2018

How to Apply

Application Guide

Contents

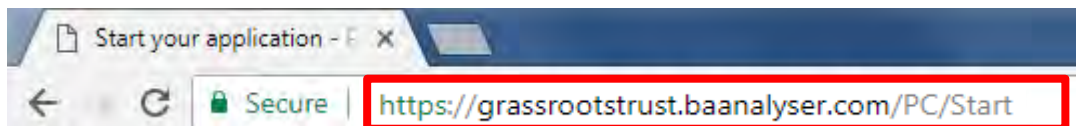# Starting an Application – Step by Step

Accessing the Grant Site

1. To start an application
   - To enter the site, enter https://grassrootstrust.baanalyser.com/Start in the address bar (top of page) of your web browser. We will be using 'Chrome' for this guide.

   Site example: https://grassrootstrust.baanalyser.com/Start

Welcome Page

1. Once you have reached the welcome page, please do the following dependent on whether you are a new Applicant, or whether you have made an application via this website before.
   (a) If you have made an application via this website before, please click "Login", and thus proceed immediately to the step titled "Start your application"
   (b) If you are a new Applicant, please click "Register Now".

Starting an Application – Step by Step

Logging in to Grassroots Trust

If you are not a 'new' user, and you wish to log in to your already exisiting Grassroots Trust Account, please complete the following steps;

    (a) Click on login
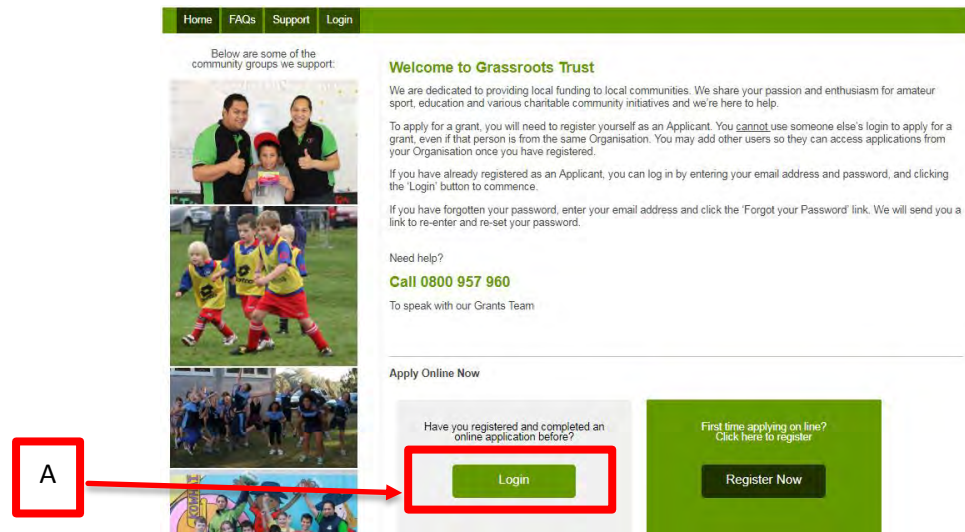
    (b) Enter your email address and password into the appropriate fields, followed by clicking on the 'login' button.
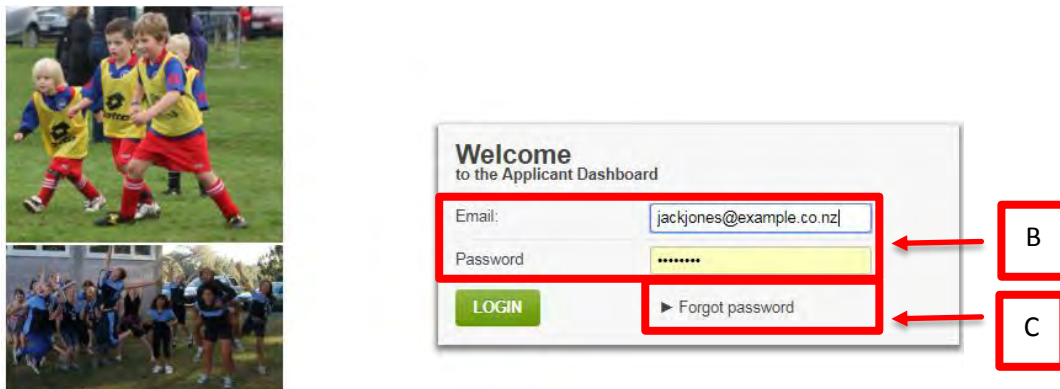
    (c) If you have forgotton your password, please click on "Forgot password", and enter your email address into the appropriate field, followed by clicking on 'reset password'. You will then be sent a link that will allow you to reset your password.
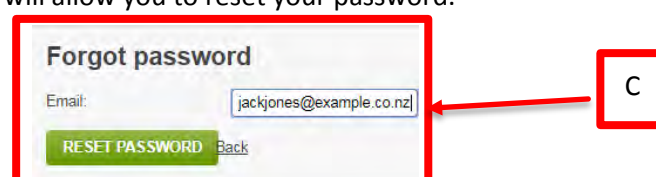
Starting an Application – Step by Step

