpetual Guardian publish a funding guideline, which details the intent of the established fund, the terms of that funding, and estimated funding timeframe.

**Grants opened Monday 1<sup>st</sup> April and close Friday 26<sup>th</sup> April**

The Rowland Edgar Charitable Trust, Allan Edgar South Canterbury Trust and The General Charitable Fund South Canterbury who were all established to apply the net income at the trustee's discretion towards charitable purposes in the **South Canterbury area.**



# Our Granting Process

## STEP TWO



# Our Granting Process

## STEP THREE

Click on the online link to formally apply for funding!

The applications are categorised into three tiers:

- Grants under \$15,000 (require less information)
- Grants between \$15,000 and \$100,000
- Grants \$100,000+

## STEP FOUR

After you've started an application, you'll receive an email. Please read the instructions provided carefully.

# Effective Applications

- ALWAYS read the **Funding Guideline**
- Make sure you combine the **History of the Settlor** and the **Terms of the Trust** deed onto your 'ask'
- Make sure your **'Ask'** is up Front
- Professional Trustees show **Preference for Projects**
- Distinguish between **Needs and Wants**
- Articulate some **Outcomes**





*Supporting our future Sports Champions*

# ABOUT

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- Established to support and assist South Canterbury athletes on the international stage.
- Criteria – be local, reaching NZ standard, national endorsement
- Sponsorship Round
- Scholarship Round – February
- It works





# Internal Affairs

Julia Cleland or Liz Stephenson  
Community Advisor  
[Julia.Cleland@dia.govt.nz](mailto:Julia.Cleland@dia.govt.nz)  
[Liz.Stephenson@dia.govt.nz](mailto:Liz.Stephenson@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**



MORE  
**PEOPLE**  
MORE  
**ACTIVE**  
MORE  
**OFTEN**

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



# Kiwisport Fund

Kiwisport is a fund that aims to have :

- More children playing sport
- More opportunities
- Better skills

It is about

- School aged children – in-school, out of school, strengthening links
- Partnerships – schools, clubs, other community organisations
- A fund not a programme



# Current RPF Fund Plan

## Funding Streams

Funding Stream	Funding Type	Percentage
Kiwisport Coordinators	Contestable	27%
Fundamental Sports Skills – Land based	Contestable	23%
Fundamental Movement Skills - Land Based	Non contestable	5%
Fundamentals – Learn to Swim	Contestable	10%
Youth (Yr 7 – 13)	Contestable	20%
Coach and Official Training	Contestable	15%



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

# Temuka/Geraldine Community Funding Forum

3 April 2019



South Canterbury  
Funders Forum

@scfundersforum

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