

ST JOHN'S COLLEGE TRUST BOARD

FUNDING MANUAL

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1 INTRODUCTION

- 1.1 The purpose of this Manual is to assist people or groups applying for funding from the St John's College Trust Board ("SJCTB" or "Trust") to understand the process to apply for funding, the different funding categories, the funding criteria relating to each category and Applicants' obligations should their application be approved.
- 1.2 This Manual is not meant to be a comprehensive document detailing all facets of the operation of the Trust but to provide Applicants with sufficient information to understand the legal framework and structures within which the Trust operates.
- 1.3 This Manual will be updated regularly as funding criteria and other matters are reviewed. Therefore, users of this Manual should ensure they have the latest version which will be available on the Trust's website www.sjctb.co.nz.

2 GOVERNANCE OF THE TRUST

- 2.1 The Trust is governed by two principal documents, the St John's College Trusts Act 1972 ("Act") and Title E, Canon II of the Anglican Church in Aotearoa, New Zealand and Polynesia ("the Church").

2.2 The Act

- 2.2.1 The Act was passed into law in 1972 and codifies the purposes of the two principal trusts of the SJCTB, being the College Fund and the Consolidated Scholarship Funds¹.
- 2.2.2 The purposes of these trusts were amended by the 1972 Act to take into account changes in the education needs of the Church from the time that the original trust deeds were executed by Bishop George Augustus Selwyn in 1858 and 1859.
- 2.2.3 These purposes, which impact what the Trust can and cannot fund and which are binding on Trustees, are discussed within the Manual.

2.3 The Canon

- 2.3.1 Title E, Canon II ("Canon") also contains a number of administrative matters relevant to the operation of the Trust, the utilisation of trust funds and the funding process, most importantly the establishment of Te Kotahitanga.
- 2.3.2 While supplementary to the Act, the terms of this Canon are important to the good functioning and governance of the Trust and the operation of the funding process.
- 2.3.3 The terms of the Canon are discussed further below.

2.4 The Trustees

- 2.4.1 The Trust is administered by the St John's College Trust Board ("Board") which is incorporated under the provisions of the Charitable Trusts Act 1957, is an authorised Trust under the Anglican Church Trusts Act 1981 and is registered under the Charities Act 2005.
- 2.4.2 Pursuant to the Canon, the nine members of the Trust ("Trustees") are appointed by the General Synod/te Hīnota Whānui on the nomination of the Tikanga Ministry Bodies.

¹ So named as the Act consolidated a number of previously separate scholarship funds into a single fund with a single purpose.

3 ROLE OF THE TRUST AND TRUSTEES

3.1 The role of the Trust and its Trustees is subject to the requirements of the Act, Canon and general trust law.

3.2 The role of Trustees is defined in the Canon as:

“The Trustees shall hold and manage all endowments and investments upon Trust for the purposes of the College Funds and Scholarship Funds in accordance with the trusts respectively declared concerning the same and with the powers conferred upon them by the Act and with all other powers howsoever conferred upon them...”

3.3 The role of Trustees is also subject to general trust law which requires trustees, amongst other obligations, to understand and adhere to the terms of the trusts and to act impartially, with diligence and prudence.

3.4 As such Trustees play an important role in not only managing the assets of the Trust but also in determining the quantum of funding that is available for distribution and to ensure that the funding it distributes is being utilised in accordance with the purposes of the trusts.

4 ROLE OF TE KOTAHITANGA

4.1 Section 3 of the Canon establishes Te Kotahitanga as a Standing Commission of the General Synod / te Hīnota Whānui.

4.2 The overarching responsibility of Te Kotahitanga is defined by section 3.11 of the Canon which states:

“Te Kotahitanga shall be responsible for exercising oversight of theological education, ministry training and formation, and other education and training relevant to advancing the mission and ministry of the Church, whether residential, regional or distance, and for facilitating the resourcing of such education and training”

4.3 The detailed duties and powers of Te Kotahitanga are further defined in section 3.11 in sub-paragraphs (a) through (p). In relation to the determination of funding from the Trust, these duties include:

- *Facilitate the coordination of the strategic plans of the three Tikanga for theological education, ministry training, and other education.*
- *Ensure that strategic shifts in direction in theological education, ministry training, and other education are understood by the Tikanga.*
- *Ensure that funding structures and policies for education are responsive to the declared strategic planning objectives of the Tikanga.*
- *Advise the St John's College Trust Board regarding the disbursement of College Funds and Scholarship and to make recommendations to the said Board regarding the proportion of available income from the Trusts to be allocated.*
- *Advise the St John's College Trust Board so as to enable it to disburse funds to institutions, programmes and individuals for work which is consistent with the planning objectives of each Tikanga.*
- *Make recommendations for the distribution of funds from the St John's College Trusts that are equitably balanced between distance, regional and residential education and training and between the three Tikanga.*
- *Endeavour to ensure equitable access by those receiving education to the widest possible range of educational resources*

- 4.4 By virtue of the Canon, Te Kotahitanga has an equally important role in considering the funding applications received by the Trust and advising and making recommendations to the Trust in respect to these applications.

