

THE KETE ORA TRUST
Funding Criteria
Education and Research projects



BACKGROUND

The principal aims of the Kete Ora Trust are:

To promote research and education in biodynamic, organic or sustainable land management for agriculture, horticulture, forestry and animal husbandry.

Any individual or group can apply for funds for activities that support these aims by submitting a project proposal using the online application form.

Fund Holders

If the application is successful, the Trust provides the funds to the **fund holder** - a group, organisation or individual - who may pay individuals or organisations for the work carried out as part of the project.

A fund holder **group or organisation** must have governance arrangements to assure:

- That Trust funds are used only as agreed and as charity law allows
- That it is not-for-profit only
- That no fund recipient determines their own remuneration
- That paid work is properly done

A fund holder individual must have no business interests that could benefit in any way from the events funded. A fund holder individual could for example apply for costs to host an event such as a workshop with others, but could not pay themselves a fee, or sell a product that benefits them or their business activities.

A fund holder must ensure proper use of funds. Any unspent funds must be returned.

Charitable Purpose

Kete Ora Trust is a charity and can give funds only for charitable purposes. Before preparing an application, applicants are advised to make themselves familiar with the requirements via

- Kete Ora Charitable Trust funding criteria: <https://www.keteora.nz/apply/funding-criteria/>
- The NZ Government Charities website here: <https://www.charities.govt.nz/ready-to-register/need-to-know-to-register/charitable-purpose/>

MAKING AN APPLICATION

Most of the application details are submitted as part of **Step 1** via the online application form:

<https://www.keteora.nz/apply/make-a-funding-application/>

Once the form is complete, you are directed to **Step 2** where you can attach supporting documentation as noted below.

Details required:

Information about the applicants, including information to show that:

- If a group or organisation, the applicant has sound governance and can manage the funds in ways that meet charitable restrictions. (*Evidence of registration etc submitted at Step 2*)
- If an individual, that individual has no business interests that could make the holding of funds non-compliant with charity law

Project details

- The aims and purposes of the project
- Who would work on and be responsible for the project
- Details of the activity
- Who will benefit – outcomes and measures
- For research or study projects:
A project proposal, not exceeding four A4 sides in length, including how the results would be disseminated and who has peer reviewed the proposal – a copy of at least one review must be supplied. (*Submitted as a PDF at Step 2*)

Financial information

Charities, associations and other organisations:

- A copy of your latest financial statements (*submitted at Step 2*)

All applications:

- The total anticipated cost of the project
- The amount of funds requested from the Trust and what items of expenditure the funds will be applied to
- how those expenditures meet charitable rules
- who will be paid for goods or services
- any other funding sources and the amount expected from those sources (including entry charges or koha)
- A detailed income and expenditure budget (*submitted at Step 2*)
- Where appropriate, two quotes for suppliers of goods and services. If this is not possible, please provide a full explanation as to why you have only included one quote (*submitted at Step 2*)

Community support and promotion

- Evidence of support for the project
- How you plan to publicise and promote the project, and acknowledge Kete Ora Trust

ALLOCATION OF TRUST FUNDS

The following criteria for funding will be considered by the Trustees:

- The project will contribute to the spreading of existing knowledge and/or to new knowledge relevant to biodynamic, organic and sustainable land management for agriculture, horticulture, forestry and animal husbandry in New Zealand.
- Biodynamic projects may be favoured, as these will often enhance and be used in organic farming and gardening practices.
- Projects for consumer education will be considered so long as they are of a charitable nature i.e. not commercial.
- The estimated qualitative and quantitative benefits to New Zealanders are expected to exceed the costs of the project
- Who, and how many will benefit will be considered
- The balance with other projects, so that funds cater for as many as possible, and for different farming, horticulture, forestry and animal husbandry types, different regions and both experienced and new biodynamic and organic farmers
- The project will not directly lead to financial benefits to individuals involved (except reimbursement for expenses and work done)

- The project could not easily be done by an individual or group without funding and is not a commercial project
- The results of activities funded will be provided free or at modest cost so that access of the general public is not restricted by cost.
- The trustees encourage applicants to consider other sources of funding in conjunction with Kete Ora trust funds.

PROMOTION AND REPORTING

- We encourage Grantees to promote the event with grantee members, participants, and wider audiences such as local and social media where appropriate, and to acknowledge the support of Kete Ora Trust. Kete Ora Trust logos etc will be supplied.
- The Trust requires you to provide a report that details the results and outcomes of the project as per your application. If the project is made up of a series of events, we’d appreciate ongoing updates.
- The Kete Ora Trust would appreciate receiving high-res photos of the event for use in our own publicity – subject to the agreement of participants.

APPLICATION DATES for 2024 and 2025

| 2024 FUNDING ROUNDS | OPENING DATES | CLOSING DATES | DECISIONS SENT TO APPLICANTS |
|----------------------------|----------------------|----------------------|-------------------------------------|
| 3 | Monday 5 August | Friday 6 September | Tuesday 5 November |
| 2025 FUNDING ROUNDS | | CLOSING DATES | DECISIONS SENT TO APPLICANTS |
| 1 | Monday 3 February | Friday 28 February | Tuesday 29 April |
| 2 | Monday 5 May | Friday 30 May | Tuesday 29 July |
| 3 | Monday 4 August | Friday 29 August | Tuesday 28 October |