

ST JOHN'S COLLEGE TRUST BOARD

FUNDING MANUAL

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TABLE OF CONTENTS

1	INTRODUCTION	4
2	GOVERNANCE OF THE TRUST	4
3	ROLE OF THE TRUST AND TRUSTEES	5
4	ROLE OF TE KOTAHITANGA	5
5	A JOINT REVIEW PROCESS.....	6
6	THE ST JOHN'S TRUSTS	6
7	THE COLLEGE FUND.....	6
8	THE SCHOLARSHIP FUNDS.....	7
9	THE COLLEGE FUND – SECTION 3(1)(c) APPLICATIONS.....	8
10	CLERGY SCHOLARSHIPS (Ordained and Candidates for Ordination).....	12
11	LAY SCHOLARSHIPS	17
12	GROUP SCHOLARSHIPS	22
13	CONTINUING FUNDING	25
14	SPECIAL FUNDING	26
15	ANGLICAN STUDENT SUPPORT FUND	26
16	OTHER DISTRIBUTIONS	26
17	REVIEW OF BENEFICIARIES/FUNDING RECIPIENTS.....	27
18	FLOWCHART OF FUNDING OPTIONS	29

1 INTRODUCTION

- 1.1 The purpose of this Funding 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
 - each Applicants' obligations should their application be approved.
 - This Manual is not meant to be a comprehensive document detailing all facets of the operation of the Trust and but to provide Applicants with sufficient information to understand the legal, canonical and organisational framework and structures within which the Trust operates.
- 1.2 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**
- 2.3 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.
- 2.4 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.
- 2.5 These purposes, which impact what the Trust can and cannot fund and which are binding on Trustees, are discussed within the Manual.
- 2.6 **The Canon**
- 2.7 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.
- 2.8 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.
- 2.9 The terms of the Canon are discussed further below.

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

2.10 The Trustees

- 2.11 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.
- 2.12 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.

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 investments and 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.

4.5 Importantly, the Trust is unable to make distributions in respect to sections 3(1)(c) and Section 7 without having received the advice of Te Kotahitanga to do so.

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;

5.2 The Trust focussed on whether the applications are in accordance with the purposes of the Trust, and

5.3 Te Kotahitanga focussed on whether the applications align to the strategic imperatives of Tikanga and the Church and are equitably balanced.

5.4 Together the Trust and Te Kotahitanga will intentionally consider equity and justice in the approval of all funding applications (including scholarships). Consideration of equity will be particularly applied in respect of all applications submitted for new educational programmes.

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 (Section 3), and
- The Scholarship Funds (Section 7).

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 There is no priority between each of these purposes, however, the majority of distributions from the Trust fall under the last general purpose – commonly referred to as Section 3(1)(c) or "3C" funding.
- 7.4 Scholarships provided to Lay members of the Church are funded from this last section (and no from the Scholarship Fund) as is detailed below.

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 0)
- Group Scholarships (discussed in section 12)

9.1.2 If the Applicant is not a recognised entity/body of the Anglican Church in Aotearoa, New Zealand and Polynesia, the application must be supported by Bishop/Pihopa from across the Tikanga and provide clear evidence in the co-design of the education programme.

9.1.3

9.2 Level of Funding Available

9.2.1 The Trust determines 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 as Section 8 of the Act allows Trustees to transfer surplus income from the Scholarship Funds, after distributions, 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.

9.2.4 However, the Trust in consultation with Te Kotahitanga, endeavours to provide this advice as early as is possible.

9.2.5 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 submit queries to the Applicant and/or seek feedback from the Ministry Educators or other persons supporting an application within the Applicant's Diocese or Amorangi, Ministry Bodies, General Synod Standing Committee or other parties the Trust or Te Kotahitanga deem are relevant to the application submitted. All queries will be via email correspondence.

9.3.4 To ensure that the scholarship review process is completed efficiently, so that all recipients may be advised of the outcome of their applications in good time, a deadline by which queries must be responded to will be provided, but which will be no more than two weeks from the query being made.

9.3.5 If no response is received by the deadline, Te Kotahitanga and the Trust may decide to decline the application.

9.4 What can be funded

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

9.4.2 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

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

9.4.4 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.

9.4.5 Te Kotahitanga and the Trust also provide the following guidelines in respect to applications under Section 3:

- If the education programme is cross-cultural the application needs to provide clear evidence that a wide co-design process with tikanga partners has been completed. For the sake of clarity, letters of support of an application from a tikanga partners/Bishops alone are not sufficient evidence of a co-design process.
- The application must be for education including the principles of the Christian faith, and not be sacramental or advocacy in nature.

9.5 Capital Expenditure.

9.5.1 The Trust has determined that only operating costs of recipients can be funded from then annual distribution from the Trust².

