

## Frequently Asked Questions: Strathlachlan Fund

### Introduction

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 July 2024.

### Background

The J M McLachlan Trust was established according to the wishes of the late Isabella McLachlan outlined in her Will dated 1954 and later Deed dated 1984, and The Strathlachlan Fund was established in 2007 according to the wishes of her daughter, the late Susannah McLachlan.

In 2014 the J M McLachlan Trust was merged into The Strathlachlan Fund in accordance with the terms of the Trust Deed, reconnecting mother and daughters philanthropic wishes to support vulnerable women. Perpetual Guardian are the sole Trustee of this Fund.

### Funding Objectives

We welcome applications from charitable organisations focusing on one of the following:

- Young women currently not in education or training
- Women who are currently imprisoned or recently released from prison
- Women who are the victims of domestic violence and sexual abuse
- Women wishing to break dependency on drugs or alcohol
- Positive mental health initiatives
- Reduction in levels of poverty
- Isolated older women

While the above are the core focus areas, they are not exclusive, for example, organisations enhancing the life prospects of younger women (aged 17 – 24 years) would also be considered.

### Funding Applications

The Strathlachlan Fund currently operates two funding streams:

1. The Grassroots round focuses on changing the causes of womens vulnerability at a local community level. Grants are likely to range from \$1,000 - \$15,000. This round is opened annually, funding dependent.
2. The High Engagement round seeks 1-2 charitable partners seeking to create significant positive change for vulnerable women, by taking innovative approaches to identifying long term solutions to current issues facing women in New Zealand. Grants are likely to range from \$50,000 - \$100,000 per annum. This will result in a multi year grant partnership including evaluation funding. This round is generally opened every 2-4 years, funding dependent.

### What are the eligibility criteria?

#### For both funding rounds

To be eligible to be considered for funding your organisation needs to be based in New Zealand and preferably be a registered charity (or incorporated society).

The Trustee *may* consider applications from appropriate organisations (for example, a social enterprise) on a case by case basis. There is an expectation that funds are ring-fenced and used for charitable purposes for public benefit only. Please email [philanthropy@pgtrust.co.nz](mailto:philanthropy@pgtrust.co.nz) for consideration before applying.

Maori and Pasifika led organisations and organisations focussing on the needs of ethnic and refugee women are encouraged to apply.

Perpetual Guardian welcomes the opportunity to work with other philanthropic funders, where innovative projects are already established and showing promise.

Applicants must meet one of the focus areas/objectives or be closely aligned to such objectives with better outcomes for vulnerable women at the helm..

An organisation may submit an application to both the Grassroots funding round and the High Engagement funding round, however they will not be successful in both giving pathways.

#### For the Grassroots funding round

The focus of the Grassroots funding round is on local community change.

Applications may be for projects/activities taking place nationally, but should focus on a local community level of change.

Exclusions for the Grassroots funding round are:

- Programmes with a sole health focus (aside from mental health)
- Capital campaigns and projects
- Projects focused on younger females (under the age of 17 years).

#### For the High Engagement funding round

The focus of the High Engagement funding round is on innovative, strategic and systematic change to address current issues facing vulnerable women in New Zealand. Successful applicants will have demonstrated the ability to work in complex systems, and be innovative, adaptable and open to new practices. They might focus on prevention and early intervention, as well as intergenerational difference.

Applications should be for purposes that have (have the potential to) impact broadly (regionally/nationally) – or are ‘scalable.’

Exclusions for the High Engagement funding round are:

- General operating funding, and salaries not associated with the specific project
- Programmes with a sole health focus (aside from mental health)
- Educational scholarships
- Capital campaigns and projects
- Projects focused on younger females (under the age of 17 years).

#### **How do I apply?**

Both the Grassroots funding round (applications) and High Engagement funding round (expressions of interest) are 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>.

### Grassroots funding round

The Grassroots funding round is a one-step application process. Applicants complete an application online during the application period. This is reviewed and an outcome is provided by Perpetual Guardian targeted for within 4 – 6 weeks of the closing date of applications.

### High Engagement funding round

The High Engagement funding round is a multi-step application process. Organisations complete a brief expression of interest application online during the application period. Fuller project details, budgets, compliance items and so on, will only be requested from those that are shortlisted and then invited to proceed to the final stage of the application process.

The expression of interest is reviewed and an applicant shortlist created.

Applicants are advised of the outcome of their expression of interest targeted for within 4 – 6 weeks of the closing date of expressions of interest.

Those that have been shortlisted will go on to complete a combination of face to face interview(s) and/or a formal application or (funded) project plan.

### **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.

### **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.

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

It is a requirement that grantees submit accountability reports to confirm the use of the grant and illustrate the impact. For High Engagement / multi year partners, multiple milestone reports will be required throughout the grant period and may be a combination of face to face meetings and online reports managed by a grant partnership agreement.

### **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