



# Mackenzie Community Funding Forum

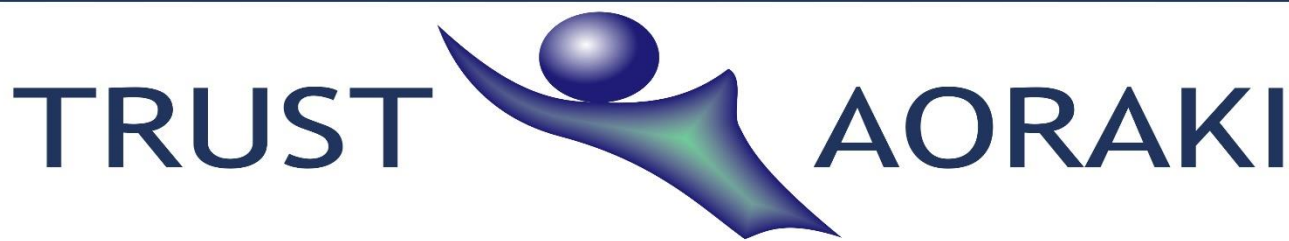
30 October 2019





# Lake Tekapo Lions Club

- New Zealand



**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

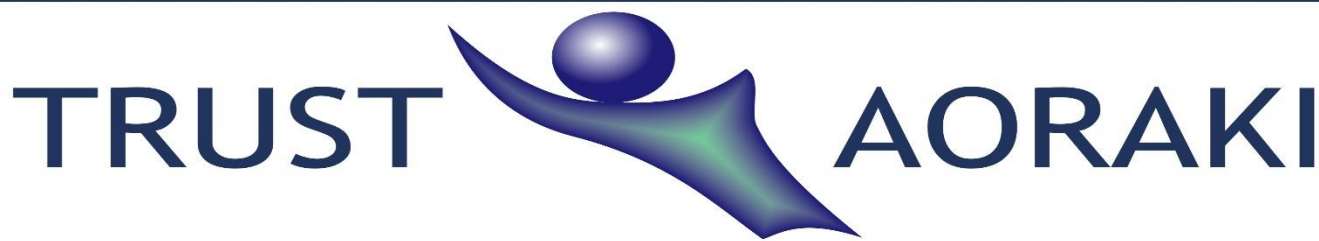






Supporting  
Excellence  
and  
Participation  
and promoting  
role models





## 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)



# Mackenzie District Council Grants Available 2019



Charlotte Borrell, Community Facilities and Services Officer



# Council Grants

- For projects that benefit the Mackenzie District
- Applications to Council (with sufficient leadtime)
- No amount allocated, case by case basis
- Land Subdivision Fund can be accessed for qualifying projects (up to \$20,000 if not on the Long Term Plan)
- Funds allocated at council meetings by Council





# Community Board Grants

- For projects specific to Fairlie, Tekapo or Twizel townships
- Applications are presented at Community Board meetings
- Annual total to grant Fairlie \$2000, Tekapo \$2000, Twizel \$2700
- Funds allocated by individual Community Board to a maximum of \$1000 per grant (Tekapo, Twizel), \$250 per grant (Fairlie)



# Genesis Tekapo Township Grant

- For projects promoting Tekapo Township
- One funding round per year
- Held in May
- \$10,000 (excl GST) available (increasing to \$13,000 in 2020)
- Funds allocation recommendation by Tekapo Community Board to Council, Council ratify
- New process implemented by the Tekapo Community Board and the first round will be held late 2019 (approx. \$19,000 excl GST available)





# Creative Communities Scheme

- For creative/art based activities in the Mackenzie District
- Two funding rounds per year
- Held in March and November
- \$17,802 (excl GST) available
- Funds allocated by a committee of local people from the arts community



# Rural Travel Fund Grant

- For sports clubs and school teams with young people aged between 5-19 years who need help with transport expenses to attend regular, local sporting competitions.
- One funding round per year
- Held in April
- \$9,500 (excl GST) available
- Funds allocated by a committee of local people from the sporting community



