

MULTI-YEAR DONATION REPORT

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 2012 closing date of:

- Round 1
17 February
- Round 2
22 June
- Round 3
21 September



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Refer to your original approval letter for details of the donation commitment and reporting requirements.

1 Address details

Organisation name

Street address

PO Box

Town

Postcode

Telephone day

Email

2 Contact person – please identify an appropriate person who can be contacted by Trust Waikato, regarding this report.

Name

Position

Telephone day

Telephone evening

Email

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

This is your accountability for your donation.

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

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

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

Remember to attach a copy of your latest audited financial statements.

Continued overleaf...

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Your Treasurer,
Chairperson, President,
Secretary or Senior
Committee Member
should sign this form.

DECLARATION

In making this donation application 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 contained herein 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 Trust Waikato to monitor performance and accountability.

This Multi-year Donation Policy is part of the Trust's Donation Policy. To see the full policy visit www.trustwaikato.co.nz.

For and on behalf of our organisation

Full name of organisation

Signature **Full name**

Position

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 focus 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.

Multi-year donations are 'approved in principle' subject to:

- *accountability report*
- *audited financial statements*
- *no significant changes.*

TRUST WAIKATO USE ONLY Recommendation:

For further information visit www.trustwaikato.co.nz

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