

Roy Owen Dixey Charitable Trust - Year 2025 Funding Eligibility Criteria

Your organisation must be:

- Registered with Charities Services or;
- A registered incorporated society or;
- A school registered with the Ministry of Education
- Operating or providing a service within the Trust Funding Region (greater Christchurch area).

PLEASE NOTE:

- Grants will be for a minimum of \$3,000 and or maximum of \$10,000. All funding is GST exclusive.
- Applicants must supply a set of Financial Statements completed in line with the reporting standards set by Charities Services.
- Your application must demonstrate how your organisation aligns with the general charitable purposes of the Trust which are:
 1. The advancement of education
 2. The advancement of religion
 3. The relief of poverty, sickness or disability
 4. Any other purpose that benefits the community

Any applications with the following circumstances will not be considered.

- Incomplete or late applications
- Retrospective funding
- Accountability requirements from 2024 - any applicant who received funding in 2024 or prior years that has not uploaded a receipt for the grant to the SmartyGrants database will not be considered. (Or who has not made alternate arrangements with the Trustee.)
- Applications from individuals, sports organisations and service clubs.
- Applications requesting funding for overseas projects.
- Applications not based in or supporting people within the greater Christchurch area.
- Applications submitted under \$3,000 and over \$10,000.
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Are you eligible to apply for funding?

* indicates a required field

Before you answer the questions below please check the Trust's Funding Region and read the [Roy Owen Dixey Trust's](#) Eligibility for funding Criteria.

If you answer **no** to any of the questions below you are **not eligible to apply** to the Trust for funding. **PLEASE DO NOT SUBMIT AN APPLICATION AS IT WILL NOT BE CONSIDERED BY THE TRUST.**

Minimum Grant \$3,000 and Maximum Grant \$10,000

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Please note applications submitted under \$3,000 will not be considered.

Is your organisation registered with Charities Services, an Incorporated Society or a School? *

Yes No

Is your organisation operating/assisting the community within the funding region? *

Yes No

Christchurch City, the Waimakariri District and the Hurunui District but not the Selwyn District or Banks Peninsula.

Have you read the Trust's Eligibility for Funding Criteria? *

Yes No

Applicant Details

* indicates a required field

Organisation Details

Name of your organisation *

Organisation Name

If your organisation is a branch of a national body please enter your name in the following format 'ABC Group - Christchurch'.

Please enter and lookup your Charities Registration Number, format: CC12345

The Charity Registration Number provided will be used to look up the following information. Click Lookup above to check that you have entered the Charity Registration Number correctly.

New Zealand Charities Register Information
Charity Registration Number
Organisation Name
Other Names
Status
Street Address
Postal Address
Telephone
Fax
Email
Website

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Date Registered

Please enter the number in upper case, with no space between the letters and digits. If you have entered the number correctly the fields in the grey box will populate.

Postal Address *

Address

Suburb Town/ Postcode
 City

Website

Is your organisation GST Registered? *

Yes

No

IRD/GST Number *

Must be at least 11 characters include, format: 012-345-678

Please provide your bank details.

Note that payments will only be made to bank accounts under your organisation's name. No payments will be made to third party bank accounts.

Bank Account *

Account Name

Account Number

Must be a valid New Zealand bank account format.

Please attach a bank deposit slip or verification of your bank account details *

Attach a file:

Verification of your organisation's bank account can either be; a full bank statement issued in your organisation's name & dated within the last 3 months, OR a signed written & stamped confirmation from a bank of your organisations account number dated within the last 3 months.

Contact for this Application *

Title

First Name

Last Name

Position Held

Contact Phone Number *

Contact Person's Email *

Tell us about your organisation

* indicates a required field

What does your organisation do?

Tell us briefly about your organisation - what do you currently do? *

Word count:

Please limit your answer to 200 words or less.

How many people does your organisation assist per year? *

Please show the number assisted annually by your branch/ within the Trust funding area. Note this for all of the work your organisation does.

How many paid staff do you have? *

Please show the number of FTE for your branch/ within the Trust funding area.

How many volunteers do you have? *

Please show the number of volunteers for your branch/ within the Trust funding area.

What are you applying for?

Funding Request Title *

In 10 words or less - if you had to give a brief statement to describe your funding request what would you say? e.g. Equipment - 2 Wheelchairs; To provide Counselling Services; Operating Expenses - 6 months' rent; etc.

