Documents to submit

For every funding request, these two documents are required:

1. 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. To see the content requirements for Tier 4 not for profit organisations, click here.

— provide a Statement of Service Performance (SSP). If you need a template for providing this information, you can use this resource.

Note: If your constitution, rules or trust deed state you must have reviewed or audited accounts, you must provide it with your funding request.

2. Budget

We ask for a 'forward thinking' budget to accompany your funding request so we can see what income your organisation is expecting to receive and what you're budgeting to spend.

How your funding request fits within the wider organisation's spending is very helpful to know when determining things like community benefit, attendance and scale.

We provide a budget guide and budget template on our website under the 'Documents to Submit' section.

The budget must include the following:
— Your organisation's name
— The months and year(s) the budget relates to, noting we do not fund retrospectively so ensure the dates are in the future
— All income sources, including the funding request to Foundation North
— If you're applying for multi-year funding, a budget for each year is required

For every first-time applicant, these additional two documents are required:

3. One 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.

4. Bank account details

Although providing bank details when submitting the request is not compulsory, it is required prior to payment of a grant. Including it with your request when submitting can save time if the request is funded.

If you submit bank account details with your request, please visit this web page and check the FAQ section "What are acceptable forms of digital bank account confirmation".

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.
— 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.

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.