# Mackenzie County Scholarship

- For students attending Twizel Area School and Mackenzie College
- One funding round per year
- Applications are open now and close 2<sup>nd</sup> November 2019
- The Trust has Scholarships available for the first year tertiary education of post Year 12 NCEA Level 2 level.
- 3 scholarships of up to \$2,000 (excl GST) available



**For further information or application forms  
see the following link on our website:**



**[www.mackenzie.govt.nz/Site/Community/Grants\\_and\\_Scholarships](http://www.mackenzie.govt.nz/Site/Community/Grants_and_Scholarships)**



## 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)
- Online form and attachments – well informed decisions and a fair process for everyone



**Community**  
**TRUST**  
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?
  - Evidence of community support *or*
  - Evidence of an environmental need/sustainable impact
- Management of risk factors, eg
  - Do you have appropriate financial/project management processes in place? (documentation requirements)
  - What is your own commitment? Volunteers, fundraising, contributions etc
  - Is any one else already offering something similar? Are you working together?

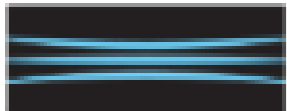
# Ask the Community Relations Manager about

- 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



**Community**  
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Mid & South Canterbury





# TRANSPOWER

<https://www.transpower.co.nz/about-us/helping-our-communities/communitycare-fund>

## ABOUT US

# CommunityCare Fund

### < ABOUT US

Careers and vacancies

CommunityCare Fund

Apply to the CommunityCare Fund

CommunityCare Fund

CommunityCare Fund: funding announcements

Guide to the CCF Expression of Interest

See where we are helping

The CommunityCare Fund assists communities affected by our overhead assets by investing in community-based projects that add real value and benefit to the wider community. The Fund makes one-off grants for projects in communities along the National Grid route, as well as communities affected by new Transpower projects.

**Please note:** Expressions of interest for the next funding round (summer 2020) close on 31 October 2019.

[Find out how to apply](#)