5 A JOINT REVIEW PROCESS

- 5.1 It is for the reasons noted in sections 3 and 4 above that the Trust and Te Kotahitanga work closely together in respect to the review of all funding applications;
- The Trust focussed on whether the applications are in accordance with the purposes of the Trust, and
 - Te Kotahitanga focussed on whether the applications align to the strategic imperatives of Tikanga and the Church and are equitably balanced.

6 THE ST JOHN'S TRUSTS

- 6.1 As referred to above, there are two principle trusts of the St John's College Trust Board being:
- The College Fund, and
 - The Scholarship Funds.
- 6.2 Each of these funds is a separate trust, with separate purposes and each is governed by different sections of the St John's College Trusts Act.

7 THE COLLEGE FUND

- 7.1 The purposes of the College Fund are defined in section 3(1) of the Act as follows:
- (a) *For or towards the maintenance and support of the College:*
 - (b) *For the education in the College of candidates for ordination:*
 - (c) *For the costs of the education of students of all races in such manner and in such places as the General Synod shall from time to time direct so long as such education includes instruction in the principles of the Christian faith.*
- 7.2 The first two purposes (a) and (b) provide funding for the College of St John the Evangelist ("St John's College") while the final purpose (c) allows funding for the more general education needs of the Church.
- 7.3 While there is no priority between each of these purposes, the majority of distributions from the Trust fall under the last general purpose – commonly referred to as Section 3(1)(c) funding.

8 THE SCHOLARSHIP FUNDS

- 8.1 The purpose of the Scholarship Funds is defined in section 7(2) of the Act as follows:

Notwithstanding the provisions of subsection (1) of this section, it shall be lawful for the Trustees, with the prior authority of the General Synod, from time to time to apply the whole or such portion or portions of the income of the scholarship funds as they think fit in or towards the maintenance and support of candidates for ordination or persons who have been ordained (and their dependents respectively) while taking a course of study for a degree or diploma at any University or University College or any other course of study within New Zealand or elsewhere.

- 8.2 As readers will note, the purposes of the Scholarship Funds is limited to the provision of scholarships to candidates for ordination or persons who have been ordained.

- 8.3 On this matter it is important to note the provision of Lay and Group Scholarships fall under the provisions of purpose Section 3(1)(c) of the College Fund as detailed above. This distinction is discussed further in the Manual.

9 THE COLLEGE FUND – SECTION 3(1)(c) APPLICATIONS

9.1 Applicants

9.1.1 Applicants for funding from the College Fund include:

- St John's College
- Amorangi education programmes
- Diocesan education programmes
- Common Life education programmes
- Lay scholarships (discussed in section 11)
- Group Scholarships (discussed in section 12)

9.2 Level of Funding Available

9.2.1 The Trust, in consultation with Te Kotahitanga, will determine the level of funding available from the College Fund each year.

9.2.2 In making this determination the Trust and Te Kotahitanga are first required to consider the funding requirements of the Scholarship Funds pursuant to Section 8 of the Act, which allows surplus income from the Scholarship Funds, after distributions, to be transferred to the College Fund.

9.2.3 The requirements of Section 8 of the Act and the fact that the level of scholarship funding cannot be determined in advance, as well as the potential volatility of the Trust's investment returns, does make it difficult to determine the annual level of funding available for Section 3 Applicants. However, the Trust in consultation with Te Kotahitanga, will endeavour to provide this advice as early as is possible.

9.2.4 Given the present level of distributions from the Trust, the funding available for Section 3 is unlikely to increase more than the rate of inflation in any given year.

9.3 Submission and review of applications

9.3.1 Applications for funding from the College Fund can be submitted via the online process available via the Trust's website (www.sjctb.co.nz). Applications need to be submitted by the 30th of September each year.

9.3.2 As noted in paragraph 5 above both Te Kotahitanga and the Trust will review all applications submitted in respect to their specific areas of focus.

9.3.3 As part of this review the Trust and Te Kotahitanga may seek feedback from the Ministry Bodies, General Synod Standing Committee or other parties relevant to the applications submitted.

9.4 What can be funded

9.4.1 Excluding Section 3(1)(a) and (b) of the Act that relate specifically to the funding of St John's College, purpose (c) of the College Fund is broad in terms of what the Trust can fund.