Registration for New Applicants ("Register Now")

1. In this step, you will be completing the registration form.
2. Please tick the check box stating that you accept the terms and condtions, as you will not be able to proceed if you don't.
3. Once you have filled in the fields with the adequate information required, please click on the "Next button", to proceed to the next step.

Online Application Registration

Person making the application to complete

First name:

Last name:

Position:

Phone:

Mobile:

Address Details

Street line 1:   Enter a location

Street line 2:

Suburb:

City/Town:

Region/Prov./State:

Post/Zip code:

Country: New Zealand

For Your Applicant Dashboard Access

Email:

Confirm email:

Password:

Confirm password:

2 → ☑ I accept the Terms & conditions and understand that it does not mean that our organisation is guaranteed to receive a grant.

Please note: All application information will be kept confidential and is subject to our Privacy Policy

Next ▶   ← **3**

Starting an Application – Step by Step

Organisation Registration

1. Before being able to proceed, you will need to fill out the appropriate fields as they are required as part of the application process.
2. The little red 'I' buttons, expand when clicked on, to provide you with more information with more information or trouble shooting tips should you encounter any problems. Please see the example below. If you wish to close the help text boxes that appear when clicked on, please click on the black 'x' located in the top right corner of the help text.
3. For the registered charity, incorporated society, and GST registered questions, please check 'Yes' if you are registered, and 'No' If you are not.
   (a) For example, if you are not a registered charity, you would click on the 'no' dot as shown in the screenshot.
   If you are registered and you enter your number and a warning populates that states your number does not match the registered name, please click on the 'need help' button and then click the link to the charities or incorporated societies to check your name.
   (b) For example, If you are GST registered you would click yes, and enter your GST number into the field that displays, as shown via the screenshot.
4. To save the entered data, and proceed to the next page, please click the "Save and Next page" button.

Organisation Registration

To check the registers click here. ℹ

If you have previously applied to Grassroots Trust, please select your Organisation name from the drop-down list.

*If this is your first time applying, please enter the **full legal name** of **your Organisation**. This name **MUST** match the Incorporated Societies or Charities Commission Register.*

Name of Applicant Organisation:	Example Application

Need help with your street address? ℹ

Street address

Street Line 1:	5 Rockwood Place
Street Line 2:	
Suburb:	Epsom
City/Town:	Auckland
Post/Zip Code:	1023
Country:	New Zealand ▾

Need help with your postal address? ℹ

Postal address

☑ Postal address same as street address?

Need help with your applicant phone number? ℹ

Applicant phone:	093600532

Need help with your after hours phone number? ℹ

Applicant Organisation After Hours Number :

0210641918	1/20

1.

NOTE: This has been carried on to page 7

Starting an Application – Step by Step

Need help with your key contacts? ❶
Key Contacts

Contact

Full name:	Thomas James
Position:	Manager
Email address:	thomas.james.manager@example.com

⊖ Remove

Contact

Full name:	Robert John
Position:	CEO
Email address:	robert.john@example.com

⊖ Remove

1.

⊕ Add another contact

Need help with registered charities? ❶
Is the organisation a registered charity?

○ Yes
⦿ No

3a.

