

## NOTES FOR GUIDANCE OF APPLICANTS 2022

❖❖ PLEASE READ CAREFULLY ❖❖

1. Applications must be on the official Application form, and must be received by the closing date. in fairness to all applicants :- **LATE APPLICATIONS WILL NOT BE CONSIDERED**
2. Applicants benefiting from a grant, must be within the catchment of Otago-based Lodges.
3. As there are limits on the funds available for distribution, grants generally will be for the provision of, or the replacement of, identifiable items of equipment, or the refurbishment, or extension of an existing building or facility.
4. **The following supporting documentation is required with all applications;**
  - **A background to the application, and an explanation for the need and anticipated benefits to your organisation and the community.**
  - **A breakdown of the total cost of the project = including TWO mandatory quotations, or price lists; together with an explanation of the organisation's ability to fund the balance of the cost, and to maintain it.**
  - **Copies of the organisations last Two Years ANNUAL REPORTS.**
  - **Copy of the last Two Years ANNUAL FINANCIAL ACCOUNTS, showing the source of all income (including investments) and explanatory notes indicating whether investment funds and resulting income, is earmarked for specific purposes.**

If you have some concerns about being able to supply this information please contact the Trust Secretary.

5. Applications for any of the following **WILL NOT** be considered:
  - Establishment, Administration, maintenance, or operating / running costs
  - Salaries / Wages, or Debt reduction, or Living Expenses, nor non-specific costs.
  - Travel Costs, or Overseas Activities, or Course Fees, Tutorial Fees, or Prizes.
  - Items you have already purchased or already own. (Replacement of existing items are eligible )
  - Funding cannot be retrospective.
  - Training Costs or expenses, or Scholarships.
  - Hire costs of Venue or Equipment, Catering Costs, Event Advertising, or Event Sponsorship.
  - General Consumables i.e. Fuel, food - (If in doubt enquire)
  - Being a portion of a multiple sourced grant fund, or joint funding; i.e. 'pool-funding'.
  - Applications must be directly for the benefit of the Applicant organisation.
  - Applications involving Commercial or Personal profit or reward.
  - Funds must be used for the purpose for which they were granted.
  - Any unused funds must be returned to the Trust immediately.

**N.B. ONLY IN EXCEPTIONAL CIRCUMSTANCES WILL AN APPLICANT WHO HAS RECEIVED A GRANT FROM THE TRUST IN THE PREVIOUS *THREE YEARS* BE CONSIDERED.**

(Note; This means three clear years between applications, so the next application would be in the fourth year, so this year, grants received in 2019 will not be considered. )

Failure to answer ALL the questions on the Application Form, or to supply any of the information requested, may render the application ineligible for consideration.

Check that you have enclosed **ALL** information, and **Signed** the Application Form.

**FOR DETAILS ON HOW TO SUBMIT OR RETURN, AN APPLICATION FORM,  
PLEASE TURN PAGE OVER**



All Applications MUST be received by the Sub-District Secretary's below  
by **Closing Date THURSDAY 31 MARCH 2022**

**Note:** Applications must be in 'Hard Copy' format.  
(Submissions sent electronically will not be considered)

**SEND YOUR APPLICATION TO YOUR NEAREST SUB-DISTRICT:**

Sub-District Secretary, Address & Contact Details:

**NORTH OTAGO**

A S (Arthur) Mahan                      11 Meon St Oamaru      9400  
☎ (03) 437 0451                      [arthur.mahan@outlook.com](mailto:arthur.mahan@outlook.com)

**CENTRAL OTAGO**

R H (Rory) Butler                      7A The Dunes, Cromwell 9310  
☎ 02109057907                      [randcbutler@inspire.net.nz](mailto:randcbutler@inspire.net.nz)

**GREATER DUNEDIN (Including Mosgiel )**

A D (Ashley) Broad                      16 Guildford Place, Mosgiel 9024  
☎ (03) 489 8788                      [ashleyb@xtra.co.nz](mailto:ashleyb@xtra.co.nz)

**SOUTH OTAGO**

C W (Colin) Weir                      72B Spenser St, Milton 9291  
☎ 02108383289                      [colinweiry@gmail.com](mailto:colinweiry@gmail.com)

**If in doubt**, please contact the Trust Secretary ( see below )  
or your Local Masonic Lodge for the correct address details.

IT IS IMPORTANT THAT ALL THE RELEVANT SUPPORTING  
DOCUMENTATION IS ATTACHED TO YOUR APPLICATION.

. Also, we would encourage you to attach a letter, explaining details and background relating  
to your Application. The more information with the Application Form the better.

**Funds to successful Applicants will be distributed, middle of JUNE.**

ALL Applications will be advised in writing if successful or not.

If you have any questions or need some guidance, please contact a  
Masonic Lodge in your local area,  
or the **Trust Secretary - Grant Watson**

(03) 454 2533                      email      [info.omct@xtra.co.nz](mailto:info.omct@xtra.co.nz)



**The Otago Masonic Charitable Trust**

[Helping Otago Communities](#)