For the costs of the education of students of all races in such manner and in such places as the General Synod shall from time to time direct so long as such education includes instruction in the principles of the Christian faith

9.4.2 However, the education being funded under Section 3(1)(c) of the Act, must include "instruction in the principles of the Christian faith".

9.4.3 The preamble to the Act further defines education as teaching of the 'doctrines' of the Anglican Church in Aotearoa, New Zealand and Polynesia, and while the Trust Board takes a much broader definition than this preamble, Applicants must ensure that all applications clearly explain how the education programmes for which funding is being sought will meet the definition of education under Section 3(1)(c) of the Act.

9.5 Capital Expenditure.

9.5.1 The Trust is only able to fund the operating costs of recipients awarded funding under section 3(1)(c) of the Act. That is, the Trust cannot fund capital expenditure apart from at St John's College.

9.5.2 However, the Trust has adopted the policy that expenditure on equipment valued less than \$2,000 and with a realistic useful life of less than 3 years is not considered capital expenditure.

9.5.3 This equipment must, however, be used in the completion/delivery of the education approved by the Trust and not more than 5% of the funding approved by the Trust may be used for the purchase of such equipment.

9.6 Administration expenditure

9.6.1 The Trust realises that there will be a cost of administering the education programmes being funded by the Trust.

9.6.2 While the Trust has not set a maximum value or percentage that these administration costs should represent, this will be a matter that the Trust and Te Kotahitanga will review to ensure these costs are not an excessive component of the funding provided.

9.6.3 As such, full explanation and detail of the administration costs included in funding applications will be beneficial to the review of applications.

9.7 Multiple year applications

9.7.1 Applications for funding may be submitted for periods of up to five years. Applications for multiple years must detail the total cost of the education programmes for which funding is being sought over the period of the application.

9.7.2 The approval of an application that seeks funding for multiple years is not a guarantee of funding and the Trust reserves the right to withdraw funding at any time.

9.7.3 Multiple year applications will be subject to Applicants submitting continuing funding applications, as detailed in section 13 of the Manual and compliance with all other funding criteria or other conditions of funding imposed by the Trust or Te Kotahitanga from time to time.

9.8 Approved and Declined Applications

9.8.1 Advice that applications have been approved or declined will be communicated directly from the Trust to the Applicant.

9.8.2 Given the volume of applications that are received and reviewed by the Trust and Te Kotahitanga, it may not be possible to detail in this advice the reasons that applications may have been declined.

9.8.3 However, this information is available on request to the CEO/Secretary of the Trust. Contact details for the Trust's CEO/Secretary are provided at the end of this Manual.

9.9 Return of Unspent Funding

- 9.9.1 All funding distributed by the Trust is to be utilised in the year for which it has been granted.
- 9.9.2 All unspent funding that equates to more than 5% of the funding received for an education programme or any amount greater than \$5,000 is to be returned to the Trust.
- 9.9.3 Unspent funds relating to individual education programmes may not be transferred to another education programme without a request for variation being approved by the Trust in accordance with section 9.10 of this Manual.
- 9.9.4 All unspent funds should be deposited in the Trust's bank account: 01-0236-0001106-00 using your name under the 'particulars' field and Unspent Funds as the 'reference'.
- 9.9.5 At the same time, please also email details of the funds returned to funding@sictb.co.nz.
- 9.9.6 In respect to unspent funds that represent less than 5% of the funding received for an education programme or less than \$5,000, a request for the variation of funding may be submitted to the Trust in accordance with section 9.10 below.
- 9.9.7 If no request for variation is sought, all unspent funds must be returned to the Trust.

9.10 Requests for Variation

- 9.10.1 All requests for variation must be submitted in writing to the Trust at funding@sictb.co.nz.
- 9.10.2 Requests for variation must fully explain the circumstances leading to the request for the variation of funding and the intended use of the funds should the variation be approved.
- 9.10.3 Applicants seeking a variation of funding will be advised of their success, or not, directly by the Trust. In the event a request is not approved, the funding must be returned to the Trust.

10 CLERGY SCHOLARSHIPS

10.1 Clergy scholarships are funding from section 7 of the St John's College Trusts Act.

10.2 Applicants

10.2.1 Applicants for funding from the Scholarship Funds are limited to:

- Ordained members of the Church and
- Candidates studying for ordination.

10.2.2 Applications submitted must be for a single applicant. Joint applications will not be accepted.

10.2.3 Applications from Lay members of the Church and for Group Scholarships do not fall under the Scholarship Funds (please refer to section 11 of this Manual).

10.3 Number of applications able to be submitted

10.3.1 Applicants are only able to submit one application for one course of study in each application period (being 31 March and 30 September each year).