> If you see this message "Name / Registration number combination doesn't match registry records" your Charities Number or Organisation Name may be different than what is registered with the Charities Commission. It is recommended that you copy and paste your Organisation name from the register by clicking here.

2. Once clicked on the red 'I' button, the red information box pops up to provide more information about this field.

Need help with Incorporated Societies? ❶
Is the organisation an incorporated society?

○ Yes
⦿ No

Need help if you are not a registered charity or an incorporated society? ❶
If you are not a Registered Charity or an Incorporated Society, what type of Not-for-profit organisation are you?

[   ]
0/20

Need help with GST? ❶
Is the organisation GST registered?

⦿ Yes
○ No

Please enter the GST number:

154525614

3b.

Need help with organisation's operating nationally? ❶
Does your organisation operate nationally?

⦿ Yes
○ No

[Save and Next Page ▶]

4.

Starting an Application – Step by Step

Let's get Started

1. Read through the details and once you are ready to begin, click on the big button located below "**To start your application, click the green button".** The button is titled **"GRASSROOTS TRUST GRANT".**
2. This page is for providing details of the 'Start' and 'End' dates of the activity/project and the Grant 'Category'.
3. Once complete, click on the "**Get Started**" button at the bottom of the page.
4. To make the application process more simplistic, click on the help text icon to learn of crucial information that will speed up the application process.

Before starting your application

- Check that you are eligible to apply here.
- Ensure you have the correct documents ready to upload to your application. To see what documents are required, please see Step 2 of the Application Process here.
- Any uploads must be in Word, PDF, PowerPoint or an image file to a maxium file size of 150MB
- All applications must be submitted using **Google Chrome**. You can download this browser here.

Important notes

- All communication will be by email through our online system. To ensure you do not miss any of our email updates, please ensure you have the following email addresses set up as SAFE SENDERS:
  - admin+grassrootstrust@baanalyser.com
  - noreply@grassrootstrust.baanalyser.com
- You cannot use someone else's login to apply for a grant, even if that person is from the same Organisation
- You may add other users so they can access applications from your Organisation once you have registered
- When contacting a member of the Grants Team via email, please use the REPLY button from an email already received from our online system (admin+grassrootstrust@baanalyser.com).
- Any emails sent directly to admin+grassrootstrust@baanalyser.com; without using REPLY option, will NOT be received by the Grants Team
- You may re-enter your application at any time using the RETURN LINK that you will be sent from our online system once you have entered you email details into your application
- Each step must be completed in full before you can save and navigate to another page
- If you need more information on how to complete your online application please refer to the **How to Apply Guide** or the **FAQs** section.

Need help?
Call 0800 957 960

To speak with our Grants Team.

After each question you will find the below incon. This icon will provide additional information about the question and/or trouble shooting tips if you encounter any problems.

To start your application, click the green button below

Step 1 – Confirm Organisation Details

1. In this step, you are simply confirming details of previously entered information, by making sure they are correct. If they are not correct already, then you need to correct them in this step, which will automatically update your registration information.
2. If the postal address is different from the street address, please untick the box, and enter the appropriate information.
3. To save your progress so far and to be able to continue to the next step, please click "Save and Next Page".

NOTE: The screenshot continues over to the next page.

Need help with your key contacts? ❶
Key Contacts

Contact

Full name:	Thomas James
Position:	Manager
Email address:	thomas.james.manager@example.com

⊖ Remove

Contact

Full name:	Robert John
Position:	CEO
Email address:	robert.john@example.com

⊖ Remove

⊕ **Add another contact**

Need help with registered charities? ❶
Is the organisation a registered charity?

- ○ Yes
- ⦿ No

Need help with Incorporated Societies? ❶
Is the organisation an incorporated society?

- ○ Yes
- ⦿ No

Need help if you are not a registered charity or an incorporated society? ❶
If you are not a Registered Charity or an Incorporated Society, what type of Not-for-profit organisation are you?

```
                                                      0/20
```

Need help with GST? ❶
Is the organisation GST registered?

- ⦿ Yes
- ○ No

Please enter the GST number:

154525614

Need help with organisation's operating nationally? ❶
Does your organisation operate nationally?

