

OTAGO MASONIC CHARITABLE TRUST

NOTES FOR GUIDANCE OF APPLICANTS 2024

❖❖ PLEASE READ CAREFULLY ❖❖

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**

Applicants benefiting from a grant, must be within the catchment of Otago-based Lodges.

As there are limits on the funds available for distribution, grants will generally be for the provision of, or the replacement of, identifiable items, or the refurbishment, or extension of an existing building or facility.

The following supporting documentation is required with all applications;

- **A background explanation to the application, and a demonstration for the reason why a grant is needed and anticipated benefits to your organisation.**
- **A breakdown of the total cost of the project = including TWO Quotations, or price lists; where possible, together with an explanation of the organisation's ability to fund the balance of the cost, and to maintain it.**
- **A Copy of the organisations LATEST CHAIRPERSONS REPORT.**
- **A Copy of the Latest 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 concerns about being able to supply this information please contact the Trust Secretary.

Applications for any of the following **WILL NOT** be considered:

- To individuals, or involving Commercial or Personal profit or reward.
- Establishment, Administration, maintenance, or operating / running costs
- Salaries/Wages, Staff Costs, Debt Reduction, or Living Expenses.
- 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)
- The Grant must be part of a current project and to be used within 12 months
- Training Costs or expenses, or Scholarships.
- Venue or Equipment hire, Catering Costs, Conference or Event Advertising, or Sponsorship.
- General Consumables i.e. fuel, food, office supplies - (If in doubt enquire)
- Livestock, animals or plants (other than landscaping as part of a wider project).
- Being a portion of a multi sourced project fund. i.e. 'pool-funding'.
- Applications must be directly for the benefit of the Applicant organisation.
- Funds must be used for the purpose for which they were approved.
- All 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 following application would be in the fourth year, therefore grants received in 2021 or since 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 attached **ALL** information, and **Signed** the Application Form.

FOR DETAILS ON HOW TO SUBMIT OR RETURN, AN APPLICATION FORM,

PLEASE TURN OVER PAGE

All Applications MUST be received by the Sub-District Secretary's below
by **Closing Date SUNDAY 31 MARCH 2024**

Note: Applications should be sent electronically / digitally to the Trust's email address, but the Trust reserves the right to request the whole Application, or part thereof, or specific documents, to be sent as 'Hard Copy'.

Enquiries are welcome and if you have any queries please contact your Local Sub-District Secretary, as below:

NORTH OTAGO

Arthur Mahan ☎ 022 3149944 arthur.mahan@outlook.com

CENTRAL OTAGO

Rory Butler ☎ 021 09057907 randcbutler@inspire.net.nz

GREATER DUNEDIN (Including Mosgiel)

Ross Hudson ☎ 021 1320591 b-hudson@xtra.co.nz

SOUTH OTAGO

C W (Colin) Weir ☎ 021 08383289 colinweiry@gmail.com

OR

contact the Trust Secretary (see below)

IT IS IMPORTANT THAT **ALL** THE RELEVANT SUPPORTING DOCUMENTATION IS INCLUDED WITH YOUR APPLICATION.

. Also, we would encourage you to attach a covering letter, explaining details and background relating to your Application.

The more information with the Application Form the better. **IF IN DOUBT, ASK !**

Funds to successful Applicants will be distributed, by the end of May.

ALL Applications will be advised by email if successful or not.

If you have any questions or need some guidance, please contact the District Secretary as above, or the Masonic Lodge in your local area,

Or the **Trust Secretary - Grant Watson**

027 2213526 email info.omct@xtra.co.nz website omct.co.nz



The Otago Masonic Charitable Trust

Helping Otago Communities