9.5.2 However, the Trust has adopted the policy that expenditure on equipment valued less than \$5,000 and with a realistic useful life of less than 3 years is not considered capital expenditure.

9.5.3 This equipment must 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

² In some circumstances, the Trust may consider the funding of capital expenditure for projects deemed of significant strategic educational importance to the Church.

- 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 Secretary/CEO of the Trust. Contact details for the Trust's Secretary/CEO 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.

9.9.8 An Applicant that does not return unspent funds, or applies such funds to other purposes without the consent of the Trust, may forfeit their opportunity to apply of receive further funding from the Trust for a period at the discretion of Trustees.

9.10 Requests for Variation

9.10.1 All requests for variation must be submitted in writing to the Trust at funding@sjctb.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.

9.10.4 An Applicant that does not return unspent funds, or applies such funds to other purposes without the consent of the Trust, may forfeit their opportunity to apply of receive further funding from the Trust for a period at the discretion of Trustees.

10 CLERGY SCHOLARSHIPS (Ordained and Candidates for Ordination)

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

10.2 Applicants

10.2.1 A flowchart has been produced at section 19 of this Manual to assist Applicant's determine under which category to apply for funding.

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

- Ordained members of the Church and
- Persons identified by their Bishop as a Candidates for Ordination.

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

10.2.4 Applications from Lay members of the Church and for Group Scholarships do not fall under the Scholarship Funds (please refer to section 0 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 Applications may not 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, without a request for a waiver being received from the Applicant's Bishop.

10.4.2 The request received from the Bishop should clearly indicate the reasons the waiver is being sought and the value that their Diocese/Amorangi will gain from the granting of a waiver. The Applicant's academic performance while attendance at St John's College may be considered in the review of the application submitted.

10.4.3 Applications from persons for a scholarship exceeding \$5,000³ in value may not be accepted for a period of three years following the completion of the previous scholarship without a request for a waiver being received from the Applicant's Bishop.

10.4.4 The request received from the Bishop should clearly indicate the reasons the waiver is being sought and the value that their Diocese/Amorangi will gain from the granting of a waiver. 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 cost³ of the study being undertaken over the period of the proposed education.

³ The value of a scholarship is determined as the total value over the full length of a course of study. This may be multiple years.

- 10.5.2 That all new applications for multi-year study (full or part-time) need a development plan prepared and submitted by the Diocese/Amorangi detailing the Diocese's/Amorangi's long term education plan for the Applicant with a study pathway and giving rationale for the scholarship investment especially across multiple years.
- 10.5.3 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.
- 10.5.4 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.
- 10.5.5 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.

10.6 Submission and review of applications

- 10.6.1 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.
- 10.6.2 Late applications will not be considered.
- 10.6.3 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.
- 10.6.4 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.
- 10.6.5 As part of this review the Trust and Te Kotahitanga may submit queries to the Applicant and/or seek feedback from the Applicant's Bishop, Ministry Educator or other persons supporting an application within the Applicant's Diocese or Amorangi, Ministry Bodies, General Synod Standing Committee or other parties the Trust or Te Kotahitanga deem are relevant to the application submitted. All queries will be via email correspondence.
- 10.6.6 To ensure that the scholarship review process is completed efficiently, so that all recipients may be advised of the outcome of their applications in good time, a deadline by which queries must be responded to will be provided, but which will be no more than two weeks from the query being made.
- 10.6.7 If no response is received by the deadline, Te Kotahitanga and the Trust may decide to decline the application.
- 10.6.8 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/or Ministry Educator prior to it being submitted.

10.7 What can be funded

- 10.7.1 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.
- 10.7.2 Firstly section 7 states that scholarships are to fund a course of study for a degree or diploma.

- 10.7.3 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.
- 10.7.4 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
 - Costs that can be covered
- 10.7.5 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.
- 10.8 PhD and other Research**
- 10.8.1 In terms of applications for PhD and other research positions, please refer to the specific requirements detailed at section 13.
- 10.9 Living Costs**
- 10.9.1 On the basis of advice received from Te Kotahitanga, the maximum level of Living Costs that will be included as part of a scholarship is \$27,000 p.a. The actual level of living costs approved will be subject to consideration of:
- Whether the proposed study is on a full or part time basis,
 - The Applicant's eligibility to receive a Study Link Student Allowance ([Study Link](#)),
 - The place of the Applicant's study, and options available to the Applicant to study at a different location, and
 - The component of study costs being met by the Applicant themselves.
- 10.9.2 Living Costs will not be provided to Applicants studying on a less than 50% full time equivalent basis.
- 10.10 Costs that will not be funded**
- 10.10.1 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

10.10.2 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.