- ⦿ Yes
- ○ No

Save and Next Page ▶   ⟵   3.

Step 2 – Organisation Information

1. If your Organisation is a school, please select "Yes", followed by proceeding to enter the decile number of your school. If your Organisation is not a school, please select "No".
2. If your organisation is affiliated to a regional or a national association please select yes, followed by entering the name of the Organisation you are affiliated to, in the appropriate field.
3. Please state how many people are employed or volunteer at your organisation. If you do not have any employees, please enter '0'. If you do not have any volunteers, please enter '0'. You are also asked how many members and/or students your Organisation has. Please enter your best estimated figure into the appropriate field.
4. Additionally, you are asked how long your Organisation has been established for. To answer this question, please click on the arrow in the respective field to populate the possible answers.
5. If you have a 'Key Person Conflict' with Grassroots Trust, please state the name of the employee and their role within your Organisation.
6. If your Organisation operates 'Gaming Machines', please select 'Yes'.
7. If you wish to go back to the previous step without losing any of your entered data, please click on the "Save and Previous Page" button.
8. Additionally, to progress to the next step, please click the "Save and Next Page" button.

Step 3 – Purpose of your Grant

1. In this step, you will be asked to identify which age group your application will be benefiting. Please note, you may select multiple i.e. Youth and Adult.
2. Additionally, you will be asked to state how many people will benefit from your grant. Please either state an exact number or if you do not know, state the approximate (number).
3. Furthermore, you are required to provide the details of what you are applying for. Please make sure that you include the purpose of the grant, relevant dates, time frames and location(s).
4. If you wish to go back to the previous step without losing any of your entered data, please click on the "Save and Previous Page" button.
5. Additionally, to progress to the next step, please click the "Save and Next Page" button.

Step 4 – Communications Statements

1. This step outlines the many different ways that you can acknowledge Grassroots Trust's support, if your application is successful.
2. In order to progress to the next step, you must click 'Yes', to identify that you have read and understood the Communications Statement.
3. If you wish to go back to the previous step without losing any of your entered data, please click on the "Save and Previous Page" button.
4. Additionally, to progress to the next step, please click the "Save and Next Page" button.

Step 5 – Document Upload

1. In this step, you are required to upload supporting documentation for your application. It is important to note, that you must upload your Cover Letter, Resolution, Organisation's Accounts and the Organisation's Bank Account Deposit Slip as these are mandatory.
2. (a) To upload a document, please click on the "**choose file**" button
   (b) choose the appropriate file to upload. Once you have chosen the appropriate file, click open.
3. If you wish to go back to the previous step without losing any of your entered data, please click on the "Save and Previous Page" button.
4. Additionally, to progress to the next step, please click the "Save and Next Page" button.

NOTE: THIS STEP CARRIES ON TO THE NEXT PAGE

Organisation's Bank Deposit Slip - Please name the upload **Deposit Slip**
Deposit Slip

Documents	
Deposit Slip (3).docx Remove	
Choose file...	

Need help with the Letter of Affiliation? 🛈

Proof of Affiliation - Please name the upload **Affiliation Letter.**

Letter of Affiliation

Documents	
Letter of Affiliation.docx Remove	
Choose file...	

Need help with the Principals Letter? 🛈

A signed endorsement letter from the Principal on School letterhead - Only required if you are a School. Please name the upload **Letter from the Principal**
Letter from the principal

Documents	
Letter From the principal.docx Remove	
Choose file...	

Need help with the Proof of Event Details 🛈

Proof of Event/Names and roles of people travelling - If your application is for hosting or attending an event. Please name the upload **Proof of event.**
Proof of Event

Documents	
Proof of event.docx Remove	
Choose file...	

Need help with the List of Travellers 🛈
List of Travellers - If your application is for travel costs to attend an event. Please name the upload **List of Travellers.**
List of Travellers

Documents	
List of Travellers..docx Remove	
Choose file...	

Need help with the List of Travellers 🛈
List of Travellers - If your application is for travel costs to attend an event. Please name the upload **List of Travellers.**
List of Travellers

Documents	
List of Travellers..docx Remove	
Choose file...	

