

The inside guide

Help us to get to know your organisation

Here's your guide to each question in our application form.



TRUST WAIKATO
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Q1 Organisation

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.

Q2 Postal Address

We rely on these addresses to keep you updated on the progress of your application and to make contact with your organisation throughout the year. Please check all contact details for accuracy and make sure you include your postcode!

Tip

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

Q3 Contact Person

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 is available by phone during the day and knows all about the current application and the project you are applying for.



Q4 Name of Principal Officers

Who is your group's Chairperson, Secretary, Treasurer or Deputy Chair?

This question provides us with another contact point if we need it. For example: if a query arises concerning the accounts you have sent in, we know the name of the treasurer to contact.

Your answer also shows us there is some structure to your group.

Q5 Organisation's Purpose/Objectives

We know people get sick of this question! From a funder's point of view, with hundreds of applications on our desks – it's crucial. We need a succinct description of your group's core reasons for operating and what you strive to achieve.

Tip

Your mission and vision are good statements to use here.

Q6 Legal Status

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.

We'd also like to know how long you have been operating and if you're part of a bigger regional or national body.

Q7 Tax Status

We are required to collect information on groups' tax status. Contact IRD or the Charities Commission for more information:

www.charities.govt.nz

www.ird.govt.nz

Q8 Services/Programmes

Remember we're trying to build a picture of your group. Here's your chance to briefly describe all the services you offer your community.

Tip

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

Q9 *Staff/Volunteers*

This question enables us to understand the size of your operations and the financial demands of wages and volunteer expenses you face.

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

Q10 *Membership*

From this question we can see how many people your group involves or helps. Members can be:

- members of your society or club
- numbers of people participating in the sport or activity you offer
- numbers of adults, children or young people (clients) you work with each year
- numbers of pupils attending your school, kohanga reo, playgroup or kindy.

If you record statistics please include a copy.

We want to ensure that our funding reaches many cultural groups within our region and as such, we ask that you estimate the cultural mix of your group and those you support (clients). We've adopted the same definitions of 'ethnicity' used by the Government agencies to describe our community.

Q11 *Accountability*

If you received a donation last year, outline how it was spent and the benefits to the community.

Some groups attach photocopied receipts, photos or media articles as part of their report, while others refer to the relevant parts of their financial statements.

Tip

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

Q12 *Donation Request*

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.

Q13 *Community Benefit*

We think it's important that our donations assist as many people as possible and in a variety of ways. 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.

Summarise:

- how the donation will benefit people
- who the donation will benefit and
- how many people will benefit.

One of our core values is to operate in a manner consistent with Te Tiriti o Waitangi. If your group's activities or services make a difference for Māori in our region, we'd like to know.

Q14 *Your Income*

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 fees and income from services.

Q15 *Financial Details*

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 group be contributing some of its own funds?

If you are registered for GST, make your budget GST exclusive.

We prefer to donate to things that will happen within the next twelve months.

We can't donate to projects completed before the donation is made.

Tip

If your request is for a specific item:
• supply a quote.

If it is for a salary or wage:
• describe the purpose of the position, and the cost.

Tip

Having some funding in place already is an advantage.

Q16 *Financial Summary*

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 groups the cost of audited financial statements is substantial; a set of reviewed financial statements by an accountant is acceptable for a smaller donation, provided they are signed and include contact details of your accountant.

Tagged Funds

Q17 Some groups 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.

Financial Changes

Q18 Sometimes groups go through periods of change that affect their financial circumstances. Tell us about anything significant for your organisation.

Bank Accounts

Q19 Donations are direct credited into an organisation's bank account. You must include your bank deposit slip.

Communication

Q20 We try to communicate with the community sector in a variety of ways. Help us to determine which ways are most effective for you.

Attachments

Q21 This is a great checklist for you to tick off.

Privacy

Q22 You have the right to request that the Trust does not use your details for further mailouts or research into community sector issues. We also need your consent to send electronic mail to you about Trust Waikato news. We will record your preferences on our database.

Q23 Declaration and Signing

Read carefully and ensure whoever signs the application has the authority to do so.

We can't process an application that hasn't been signed by an office holder or someone in your group with the authority to sign. This signature must be witnessed.

Multi-Year Donation Application

Insert Carefully read the Multi-year Donation Policy on the back of the insert to determine if your group is eligible for a multi-year donation.

If you fit the criteria you will need to complete both the insert and the main application form if you want to apply for a multi-year donation.

Tip

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

You made it!

We look forward to receiving your application.

Now... 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.



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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