## 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  
Strategy (CWMS)

Up to \$100,000 per year

Rangitata River, Canterbury

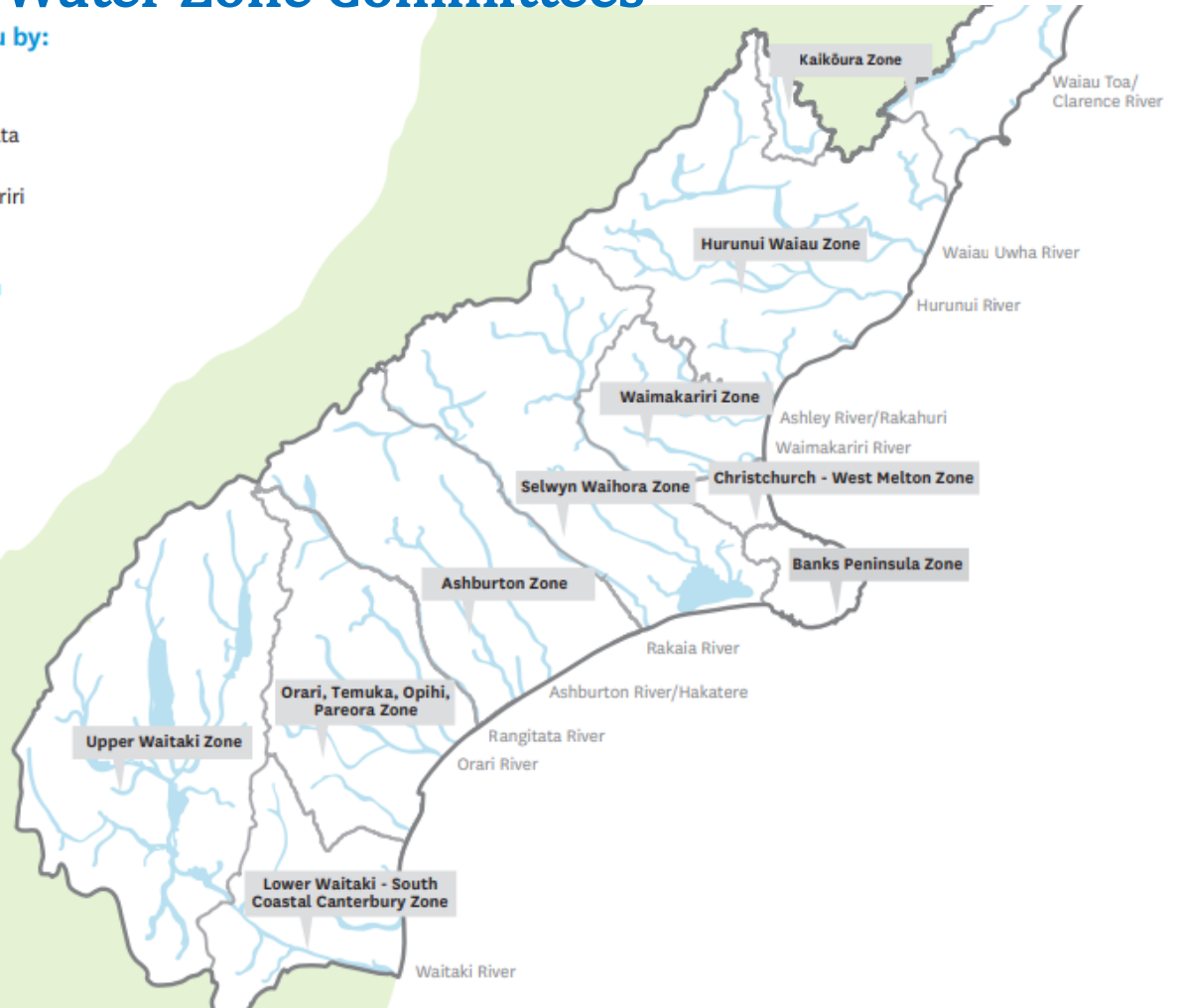


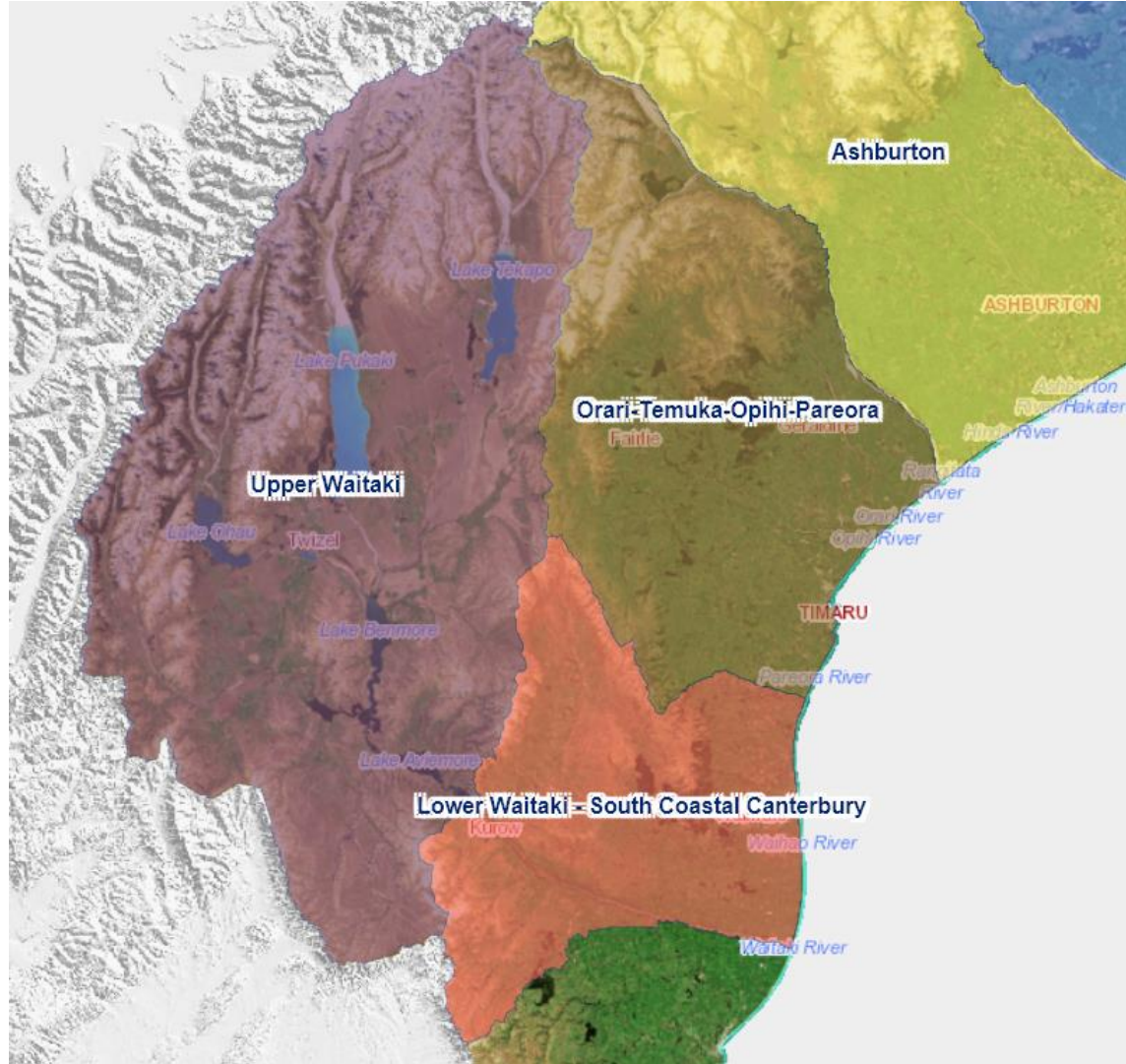
# 10 Water Zone Committees

A collaborative Canterbury process brought to you by:

- Canterbury Mayoral Forum
  - 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
  - Te Rūnanga o Ngāi Tahu
  - Papatipu Rūnanga
- Arowhenua
  - Kaikōura
  - Koukourārata
  - Moeraki
  - Ngāi Tūāhuriri
  - Ōnuku
  - Rāpaki
  - Te Taumutu
  - Wairewa
  - Waihao

**\$100k per Zone for protection and restoration of fresh water related biodiversity**





# Apply Online

## Biodiversity funding

[HOME](#) / [OUR NATURAL ENVIRONMENT](#) / [BIODIVERSITY FUNDING](#)

### Our natural environment

[Our unique ecosystems](#)

[Pest management](#) +

[Nature in your area](#) +

**Biodiversity funding**

[Apply for funding](#)

[Funding checklist](#)

[Mahinga kai](#)

### Immediate Steps Success



#### Mt Somers farmers' passion for protection

Mt Somers farmers were granted around \$17,000 from Ashburton Water Zone Committee's Immediate Steps fund towards protecting the land from degradation and enhancing it for future generations.

We have over a million dollars available annually for protection and restoration of biodiversity on private and public land.



**Apply for funding**



**Funding checklist**

### Immediate Steps flagship projects

We support three biodiversity flagship projects – [Te Waihora/Lake Ellesmere enhancement project](#); enhancement of the upper catchments of the [Rakala and Rangitata rivers](#); and the [Wainono Lagoon project](#).

### Looking for community support?

Information for community organisations seeking support from Environment Canterbury can be found on our [Community support page](#).

