



Community
TRUST
 Mid & South Canterbury

Supporting community organisations to achieve a region of healthy, vibrant and caring communities

Donation Application Form

The Community Trust helps organisations carry out charitable, cultural, philanthropic and recreational work that is of benefit to the people in the Mid and South Canterbury area, including all towns and cities within the Districts of Waimate, Mackenzie, Timaru and Ashburton.

Organisation Name

Location(s) where your organisation operates

Summary of Project(s) applied for (e.g. Operational costs, Building renovation, Event costs). Details are asked for on Page 4 of this application.

Amount applied for \$.....

Closing Dates for Applications

| | |
|--|---|
| <p>Applications for donations up to \$10,000 will be considered at each monthly meeting of the Community Trust except December and January.</p> <p>Applications close on the third Friday of the month (Jan-Oct) & are considered the following month. Donation Policies, Closing Dates & Consideration Dates can be viewed on-line at www.comtrust.org.nz</p> | <p>Applications for donations more than \$10,000 will close on:</p> <ul style="list-style-type: none"> • The third Friday in March (to be considered in May) • The third Friday in September (to be considered in November) <p>Community Trust meetings are usually held on the last Monday of the month apart from December</p> |
|--|---|



Community House, 27 Strathallan St, Timaru, New Zealand P.O.Box 983, Timaru, 7910 New Zealand.
 Phone: (03) 687 7360 Fax: (03) 688 9972 Freephone: 0800 67 22 87 Email: mscomtrust@xtra.co.nz

www.comtrust.org.nz

1. **Organisation**

2. **Postal Address**

Street P O Box

Town..... Postcode.....

Phone Fax

Email

3. **Contact Person**

Name Position

Phone (Day) (Evening)

Email

4. **Names of Principal Officers**

Name Position Phone (Day).....

Name Position Phone (Day).....

Name Position Phone (Day).....

5. **Legal Status**

Tick one of the following categories that best describes your organisation.

- Charitable Trust
- Incorporated Society
- Marae
- Education Institute
- Other (Please specify).....

Is your organisation registered with the Charities Commission? Yes No

Please advise number.....

How long has your organisation or branch been in existence?

If your organisation is responsible to, or controlled by, any other organisation, please state.

.....

6. **Services / Programmes**

What services or programmes do you currently provide?

.....

.....

7. **Staff / Volunteers**

Number of paid staff (full time equivalents) Number of Volunteers.....

What do your volunteers do?

.....

8. Membership

Number of members, if applicable

Number of people (clients) helped last year, if applicable.....

9. Previous Donations

Has **your organisation** received a donation from this Trust in the past five years?

Yes No \$..... Year

Has **this project** received a donation from this Trust in the past five years?

Yes No \$..... Year

10. Donation Request Detail

What are you seeking this donation for? Additional details should be attached to support your application, e.g. plans, quotes, budgets, feasibility studies.

.....

11. Community Benefit

The table below lists the main ethnic groups in the Mid & South Canterbury region as well as age and gender groups. Please estimate the number of beneficiaries in each area below.

| Ethnicity | NZ European | Maori | Pacific | Asian Other Ethnic | Don't know | Total |
|------------------|------------------------|--------------------------|---------------------------|------------------------|----------------------|--------------|
| Numbers | | | | | | |
| Age range | Infants (0 – 4) | Children (5 – 10) | Teenager (11 – 19) | Adult (20 – 64) | Senior (65 +) | Total |
| Numbers | | | | | | |
| Gender | Female | | Male | | Total | |
| Numbers | | | | | | |

What will the benefit from your project be? Who will benefit? How will they benefit? Does your property and/or project allow general public access?
 Please summarise and attach further information if required.

.....

12. Your Income

What are your usual sources of funds?

.....

13. Financial Details of Project

(Please specify exactly what you want the Trust to fund)

If you are registered for GST do not include GST in these costs. Please round figures to nearest dollar. Please indicate **all** income sources **including** those not yet confirmed and list all Applications to other Organisations for this project. The Trustees require a **full budget breakdown** of the project being applied for. Please provide this on a separate page if necessary.

Has your organisation raised at least 50% of the funds for the project? Yes No
 Please comment on the contribution by your organisation

.....

| Expenditure (Project Costs) | \$ | Confirmed Income / Grants (How you plan to fund the project) | \$ |
|------------------------------------|-----------|---|-----------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | Unconfirmed Income/Grants | |
| | | | |
| | | | |
| | | | |
| | | Plus contribution from own funds | |
| A. Total Cost of Project | \$ | B. Total Funds for Project | \$ |

Total cost of project (A) \$.....
Less Total funds for project (B) \$.....
= Amount applied for to this Trust \$.....

If applicable, when will the project startand finish

Note: The application will be declined if the project has been completed prior to a funding decision being made.

14. Financial Summary from the latest Annual Accounts (Please also attach a copy)

Summary for financial year ending/...../..... or period from/...../..... to/...../.....

