

2010 Multi-year Donation Application



TRUST WAIKATO
TE PUNA O WAIKATO

Does your organisation:

- provide services that fit with Trust Waikato priorities; you can find these funding priorities in our booklet called "An Overview", on page 3 of Trust Waikato's Strategic Plan, or at www.trustwaikato.co.nz, through the link on the 'What We Fund' page,
- **and** have funding needs for 2 – 3 years ahead,
- **and** have a donations record with Trust Waikato for at least three consecutive years,
- **and** have audited financial statements with no significant qualifications?

If so, you may wish to apply for a multi-year donation.

Please read Trust Waikato's multi-year donation policy on the other side of this page to determine if your group fits the criteria for a multi-year donation.

Still got questions?

Call a Donation Advisor. Freephone 0800 436 628 or 07 838 2660.

For further information visit:

www.trustwaikato.co.nz

You must complete both the full fold-out Application and this Multi-year Application.

Organisation name

Please complete this additional form **only** if you want your donation application to be considered for a 2 or 3 year commitment.

1 Do you want your Donation Application (as completed on the main fold out application form) to be extended for

2 years? or 3 years?

Note: The donation amount would remain the same for each year.

2 What are your group's plans for the next 2 or 3 years?

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3 How will a multi-year donation assist your group?

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Have you attached audited financial statements that contain no significant qualifications?

4 How does your application fit with the funding priorities of Trust Waikato?

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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 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

1. Fit with Trust Waikato funding priorities
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2. Donations record with Trust Waikato
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3. Audited financial statements
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4. Recommendation
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