

# Documents to submit

Alongside answering the questions, you will be asked to submit the following documents:

## Annual accounts

These accounts must:

- be no older than 16 months at the 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. To understand what tier to use, visit this website: [www.charities.govt.nz/reporting-standards/which-tier-will-i-use/](http://www.charities.govt.nz/reporting-standards/which-tier-will-i-use/)

*If your organisation's constitution, rules or trust deed require compiled, reviewed or audited accounts, you must provide these accounts.*

## A detailed budget

The budget is a 'forward thinking' document that will need to provide details of the income you are budgeting to receive (note all income sources, including this funding request) and the expenditure your organisation is budgeting to spend.

The budget must include the following:

- Your organisation's name.
- The months and years to which this budget applies – noting that we do not fund retrospectively, so ensure this is reflected in the budget date/s.
- If you're applying for multi-year funding, a budget for each year is required.

## Letter of support

If you are a first-time applicant, or you haven't received a grant from Foundation North in the last five years, please provide us with a letter of support.

This must be on applicable letterhead, signed, dated and no more than six months old, from an organisation working with your community (either in the same location, or in the same sector) that has a good understanding of what you do and how you do it.

Please ask them to write about the reputation your organisation has, the quality of your service delivery, how you are benefiting your community, and how you work with other service providers. Please ask your letter-writer to include their name, job title and contact details.

## GST

Please note if your organisation is GST registered, ensure any quotes and budget amounts applied for are GST exclusive. This is because any GST paid by your organisation can be claimed back in your next GST return.

If your organisation is not GST registered, any quotes and budget amounts applied for should be GST inclusive. This is because any GST paid by your organisation forms part of your overall cost.

**If applicable to your application:****Audited accounts**

If the accounts are not audited, and the request is ≥\$300,000, we may ask for additional information to determine the financial management practices of the applicant.

**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, Māori/Marae Reservation and gazetted in the Māori 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.

**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.

**Quotes(s) for specific equipment or services where applicable**

If you are applying for specific equipment or services, you will need to provide one quote of your choice for the item/service you are requesting funding for.