- ✓ [Find out more about the biodiversity in your zone](#)
- ✓ [Apply for funding](#)
- ✓ Find out how the [Te Ara Kakariki Greenway Trust](#) can assist with restoring native vegetation and ecosystems

<https://www.ecan.govt.nz/your-region/your-environment/our-natural-environment/biodiversity-funding/>



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## Funding checklist

Why is Immediate Steps needed?	+
Who can apply for Immediate Steps funding?	+
What is the assessment criteria?	+
Do I have to get a covenant to protect my project?	+
What do I need to include in my application?	+
Do I have to contribute anything?	+
Do I have to undertake a project on my own land?	+
Can I undertake a project in conjunction with another organisation or individual?	+
What kind of projects will not be funded?	+
What is an example of a project that is likely to get funding?	+
How do I apply?	+

## Who can apply for Immediate Steps funding?

Any individual, landowner, community, conservation or recreational group that seeks to protect or restore indigenous plants or animals and their habitat, waterways, wetlands and dunes can apply for the Immediate Steps fund.

## What kind of projects will not be funded?

We are unable to fund:

- projects that generate personal or commercial profits or compensate individuals;
- research projects;
- beautification projects;
- projects that are a government, local authority or other public body (such as producer boards) responsibility or requirement (including works that are required as part of a resource consent); or
- projects that are required under council rules.



# Assessment Criteria

- 6 Goals set out in the Canterbury Diversity Strategy
- 7 Ecological value criteria

## What is the assessment criteria?

Projects will need to reflect and contribute to the goals and guiding principle of the Canterbury Biodiversity Strategy. The guiding principle is to focus first on protecting and maintaining what remains, and then restore what has been lost.

Projects will be assessed against the six goals set out in the Canterbury Biodiversity Strategy:

1. Protect and maintain the health of all significant habitats and ecosystems.
2. Restore the natural character of degraded indigenous habitats and ecosystems.
3. Increase the integration and sustainable use of indigenous species in modified environments (e.g. farm, urban, lifestyle blocks).
4. Enhance public awareness, understanding and support of biodiversity.
5. Encourage, celebrate and support action by landowners and communities to protect, maintain and restore biodiversity.
6. Improve the range and quality of knowledge and information about Canterbury's biodiversity for its sustainable management.

Projects are also assessed against the following criteria to consider the ecological value of the project.

### **Ecological context:**

Projects must provide a benefit to indigenous biodiversity and play an important role in the long-term health of the wider ecosystem.

### **Representativeness:**

The extent to which an area represents a habitat type or ecosystem that is typical of the area concerned.

### **Diversity and pattern:**

Ecosystems including vegetation communities, habitats for native animals, and wetlands that contain a high degree of natural diversity (e.g. a range of plant types).

### **Naturalness:**

Native vegetation or habitat of indigenous fauna is in a natural state or healthy condition, or is in an original condition.

### **Rarity or distinctiveness:**

Plants or habitats (including wetlands) that are rare or threatened or support rare or threatened species; plants or habitats that are distinctive (e.g. a plant species at the limits of its natural range or that is uniquely adapted due to special areas such as caves); species at the limits of their natural range.

### **Project leadership:**

Proposed projects that will be undertaken by groups need identified leadership.

### **Geographic spread:**

Where possible a fair distribution of funding will be allocated across the region

### **Community education:**

The extent to which the project will provide environmental benefits to the wider community, for example, enhancing the community's understanding of indigenous biodiversity.



Bignose galaxias, McDowall & Waters, 2003, collected July 2001, "Willowburn", CC BY-NC-ND 4.0. Te Papa (P.038012)

‘Twaddle’s Swamp’, stream (near Omarama) enhancement and planting of 500 new native plants to help the threatened native fish bignose galaxias.





