

ANZ New Zealand Staff Foundation: Example application questions

- This form is for **preparation purposes only and does not constitute an application**. Only applications submitted through the Foundation Hub will be accepted by the ANZ Staff Foundation.
- Please read the [application guidelines](#) before preparing your application.
- All applications that do not provide the correct information may be automatically DECLINED.
- You will be able to save a draft of your application in the Foundation Hub and come back to it at a later stage.
- You must submit your application before the funding round deadline to be considered for funding.

1. Charity name

- This must be the charity's legal name, i.e. the name under which the charity is registered.
- If you cannot find your charity's legal name in our drop-down list, which is taken from the New Zealand Charities Services database, you will be prompted to manually enter the charity's legal and trading name (if different), and your Charities Commission registration number.

2. Have you received a grant from the foundation in the past? Yes/ No

3. If yes to question 2, have you received a grant from the foundation in the past 11 months? Yes / No.

- No organisation can receive funding in two consecutive funding rounds unless the funding rounds are more than 11 months apart.
- If you are unsure whether this applies to your charity, please contact the Foundation team.

4. Provide your charity's details:

- Postal Address (street) Suburb, City/Town, Region, Postcode
- Phone Number
- Email Address
- Website



Call us on 09 252 6563



Email stafffoundationnz@anz.com

5. Provide your charity's bank account number and proof of bank account. Proof of bank account can be any of the following:

- A *pre-printed deposit slip* which includes the full bank account number (bank, branch, account number and suffix) and the account holder's name.
- A *bank statement* which includes the full bank account number (bank, branch, account number and suffix) and the account holder's name.
- A *letter from the bank* which includes the full bank account number (bank, branch, account number and suffix) and the account holder's name. This must be signed and stamped by the bank.

If your application is successful, we will deposit funds into this account.

6. Provide a main contact person for your application:

- Name (first and last)
- Position/Title
- Mobile Phone Number (you may enter a landline if the person does not have a mobile phone)
- Email Address

This person must belong to or be employed by the applicant charity and have the authority to answer any questions we may have e.g. chairperson, manager, funding co-ordinator.

7. Provide a secondary contact person for your application:

- Name (first and last)
- Position/Title
- Mobile Phone Number (you may enter a landline if the person does not have a mobile phone)
- Email Address

We require a second contact person in case we can't get hold of the main contact. This person must also belong to or be employed by the applicant charity.

8. Tell us about your organisation.

In 1000 characters [approximately 200] words or less, please tell us when and why you were established, what you do and what you aim to do.

9. What sector does your application for funding relate to? (Select one only):

Health, Education, Environment, Community Services, Arts / Culture

If your application for funding falls into more than one of the sectors listed, please pick the sector that you feel is **most** appropriate.



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10. Provide referee details:

- Name
- Position/Title
- Mobile Phone Number (you may enter a landline if the person does not have a mobile phone)
- Email Address

Your referee must be someone who is familiar with, but independent of your organisation, e.g. somebody who has benefitted from your services, somebody from another charity that works on group projects with the applicant charity, somebody from a health or government service who knows of the work your charity does, a school teacher or principal etc.

We will contact this person to discuss your application. Please confirm with this person that they are happy to be your referee **before** submitting your application.

11. Would your charity benefit from having ANZ volunteers?

ANZ encourages every staff member to take a paid volunteer day each year.

If you are interested in having ANZ Staff volunteer for a day at your organisation, please provide details of: what activity they could undertake and when, and the number of volunteers you require. Please limit your answer to 500 characters.

12. Is an ANZ New Zealand Staff Foundation member supporting this application? Yes / No

Applications will **no longer** be given preference if they have the support of an ANZ staff member, however, you are welcome to provide details of an ANZ staff supporter if you or the charity have an existing relationship with us.

If YES to question 12, then please provide the ANZ staff member's:

- Name
- Position/Title
- Business Unit & Location
- Mobile Phone Number
- Email Address

13. What project or activity is your organisation seeking funding for?

In 1000 characters [approximately 200 words] or less, please describe the activities or project(s) you are requesting funding for.

14. Amount Requested:

- Less than \$10,000 or \$10,000 or more.
- Enter the total amount you are requesting from the ANZ Staff Foundation in this funding round.

Provide a copy of your most recent set of annual financial accounts. They must be:

- Signed by your Chairperson and a Chartered Accountant registered with Chartered Accountants Australia and New Zealand or a Certified Practising Accountant (CPA); and
- Audited*, if you're applying for \$10,000 or more.

If your annual financial accounts are more than six months old

If your annual financial accounts will be more than six months old when our funding round closes, you will also need to supply management accounts (a statement of profit and loss and balance sheets).

If you need to supply management accounts, they must cover the time from the end date of your annual accounts to no more than three months before our funding round closes.

We can accept print outs of your management accounts from accounting software, e.g. Xero. Draft accounts do not need to be signed.

*Accounts that have been reviewed by an auditor, but not formally audited, will not be accepted for applications of \$10,000 or more.

15. What is the total cost of this project / initiative?

The maximum amount a charity can request for funding from the Foundation is \$25,000 per funding round.

This question relates to the total cost of the project. E.g. the project may cost a total of \$100,000, and you are applying to the Foundation for a portion of that funding.

16. Cost breakdown.

- If your application involves funding for a number of different items, please provide an itemisation of costs for each item/component.
- E.g. for a \$10,000 application, this may look like:

Item	Cost
Counsellor wages x 35 sessions	\$7,000
Catering for sessions	\$2,000
Paper and pens	\$1,000

- Please note that your cost breakdown must add up **exactly** to the amount you have requested in question 14. (This may not necessarily be the total cost of the project you have entered in question 15).

17. Approximately how many people will benefit from this funding?

18. How will you measure the success of the project?

In 1000 characters [approximately 200 words] or less, tell us how you will track your progress.

19. What is the timing of your project?

Please tell us the actual date, or specific period, of activity.

- If your application is successful, your charity must spend the funds within six months from the time of receipt.
- For August funding rounds, this means by 30 April the following year. For February funding rounds, this means by 31 October the same year.

20. Have you applied to any other organisations for funding for the same purpose? Yes/No

If YES, was your application successful? Yes/No

21. Disclaimer:

Please note that we reserve the right and have complete discretion to:

- (i) Refuse an application; and
- (ii) Withhold the payment of any money (notwithstanding that an application has been successful)

Confirmation requirements if your application is successful: (tick boxes)

We declare, to the best of our knowledge and belief, that:

- All the information in our application is true and correct.
- We are authorised to make this application on behalf of the applicant charity.
- All estimates of spend included in this application represent costs that will be incurred by us.
- We agree to only use money given to us by the foundation for the charitable purpose in our application (meaning the project or activity described in question 13).
- We will provide a brief report to the foundation on the result of our project and the impact the funding has made within six months of receiving the money. We will confirm in this report that we have only spent the money on the charitable purpose in our application. We agree to repay the money to the foundation if we don't comply with this requirement.
- We will return money we don't spend to the foundation if it is more than \$300 or if we don't spend the money within six months.
- We will let you know immediately if we're removed from the charities register or our charitable registration is, or could be, at risk.

