



# the Southern trust

## Application for Funds

(FOR OFFICE USE ONLY) Date Received:

Please read carefully and follow the guidelines.

**“Your application will not be considered unless it is fully completed and accompanied by all required supporting documentation.”**

**Please note there is no guarantee that completion of an application form will automatically result in funds being granted to the applicant society.**

**Please Note:**

Eligible organisations will be limited to one successful application per calendar year. Please prioritise your purposes if your group requires funding for more than one project. If you have received previous donations from the Southern Trust, you must ensure all accountability has been returned before sending in this application. Incomplete applications will not be considered.

Name of Applicant Organisation

Physical Address

Postal Address  Post Code

Telephone Number ( )  Email address

Two contact names, personal addresses and telephone numbers (business and after hours) required.

| NAME                 | ADDRESS              | BUSINESS                 | AFTER HOURS              |
|----------------------|----------------------|--------------------------|--------------------------|
| <input type="text"/> | <input type="text"/> | ( ) <input type="text"/> | ( ) <input type="text"/> |
| <input type="text"/> | <input type="text"/> | ( ) <input type="text"/> | ( ) <input type="text"/> |

What is the purpose of your organisation?

Is the applicant group registered for GST?  
If yes, please supply the number (see notes on GST on final page)

Yes  No  GST No.

Does the applicant group have IRD Charitable Status?

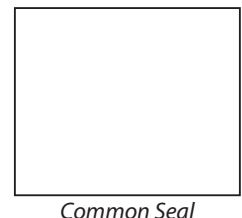
Yes  No  IRD No.

Is the applicant group an Incorporated Society?  
(Affix common seal or include certificate of incorporation)

Yes  No  CC No.

Total number of people who will benefit from the payment of these funds.

| Made up as follows:         | Number               | Ethnicity  | Number               |
|-----------------------------|----------------------|------------|----------------------|
| Juniors (Male) 0-18 years   | <input type="text"/> | Asian      | <input type="text"/> |
| Juniors (Female) 0-18 Years | <input type="text"/> | European   | <input type="text"/> |
| Adults (Male) 19-60 Years   | <input type="text"/> | Maori      | <input type="text"/> |
| Adults (Female) 19-60 Years | <input type="text"/> | Polynesian | <input type="text"/> |
| Seniors (Male) 61+ Years    | <input type="text"/> | Other      | <input type="text"/> |
| Seniors (Female) 61+ Years  | <input type="text"/> |            |                      |



Common Seal

**ACKNOWLEDGEMENT RECEIPT**

Please complete this section and we will post it back to you so you will know we have received the application

NAME

ADDRESS

(FOR OFFICE USE ONLY)

Signed

(Funding Administrator)

Date

What will the funds be used for?

|  |
|--|
|  |
|  |
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|  |

Please supply comparable quotes to support your costs.

- Please show your contributions towards the total of your Project Costs in the Income column.
- Please be specific about your costs, e.g. 5 tennis racquets at \$75 each.

| Project Costs<br><small>List all the eligible costs for this project</small> | \$ |
|--|----|
|  |    |
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|  |    |
|  |    |
| (A) Total cost of the project is   |    |

| Income – How will your group contribute financially to the project? E.g: | \$ |
|--|----|
| Sponsorship  |    |
| Fees/Subscriptions   |    |
| Fundraising  |    |
| Loan/mortgage/debenture  |    |
| Bank savings   |    |
| Grants (successful or proposed)  |    |
| Other  |    |
|  |    |
|  |    |
|  |    |
|  |    |
| (B) Your contribution is   |    |

How much money are you applying for? \$

To find out how much money you should apply for, subtract your contribution (B) from the total cost of the project (A). The answer is the amount of money you need in order for your project to go ahead.

If you have applied to any other organisation for funding for this project, **including declined applications**, please list the organisation(s), the amount of money you have applied for and when you will know the result of your application.

| Organisation(s) | Purpose | \$ Requested | DATE     |          |
|-----------------|---------|--------------|----------|----------|
|                 |         |              | Approved | Declined |
|                 |         |              | / /      | / /      |
|                 |         |              | / /      | / /      |
|                 |         |              | / /      | / /      |
|                 |         |              | / /      | / /      |
|                 |         |              | / /      | / /      |

If approved the funds will be Direct Credited.

