

Documents you have to submit

This document is a **checklist only** to help prepare you for the on-line funding process. Print out this document and check off when you have what you need in each section. Make notes in the margin on information you still need, conversations you need to have etc.

If you are applying for a grant of **up to \$25,000** you will need to include:

- Annual Accounts** - These accounts must:
 - be no older than 16 months at submission of the application. If the constitution, rules or trust deed stipulates the organisation must have compiled, reviewed or audited accounts, the organisation must provide that report with their application.
 - be signed by two organisation representatives (e.g. two Trustees, or a Chair and Committee member)
 - meet the content requirements of New Zealand's reporting standards for not for profit organisations. These content requirements differ by size of organisation and further details can be found at www.xrb.govt.nz/accounting-standards/not-for-profit
- One letter of support** - this must be signed, dated and no more than six months old, from community organisations you work with. This must confirm what kind of reputation your organisation has beyond the service you provide and the benefits your service or programme delivered.
- Trustee mandate/resolution** - a resolution must include approval to apply for funding from Foundation North for the purpose and amount for which the organisation is applying. This resolution must be signed by the Chair and one other member of the organisation.
- Detailed project/services budget** - actual cost and confirmed funds. A budget is regarded as a key management tool for planning, monitoring, and controlling the finances of a project or organisation. The budget will need to provide details on estimates of income and expenditures for a set period of time for your project or organisation.
- Quotes (s) for specific equipment or services where applicable.** A quote for the item/s you want to be funded. Please note if your organisation is GST registered any approved grant will exclude GST.

Notes:

If you have any questions, or need help with your application, please give us a call on 0800 272 878

If you are applying for a grant of *more than \$25,000* you will need to include:

Notes:

- Annual Accounts** - These accounts must:
 - be no older than 16 months at the time of the application. If the constitution, rules or trust deed stipulates that the organisation must have compiled, reviewed or audited accounts, the organisation must provide that report with their application.
 - be signed by two organisation representatives (e.g. two Trustees, or a Chair and Committee member)
 - meet the content requirements of New Zealand's reporting standards for not for profit organisations. These content requirements differ by size of organisation and further details can be found at: www.xrb.govt.nz/accounting-standards/not-for-profit
 - be audited if the application is for more than \$40,000, even when the rules of the organisation state that they do not require an audit.
 - applications for over \$100,000 will be required to provide their Management Letter from their Audited Accounts.
- Bank statements** - no older than 6 months from the submission of the application, showing all account balances.
- Two letters of support** - these must be signed, dated and no more than six months old, from community organisations you work with. These must confirm what kind of reputation your organisation has beyond the service you provide and the benefits your service or programme delivered. Where applicable these may include; how your project aligns to local, regional or national strategies. Eg. letters from rūnanga/iwi trust board; regional/national organisation; council or government. If you are a Heritage organisation, please provide a letter of support from Heritage New Zealand.
- Detailed project/services budget** - actual cost and confirmed funds. A budget is regarded as a key management tool for planning, monitoring, and controlling the finances of a project or organisation. The budget will need to provide us with details on estimates of income and expenditures for a set period of time for your project or organisation.
- Quotes (s)** for specific equipment or services where applicable. A quote for the item/s you want to be funded. Please note if your organisation is GST registered any approved grant will exclude GST.
- Trustee mandate/resolution** - a resolution must include approval to apply for funding from Foundation North for the purpose and amount for which the organisation is applying. This resolution must be signed by the Chair and one other member of the organisation.

If applicable to your application

- Project evaluation report or plan** - describe the tools you will use and activities you will undertake to help you understand how you are achieving your outcomes. You may want to attach your evaluation plan with your application.
- Government contracts** - If you hold Government contracts provide a summary of your most recent government contract audit report.
- Resource/building consent** - provide evidence that resource or building consent has been lodged, or approved.
- Feasibility study/report or conservation plan or condition report** - provide a copy of your feasibility study/ report completed by an architect or suitably qualified professional. If it is for a heritage organisation or project, a heritage restoration plan must be included.
- Land Ownership** - provide evidence of the land ownership. This could include, a lease agreement, land title in the name of the applicant, Maori/Marae Reservation and gazetted in the Maori Land Court.
- Detailed Project Plan** - this should include a project timeline, how the project will be managed, who the stakeholders you will work with are, how they have been consulted and how they will be involved.
- List of current or potential users** - Provide a list of the current or potential users.
- Environment related requests** - you must provide the following:
 - documentation that states whether or not your project is located on public land (or covenant land) or private land
 - Council map - showing us the location of your project
 - Threatened species - a threatened species classification list related to your project
 - Ecological awareness - evidence that you have considered how to be ecologically friendly and reduce your energy consumption

Other documentation you wish to include may also be attached. Examples include:

- The most recent annual report
- Governance and operational policies
- Statement of Service Performance for registered Charities.
- Constitution/Marae charter

Notes: