

**FOUNDATION
NORTH**
*Pūtea Hāpai Oranga
Funding to Enhance Lives*

**Foundation North
Connie Lee- Engagement
Advisor**

**Auckland North Community
And Development Funding
Fair 2022**


Foundation North © 2021 Thursday, 17 March 2022

1

1

Who is Foundation North?

- We are your community trust, created in 1988 from the sale of community shares in Auckland Savings Bank
- An endowment/pūtea, invested for the people of Auckland and Northland for generations to come
- Around \$35 - \$45 m in grants provided each year to community organisations and initiatives.



Foundation North © 2021 Thursday, 17 March 2022

2

2

Who are we?

- Team of ±40 + Network of 20 Associates from Centre of Social Impact
- Ngā Uara| Our Values:



Kia kotahi te hoe
Paddling in unison



Whakamana
Enabling, uplifting and
reinforcing



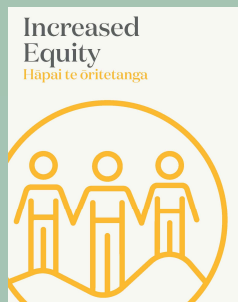
Ako
Listening, learning and
understanding



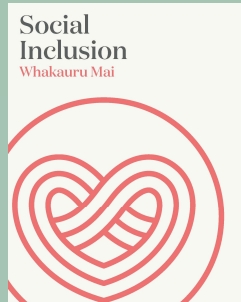
Me mahi i roto te tika, te
pono, me te aroha
Doing the right thing with
respect and care



Ngā Hua: Our Focus Areas



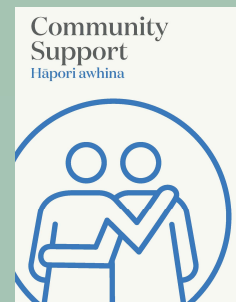
Increased
Equity
Hāpai te ōritetanga



Social
Inclusion
Whakauru Mai



Regenerative
Environment
Whakahou taio



Community
Support
Hāpori awhina



Funding Framework



Community Funding
(Includes QRG under \$25k, CG over \$100k)

Impact Funding
Flexible funding, 'seed, scale, system'
approaches and innovation



Who can apply?

- Organisations that can demonstrate a charitable purpose
- Provide us with annual accounts
- Providing a service, project or programme of benefit to the communities of Auckland and/or Northland.

Funding Exclusions and Limitations



The Foundation aims to be a broad community funder however, we recognise we cannot fund everything. Whilst the focus areas and theories of change identify priorities for funding, specified exclusions guide applicants in understanding what we are unlikely to fund or have limitations on funding, given the constraints of the grants budget.

Items we will not generally fund

- Costs that are regarded as being primarily the responsibility of central or local Government. We acknowledge however that many community building projects and iconic projects can only be funded in partnership with central and local government.
- Examples of items we will not fund (note: this is not an exhaustive list):
 - Schools including school facilities, school resources, school equipment, school classrooms, school uniforms, IT suites in schools and administration blocks, school halls, school gymnasiums, school swimming pools, school gardens, care education provision (core curriculum delivery)
 - External providers delivering programmes or resources into schools that can be regarded as part of the delivery of core Ministry of Education curriculum
 - New early childhood education centres
 - Council-maintained sports fields
 - Roads and street lighting
 - Core health and social services (including salaries of health professionals, Primary Health Organisations, District Health Boards, hospitals, clinics, core primary healthcare, medical equipment (hospital and dental))
 - Tertiary education institutions and related clubs (including teaching and buildings). We may occasionally fund projects where there is a direct benefit to community. This is limited to one application per year via the University's Foundation.
 - Academic research
 - Rescue helicopters, fire and ambulance services
 - Vacuity facilities and services
 - Leaky building repairs as defined in the Weather Tight Home Resolution Services Act
 - Facilities owned by government or Council-controlled Organisations (CCOs)
 - Marae linked to educational institutions
 - Building projects
 - Feasibility studies, needs analysis, project plan development, building consents, resource consents, Quantity Surveyor or architectural drawings
 - Purchase of buildings

- Aged care facilities and services (Note: in some cases, we may consider initiatives that are owned and proposed by community, where there is no intention to sell to private owners)
- If Foundation North has provided a grant over \$1 million or has been at least a 50% funder of a large capital grant, it is unlikely to consider any further funding applications within three years of the grant (Note: This will be built into the conditions of all building project grants over \$1m)
- Financial:
 - Retrospective funding
 - Debt repayment
 - Refinancing of existing loans
 - Endowments
- International costs:
 - Travel and other costs incurred overseas
 - Overseas aid
- Projects seeking to promote religious or political objectives
- Individuals
- Projects that create benefit, especially financially, for private owners (except for Nga Whenua Rahui legal agreements or land under QE II Covenants).
- Fundraising activities and organisations
- Funding to run conferences

Items we have limitations on

- Foodbanks - We will consider applications from foodbanks, up to a maximum of \$50,000.
- Organisations that focus on a single health issue - funding up to \$25,000 under Quick Response Grants will be considered.
- We will not fund operating costs at more than 30% of organisation's total expenditure (based on the previous year's financial statements).
- We will consider funding for sports uniforms and equipment for children and young people aged between 5 and 18 years, up to a maximum of \$10,000.



Our funding hub online application process:

When you are ready to apply, go to our website: www.foundationnorth.org.nz/funding

If you have any questions, or need help with your application:
Give us a call 09 360 0291 or 0800 272 878 - Mon-Fri 9am-5pm.

foundationnorth.org.nz | info@foundationnorth.org.nz | (0800) 272 878

Are you ready to apply for a QRC? 8820

Quick Response

- Up to \$25,000
- No closing dates
- We aim to give you a decision within two months of receiving a complete application



Wakarusa Valley Community Trust



Community Grants

- \$25,000+
- No closing dates
- Multi-year applications
- We aim to give you a decision within five months of receiving a complete application



Ngati Raukawa ki Te Taiwhiri Trust, Te Taiwhiri Trust, Te Taiwhiri Trust & Te Taiwhiri Trust

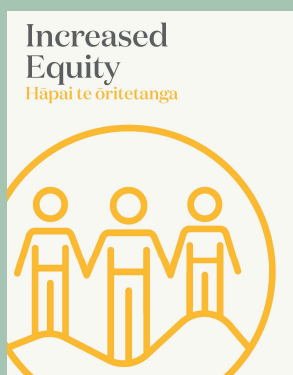


Ngā Hua: Our Focus Areas



9

Increased Equity



Priority:

- Māori and Pacific Peoples, Northland and South Auckland.
- children and young people at the centre.

Communities **leading** their own solutions to achieve their hopes and dreams

Intergenerational change



10

Social Inclusion



Priority:

- former refugees,
- new migrants (fewer than five years in New Zealand),
- rainbow communities
- people living with a disability

Reduce discrimination and racism and increase social inclusion

Tackle root causes



Regenerative Environment



Priority:

- Initiatives proposed by tangata whenua

Ecosystems and communities being renewed and regenerated

Maturanga Māori being recognised, valued and implemented.



Community Support



Initiatives which enable:

- Communities to come together
- Community resilience
- An increase in skills and creativity
- Access to and participation in community activities and spaces



Application tips

- **Understanding Funder's strategic goals**
- Who, When, What, Why and How?
- Use our helper text to guide your answers
- Supporting information and documents are easily understood and coherent to the application.
- Be realistic

Lastly, our team is here to work with you and support you!



Useful Guides:

Foundation North's website has a wide range of application guides to support you through the process from the get go:

Application guides

- 1 Applying for a grant
- 2 Who can apply?
- 3 How to use the Funding Hub
- 4 When can you apply?
- 5 Are you ready to apply?
- 6 Documents to submit
- 7 How do we assess?
- 8 Exclusions and limitations
- 9 Applying under an umbrella
- 10 Download our logo



15



16