10.3.2 Additionally, Applicants are not able to submit applications for courses that overlap. For example, an application cannot be submitted when a prior course of study which that the Applicant has received funding for has not finished.

10.4 Stand-down periods

10.4.1 No applications will be accepted from persons who have received a residential scholarship to attend St John's College for a period of three years after having attended the College. The Applicant's academic performance while attendance at St John's College may be considered in the review of the application submitted.

10.4.2 Applications from persons receiving multiple year scholarships exceeding \$5,000 in value will not be accepted for a period of three years following the completion of the previous scholarship. An Applicant's academic performance achieved while the recipient of a previous scholarship may be considered in the review of the application submitted.

10.5 Multiple Year Applications

10.5.1 Applications may be submitted for periods of study up to five years. Applications for multiple years must detail the total cost of the study being undertaken over the period of the proposed education.

10.5.2 The approval of an application that seeks funding for multiple years is not a guarantee of funding, and the Trust reserves the right to withdraw funding at any time.

10.5.3 Multiple year applications will be subject to successful Applicant's submitting continuing funding applications, as detailed in section 13 and compliance with all other funding criteria or other conditions of funding imposed by the Trust or Te Kotahitanga.

10.6 As part of the process outlined in section 13, Continuing Scholarship Applicants will need to submit details of their education achievement results and a report, prepared by a course supervisor or educational institute, detailing the Applicant's academic performance.

10.7 Submission and review of applications

10.7.1 Applications for funding from the Scholarship Funds can be submitted via the online process available via the Trust's website (www.sjctb.co.nz). Applications need to be submitted by the 31st of March or 30th of September each year.

10.7.2 As noted in section 5 of the Manual, both Te Kotahitanga and the Trust will review all applications submitted in regard to their specific focus areas.

10.7.3 As part of this review the Trust and Te Kotahitanga will seek feedback from the Bishops and/or Ministry Educators of the Amorangi/Diocese associated with the Applicant.

10.7.4 As is noted on the application form, it is very important the Applicants have discussed their application in full with their Amorangi/Diocese Bishop and Ministry Educator.

10.8 What can be funded

10.8.1 As previously noted in this Manual, section 7 of the Act contains some specific provisions regarding the purposes of the Scholarship Funds which place constraints on the funding able to be approved by the Trust.

10.8.2 Firstly section 7 states that scholarships are to fund a course of study for a degree or diploma. While the requirement to be studying for a degree or diploma has not been strictly enforced with the Trust taking a liberal view of this requirement, Trustees do require Applicants to be undertaking a defined course of study.

10.8.3 This requirement needs to be carefully considered in respect to making applications for funding, especially in regards to:

- Applications for sabbatical leave
- Applications to attend conferences

10.9 Costs that can be covered

10.9.1 In regards to the Scholarship Funds, the Trust will consider covering the costs the Applicant will incur in order to complete a course of study. As examples the following costs may be met by the Trust:

- Course enrolment and attendance costs
- Reasonable travel and accommodation costs relating to the attendance at courses
- Course material costs
- Reasonable living costs while attending courses of study, if away from your normal place of residence.

10.10 Costs that will not be funded

- Travel and accommodation costs not directly related to course attendance
- Travel and accommodation costs of family/whanau
- Relocation costs
- Vehicle rental costs
- The purchase of computer equipment and other assets

10.10.1 The Trust will not cover costs not considered to be related to the completion of a course of study, costs which are believed to convey a personal benefit beyond the education being received, or costs that would normally be incurred by the Applicant.

10.10.2 The actual costs the Trust will meet will depend on the individual circumstances of each application submitted and approved. It is possible that the Trust may not approve the full value of the costs being sought by the Applicant.

10.11 Approved and Declined Applications

10.11.1 Advice that applications have been approved or declined will be communicated directly from the Trust to the Applicant.

- 10.11.2 Given the volume of applications that are received and reviewed by the Trust and Te Kotahitanga, it may not be possible to detail in this advice the reasons that applications may have been declined.
- 10.11.3 However, this information is available on request to the CEO/Secretary of the Trust. Contact details for the Trust's CEO/Secretary are provided at the end of this Manual.

10.12 Reporting

- 10.12.1 For scholarships up to a year in duration, the Trust or Te Kotahitanga may request from the successful Applicant a report detailing the outcome of their study. Selected Applicants will be contacted and requested to provide these reports.
- 10.12.2 All recipients of scholarship funding for a period greater than one year are required to submit a brief annual report detailing the outcome of their studies, including the academic performance achieved. This report will be a prerequisite for the continued funding of the scholarship (refer to section 13 of this Manual).
- 10.12.3 The Trust or Te Kotahitanga may also undertake a review of the outcome of the education being achieved during the period of the scholarship to assess the outcomes being achieved. This review may be undertaken by third parties (refer to section 17 of this Manual).