How much funding is your organisation requesting? *

Please round to the nearest \$. If you are GST registered the amount requested must EXCLUDE GST. Applications must be between \$3,000 and \$10,000

What will this grant enable your organisation to achieve? *

Word count:

Must be no more than 200 words.

Please provide specific details of your project/programme, the expense you wish to pay or item you wish to purchase. What are the expected outcomes of the funding and who will benefit?

Describe how the project / programme is aligned with the Trust's objectives?

Word count:

In 150 words or less please provide details of the need you have identified and how that need would be supported by this funding.

Approximately how many people do you expect to benefit from the funding? *

What is the total expected cost of your project/programme/expense? *

\$

If not fully funded by the Trust, how will you fund the remaining balance required? Include details of other funding applications, and/or provide an outline of any fundraising efforts already undertaken toward this project.

This is specifically related to the purpose of the application. If you are seeking other grants how much of your funding is confirmed?

Budgets, Cost and Quotes

If you are requesting funding for a project/programme/expense please attach a budget. If you are purchasing a specific item please attach a quote.

Attach a file:

Your Organisation's Financial Details

* indicates a required field

Please attach a copy of your most recent Financial Statements *

Attach a file:

Financial Statement Balance Date *

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Note: Financial Statements must comply with the Reporting Standards set by DIA - Charities Services. You must attach the same completed financial statements you used with your latest Charities Filing return.

Income & Expenditure

In the questions below please provide financial details using your most recent Financial Statements.

Total Income *

Total Expenditure *

Net Surplus/Deficit *

Current Assets *

E.g. Bank Accounts, Debtors, Stock, Term Deposits maturing within 12 months.

Non-Current Assets *

Total Assets *

Current Liabilities *

Non-Current Liabilities *

Total Liabilities *

Working Capital (Current Assets - Current Liabilities) *

Sources of Funding

Please list your organisation's top 10 sources of external funding (such as grants, government contracts & foundation income) for the next 12 months. For unconfirmed sources of funding, you may write, 'unconfirmed' next to it in brackets. E.g. ABC grant (unconfirmed).

Funding Source/ Organisation	Amount	Funding End Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

Final information & declarations

* indicates a required field

Is there any other supporting information you would like to upload? Please limit to 2 documents.

Attach a file:

E.g. Supporting research, letters of support etc.

Our preferred format for attachments is PDF, Excel, Word or JPG.

Supporting materials cannot exceed 25MB in size, as files exceeding this will not upload.

How did you hear about the Trust? *

- I have applied to the Trust in the past.
- Word of mouth or recommendation.
- Internet (e.g. Public Trust, Search Engine or Other Funding Websites).
- Media (e.g. Newspaper or Radio adverts).
- Facebook
- Other:

Declaration & Privacy Statement

I certify that:

- I am authorised by my organisation to complete and submit this application;
- I am authorised to provide and upload the personal information of our employees in accordance with the Privacy Act 2020, if applicable;
- to the best of my knowledge, all details supplied in this application and any attached documents are true and correct.

I agree that I will contact Public Trust - Charities Team immediately if any information provided in this application changes or is incorrect.

I understand that if the Trust approves a grant, my organisation will be required to comply with any terms and conditions applying to the grant, including those set out on Public Trust's website, and be bound by the content of my application to apply the funding for

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the purpose for which it was requested. My organisation may also be required to comply with the Trust's accountability requirements and may be asked to publicly acknowledge the donation from the Trust.

I acknowledge that the information contained in this application is stored in the SmartyGrants database and will be held by Public Trust for the purpose of assessing the application submitted by me on behalf of my organisation to the Roy Owen Dixey Charitable Trust and/or any other conjoint Trust/s.

I understand the information may be made available to other parties such as an Advisory Committee and / or Independent Auditors in the course of enquiries regarding applications and third-party suppliers for related purposes.

I acknowledge that if I do not provide all of the information requested, Public Trust may not be able to assess this application.

My organisation gives consent for Public Trust to hold this information for no longer than is required in order to assess this application and to meet their legal requirements.

My organisation acknowledges that individuals may ask for access to personal information held about them and, if they believe the information is incorrect, they are able to request correction of that information.

I have read and understood the declaration and privacy statement *

Yes

Full Name *

Date *

Must be a date.