10.10.3 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 18 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@sjctb.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

11.1.1 A flowchart has been produced at section 19 of this Manual to assist Applicant's determine under which category to apply for funding.

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

11.3 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.

11.3.1 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 recognised as Lay members of the Church, participating and involved with a Diocese, Amorangi, Parish or Ministry Unit of the Anglican Church in Aotearoa, New Zealand and Polynesia.

11.4.2 As part of this review of applications, the Trust and Te Kotahitanga will seek feedback from Applicants Amorangi/Diocese as to their participation in the life of the Church.

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

11.4.4 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.

11.4.5 That the education received may be deployed in the Applicant's employment, to the betterment of 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 Applications may not 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 without a request for a waiver being received from the Applicant's Bishop.

11.6.2 The request received from the Bishop should clearly indicate the reasons the waiver is being sought and the value that their Diocese/Amorangi will gain from the granting of a waiver. The Applicant's academic performance while attendance at St John's College may be considered in the review of the application submitted.

- 11.6.3 Applications from persons receiving multiple year scholarships exceeding \$5,000³ in value may not be accepted for a period of three years following the completion of the previous scholarship without a request for a waiver being received from the Applicant's Bishop.
- 11.6.4 The request received from the Bishop should clearly indicate the reasons the waiver is being sought and the value that their Diocese/Amorangi will gain from the granting of a waiver. 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 cost³ of the study being undertaken over the period of the proposed education.
- 11.7.2 That all new applications for multi-year study (full or part-time) need a development plan prepared and submitted by the Diocese/Amorangi detailing the Diocese's/Amorangi's long term education plan for the Applicant with a study pathway and giving rationale for the scholarship investment especially across multiple years.
- 11.7.3 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.
- 11.7.4 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.
- 11.7.5 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.

11.8 Submission and review of applications

- 11.8.1 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.
- 11.8.2 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.
- 11.8.3 As part of this review the Trust and Te Kotahitanga may submit queries to the Applicant and/or seek feedback from the Applicant's Bishop, Ministry Educator or other persons supporting an application within the Applicant's Diocese or Amorangi, Ministry Bodies, General Synod Standing Committee or other parties the Trust or Te Kotahitanga deem are relevant to the application submitted. All queries will be via email correspondence.
- 11.8.4 To ensure that the scholarship review process is completed efficiently, so that all recipients may be advised of the outcome of their applications in good time, a deadline by which queries must be responded to will be provided, but which will be no more than two weeks from the query being made.
- 11.8.5 If no response is received by the deadline, Te Kotahitanga and the Trust may decide to decline the application.

11.8.6 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/or Ministry Educator prior to it being submitted.

11.9 Costs that can be covered

11.9.1 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.

11.9.2 Regarding 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.

11.10 PhD and other Research

11.10.1 In terms of applications for PhD and other research positions, please refer to the specific requirements detailed at section 13.

11.11 Living Costs

11.11.1 On the basis of advice received from Te Kotahitanga, the maximum level of Living Costs that will be included as part of a scholarship is \$27,000 p.a. The actual level of living costs approved will be subject to consideration of:

- Whether the proposed study is on a full or part time basis,
- The Applicant's eligibility to receive a Study Link Student Allowance ([Study Link](#)),
- The place of the Applicant's study, and options available to the Applicant to study at a different location, and
- The component of study costs being met by the Applicant themselves.

11.11.2 Living Costs will not be provided to Applicants studying on a less than 50% full time equivalent basis.

11.12 Costs that will not be funded

11.12.1 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

11.12.2 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.

11.12.3 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.

11.13 Sabbatical Leave for Lay Members

11.13.1 Lay members of the Church may apply for Sabbatical Leave on the basis that they are heavily involved in the life of their parish, pastorate, Amorangi, Diocese and Church or a licenced and actively employed in Lay Ministry within a Diocese or Amorangi.

11.13.2 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.

11.14 Approved and Declined Applications

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

11.14.2 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.

11.14.3 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.

11.15 Reporting

11.15.1 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.

11.15.2 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)

11.15.3 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 18 of this Manual).

11.16 Inaccurate applications or reporting

11.16.1 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.

11.16.2 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.

11.17 Unspent Funding

- 11.17.1 All funding distributed by the Trust is to be utilised in the year for which it has been granted.
- 11.17.2 All unspent scholarship funds are to be returned to the Trust.
- 11.17.3 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'.
- 11.17.4 At the same time please also email details of the funds returned to funding@sjctb.co.nz .
- 11.17.5 If no request for variation is sought, all unspent funds must be returned to the Trust.

11.18 Requests for Variation/Deferral of Funding

- 11.18.1 Requests for variation of funding may be submitted in writing to the Trust at funding@sjctb.co.nz.
- 11.18.2 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.
- 11.18.3 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 11.17 of this Manual.

