Tauranga RSA Support Trust – Members Support Funding Policy

1. Overarching Purpose and Governance

These Funding Policies provide a clear framework for how the Tauranga RSA Support Trust considers and approves funding assistance across three separate areas: Veterans Welfare, Members Support, and Youth Development. Each policy is separate in purpose, eligibility, and application criteria; however, all funding remains discretionary and must align with the Trust's charitable purposes, governing documents, available funds, and trustee approval. The Trust's support is intended to promote wellbeing, dignity, independence, service connection, remembrance, education, and community benefit, while ensuring that any private or member benefit is incidental to a recognised charitable purpose.

2. Guiding Principles Applying to All Funding

- Funding assistance is discretionary and not an entitlement.
- Applications will be considered fairly, compassionately, consistently, and in line with the Trust's charitable purposes.
- Funding should provide public benefit or benefit a sufficient section of the public, such as veterans, service personnel, their whānau, or eligible community groups, and should not primarily operate as a private benefit.
- Funding is intended to supplement, not replace, support available from government agencies, Veterans' Affairs New Zealand, ACC, MSD, health providers, insurance, or other welfare organisations.
- Applicants will be asked to show that other available support options have been explored first.
- Trustees will consider the applicant's circumstances, urgency, available Trust funds, supporting information, and whether the request aligns with the relevant funding policy.
- All assistance must be used for the purpose approved by the Trustees.

3. Funding Level and Limits

Unless otherwise approved by the Trustees in exceptional circumstances, funding assistance will generally be limited to up to 25% of the approved cost to a maximum of $500. The remaining cost will be the responsibility of the applicant or may be met through other funding sources. Trustees may set maximum dollar limits for a funding category, for a particular type of assistance, or for total assistance to one applicant, member, organisation, cadet unit, or youth initiative within a financial year.

4. What the Trust Will Generally Not Fund

- Costs that are fully covered or reasonably available through government agencies, ACC, Veterans' Affairs New Zealand, insurance, or another funder.
- Retrospective costs where no prior approval was sought, unless the Trustees consider there are exceptional circumstances.
- General debt repayment, credit card debt, fines, penalties, interest, or legal costs unrelated to welfare need.
- Non-essential, luxury, recreational, or lifestyle purchases.
- Business, investment, or income-generating activities for an individual applicant.
- Ongoing living costs where the request is not linked to a specific hardship, welfare, wellbeing, or charitable purpose.
- Political activities, lobbying, or activities inconsistent with the Trust's charitable purposes.

- Items or services that the Trustees consider unreasonable, excessive, unsupported, primarily private in benefit, or outside the Trust's objectives.

5. Application Requirements

- Applications should be made in writing using the Trust's approved application form or another format accepted by the Trustees.
- Individual welfare applicants will be required to meet face to face with a Support Advisor as part of the application process, unless the Trustees approve an exception due to exceptional circumstances.
- Applicants should provide enough information for the Trustees to understand the need, purpose, amount requested, total cost, and any other funding being sought or received.
- Quotes, invoices, receipts, medical confirmation, agency correspondence, programme information, budgets, or other supporting documents will be required.
- Applicants will be asked to confirm service connection, RSA membership, family relationship, residency, school or cadet unit involvement, charitable alignment, or other eligibility details.
- The Trust may pay an approved provider directly or reimburse the applicant where appropriate evidence is supplied.

6. Decision-Making, Accountability, Privacy, and Review

All funding decisions are made at the discretion of the Trustees. Trustees may approve, decline, defer, partially fund, or place conditions on any application. Applicants may be asked to provide evidence that funds were used for the approved purpose. Personal information collected as part of an application will be collected only where necessary, stored securely, used for assessing and administering the request, and disclosed only where authorised, required by law, or necessary to administer approved support. These policies should be reviewed regularly by the Trustees to ensure they remain appropriate, financially sustainable, legally compliant, and aligned with the Trust's purposes.

Policy Two: Members Support Funding Policy

The Members Support Funding Policy is for eligible Tauranga RSA members where support is connected to welfare, hardship, wellbeing, social isolation, practical assistance, or service-community connection. This policy must be applied carefully so that funding does not operate as a general member benefit. Assistance should only be approved where the request is charitable in nature, consistent with the Trust's purposes, and supported by an identified need.

What Members Support Funding May Support

Members Support funding may include limited assistance for hardship, social connection, transport to welfare or remembrance activities, support following illness or bereavement, essential needs where hardship is demonstrated, and practical assistance that supports safe living, dignity, wellbeing, or continued community participation. Trustees may also approve partnership or referral support through appropriate agencies where this is the most effective way to assist a member.