10.13 Inaccurate applications or reporting

- 10.13.1 Inaccurate or misleading information being provided from an Applicant in applying for a scholarship will result in the Applicant being prohibited from applying for funding for a period to be determined by the Trust.
- 10.13.2 Inaccurate or misleading information being provided from an Applicant in reporting on the outcome of the education achieved from a scholarship or the utilisation of funding received will result in cancellation of the scholarship, the requirement for the return of any funding received and the prohibition of the Applicant being able to apply for funding for a period to be determined by the Trust.

10.14 Unspent Funding

- 10.14.1 All funding distributed by the Trust is to be utilised in the year for which it has been granted.
- 10.14.2 All unspent scholarship funds are to be returned to the Trust.
- 10.14.3 All unspent funds should be deposited in the Trust's bank account: 01-0236-0001106-00 using your name under the "particulars" field and Unspent Funds as the 'reference'.
- 10.14.4 At the same time please also email details of the funds returned to funding@sjctb.co.nz .

10.15 Requests for Variation/Deferral of Funding

- 10.15.1 Requests for the variation of funding may be submitted in writing to the Trust at funding@sictb.co.nz.
- 10.15.2 Requests for variation, including requests to defer or extend scholarship periods, must fully explain the circumstances leading to the request for the variation of funding and the intended use should the variation be approved.
- 10.15.3 Applicants seeking a variation of funding will be advised of their success, or not directly by the Trust. In the event a request is not approved, the funding must be returned to the Trust in accordance with section 10.14 of this Manual.

11 LAY SCHOLARSHIPS

11.1 Lay scholarships are funded from Section 3(1)(c) of the St John's College Trusts Act.

11.2 Section 3(1)(c) of the Act states the following:

For the costs of the education of students of all races in such manner and in such places as the General Synod shall from time to time direct so long as such education includes instruction in the principles of the Christian faith.

11.3 The preamble to the Act further defines education as teaching of the 'doctrines' of the Anglican Church in Aotearoa, New Zealand and Polynesia, and while the Trust Board takes a much broader definition than this preamble, Applicants must ensure that all applications clearly explain how the education programmes for which funding is being sought will meet the definition of education under Section 3(1)(c) of the Act.

11.4 Applicants

11.4.1 Persons applying for a Lay Scholarship must be Lay members of the Church, involved with a Diocese, Amorangi, Parish or Ministry Unit of the Anglican Church in Aotearoa, New Zealand and Polynesia.

11.4.2 Applications submitted must be for a single applicant. Joint applications will not be accepted.

11.4.3 While employees of the Anglican Church in Aotearoa, New Zealand and Polynesia, Diocese, Amorangi or Ministry Units are eligible to apply a scholarship, the education being undertaken must include education consistent with Section 3(1)(c) of the Act.

11.4.4 That the education received may be deployed in the Applicant's employment, to the betterment if the Church, is not solely grounds for funding being approved.

11.5 Number of applications able to be submitted

11.5.1 Applicants are only able to submit one application for one course of study in each application period (being 31 March and 30 September each year).

11.5.2 Additionally Applicants are not able to submit applications for courses that overlap. For example, an application cannot be submitted when a prior course of study, that the Applicant has received funding for, has not finished.

11.6 Stand-down periods

11.6.1 No applications will be accepted from persons who have received a residential scholarship to attend St John's College for a period of three years after having attended the College. The Applicant's academic performance while attendance at St John's College may be considered in the review of the application submitted.

11.6.2 Applications from persons receiving multiple year scholarships exceeding \$5,000 in value will not be accepted for a period of three years following the completion of the previous scholarship. An Applicant's academic performance achieved while the recipient of a previous scholarship may be considered in the review of the application submitted.

11.7 Multiple Year Applications

11.7.1 Applications may be submitted for periods of study up to five years. Applications for multiple years must detail the total cost of the study being undertaken over the period of the proposed education.

11.7.2 The approval of an application that seeks funding for multiple years is not a guarantee of funding, and the Trust reserves the right to withdraw funding at any time.

- 11.7.3 Multiple year applications will be subject to successful Applicant's submitting continuing funding applications, as detailed in section 13 and compliance with all other funding criteria or other conditions of funding imposed by the Trust or Te Kotahitanga.
- 11.8 As part of the process outlined in section 13, Continuing Scholarship Applicants will need to submit details of their education achievement results and a report, prepared by a course supervisor or educational institute, detailing the Applicant's academic performance.