12 GROUP SCHOLARSHIPS

12.1 The Trust allows 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.

12.1.1 A flowchart has been produced at section 19 of this Manual to assist Applicant's determine under which category to apply for funding.

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, without a request for a waiver being received from the Applicant's Bishop..

12.6.2 Group participants should not include individual persons who have received another scholarship from the Trust in the preceding three year period, without a request for a waiver being received from the Applicant's Bishop..

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 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 may submit queries to the Applicant and/or seek feedback from the Applicant's Bishop, Ministry Educator or other persons supporting an application within the Applicant's Diocese or Amorangi, Ministry Bodies, General Synod Standing Committee or other parties the Trust or Te Kotahitanga deem are relevant to the application submitted. All queries will be via email correspondence.
- 12.7.4 To ensure that the scholarship review process is completed efficiently, so that all recipients may be advised of the outcome of their applications in good time, a deadline by which queries must be responded to will be provided, but which will be no more than two weeks from the query being made.
- 12.7.5 If no response is received by the deadline, Te Kotahitanga and the Trust may decide to decline the application.
- 12.7.6 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/or Ministry Educator prior to being submitted.

12.8 Costs that can be covered

- 12.8.1 The maximum funding is limited to \$70,000 per application and Group's must be represented by a minimum of four persons and a maximum of 20.
- 12.8.2 In regard 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 SCHOALRSHIPS FOR PHD, POST-GRADUATE AND OTHER RESEARCH STUDY

- 13.1 Due to the high investment to fund research, Te Kotahitanga and the Trust have introduced the following additional requirements in regards to applications for the funding of PhD and other research.
- 13.2 A separate document should be submitted in support of your application providing the following:
- A Development Plan prepared by your Amorangi/Diocesan Bishop explaining why the post graduate research is relevant for the Church as a whole.
 - An explanation as to how your research will be published and communicated throughout the Church in Aotearoa, New Zealand and Polynesia.
 - Clear evidence of wide consultation and co-design across Tikanga and with relevant bodies, commissions, entities and national workers within the Church (i.e Disability Ministry, Youth Ministries etc) .
 - A copy of your Statement of Research Intent, detailing the focus of the research, including how a 'theological lens is to be included within the reasearch.
 - Details as to the Education Institution and Supervisor(s) that will oversee the research, noting this can include someone with theological knowledge
 - If application is for an Institution not within the Province of Aotearoa, New Zealand and Polynesia &P, an explanation of your preference to study overseas
 - A copy of your 'Application for Admission' to a research position
 - Information as to whether or not you have applied for research funding from a University
 - Advice as to whether you have been awarded an 'Offer of Place' (offer of a research position) by the named Education Institution.

14 CONTINUING FUNDING

- 14.1 As noted in the sections above, applications for funding may be submitted for periods greater than one year.
- 14.2 If such applications are approved, Applicants will need to submit an annual application for the continuation of funding via the Trust's website (<https://www.sjctb.co.nz>).
- 14.3 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.
- 14.4 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.

15 SPECIAL FUNDING

- 15.1 The Trust may decide from time to time to approve the distribution of funds for special purposes or circumstances. For example, in 2020 and 2021 additional funding was made available during the Covid 19 pandemic to ensure education programmes within the Church continued.
- 15.2 This funding may not be available each year.
- 15.3 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 0 of this Manual.
- 15.4 The availability of such funding will be communicated to all Episcopal and Ministry Units within the Province and details documented on the Trust's website (www.sjctb.co.nz).

16 ANGLICAN STUDENT SUPPORT FUND

- 16.1 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.
- 16.2 Details of the funding criteria, funding limits and the application process is available at: <https://www.sjctb.co.nz/students>.

17 OTHER DISTRIBUTIONS

17.1 Bishop's Study Leave

- 17.1.1 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 Episcopate⁴.
- 17.1.2 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).

⁴ Or translation to the Province of Aotearoa, New Zealand and Polynesia

17.1.3 The Study Leave grant was set at \$25,000 at November 2008 adjusted annually for inflation⁵

17.2 Ordination Training Grants

17.2.1 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.

18 REVIEW OF BENEFICIARIES/FUNDING RECIPIENTS

18.1 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.

18.2 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.

18.3 The Trust may also elect to undertake a review or 'audit' of the accounting for and the utilisation of funding received by an applicant, including determining if the obligations contained in this manual have been adhered to.

18.4 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.

⁵ As measured by the Reserve Bank of New Zealand 'all groups Consumer Price Index' using Q4 2008 as a base

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

January 2023

The Secretary
St John's College Trust Board
Phone 021 1472 682
Email grant@tumanako.nz
Email funding@sjctb.co.nz

19 FLOWCHART OF FUNDING OPTIONS

