

# Documents you have to submit

This document is a **checklist only** to help prepare you for the online 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.

## For a Community Grant (CG) funding request:

### Documents you have to submit with a request for funding **over \$25,000** must include:

Notes:



**Annual Accounts** - these accounts must:

- be no older than 16 months at submission of the funding request
- be signed by the Chair
- meet the content requirements of New Zealand's reporting standards for not for profit organisations. These content requirements can be found at [www.xrb.govt.nz/accounting-standards/not-for-profit](http://www.xrb.govt.nz/accounting-standards/not-for-profit).

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 funding request.

If the funding request is for over:

**\$40,000**, the accounts must be audited and the Audit Report provided with the request.

**\$100,000**, the Management Letter from your audited accounts must also be provided.



**Two letters of support** - these must be on applicable letterhead, 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, one letter of support can be from rūnanga/iwi trust board; regional/national organisation; council or government outlining how your project aligns to local, regional or national strategies.

A letter of support from Heritage New Zealand is required if your funding request is for a heritage project, including building restoration. If you are unsure, please call our office on 0800 272 878.



**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. [Click here for an example.](#)



**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.

## 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
- Bank statements** - no older than 6 months from the submission of the application, showing all account balances

### 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:

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