Please attach an original pre-printed Bank Deposit Slip or Bank Account verification.

**The Southern Trust Profile**

**How can a community profile be achieved for The Southern Trust**

- |  |                                    |
|--|------------------------------------|
| 1. A call to your local newspaper or radio station to advise it of the support (Advise name of newspaper or radio station)   | (Tick)<br><input type="checkbox"/> |
| 2. Acknowledgement in any speeches or prizegiving.   | <input type="checkbox"/>           |
| 3. Application of the Trust’s logo to uniforms. (Logos can be downloaded from the Branding section of our website.)          | <input type="checkbox"/>           |
| 4. Notice to club members via programmes or newsletters. (Logos can be downloaded from the Branding section of our website). | <input type="checkbox"/>           |
| 5. Like our facebook page: <a href="http://www.facebook.com/TheSouthernTrust">www.facebook.com/TheSouthernTrust</a> .        | <input type="checkbox"/>           |



## Declaration and consent to audit. (This section must be completed.)

We declare that the information provided in this funding application form is true and correct, to the best of our knowledge, and we have the authority to make the application on behalf of the applicant.

We agree to comply with requests from an officer of the Department of Internal Affairs, or The Southern Trust, for additional information to be provided and/or to direct an audit or inspection of the books, accounts or data systems regarding the use of monies received by this society from the net proceeds of gaming. Where this requires the disclosure of personal information, the appropriate consents are held.

We authorise The Southern Trust to store information pertaining to this application manually and electronically on in-house and national databases, and to disclose that information as deemed necessary by the Trust for any purpose, including without limitation; national publication of grants, and compliance with Department of Internal Affairs regulations.

No benefit will be provided to The Southern Trust, any employee of the Trust, or any venue operator associated to the Trust, that is conditional upon the determination of this application.

We have read, understand and accept all the conditions applicable. The funds will only be used for those items for which quotes were supplied and approved and will not be used for costs that have been incurred by our society before this application has been determined. We agree that any audit or inspection will be carried out in a manner approved, and within the time frame specified, by the Department.

*Signature*

*Date*

*Signature*

*Date*

*Position in Society*

*Position in Society*

Make sure you keep a copy for your records

### CHECK LIST – HAVE YOU REMEMBERED EVERYTHING? Without this information your application cannot be considered.

#### Before you send this form, make sure that:

1. You have attached competitive quotes (addressed to the applicant organisation) for each item requested and identified preferred supplier/s, included invitations to events or other supporting material. Provide an explanation in writing if you can only supply one quote per item.
2. The organisation's common seal is affixed or certificate of incorporation has been included (if the organisation is incorporated)
3. The application has been signed by two representatives of the applicant society.
4. You have attached a copy of the resolution of the committee/executive to apply for funding (and that the secretary has certified it as true and correct).
5. An original printed bank deposit slip or bank account verification is attached.
6. You have retained a copy of the application for your records.
7. You have included confirmation that your team/club/organisation is affiliated to a recognised national organisation, and proof your national sports organisation is recognised by Sport New Zealand.
8. You have completed the IRD and GST section.
9. A current statement of income and expenditure for the last 12 months, and a Balance Sheet certified as correct by two of the principal officers of your group.
10. If applying for salary/wages, provide job description and a signed employment contract.

(Tick)

**PLEASE NOTE:** Applications must be accepted at the Trust office at least 6 weeks prior to the event and payments for which the funds are required.

### Office Use Only

This application is approved/declined

*Signature - Committee member*

*Signature - Committee member*

*Signature - Committee member*

*Date of approval/decline*

*Amount Approved*

*Direct Credit reference*

*Net proceeds reference number*

# FUNDING APPLICATION CRITERIA AND GUIDELINES

## AUTHORISED PURPOSES:

All distributions must be to authorised purposes. The Gambling Act 2003 ("the Act") defines authorised purposes as:

- A charitable purpose
- A non-commercial purpose that is beneficial to the whole or a section of the community
- Promoting, controlling and conducting race meetings under the Racing Act 2003, including the payment of stakes

The Southern Trust will distribute 95% of the available proceeds raised in each territorial region to purposes that directly benefit each regional community. The remaining 5% of proceeds will be distributed for purposes that benefit the wider regional community, or all New Zealanders.

## TO ASSIST US TO ACHIEVE OUR VISION WE WILL FUND:

- People:** We will support community organisations that provide services that give direct positive benefits/outcomes within local communities. We have a particular interest in supporting children, young people and families.
- Participation:** We will support community and sporting organisations that encourage and enable people to be engaged and active within their local communities through provision of sporting and recreational activities, cultural and artistic experiences and activities.
- Places:** We will support projects that enhance local communities by providing sporting and recreational environments and opportunities, preserving the history of the community and generally providing facilities that provide tangible benefits for the community.
- Partnerships:** We will partner with community organisations that provide innovative programmes that address particular issues within local communities, in particular in areas that are recognised as being high need.

## FUNDING PRIORITIES FOR THE SOUTHERN TRUST ARE:

- We have a particular interest in supporting children, young people and families
- In smaller communities we will work with those communities to determine community need and support those areas that have been identified as a priority
- Funding priority will be given to multi-use sporting facilities above single use facilities

## SPECIFIC CRITERIA/AREAS WE FUND ARE:

**Please Note:** The Trustees have the ability to apply discretion when applying these criteria.

- Organisations must have been established for a minimum of 12 months and possess annual audited accounts – the exception are innovative start up programmes that could provide wide ranging benefits to local communities
- The applicant organisation must offer non-exclusive membership
- One application per annum will be considered
- There must be no conflict of interest existing between the applicant and any provider of goods and services
- Comparable quotes must be provided when possible
- Expenses must be incurred within New Zealand with the exception of specialised items purchased overseas when not available locally
- Applications for salaries will be considered in the context of whatever area of the community the applicant group provides services for – generally administration salaries for groups other than community welfare oriented organisations will not be considered
- Only amateur sporting participants can benefit from grants made
- Sporting organisations must be affiliated to a sporting body recognised by Sport New Zealand
- Competitions must be bona fide and recognised as such by the governing body
- Non-incorporated clubs will be limited to \$1,500 per application
- Equipment and uniforms must remain the property of the organisation
- Education providers can make applications, not associated organisations
- As a partial funder we see our role as complementing regional sector strategies and other funding opportunities, we will consider projects/applications that add value to but do not replace government's (local, regional and central) core provision of services by providing community funding for justifiable additional and/or enhanced services

## THINGS WE DO NOT FUND ARE:

- No retrospective grant applications will be considered
- Catering expenses will not be considered
- Bar related expenses will not be considered
- Individual teams will not be considered, applications must be made by the Club
- Overseas travel is not a priority for the Southern Trust

## DETERMINATION:

Applications for funds totaling \$30,000 or more will be considered by the Board of Trustees. Applications submitted by organisations affiliated to New Zealand Thoroughbred Racing Incorporated, Harness Racing New Zealand Incorporated, and New Zealand Greyhound Racing Association (Incorporated) will be considered by the Board of Trustees, regardless of the purpose and the amount sought.

## ANNUAL REVIEW:

This policy will be reviewed at least annually.

## Goods and Services Tax

- The allocation of funds made by The Southern Trust is an unconditional gift or donation. No portion is claimed by The Southern Trust as a deduction for Goods and Services Tax paid.
- If an applicant is GST registered, only the GST exclusive amount can be funded (as GST is not a real cost to such organisations).

**This is by no means a definitive list. Trust staff will evaluate all applications and inform applicants if the criteria is not met.**

**Contact The Southern Trust if you have ANY queries in respect to completion of this form or submission dates. Once all parts of the form are complete, send the form and supporting documents to:**

**The Southern Trust, PO Box 858, Dunedin 9054.  
Call Free on 0800 4 CHARITY (0800 424 274). Fax (03) 471 8470. [www.southerntrust.org.nz](http://www.southerntrust.org.nz)**