Need help with the letter of commitment? 🛈

Vehicle Letter of Commitment - If your application is for the Lease or Purchase of a Vehichle. Please name the upload **Letter of Commitment.**
Letter of Commitment

Documents	
Letter or Commitment.docx Remove	
Choose file...	

In addition to the above uploads, you will also be asked in Step 7 (final step) to upload quotes for the items of expenditure that you are seeking a grant for and to upload copies of signed employment contracts for any salary or wages applied for.

3 ← ◄ Save and Previous Page

Save and Next Page ► → **4**

Step 6 – Other Funding

1. In this step you are required to fill out the following:
   (a) Is Grassroots Trust the only Gaming Trust you have applied to, for funding for this purpose.
   (b) If you have applied to multiple Gaming Trusts for the same purpose, please provide the name of the trust, the amount applied for and the status of your application.
   (c) What is the total cost of the project.
   (d) How much money has your Organisation raised outside of the application
   (e) If your application was approved, would you have enough to complete your project. If 'NO' please enter the amount you will need to raise and when would you expect to raise the required funding.

2. If you wish to go back to the previous step without losing any of your entered data, please click on the "Save and Previous Page" button.

3. Additionally, to progress to the next step, please click the "Save and Next Page" button.

Name of Trust 01 :

Trust 1   3/20

Amount applied for Trust 01 :

10000

Application Status for Trust 01

Pending ▼

Pending ▼
-- Please Select --
Approved
Declined
Pending

1b

Name of Trust 02:

Trust 2   2/20

Amount applied for Trust 02:

10000

Application Status for Trust 02

Pending ▼

Name of Trust 03:

0/20

Amount applied for Trust 03:

Application Status for Trust 3

-- Please Select -- ▼

Project Cost

Need help with the Project Cost? 🛈

What is the total cost of the project? (NZD $):

$15,000.00

1c

Funding & Finances

Need help with Funding and Finances? 🛈

How much money has the Organisation raised for this project outside of this application? (NZD $):

$5,000.00

1d

If Grassroots Trust were to grant you the funding you are applying for, would you have enough to complete your project?

◉ Yes

○ No

If NO please enter the amount you would still need to raise:

When would your organisation expect to raise the funding required :

1e

2   ◀ Save and Previous Page   Save and Next Page ▶   **3**

Step 7 – Application Details

1. When entering your bank details, please make sure that they match, as you will not be able to submit your application if they don't.
2. When entering the project cost, you simply have to put the cost of the entire project/activity.
3. When entering the requested amount, you simply have to put in the amount you are seeking to be granted by Grassroots Trust. In this example, the total project cost is $10,000.00.

NOTE: THIS STEP HAS BEEN CONTINUED ON TO THE NEXT PAGE.

4. in the continuation of Step 7 you are required to upload the following, dependent on what your application is seeking funding for:

    (a) If your application is for the purchase of goods and services, then please upload a preferred and competitive quote. If you do not have a competitive quote, you must upload a **"Letter of Explanation"** providing your reasoning.

    (b) If your application is for salary or wages, you must upload a signed employment contract and position description.

    (c) If your application happens to include both the purchase of goods and services and salary or wage contributions, then simply complete task A and B, and C if applicable.

NOTE: THIS CONTINUED ON TO THE NEXT PAGE

5. For whichever box you select, the respective grids will appear:
   (a) If you select Project/Activity costs, then "grid 5a" will appear.
   (b) If you select "Salary/Wages", then "grid 5b" will appear
   (c) Note if you select both, then both will appear as shown in the example below.
6. You are required to fill out the appropriate fields in whichever grid populates for you, in order to progress. Please note, that the ability to scroll from right to left and left to right exists, so you are able to see all of the fields in each grid.
7. Where it says "Please enter the total amount of funding that this application is for…" you are required to put it in the total amount requested. Please note, that this must match the figures appearing underneath the grids.
8. You are required to confirm that no funds being sought have already been spent by you. By this, it means, you are not trying to receive funding for items/services/salaries that have already been purchased/paid. Failing to confirm this will halt the progress of your application.
9. If your application is for the funding of 'uniforms and/or equipment', please notify us by clicking 'yes' or 'no', as to whether they will remain in your possession. If this question is not applicable, please select 'Not applicable'.

