

## Frequently Asked Questions: The Stout Trust

### Introduction

The Stout Trust is one of the highest contested philanthropic funds managed by Perpetual Guardian. This FAQ information sheet is for the purpose of providing information to commonly asked questions. Please note that funding guidelines are subject to change at the discretion of the Trustee. The following information is current as at November 2022.

### Background

Dr John David Stout (1925-1982) was a scientist with broad interests in science, history and culture. Born in Wellington he studied medicine at Otago University but was forced to relinquish his medical studies due to ill health. He returned to Wellington and studied Zoology at Victoria University College, eventually gaining his PhD in 1953.

John Stout's work and publications led him to the forefront of biological soil science. Some of his almost 100 publications represent significant advances or turning points in soil zoology which will be referred to for many years. He was the editor of New Zealand Soil News for 15 years, on the editorial board of Pedobiologia for 14 years and made valuable contributions to the running of the scientific programme of the Soil Bureau.

In addition to his scientific work, John Stout had wide cultural interests and contributed to many societies.

On his death in 1982, Dr John Stout set up a trust under his will in memory of the Stout family and its wide interests in New Zealand, that would promote and preserve this country's arts, cultural and natural heritage in a variety of ways.

Dr Vida Stout, John's sister, was closely involved with the Trust following its inception. As Advisory Trustee she took an active part in all Granting Panel discussions and advised the Trustee. Vida's final and lasting legacy was to leave a significant contribution to the Stout Trust which, alongside that of her brother John, now continues their contributions to New Zealand's scientific, cultural and environmental heritage.

### What are the eligibility criteria?

To be eligible to be considered for funding your organisation needs to be based in New Zealand and be:

- a registered charity (with the exclusion of applications for historic sites or buildings);
- operating for at least 12 months;
- able to provide annual accounts.

Only one application per organisation, per year will be considered by the Trust, excluding applications made as an umbrella organisation.

### Umbrella Applications

In order to promote the Trust's charitable purposes the Trust will consider providing support for groups not registered as a charity through allowing them to apply under the umbrella of a registered charity; which will act as a fund-holder and ensure accountability is completed. The umbrella organisation (the registered charity) is expected to submit the funding application. Both parties will need to work together to complete the application. This will not exclude the umbrella organisation from applying on its own behalf.

### **What is excluded from consideration? Are there any exceptions?**

The following are ineligible to receive funding from the Stout Trust:

*(Exceptions or focus areas are indicated in italics)*

- Projects not based in New Zealand.
- Projects that have already been fully funded.
- Projects that have already been completed.
- Health and social service organisations.
- Projects which are seen as the responsibility of central/local government, *excluding council owned heritage buildings.*
- Sports facilities or Arenas.
- Schools or scholarships.
- The payment of debt, refinancing of loans or endowments.
- Salaries/Expenses related to professional fundraisers.
- Ongoing salaries for management, administrative or permanent staff. *Staff costs related to relevant projects will be considered as part of the overall budget if these roles are key to the delivery of the project.*
- Ongoing operating costs that can reasonably be seen as a part of an organisation's annual operating plan.
- Normal repairs and maintenance *other than for historic buildings.*
- Projects requested by organisations which have significant financial sources, where the project could conceivably be funded by the organisation out of its own resources/reserves.
- *Environmental or conservation projects should be focused on the preservation or protection of a natural site or native ecosystem, as well as NZ flora and fauna, rather than exotic species.*

*The Stout Trust encourages applications that are for innovative projects, that are broad in scope and cover several disciplines and demonstrate engagement with and are of significant benefit to the community.*

### **Can I apply for activities that are already underway?**

Applications must be for activities taking place after November 1st of the current calendar year that the application is made in. For example, if you are applying for funding in the 2023

funding round, the purpose of funding must be for activities taking place after 1<sup>st</sup> November 2023.

### What are the timeframes?

Applications to be considered as a recipient for funding are assessed annually; funding dependent. Applications usually open in July and close in August.

Due to the consultative nature of this Trust, application outcomes take a little longer than our usual timeframes. Outcomes are usually provided by the end of November in the year that you apply.

### How much should I apply for?

There is no cap on the amount that you can apply for, however we recommend that you take in to consideration the total amount to be distributed. This information is provided with the application form each year. The amount available for distribution in 2022 was approximately \$800,000 NZD.

The Trust operates a two tier application process based on the amount of the grant requested:

- Applications for grants of \$20,000 and under.
- Applications for grants over \$20,000.

### How do I apply?

All applications must be completed online via the Perpetual Guardian Funding Hub. If you do not have an account with the Perpetual Guardian Funding Hub, you will need to register for one before you apply. You can do this at <https://perpetualguardian.fluxx.io>.

### How will I know if I have provided enough information?

A number of questions in the application form are compulsory, to ensure sufficient information is received.

During the assessment period, the granting panel may request further clarification from the applicant regarding their application. Perpetual Guardian's Philanthropy Team will reach out to you to request any further information if required.

### What documents should I provide?

You will be required to provide the following documents:

- Project budget (we request this is provided in pdf. format, not excel).
- Latest financial statements (if these are part of a full annual report, we kindly request you extract the financial statements for upload).

There is also an opportunity to upload additional supporting documentation, for example a letter of engagement with other organisations working on the project.

We recommend only supplying information pertinent to the funding application.

The Trustee does not require annual reports, a board resolution to apply, or a certificate of charities registration.

### **Do you provide feedback on unsuccessful applications?**

Regrettably, due to the number of applications received across Perpetual Guardian's managed Trusts, we are unable to provide detailed feedback on unsuccessful applications. Please note the decision of the Trustee is final and not subject to any appeals process.

### **How do I acknowledge a grant from the Stout Trust?**

The Stout Trust has a logo that is available for use. Please contact the Philanthropy Team at Perpetual Guardian for a copy of the file. Perpetual Guardian appreciates the opportunity to approve acknowledgements where possible. In instances where space for a logo is not available, please use the following format

The Stout Trust, proudly managed by Perpetual Guardian.

### **What are the reporting requirements?**

It is a requirement that grantees submit an interim or final accountability report by the 31<sup>st</sup> of August of the year following the grant award - regardless of project and expenditure timeframes. For example, 2023 grant recipients are expected to complete a report by the 31<sup>st</sup> of August 2024.

For any grant awarded from 2022 onwards, grantees are expected to complete reporting via their Perpetual Guardian Funding Hub account.

### **I need support. Who should I contact?**

If you need support or have a question regarding submitting an application, please contact Perpetual Guardian's Philanthropy Team:

- Email: [philanthropy@pgtrust.co.nz](mailto:philanthropy@pgtrust.co.nz)
- Free phone: 0800 878 782
- DDI: 09 909 5219