11.9 Submission and review of applications

- 11.9.1 Applications for funding from the Scholarships Fund can be submitted via the online process available via the Trust's website (www.sjctb.co.nz). Applications need to be submitted by the 31st of March or 30th of September each year.
- 11.9.2 As noted in section 5 of this Manual, both Te Kotahitanga and the Trust will review all applications submitted in regard to their specific focus areas.
- 11.9.3 As part of this review the Trust and Te Kotahitanga will seek feedback from the Bishops and/or Ministry Educators of the Amorangi/Diocese associated with the Applicant.
- 11.9.4 As is noted on the application form, it is therefore very important that Applicants have discussed their application in full with their Amorangi/Diocese Bishop and Ministry Educator.

11.10 Costs that can be covered

- 11.10.1 Consideration of the Applicants role within the Church following the completion of any approved scholarship will be taken into account in determining the quantum of funding to be approved. As such the Trust may not approve 100% of the funding being sought by the Applicant.
- 11.10.2 In regards to Lay Scholarships, the Trust will consider covering the costs the Applicant will incur to complete the proposed education including:
- Course enrolment and attendance costs
 - Reasonable travel and accommodation costs relating to the attendance at courses
 - Course material costs
 - Reasonable living costs while attending courses of study, if away from your normal place of residence.

11.11 Costs that will not be funded

- 11.11.1 Applicants should note that Lay members of the Church are not eligible to apply for the funding of Sabbatical Leave unless the Lay members is licenced and actively employed in Lay Ministry within a Diocese or Amorangi.
- 11.11.2 Funding will not be awarded to Lay Members who are proposing to accompany their ordained spouse as they complete approved Sabbatical Leave or to Lay Members employed by any Church entity and subject to standard terms of employment.
- 11.11.3 In addition the Trust will not fund:
- Travel and accommodation costs not directly related to course attendance
 - Travel and accommodation costs of family/whanau
 - Relocation costs
 - Vehicle rental costs

11.11.4 The Trust will not cover costs not considered to be related to the completion of a course of study or which are believed to convey a personal benefit beyond the education being received, or costs that would normally be incurred by the Applicant.

11.11.5 The actual costs the Trust will meet will however depend on the individual circumstances of each application submitted and approved. It is possible that the Trust may not approve the full value of the costs being sought by the Applicant.

11.12 Approved and Declined Applications

11.12.1 Advice that applications have been approved or declined will be communicated directly from the Trust to the Applicant.

11.12.2 Given the volume of applications that are received and reviewed by the Trust and Te Kotahitanga, it may not be possible to detail in this advice the reasons that applications may have been declined.

11.12.3 However, this information is available on request to the CEO/Secretary of the Trust. Contact details for the Trust's CEO/Secretary are provided at the end of this Manual.

11.13 Reporting

11.13.1 For Lay Scholarships up to a year in duration, the Trust or Te Kotahitanga may request from the successful Applicant a report detailing the outcome of their study. This request may include details and evidence as to how the funding provided to the Applicant has been utilised.

11.13.2 All recipients of Lay Scholarship funding for a period greater than one year are required to submit a brief annual report detailing the outcome of their studies, including the academic performance achieved. This report will be a prerequisite for the continued funding of the scholarship (refer to section 13 of this Manual)

11.13.3 The Trust or Te Kotahitanga may also undertake a review of the outcome of the education being achieved during the period of the scholarship to assess the outcomes being achieved. This review may be undertaken by third parties (refer to section 17 of this Manual).

11.14 Inaccurate applications or reporting

11.14.1 Inaccurate or misleading information being provided from an Applicant in applying for a Lay Scholarship will result in the Applicant being prohibited from being able to apply for funding for a period to be determined by the Trust.

11.14.2 Inaccurate or misleading information being provided from an Applicant in reporting on the outcome of the education achieved from a scholarship or the utilisation of funding, will result in cancellation of the scholarship funding, the requirement for the return of any funding received and the prohibition of the Applicant being able to apply for funding for a period to be determined by the Trust.

11.15 Unspent Funding

11.15.1 All funding distributed by the Trust is to be utilised in the year for which it has been granted.

11.15.2 All unspent scholarship funds are to be returned to the Trust.

11.15.3 All unspent funds should be deposited in the Trust's bank account: 01-0236-0001106-00 using your name under the 'particulars' field and Unspent Funds as the 'reference'.

11.15.4 At the same time please also email details of the funds returned to funding@sictb.co.nz.

11.15.5 If no request for variation is sought, all unspent funds must be returned to the Trust.

11.16 Requests for Variation/Deferral of Funding

- 11.16.1 Requests for variation of funding may be submitted in writing to the Trust at funding@sictb.co.nz.
- 11.16.2 Requests for variation, including requests to defer or extend scholarship periods, must fully explain the circumstances leading to the request for the variation of funding and the intended use should the variation be approved.
- 11.16.3 Applicants seeking a variation of funding will be advised of their success, or not directly by the Trust. In the event a request is not approved, the funding must be returned to the Trust in accordance with section 11.15 of this Manual.