You may also upload additional information that you feel will assist us when considering your funding request under Supporting Documents. This is not mandatory.

10. You must complete the Authorised Person's uploads in order to submit your application. Please provide a New Zealand drivers licence or Passport of two authorised personal within your organisation. Please then enter their full names and their positions within your organisation, in the appropriate fields.
11. To be able to submit the application, please certify that the information provided in this application is correct to the best of your knowledge, that you have the authority to make this application on behalf of the organisation and that you consent to audit and Privacy Act declarations. To be able to do so click the box as shown below.
12. If you wish to go back to the previous step without losing any of your entered data, please click on the "Save and Previous Page" button.
13. If you wish to submit your application, please click on the Submit Application button, present at the bottom of the image.

Supporting Documents

Please attach any supporting documents here. An example would be 'Executive Committee Document'.
Supporting Document

Documents
Supporting Document.docx Remove
Choose file...

Declaration and Consent to Audit

We (the undersigned) declare that:

1. The information provided in this application form is true and correct to the best of our knowledge.

2. We have the authority to make this application on behalf of the applicant (if the applicant is not a natural person).

3. This application has not been completed by a person who has any management or ownership interest in a Grassroots Trust Limited venue that hosts gaming machines ("a gaming machine venue key person").

4. When any grant money is obtained, the persons who decide how that money is spent, will not be Grassroots Trust Limited gaming machine venue key persons.

5. When any grant money is obtained, a check will be undertaken and no payment will be made from grant money to any Grassroots Trust Limited gaming machine venue key person for any goods or services.

All of the information presented in this application - relating to the organisation I represent and to the specific proposal/project for which grant funds are requested is true.

This application includes complete information relating to other sources of funding that my organisation has received, been pledged, applied for, or intends for future application, for this and other organisational projects. All prices and quotes included in this application represent the actual costs that will be incurred by my organisation.

I have read and understand the Conditions for Allocation of Funds and Audit and Inspection requirements. My Organisation hereby agrees to participate in an inspection, to provide further information if requested, and/or audit by the Department of Internal Affairs or Grassroots Trust Limited if so requested. In the event of payment default, any legal or collection agent costs will be the responsibility of the Applicant

NOTE: Screenshot continues to the next page...

Need help with your authorised persons? ⓘ

Authorised Persons Proof of Identity: NZ Drivers Licence (front and back) or NZ Passport of two Executive Committee / Board members, or verified delegates on behalf of the Executive Committee / Board who have authority to approve this application. Please name the upload ID **[Full Name of Person].**

Proof of Identify for Authorised Person 1

Documents
Proof of Identity.docx Remove
Choose file...

Proof of Identity for Authorised Person 2

Documents
Proof of Identity 2.docx Remove
Choose file...

Full Name of Authorised Person 1:

Thomas James	3/10

Position of person 1:

Manager	1/10

Full Name of Authorised Person 2 :

Robert John	3/10

Position of person 2:

CEO	1/10

10

Statement to Comply with the Provisions of the Privacy Act 1993

The personal information above is collected, and will be held by the Grants Organisation for the purpose of considering your application for financial assistance. You have the right of access to, and correction of, personal information about you, that we hold. We the applicant, allow the Trust to collect information about our organisation from third parties in respect of this application.

☑ I certify that the information provided in this application form is true and correct to the best of my knowledge. I have the authority to make the application on behalf of the Organisation. I agree to the Consent to Audit and Privacy Act declarations.

11

Enter your name in the text box:

Thomas James	2/10

12 ◄ Save and Previous Page   Submit Application ► **13**

Starting an Application – Step by Step

Application Submitted Email

Once you have completed your application and, clicked on "**Submit Application**", an email notification will be sent to you.

This email contains two links:
1. Download your submitted application form.
2. Application Dashboard link.

Re-Accessing your Current Incomplete Application

1. If you need to re-enter your grant you can do so by clicking on the link that has been sent to you in your "Get Started Email".