

Picking up your Grant

Decision Notification

If you are successful in receiving a grant from the Otago Community Trust you will receive a Decision Notification email. This email will go to the email address of the Primary Contact noted in the original application.

The Decision Notification email will look like the below email.



The Decision Notification email will instruct you to log back on to the grant portal to view the Trust's decision. If successful a 'Conditional Approval Letter' and any other Trust documentation will be available to view in the portal.

To find the 'Conditional Approval Letter':

1. Log into grants portal

2. Click on Grants - Active. This will show the current grant, click on it to open it.

3. In Table of Contents, click on Supporting Documents. You will see a list of documents, select Conditional Letter to open it.



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2.6	Roslyn Kindergarten Community Donation Under \$10k	Roslyn Kindergar	ten	
Roslyn Kindergarten 🗘	G-1908-17917 - Safety Matting Replacement Amount Granted: \$4,000.00 Granted At: 31/10/2018 Status: Approved	G-1908-17917 - Safety Matting Amount Granted: \$4,000.00	Replacement	
INFORMATION	Board meeting: 30 October 2018			
Grantee Portal		Organization Information		
Apply for Funding		Application Type		
ORGANISATION		Project Description Project Finances		
Organisations		Additional Project Informatio	n	
		Applicants Declaration		
PEOPLE		Supporting Documents		
People				
APPLICATIONS				
Pending Requests		▼Organisation Informat	ion	
Requests to Edit		Organization:	Roslyn Kindergarten	
Submitted Requests				
GRANTS		Primary Contact:	Melanie McAtamney	
Active				
Olorad				

Supporting Documents Please upload the following documents in support of your application: The following documents should also be uploaded, subject to the nature of your application: - Detailed budget showing all income and expenses related to your project/programme - Quotes and estimates related to your project - If not a registered charity your IRD status letter (NOT IR15RWT certificate) - Letters of support and/or other additional information, if applicable - Your annual operating budget - If the document type isn't listed, please select 'Other items' and specify the document you are uploading. To upload your documents, please click the [+] button below. Supporting Documents W Conditional Approval Letter.docx Ð **Conditional Approval Letter** Added at 1:20 PM on 31 October 2018

1. Print the Conditional Approval Letter off and sign it.

Please Note: It is important that you read the conditional approval letter, further conditions maybe outlined in the letter that you will have to meet before we can pay out your grant.



30 October 2018

Melanie McAtamney Kindergarte 69 Dunedin

Dear Melanie

Project Title: Safety Matting Replacement

I have pleasure in advising that the trustees have approved a grant offer of \$4,000. This is a contribution toward the total project cost of \$16,540 as described in your application.

Before we can pay your grant you will need to:

Accept our Terms & Conditions by signing and returning a copy of this letter; and Confirm in writing that the total project amount has been raised and from what sources;

- This grant is approved on the basis of our standard Terms and Conditions as attached, please note that:

- The grant is to be used for the purposes as set out in your application;
 The grant is to be used for the purposes as set out in your application;
 The sequence that the grant will be uplifted within the next 12 months;
 You are required to complete an Accountability Report at the completion of your project or upon request;
 You are required to advise the Trust if your project significantly alters from your application;
 You should acknowledge our grant in accordance with our Acknowledgment Guidelines, which can be found on our website.

If your organisation accepts the conditions of our offer, please sign accordingly at the bottom of this letter and return a copy to the Trust. The Trust wishes your organisation every success with the project.

Kind regards

Ross McRobie Chairperson

It has been resolved by our Board to accept the grant and its attaching conditions. Name ABC Teacher Name MarNIE M'ATAMNEY Position HEAD TEACHER Position a KANTS SECREPARY. signed the signed Melin wat $\left(\right)$ 6.3.19 6-5-19 Data Data

How to upload your Conditional Approval Letter.

You upload the signed Conditional Approval Letter in the Accountability / Conditions' section of the portal, under 'Conditions due'.



Search.

Roslyn Kindergarten Community Donation Under \$10k Go-1908-17917 - Safety Matting Replacement Amount Granted; \$4,000.00 Granted At: 31/10/2018 Status: Approved Board meeting: 30 October 2018



1. Click on the Add Files box, select from your files the signed Conditional Approval Letter

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2.6	Roslyn Kindergarten G-1908-17917 Conditions Status: New / Pending Submission		Roslyn Kindergarten Project Title: Safety Matting Replacement Grant ID: G-1908-17917 - Conditions				
Roslyn Kindergarten 🗘	Project Titl	e: Safety Matting Repla	cement	Due On:	30/1	0/2019	
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2. A 'Start Upload' button will appear beside the Add Files button, click this to upload your **Conditional Approval Letter**

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3. When it is successfully uploaded it will appear at the bottom of the 'Supporting Documents' section.