12 GROUP SCHOLARSHIPS

12.1 The Trust permits recognised groups of persons who are common members of recognised groups within the Church to jointly apply for scholarships. These 'Group Scholarships' are funded from section 3(1)(c) of the St John's College Trusts Act.

12.2 Section 3(1)(c) of the Act states the following:

For the costs of the education of students of all races in such manner and in such places as the General Synod shall from time to time direct so long as such education includes instruction in the principles of the Christian faith.

12.3 The preamble to the Act further defines education as teaching of the 'doctrines' of the Anglican Church in Aotearoa, New Zealand and Polynesia, and while the Trust Board takes a much broader definition than this preamble, Applicants must ensure that all applications clearly explain how the education programmes for which funding is being sought will meet the definition of education under Section 3(1)(c) of the Act.

12.4 Applicants

12.4.1 Group Scholarships must be submitted by an Amorangi or Diocese and a Group's members must be represented by recognised Lay members of the Church and/or members of Clergy of the Church, with a common involvement with a Diocese, Amorangi, Parish or Ministry Unit of the Anglican Church in Aotearoa, New Zealand and Polynesia.

12.4.2 While the final details of participants may not be known at the time of submitting an application, particulars of all members of a group must be disclosed to the Trust before funding will be released.

12.5 Number of applications able to be submitted

12.5.1 Only one application can be submitted by each Amorangi, Diocese or Ministry Unit each year.

12.6 Stand-down periods

12.6.1 Group participants should not include individual persons who have received a residential scholarship to attend St John's College, in a period three years prior to the application.

12.6.2 Group participants should not include individual persons who have received another scholarship from the Trust in the preceding three year period.

12.6.3 The academic performance of any individual member of a Group who has previously received funding from the Trust, may be taken into account in the consideration of the Group Scholarship.

12.7 Submission and review of applications

12.7.1 Applications for Group Scholarships must be submitted via the online process available via the Trust's website (www.sjctb.co.nz). Applications need to be submitted by the 31st of March or 30th of September each year.

12.7.2 As noted in section 5 of this Manual both Te Kotahitanga and the Trust will review all applications submitted in regard to their specific focus areas.

12.7.3 As part of this review the Trust and Te Kotahitanga will seek feedback from the Bishops and/or Ministry Educators of the Amorangi/Diocese associated with the application submitted.

12.7.4 As is noted on the application form, it is very important all Group Scholarship applications have been discussed in full with the Amorangi/Diocese Bishop and Ministry Educator.

12.8 Costs that can be covered

12.8.1 The maximum funding is limited to \$60,000 per application and Group's must be represented by a minimum of four persons and a maximum of 20.

12.8.2 In regards to the Group Scholarships, the Trust will consider covering the costs the Applicants will incur in order to education including:

- Course enrolment and attendance costs
- Reasonable travel and accommodation costs relating to the attendance at courses
- Course material costs
- Reasonable living costs while attending courses of study, if away from their normal place of residence.

12.9 Costs that will not be funded

12.9.1 The Trust will not cover costs not considered to be related to the completion of the Group Scholarship and its course of study, costs which are believed to convey a personal benefit beyond the education being received, costs that would normally be incurred by the Group's members or costs relating to the purchase of equipment.

12.9.2 The actual costs the Trust will meet will depend on the individual circumstances of each application submitted and approved. It is possible that the Trust may not approve the full value of the costs being sought by the Applicant.

12.10 Approved and Declined Applications

12.10.1 Advice of that applications have been approved or declined will be communicated directly from the Trust to the Applicant.

12.10.2 Given the volume of applications that are received and reviewed by the Trust and Te Kotahitanga, it may not be possible to detail in this advice the reasons that applications may have been declined.

12.10.3 However, this information is available on request to the CEO/Secretary of the Trust. Contact details for the Trust's CEO/Secretary are provided at the end of this Manual.

12.11 Reporting

12.11.1 The Trust will require the submission of a report detailing the outcome of the Group Scholarship undertaken. The receipt of this report will be a prerequisite for the Diocese, Amorangi or Ministry Unit applying for any subsequent Group Scholarships.

12.11.2 The Trust or Te Kotahitanga may also undertake, or have undertaken, a review of the outcome of the education achieved as a consequence of the Group Scholarship.

12.12 Inaccurate applications or reporting

12.12.1 Inaccurate or misleading information being provided in relation to a Group Scholarship will result in the Applicant Group being prohibited from applying for funding for a period to be determined by the Trust.

