

# THE INSIDE GUIDE

## MULTI-YEAR DONATION APPLICATION



TRUST WAIKATO  
TE PUNA O WAIKATO

*Your guide to each question in our application form.*

### ORGANISATION

- 1 We need to record the full legal name of your organisation. Ensure it's the same one used on your bank accounts and trust deed or constitution. If it's different, let us know.
- 2 Most groups we fund have a legal status such as charitable trust or incorporated society. However, we fund small amounts for groups who don't have a legal status.
- 3 You do not need to be registered with the Charities Commission in order to apply for Trust Waikato funding. You may wish to register with the Charities Commission which will mean you are eligible for tax exempt status. For more information visit [www.charities.govt.nz](http://www.charities.govt.nz).
- 4 We'd like to know how long you have been operating.
- 5 Let us know if you are governed by another organisation or if you are part of a regional or national body.
- 6 Some organisations are affiliated with another organisation and may, for example, pay affiliation fees.
- 7 We rely on this information to keep you updated on the progress of your application and to make contact with your organisation throughout the year.

### ATTACHMENTS/DECLARATION

- 34 This information is important to us and forms part of your application.  
Please attach the documents to your application and deliver or post them to our office before the closing date.
- 35 We try to communicate with the community sector in a variety of ways.
- 36 Trust Waikato's newsletter *Puawai* is a great way to keep informed about what's happening at the Trust and in our community.  
You have the right to request that we do not use your details for further mailouts, emails or research into community sector issues.
- 37 It is important that any information which may have a bearing on the application, is fully disclosed.  
Read the application and declaration carefully and ensure whoever signs it has the authority to do so.

### YOU MADE IT!

**We look forward to receiving your application.**

Post or hand deliver your paper application in on time. We don't accept late, emailed or faxed applications (unless there has been an emergency of some kind – in which case you should talk with Trust Waikato's Chief Executive).

Remember to include enough postage so that your application isn't delayed.

*If your application is not successful, please talk to our Donation Advisors.*

### ! Reminder

- Make sure you fill in all the questions
- Include supporting documentation
- Don't put 'see attached'; summarise your main points.



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[www.trustwaikato.co.nz](http://www.trustwaikato.co.nz)

- 27 The Trust will consider applications for multi-year donation commitments of 2-3 years subject to some specific criteria.  
If you do not receive a multi-year donation, we will still consider this application for a donation this year.  
A copy of the Trust's Multi-year Donation Policy is available on our website [www.trustwaikato.co.nz](http://www.trustwaikato.co.nz).
- 28 Organisations can plan ahead knowing they have a funding commitment from the Trust over the next 2 or 3 years. Share with us your organisation's plans for the next 2 to 3 years.
- 29 Your multi-year donation amount would remain the same for each year. Share with us how your organisation will benefit from receiving a multi-year donation.
- 30 The Trust has identified particular needs within our region which we are keen to fund. The 7 main areas of focus are:
  - Supporting families and young people
  - Encouraging participation and inclusion
  - Supporting volunteers
  - Supporting Iwi and Māori communities
  - Preserving and celebrating cultural identity
  - Building resilient communities
  - Strengthening community groups.
- 31 It doesn't matter if you're a big, medium or small organisation, we'd like to know the impact your donation may have within your community.
- 32 If applicable, let us know when your project starts and ends.  
We prefer to donate to things that will happen within the next twelve months.  
We cannot donate to projects completed before the donation is made.
- 33 We need to see a brief outline of how you plan to fund your project, programme or service. It's rare for us to fund whole projects, so think about where else you will access funds. Will your organisation be contributing some of its own funds?  
*Cost Items* – you may enter one request for a donation toward all cost items (e.g. operational costs, programme costs) or enter a donation request amount for each cost item (e.g. rent, power, telephone).  
*Funding Source* – show us how you plan to fund the project (e.g. fundraising, Lottery Community, WEL Energy). Indicate whether this funding is confirmed.

*Having some funding in place already is an advantage.*

*Invest wisely, donate effectively*

- 8 **Primary Contact:** If our staff have a query about your application, we need to be able to contact a representative quickly. It's best if this person can be available by phone during the day and knows about the current application and project you are applying for.

*A current email address is another way we can keep you informed.*

**Officers:** Who is your organisation's chairperson, secretary, treasurer or other office holders? Please provide information for up to 3 current officers.

- 9 We are interested in knowing where in our funding region your organisation is based.



- 10 List the location/s or closest towns of your services. Refer to the Trust Waikato funding region map.

- 11 We need a succinct description of your organisation's reasons for operating and what you strive to achieve.

*Your mission and vision are good statements to use here.*

- 12 **Cultural Identity (optional):** We want to ensure that our funding reaches a wide range of communities within our region.

- 13 We are trying to build a picture of your organisation. Here's your opportunity to describe the services you offer your community.

*Give a brief summary and if you wish to elaborate, add an appendix. Don't leave questions blank.*

- 14 This question helps us understand the size of your operations and the financial demands of wages and volunteer expenses you may face.

- 15 Like you, we value volunteers and would like to know how their hours contribute to your work.

- 16 From this question we can see how many people your organisation involves. Members can be:

- people belonging to your society or club
- numbers of people participating in the sport or activity you offer.

- 17 From this question we can see how many people your organisation helps. This could include:

- number of people you work with each year
- number of pupils attending your school, kohanga reo or playgroup
- audience or public.

- 18 This table shows the main ethnic groups in our region.

We've adopted the same definitions of 'ethnicity' used by government agencies to describe our community. 'Asian' includes people with, for example, Chinese, Japanese, Korean, Malaysian or Indian cultural affiliations.

- 19 We're interested in knowing whether your organisation focuses on a particular age group.

## ORGANISATION FINANCES

- 20 The sustainability of groups that we donate to is important to us. We want to understand how you fund your operations. For example: other trusts, foundations, government contracts, donations, membership fee, tickets and income from services.

- 21 From this question we're able to get a feel for your financial position but we also need a copy of your annual financial statements for greater detail.

We understand that for smaller organisations the cost of audited annual financial statements is substantial; a set of reviewed financial statements by an accountant is acceptable for a smaller donation or small organisation provided they are signed and include contact details of your accountant.

- 22 Some organisations are saving for an expensive item or capital project. Let us know if you have funds for such a purpose and how they relate to your normal operating costs. The Trust accepts that holding some reserves is a sensible strategy.

- 23 Sometimes organisations go through periods of change that affect their financial circumstances. Tell us about anything significant for your organisation.

- 24 Some organisations attach photocopies of receipts, photos or media articles as part of their report, while others refer to the relevant parts of their financial statements.

*Your accountability report should be relative to the size of your donation.*

## PROJECT

- 25 Sometimes an organisation will act as an umbrella for another organisation's application. For example, where a small group is operating without legal status. It is important that you share this information with us.

We will need the financial statements and bank account information of the umbrella organisation.

- 26 Here's the big question! What are you asking Trust Waikato to fund? Be specific and brief. If you need to elaborate, attach a concise project description to your application.

If your request is for a specific item, please provide a quote.

If your request is for a salary or wage, describe the purpose of the position and the cost.