Income \$
 Expenditure \$
 Surplus (deficit) \$

Current funds in hand (to include investments) \$ at/...../.....

15. Reserved Funds

Indicate if any of the above funds are reserved for specific purposes.....

.....

16. REQUIRED Additional Information (CHECKLIST)

- Verified full copy of Minutes including resolution to apply for funding from The Community Trust of Mid & South Canterbury Inc. that states the purpose and amount for which your organisation is applying for funding.
- Copy of the most recent Annual Accounts (including the Auditor’s Report if audited)
- Copy of the latest bank statement for each account held.
- A printed bank deposit slip for the account to be credited.
- Copy of two quotes for each capital item in this application, or an explanation if not available
- Any other information you consider would support your application
- Do **not** send your Constitution or Trust Deed or Employment Agreements unless this is your first application to the Trust.

17. Applicant’s Declaration

Your declaration must be countersigned by your President, Chairperson, Treasurer, Secretary or senior committee member.

In making this declaration I declare that

- 1. I am authorised to do so.**
- 2. To the best of my knowledge all key information has been disclosed, and all information in the application is true and correct.**
- 3. Any donation received will be used for the project for which it was approved.**
- 4. The organisation will comply with any reasonable request from The Community Trust of Mid & South Canterbury to monitor performance and accountability.**

For and on behalf of our organisation:

Name (Print):Position:

Signature:Date:

Countersign by either the President or Chairperson of the organisation:

Name (Print):Position:

Signature:Date:

18. Privacy Act

Please Note:

- Any personal information about individuals you provide in this application will be used only to assist with the administration and assessment of your application.
- The information you provide is restricted to the Community Trust of Mid & South Canterbury Inc and staff, other parties that may need to be consulted, officers of, and people contracted to act on behalf of the Community Trust of Mid & South Canterbury Inc.
- Names of Recipients will appear in the Community Trust of Mid & South Canterbury Inc Annual Report and may appear in publicity material. You are entitled to access the information and correct it.

Please keep a copy of this form and all supporting information

Who May Apply?

Not-for-profit groups and organisations providing community benefits in the Mid and South Canterbury Region which includes the districts of Ashburton, Mackenzie, Timaru and Waimate.

- Generally organisations should apply for funding only once within the Community Trust's financial year.
- Organisations can request to be considered for multi-year funding.

Groups and organisations should be

- Incorporated societies or
- A registered Charitable Trust, or
- A body or club, controlled by an association of persons under an adopted constitution that has audited or reviewed accounts and an Annual Report.
- Not for profit pre-schools and playgroups.

Purpose

The purpose of making donations is to:

- Generally provide supplementary funding support rather than act as a principal funding source.
- Focus on best supporting an organisation by providing funding at a time best suited to their needs.
- Recognise the continuing and invaluable work of the voluntary sector.

Applications will not be received from

- Individuals or groups seeking to provide funding for individuals
- Organisations and groups operating for private profit
- Commercial entities
- Primary or Secondary Schools or Kindergartens that are eligible for annual formula funding from the Community Trust (Subject to the Schools/Kindergarten Policy)

Applications will not be considered for

- Projects that the trustees consider are the primary responsibility of local or central government
- Projects that have been completed by the date the application is considered by the Trust.
- Projects that do not specifically benefit the community of the Mid & South Canterbury region.

Taxation Responsibility

All donations made by the Community Trust are exempt of GST. It is the responsibility of the donee organisation to declare donations and pay any tax that may be applicable to that organisation.

Guidelines for Applicants

When submitting an application for funding assistance, the applicant should ensure that the following information, where applicable, is clearly evident. If necessary, a supporting letter should be provided and advice sought from the Community Trust office.

1. The way in which the donation will contribute to the benefit, well being and/or enjoyment of the community.
2. The number of people in the local community who will benefit from the project.
3. The amount being contributed by the Applicant to the project – generally at least half the cost is expected to be raised by the Applicant.
4. The extent to which projects and amenities will have a multipurpose use.
5. The extent of collaboration with other funders.
6. For any restoration project, the historical category classification, amount of community use and historical significance.
7. The ownership of any capital items purchased as part of a project.
8. The availability of other services or projects that may overlap with the Applicant's service or project.
9. How the ongoing costs of the project will be sustained.
10. Where an application is made by a national or regional body applying on behalf of a local branch for a specific local project or for the local aspects of a national project, financial information, including budgets and financial statements, must be provided for the local branch or the local project. *Details of the way in which the local community will benefit, including numbers of people, should also be provided.*

The Community Relations Manager of the Community Trust is available to discuss your application with you and to offer guidance and advice. The CRM can be contacted at, and applications should be sent to;

**Community House
27 Strathallan Street,
P O Box 983
TIMARU 7910**

Phone: (03) 687 7360 Fax: (03) 688 9972
0800 MSCCTRUST
(0800 67 22 87)

Email: msccomtrust@xtra.co.nz

Full donation policies are available online at
www.comtrust.org.nz