Roslyn	Kindergarten
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Due On:	30/10/2019	
Documents		
If you agree to our cond have met the conditions • Confirm in writing that	litions please upload a signed copy of our Letter of Offer, along with confirmatio s: the total project amount has been raised and from what sources;	n you
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Added by Melanie McAtan	nney at 2:41 PM on 8 March 2019	
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Additional Conditions

In most instances, you will have to prepare and sign off an additional letter outlining that you have met the Otago Community Trust conditions.

If you are unsure of what conditions are associated with your grant, you can also view them under the 'Accountability / Conditions' section of the portal. These will be under 'Conditions due'.

Project Title: Safety Matti Grant ID: G-1908-17917	g Replacement Conditions
Due On:	30/10/2019
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Meeting Conditions

Before Otago Community Trust can pay the grant, we need grantees to meet certain conditions. These will differ from grant to grant but could be one or more of the following:

- Confirm in <u>writing</u> that the budget you supplied with your application remains current, if major changes are made, we would expect you to supply a revised version.
- Confirm in <u>writing</u> that the total project amount has been raised and from what sources.
- Confirm that a contract to carry out the work has been accepted. Please supply a copy.
- Confirm that an agreement to purchase has been finalised. Please supply a copy.
- Confirm that all required consents, licences and permits have been obtained. Please <u>supply a</u> <u>copy</u>.



- Confirm that your organisation has formally resolved to proceed with the project. Please <u>supply</u> <u>copy of resolution</u>.
- You may uplift the grant upon presentation of the relevant project related invoices totalling \$X project costs (GST exclusive)

In most instances we therefore expect that you will draft a separate letter (see example below) or supply a copy of certain requested documents to confirm you have met our conditions.

We then expect you to upload this using the same process as for your Conditional Approval Letter. The end result is that you will have your two (or more) uploads listed under 'Supporting Documents' like below:

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Roslyn Kinderg Project Title: Safety Matting Grant ID: G-1908-17917 -	arten Replacement Conditions
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	Multime McAdamety . Yours faithfully Melanie McAtamety Rosiyn Kinderaten Committee Grants Secreti	IFY

Important Note: Conditions Due Drop-Down Options

At this point in time the Conditions Due drop-down options only present three different options that relate to the Accountability. We are working to fix this thus just select the first option in the interim.

- 1. Financial Statements relating to the period of receipt of our grant & expense of your project and/or copies of invoices for the total project amount
- 2. Photographs of your project
- 3. Independent Evaluation of your project



Note for Submit

After you have hit the 'Submit' button. A pop-up box called 'Note to Submit' will appear. This allows you - the grantee to write a note to the OCT Team if you wish. Regardless of whether you leave a note or not, hit the OK button for your submission to proceed.

Search Topose Austre V Roslyn Kindergarten G-1908-17917 Conditions Brandma Subvision	Roslyn Kinde Project Title: Safety Ma Grant ID: G-1908-1791	rgarten tting Replacement 7 - Conditions
Status, New Perioding sourcesson Project Title: Safety Matting Replacement	Due On:	30/10/2019
Note for Submit		speed copy of our Let us been raised and fro rting Documents
	Added by Melanie McAtar	Cancel OK r grant & expense of grant, 12.07PM on 8 March 2019 gatten OCT Conditions Letter 8March2019.pdf

Meeting Conditions with Note to Submit

With the 'Note to Submit', some grantees can use this to meet the conditions outlined in their Condition Approval Letter. For example, if the OCT conditions are 'Confirm in writing that the budget you supplied with your application remains current' OR 'Confirm in writing that the total project amount has been raised and from what sources'; you can write this in the 'Note to Submit' box.

Note for Submit	V
	^
Detailed below is a summary of all the funds raised	*
towards the project.	-
 Alexander McMillan Trust - \$4,000 	



Once you hit OK your conditions have been submitted. You will see a small yellow '1' beside the submitted in the Accountability / Conditions' section of	Roslyn Kindergarten 🗘
the portal, under 'Conditions due'.	APPLICATIONS
	Pending Requests
	Requests to Edit
	Submitted Requests
	GRANTS
	Active
	Closed
	ACCOUNTABILITY/CONDITIONS
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	Accountability to com
	Conditions due
	Conditions to Edit
Conditions Met & Grant Paid	1 Submitted

Please note that all grantees will receive an email like the below example when their grant has been paid. Grants will typically be paid out within one to two weeks.