Weed control of Holly in Foothills forest



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<https://www.ecan.govt.nz/your-region/your-environment/our-natural-environment/biodiversity-funding/>

## Apply for funding

Name of person/ organisation/ group or school undertaking the project \*

First

Last

Key contact person: (person responsible for overall leadership of the project)

\*

First

Last

Address \*

Street Address

Address Line 2

City

State / Province / Region

Postal / Zip Code

New Zealand



Country

Contact Number \*

Enter 7 to 12 digits. Currently Used: 0 digits.

Email \*

Project Location

Local District Council

Grid reference: (if known)

Map number: (if known)

What is the nature of your project?

- ☒ Enhancement  
☐ Protection  
☐ Creation

In which habitat types will the work be undertaken?

- |   |  |
|---|--|
| <input type="checkbox"/> Wetlands             | <input type="checkbox"/> Braided rivers                |
| <input type="checkbox"/> Dryland ecosystems   | <input type="checkbox"/> Lowland streams               |
| <input type="checkbox"/> High country lakes   | <input type="checkbox"/> Hill country catchments       |
| <input type="checkbox"/> Intermontane streams | <input type="checkbox"/> Hapua, lagoons, estuaries     |
| <input type="checkbox"/> Coastal vegetation   | <input type="checkbox"/> Other (please specify below)* |

\*Other

Please briefly describe your idea

Submit









**Aoraki  
Foundation**

## **About Us**

- **Started in 2009**
- **Not-for-profit organisation**
- **Initially project based (MRI Scanner, CBAY)**
- **Part of a NZ Wide Network – 16 Community Foundations throughout Aotearoa New Zealand**
- **We have over \$4.4m in donated funds that we manage. These funds will continue to grow and will ONLY benefit causes in our region for now, forever**
- **Distributed over \$34,000 into the community to 19 recipients last year**



## Grant Process

- Criteria – not-for-profit charitable organisations, clubs and community groups
- Notification of Funding Round
- How to Apply

### Established Funds

- General Community Impact – opens early 2020
- Health – Two Funding Rounds per year (March, September)
- Timaru, Waimate and Mackenzie Funds
- Heritage Buildings
- The Environment
- Sport







## Contact Details

- Leah Bradley – Executive Officer

admin@aorakifoundation.co.nz  
021 905 402



[aorakifoundation.co.nz](https://aorakifoundation.co.nz)



@aorakifoundation



# *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

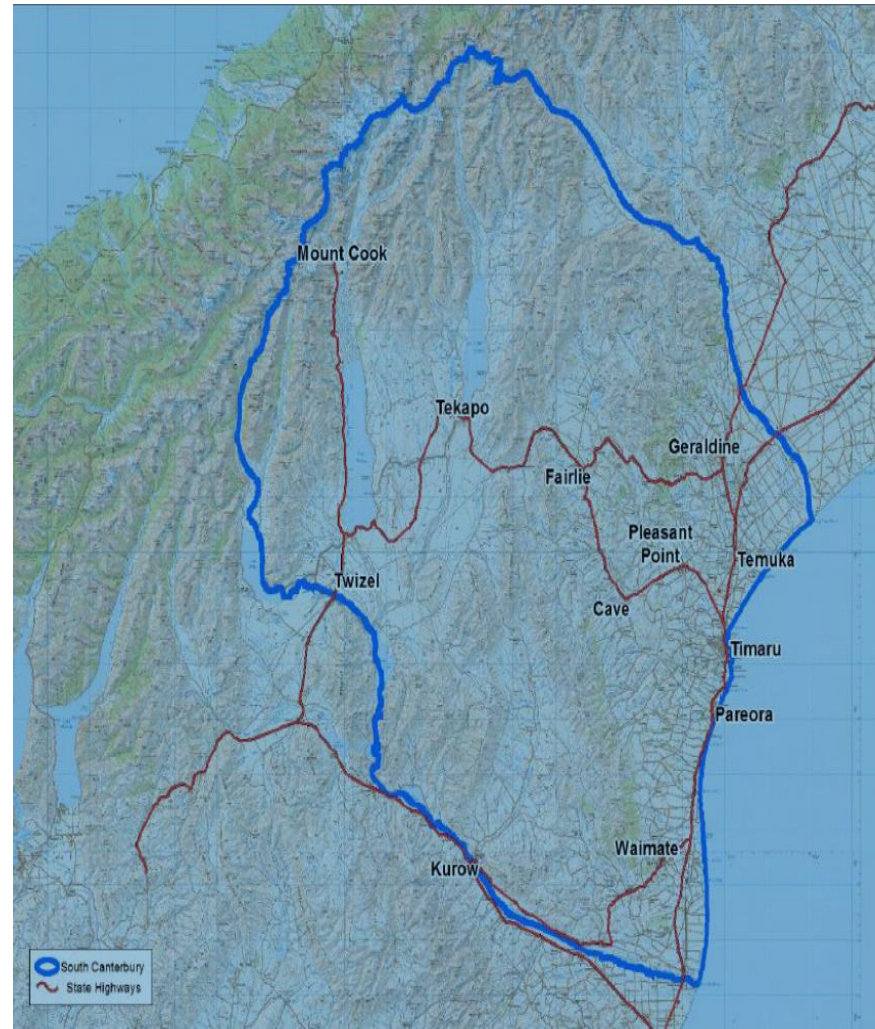
On the opening date Perpetual Guardian publish a funding guideline, which details the intent of the established fund, the terms of that funding, and estimated funding timeframe.