12.12.2 Inaccurate or misleading information being provided in reporting on the outcome of the education achieved from a Group Scholarship or the utilisation of funding received for purposes other than approved by the Trust, will result in cancellation of the scholarship funding, the requirement for the return of any funding received and the prohibition of the Applicant Group being able to apply for funding for a period to be determined by the Trust.

12.13 Unspent Funding

- 12.13.1 All funding distributed by the Trust is to be utilised in the year for which it has been granted.
- 12.13.2 All unspent scholarship funds are to be returned to the Trust.
- 12.13.3 All unspent funds should be deposited in the Trust's bank account: 01-0236-0001106-00 using your Group's name under the 'particulars' field and Unspent Funds as the 'reference'.
- 12.13.4 At the same time please also email details of the funds returned to funding@sjctb.co.nz.

12.14 Requests for Variation/Deferral of Funding

- 12.14.1 Requests for variation of funding may be submitted in writing to the Trust at funding@sjctb.co.nz.
- 12.14.2 Requests for variation, including requests to defer or extend scholarship periods, must fully explain the circumstances leading to the request for the variation of funding and the intended use should the variation be approved.
- 12.14.3 Applicants seeking a variation of funding will be advised of their success, or not directly by the Trust. In the event a request is not approved, the funding must be returned to the Trust in accordance with section 12.13 of this Manual.

13 CONTINUING FUNDING

- 13.1 As noted in the sections above, applications for funding may be submitted for periods greater than one year.
- 13.2 If such applications are approved, Applicants will need to submit an annual application for the continuation of funding via the Trust's website (www.sjctb.co.nz/funding).
- 13.3 This application is a significantly condensed application process seeking confirmation of the continuation of education programmes or, for scholarship Applicants, seeking confirmation of the continued enrolment in the approved education programme.
- 13.4 Continuing Scholarship Applicants will also need to submit their education achievement results and a report, prepared by a course supervisor or educational institute, detailing the Applicants academic performance.

14 NEW INITIATIVE FUNDING

- 14.1 The Trust may decide from year to year to distribute surplus income by way of seeking applications for the funding of New Initiatives.
- 14.2 This funding may not be available each year.
- 14.3 The level of funding provided by the Trust will be determined each year and all applications will be subject to the same review processes as detailed in section 9 of this Manual.
- 14.4 The intention of this funding is to identify and provide pilot funding to allow new education initiatives to become sustainable. Funding will be provided for approved initiatives for up to three years
- 14.5 Full details of the criteria for this funding will be available on the Trust's website: <https://www.sjctb.co.nz/initiatives>.
- 14.6 The provision of New Initiative Funding will be subject to the same conditions as distributions under Section 3(1)(c) of the Act in respect to reporting, return of unspent funds and variations of funding.

15 ANGLICAN STUDENT SUPPORT FUND

- 15.1 For many years The St John's College Trust Board has provided scholarships for children attending Anglican Schools throughout Aotearoa, New Zealand and Polynesia to ensure children can continue their education in situations where parents/guardians have encountered unexpected financial difficulties.
- 15.2 Details of the funding criteria, funding limits and the application process is available at: <https://www.sictb.co.nz/students>.

16 OTHER DISTRIBUTIONS

16.1 Bishop's Study Leave

- 16.1.1 Pursuant to a resolution of Trustees, Bishop's Study Leave grants will be available to every active Bishop on every fifth anniversary of their ordination to the Episcopate².
- 16.1.2 The leave must be taken within two years of it being due or the leave is forfeited (with the next leave available being on the next five year anniversary of ordination).
- 16.1.3 The Study Leave grant is set at \$25,000 at November 2008 adjusted annually for inflation³

16.2 Ordination Training Grants

- 16.2.1 Pursuant to a resolution of Trustees, all clergy approved for ordination as a Bishop of the Church shall be eligible for an Ordination Training Grant of \$15,000.

17 REVIEW OF BENEFICIARIES/FUNDING RECIPIENTS

- 17.1 The Trust and Te Kotahitanga reserve the right to review the funding received by any Applicant at any time. This review may be undertaken by the Trust, Te Kotahitanga or a third party appointed by the Trust.
- 17.2 The purpose of these reviews is to provide the Trust and Te Kotahitanga with information about the success of the utilisation of the funds the Trust has distributed and to assist with refining education strategies and funding processes.
- 17.3 The outcome of the reviews undertaken may result in the Applicant being asked to amend some aspects of their programme of education or in limited case the Trust withdrawing funding.

It is hoped this Manual will assist Applicants to apply for funding from the Trust. If you have any question, please direct these to the Secretary of the Trust using the below contact details.



Grant Hope
Secretary

July 2019

² Or translation to the Province

³ As measured by the Reserve Bank of New Zealand 'all groups Consumer Price Index' using Q4 2008 as a base

The Secretary
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