

# Multi-year Donation Report



TRUST WAIKATO  
TE PUNA O WAIKATO

Please complete this form so that we can consider payment of the next year of your multi-year donation. The Trust's multi-year donation policy is outlined on the back of this form.

This report must be completed by the 2011 closing date of:

- Round 1  February
- Round 2  June
- Round 3  September

Check our website for 2011 closing dates.



1 Organisation name .....

Postal Address    Street .....    PO Box .....

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

                          Phone .....

                          Email .....

2 Contact Person

Please identify an appropriate person who can be contacted by Trust Waikato, regarding this report.

                          Name .....    Position .....

                          Phone (Day) .....    (Evening) .....

                          Email .....

3 How have you used this donation over the last year?

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4 Describe the community benefits that have occurred as a result of this donation.

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5 Describe any changes in the objectives, direction or services provided by your organisation over the last year or anticipated in the forthcoming year.

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6 Outline any significant changes in your financial position. Attach your most recent audited financial statements.

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Continued overleaf...



## Declaration

In completing this donation report I declare that

1. I am authorised to do so and to the best of my knowledge the information contained herein is true and correct.
2. Any donation received will be used for the purpose for which it was approved.
3. The organisation will comply with any reasonable request from Trust Waikato to monitor performance and accountability.

For and on behalf of our organisation

Full name of organisation .....

Signature ..... Full Name .....

Position .....

Signature of witness ..... Full Name .....

Date .....

Your Treasurer,  
Chairperson, President,  
Secretary or senior  
committee member  
should sign this form.

## Trust Waikato's Multi-year Donation Policy

1. The Trust will consider applications for multi-year donation commitments for 2 or 3 years, where
  - a. the purpose of the organisation and its work is closely aligned with the donation priorities of the Trust;
  - b. **and** a multi-year donation will assist the organisation better achieve its mission, provide ongoing quality services, strengthen its planning or build its capacity;
  - c. **and** the organisation has a track record with the Trust of at least 3 consecutive years of donations and appropriate accountability reporting;
  - d. **and** the organisation has audited annual financial statements with no significant qualifications.
2. **Multi-year donations will be "approved in principle" subject to the following:**
  - a. **an appropriate accountability report and audited financial statements being received by the date specified in the letter informing the organisation of the multi-year donation commitment. (This**

Multi-year donations  
are 'approved in principle'  
subject to:  
• accountability report  
• audited financial statements  
• no significant changes.

date will normally be the closing date of the same application round as the round in which the original application was made.)

- b. **and there being no material changes to the organisation's work or financial position.**
3. Normally multi-year donation commitments will be for the same donation amount each year.
  4. Organisations receiving a multi-year donation commitment may also apply for a donation towards major capital works or a significant new service over the same time.
  5. In making multi-year donations the Trust is mindful of the need to balance commitments to multi-year donations and annual donations.

## Trust Waikato Use Only

Recommendation: .....  
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