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J R McKenzie Trust

Closing dates:

Check dates with funder

Eligibility

Will fund: Groups

Criteria: The Trust's strategy for 2015-19 is to focus on working towards a more socially just and inclusive Aotearoa New Zealand. Its main focus areas are Māori Development and Disadvantaged Children and their Families. Applications with a focus on other especially marginalised groups may also be considered.

Each organisation may only apply once per calendar year.

Districts: National

Purposes funded: The Trust provides funding and other support to community organisations which shares its goals, and which work in one or more of the following ways:

- capacity development – activities that strengthen leadership, participation and/or community skills and resources.
- Māori development – Tino rangitiratanga /self-determined development activities.
- social change – advocacy and other work towards social and systemic change.

Expenses funded: administration/operating costs; advocacy; care, counselling; equipment, furniture, materials, etc; publicity/information; salaries/volunteers' expenses/stipend; setting up groups; start-up costs; supervision; training/education; transport; evaluation and monitoring; feasibility studies.

Purposes not funded: There are some activities and initiatives the Trust generally does not fund. However, if they are part of an integrated long term change strategy, they may be considered.

The Trust does not make grants to:

- individuals
- sporting groups
- schools and early childhood centres
- out-of-school care programmes
- rest homes and hospitals
- environmental groups
- disaster relief organisations
- well established, uniformed youth groups.

Expenses not funded: The Trust does not make grants towards:

- the purchase of land or buildings
- the promotion of religion
- building alterations
- overseas travel
- projects already completed

About the fund

History of fund: The Trust was established in 1940 by John Robert McKenzie, founder of 'McKenzies', a nationwide chain of department stores. One third of the company profits were placed in the Trust for the benefit of the people of NZ. The Trust was increased in size, and led for several decades, by JR's son Sir Roy McKenzie. The Board membership is diverse and includes two McKenzie family members.

Fund Objectives: J R McKenzie Trust's vision is a more socially just and inclusive Aotearoa New Zealand. It wants to contribute to a long term change - this means building a society where fewer people are in dire straits, and where there is less need for health and social services over time.

Funds available: \$3,000,000.00

Upper limit: No set upper limit

Funding last year: \$3,389,890.00

Grants last year: 26

Application process

How to apply: Funding rounds have closed for 2017.

The Trust has a two-stage funding process. The first stage is a brief outline application designed to give them an idea of what you would like to achieve, and what you will do. It is designed to be reasonably quick for you to complete and for them to process.

If your application is short-listed, a team from the J R McKenzie Trust will visit you, and you will be asked to submit further information, including more detailed plans.

If there is an active round, the Application Form can be completed online at:

<https://jrmckenzie.smartygrants.com.au/>

Info required: First stage application form requires:

- details about what you want the grant for
- how your project fits with the aims of the Trust
- contact details

Application form/guidelines list the information required.

Decision process: Shortlisted applicants are invited to put in a full application with more details. Volunteers and staff from the Trust visit all shortlisted groups.

Decision makers: JRMT Board

Notified: By post, email, or phone.

How payment is made: As agreed with successful applicants.

Reports required: Must send acknowledgement of receipt of payment.

Progress reports after a specified time and as agreed with applicants.

Grant must be recorded as a separate entry in accounts.

Other information: If you're still not clear whether you fit the criteria or focus, give the Trust a call on (04) 472 8876.

Contact details

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