

# DV BRYANT TRUST

## WELFARE GRANTS

*Making an online grant application*

 [bryanttrust.nz](http://bryanttrust.nz)



### DOCUMENTATION & INFORMATION

#### *Preparation before starting your online application*

Please note, the [online application](#) cannot be saved and returned to, or left open for an extended period. The following information/documents are required to be uploaded; have these ready before you start.

1. **PROPOSAL** – Your personalised project and/or services proposal, signed by an authorised executive member applicable to your organisation. Proposal to include details as follows:
  - a. **Organisational information:**
    - i. History
    - ii. Aim/objectives
    - iii. Philosophy
    - iv. Membership size etc.
  - b. **Project and/or services proposal information** – Outline the following:
    - i. Overall plan and objectives of your project and/or services and how it aligns with the Trust's focus (refer '*Strategic Focus*' section below);
    - ii. Wider community benefit(s), particularly relating to people who are disadvantaged by personal or social circumstances.
  - c. **Funding request:**
    - i. Amount requested
    - ii. What the funds will be specifically used for
    - iii. Total project/proposal cost
    - iv. Other funding/applications for this proposal – confirmed and pending
    - v. Long term funding, if it is an ongoing project.
2. **REFEREES** – FOR NEW APPLICANTS ONLY - provide contact details of two referees.
3. **BUDGET** – Project or current year budget.
4. **ACCOUNTS** – Recent annual financial accounts, reviewed or audited, as applicable.
5. **BANK ACCOUNT** – one of the following:
  - a. Bank deposit slip
  - b. Bank issued account number verification document
  - c. Copy of recent bank statement – *showing account name and number.*

You will be able to add multiple documents under the final '*Any supporting documents*' upload section to support your application e.g. annual report, photos, quotes, references etc.

#### STRATEGIC FOCUS

*Strengthening communities in the Waikato through:*

- *Supporting children and youth*
- *Innovative education initiatives and*
- *Projects addressing inequality.*

## ONLINE APPLICATION FIELDS

### *Information fields and 3 step process of online application*

Below is an outline of the three-step [online application](#) process and the associated information fields.

#### 1. Step 1 of 3: Organisational details

- Constitutional name of organisation
  - Trading/past name
  - Legal status – Charitable Trust, Incorporated Society or other
  - Organisational charities number – enter your charities registration e.g. CC12345. If you don't have a charities number:
    - Enter applicable organisational number such as *Incorporated Society number*
    - *Schools* - Enter school's education organisation number
    - If you don't have either of these, please contact us before applying online.
- It is important you enter this field correctly to link your records. Include the letters CC followed by the digits.** *If your registration number has changed recently, or you are unsure what to enter, please contact us before applying online.*
- Date registered
  - Physical address
  - Postal address
  - Website/social media links
  - Contact person for your application – Name, position, email and preferred contact phone number.

#### 2. Step 2 of 3: Funding application summary

- Project/proposal title
- How much money you are applying for?
- Total project/proposal cost
- What the funds will specifically be used for
- Have you received DV Bryant Trust funding before?
- Check boxes for the applicable Waikato region(s) that your project or services would predominantly serve in.
- Referees – FOR NEW APPLICANTS ONLY, provide contact details of two referees.

#### 3. Step 3 of 3: Complete checklist and upload supporting documents

Browse and upload your supporting documents [any format, 14MB max size] as follows:

- a) *Funding proposal* (refer page one above for what to include in your proposal)
- b) *Budget* - Project or current year budget, applicable to your application
- c) *Annual financial accounts* - Recent annual financial accounts, reviewed or audited, as applicable.
- d) *Bank account* - one of the following:
  - i. Bank deposit slip
  - ii. Bank issued account number verification document
  - iii. Copy of recent bank statement – showing account name and number
- e) *Any supporting documents* – e.g. annual report, photos, quotes, references etc.

**SUBMIT FORM** – If you need to review or go back a step, click the number at the top of the form.



Once you're finished, click **SUBMIT** – refer picture below of step 3 of 3.

**1****2****3**

## Step 3 of 3: Complete checklist and upload supporting documents

\* required fields

Additional information can be supplied in any format but please check that your complete funding application includes:

Funding Proposal - Your personalised project proposal signed by an executive member. Please refer to **Q&As** for information on what to include in your proposal.

Max size 14MB

Budget - Your project/current annual budget for your organisation.

Max size 14MB

Annual Financial Accounts - Copy of your most recent annual accounts, reviewed or audited, as applicable.

Max size 14MB

Bank account - Copy of bank deposit slip / recent bank statement / bank verification document

Max size 14MB

Any supporting documents

Max size 14MB

This is the final step. Please make sure you have filled out all the fields the best you can. If you need to go back a step click on the number at the top of the form.