

St Joans Trust

2023 Application Guidelines

Charity Registration Number CC25178

The Objectives of the Trust

The Trust Deed for the St Joans Trust dated the 1st August 2007 defines the purpose of the Trust as follows:

“To promote the care, maintenance, welfare and rehabilitation of elderly persons and to promote stimulation and encourage public interest in the total welfare and health care of elderly persons.”

Granting Focus for 2021-2023

The Trustee has identified three focus themes, it will focus funding until 2023. The themes are as follows:

- Promoting access to services for elderly through supportive environments, health promotion and disease minimisation and prevention
- Improving the wellbeing of elderly socially isolated older people, experience financial disadvantage or have barriers to inclusion through social connection
- Providing care and support for elderly with complex health and support needs

2023 Grant Round

The St Joans Trust has \$135,000 available to provide funding to charitable organisations providing support and/or services to those aged over 65+ consistent with the funding focus themes.

The Trust will consider applications for funding towards projects, programmes, services, and initiatives. This includes but is not limited to general operational expenses (including salaries), capital Projects and expenses relating to additional or established programmes, services, and one-off initiatives.

The Trust cannot fund non-registered organisations, individuals, sports organisations or clubs and overseas based charities are not eligible to apply.

Please Note the Following:

Eligibility

- Applicants must be registered with Charities Services or hold Incorporated Society status in NZ
- The 2023 Application Form must be completed in full and include the required supporting documents
- Funding requests must within the purposes of the Trust and the funding focus themes
- Late or posted applications will not be eligible of consideration for funding
- Any applications that do not fit the eligibility requirements, requests for funding for a purpose defined as something the Trust does not fund, a request under the minimum request amount or that are incomplete will not be assessed and will be unsuccessful.



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Decisions

- The Trustee will only consider one application per organisation
- The Trustee will consider all eligible applications based on the information provided in the application and other general enquiries
- The Trustee's decision is final, unsuccessful applicants will not be advised the reason their application was unsuccessful or have an opportunity to resubmit an application

Financial

- Applications can apply for full or part funding of the projects, programmes, services, or initiative
- The minimum amount that can be applied for as \$5,000
- The Trustee may approve a Grant less than the amount applied for and lower than \$5,000
- Applications may not be advised the reason by they have received an amount less then applied for
- No GST is payable on any Grants approved and you cannot apply for funding towards the GST components of costs

The Trust does not fund applications for:

- Projects/programs/services or initiatives based outside of New Zealand (this includes travel and or exchange programmes)
- Retrospective funding e.g., expenses incurred prior to the 1st of November 2023
- Funding that will be spent outside of 12 months of receiving the Grant (e.g. after November 2024)
- Endowments or capital raising funds
- Organisations with outstanding accountability requirements from previous Grants from St Joans Trust (unless an extension for reporting has been approved by the Trustee)

Conditions and Accountability Requirements

The Trustee may request further, or reduced accountability requires from time to time, this may include but is not limited to progress reporting or milestone reporting (where milestone payments are being made). This will be considered in a case-by-case basis and advised to the applicant prior to the Grant being released. Successful applicants will be required to:

- Use the funds only for the approved purpose and in accordance with any terms and conditions advised.
- A grant may be approved subject to certain conditions, in such circumstances the funds will normally be held by the Trustee until the conditions have been met.
- Provide a Receipt to the Trustee once the Grant has been received
- Advise the Trustee if the Grant is not able to apply the funds for the purpose it was approved for and may be required to refund all, or part of the Grant received
- Complete an Accountability Report to the Trustee within 12 months of receiving the Grant



How to Apply and Key Dates To apply for funding from the Trust please complete a 2023 Application Form which can be accessed at www.trustees.co.nz. Please download the application form and complete on screen using the fields available, sign (electronic signatures are accepted) and email it to us with all required and supporting documents.

All completed application forms and accompanying documentation must be emailed to charities@trustees.co.nz no later than **5pm on Thursday the 31st of August 2023**.

Please note late or posted applications will not be accepted.

Trustees Executors will acknowledge receipt of the application within five working days, if you do not receive an acknowledge then we have not received your application.

Outcomes and Grant Payments The Committee will consider all eligible applications based on the information provided in the application (including supporting documents and other general enquiries). Applicants will be advised the outcome of their application by 31 October 2023. Grant payments to successful applications will be made by 31 October 2023*.

** Providing all conditions to the Grant have been met.*

Contact

If you are unsure of your eligibility or your application, please contact:

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Email: charities@trustees.co.nz



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