**One of the SC grants rounds open annually around April**  
This includes The A & R Edgar Charitable 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**.



# AD Hally Trust

- The Albert Daniel Hally Trust fund is administered by Perpetual Guardian.
- Applications are considered by the AD Hally Trust committee.
- The fund is distributed according to the wishes of the late Mr Hally, to support charitable institutions, community groups and organisations that have as their charitable objective(s) for the benefit to the people of South Canterbury.



# Our Granting Process

## STEP TWO



# Funding Guideline - Example

## Albert D Hally Trust Fund

### Biography

Albert Daniel Hally was born in Epworth, Temuka in 1902. He worked for his father at Hally Motors, the first Ford Agency in South Canterbury, taking over and running the business from 1930 to 1963.

Albert was a keen sportsman taking part in most outdoors sports, including shooting and fishing, and played senior rugby for Temuka - supporting the club in later years. He was also a loyal supporter of Temuka Plunket Society and the Sisters of St Josephs.

Albert passed in 1966 establishing the A D Hally Charitable Trust asking that preference be granted to charitable purposes in South Canterbury.



# Funding Guideline – AD Hally Trust

## Funding Application Guidelines

The Albert Daniel Hally Trust is distributed according to the wishes of the late Mr Hally, to support charitable institutions or those having as their charitable object(s) the benefit of the people of South Canterbury.

With the recent establishment of the Charities Commission it is helpful to restate the four categories of recognised charitable purposes. These are:

- The Relief of Poverty
- The Advancement of Education
- The Advancement of Religion
- Other Purposes Beneficial to the Community

# Funding Guideline – AD Hally Trust

## Period and Processing of Funding

- There are two funding rounds a year:  
The closing dates are 30 April and 31 October.
- The amount available for distribution at each round is approximated \$30,000.
- All applications must be made on the Albert D Hally Trust Fund application form. (Available at Council offices in Geraldine, Temuka and Timaru as well as on the TDC's website)
- All applications will be acknowledged and applicants will be advised of the outcome of their application. Further information may be requested in support of the application.
- Regrettably, due to the number of applications we receive, we are unable to provide detailed feedback on unsuccessful applications. Please note the decision of the Trustees is final and not subject to any appeals process.

# 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**

# Future Focussed Investing in Communities

Liz Stephenson  
Community Advisor  
Dept. Internal Affairs  
Ph: 0800 824 824

[www.communitymatters.govt.nz](http://www.communitymatters.govt.nz)

[Liz.stephenson@dia.govt.nz](mailto:Liz.stephenson@dia.govt.nz)

INTERNAL AFFAIRS



Te Tari Taiwhenua

New Zealand Government

# What we do

## Community Advisory Services

- We provide advice, information, support and resources to assist the development of resilient, strong and prosperous communities, hapū and iwi.
- We administer community funding schemes - e.g. COGS, Lottery Community, L. Community Facilities
- <http://www.communitymatters.govt.nz>
- Liz Stephenson, Community Advisor
- Ph 0800 824 824





A Clear &  
**POWERFUL**  
STRATEGY



## How we Work

- Supporting Community Led Development
- Identifying and supporting community leaders and leading agencies /groups
- Community visioning
- Collective Action
- Governance and Management training
- Strategic Planning
- Evaluation workshops
- Brokering relationships
- Funding Investment advice





# Community Accounts Service



- » Mentor existing treasurers
- » Manage their payroll
- » Enter their transactions in a cash book, or software program
- » Invoice their members
- » Prepare payment schedules
- » Prepare end of year accounts

# What we will do: >

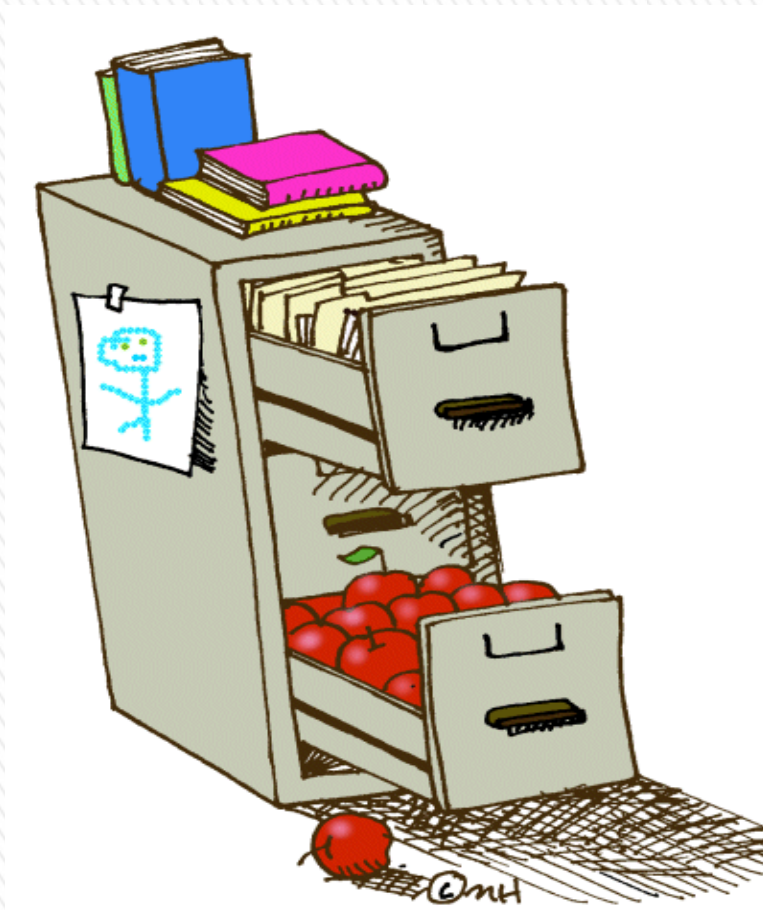


- » Simplifies the difficult treasurer role
- » Protects against fraud
- » Provides accurate and timely accounts
- » Frees up time for the groups to focus on their activities

What will this achieve?







- » Make payments, or sign cheques
- » Funding Applications
- » Archive your files
- » File the Charities Services or Company Office Annual Returns

What we cannot do:





# Mackenzie Community Funding Forum

30 October 2019