



TRUST WAIKATO  
TE PUNA O WAIKATO

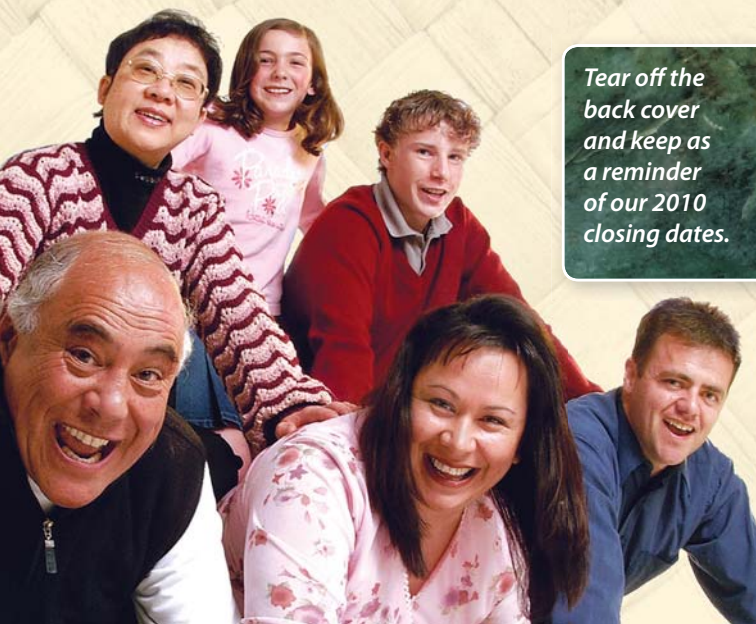
## An Overview

Supporting and enhancing the  
greater Waikato community

*Te Puna o Waikato*

*Ē tautoko ana, e āwhina ana  
i te hira tangata o Waikato whānui*

*Tear off the  
back cover  
and keep as  
a reminder  
of our 2010  
closing dates.*



*Hāere Mai*  
*Welcome*  
*Taloʻa lava*  
*Ni sa bula*  
*Malo e lelei*  
*Kia orana*  
*Joom reap sooa*  
*Assalaam alaikum*  
*Ni hau*  
*Oso ose yo*  
*Konnichiwa*  
*Namaste*  
*Salam*  
*Mauri*



## Where did Trust Waikato come from?

Ever wondered where Trust Waikato's money originated? We were established by government statute in 1988 to hold the shares of Trust Bank Waikato. In 1996 all our banking shares were sold and we exited the banking business. Since then the Trust has built up a global investment portfolio and donates a percentage of its profits to community groups throughout the region.

## What is our purpose?

Trust Waikato supports the things that make our corner of the world a better place by donating money to community organisations. Trust Waikato's funding supports groups and projects that focus on welfare, sport, recreation, youth, environment and culture.

Our vision is for resilient and vibrant communities.



*Trust Waikato supports the things that make our corner of the world a better place.*

## Where do we fund?

Our funding area includes the districts of Thames/Coromandel, Hauraki, Matamata/Piako, Waipa, Waikato, South Waikato, Waitomo, Otorohanga, Ruapehu and Hamilton city.

The Trust acknowledges that this area includes much of the lands of the Tainui waka and thus the people of Waikato, Raukawa, Hauraki and Maniapoto.



## Who do we fund?

We fund not for profit community organisations that:

- **operate predominantly within the Trust's geographic area**
- **have an incorporated society or registered charitable trust status**  
*Note: We can still fund groups without this status; please talk to one of our Donation Advisors.*
- **have a bank account, annual financial statements and annual report on their operations.**

**TIP**

Visit

[www.trustwaikato.co.nz](http://www.trustwaikato.co.nz)  
to view lists of past donations  
and descriptions.



## What do we fund?

We focus on projects, programmes and organisations which contribute to the well-being of communities. This includes groups whose work may involve:

SOCIAL SERVICES

SPORTS

RECREATIONAL ACTIVITIES

ARTS

CULTURE

ENVIRONMENTAL INITIATIVES

PRESERVATION OF OUR HISTORY

EDUCATION

YOUTH



## Do we have funding priorities?

Yes, Trust Waikato has identified particular needs within our region which we are keen to fund. They include:

### *Supporting families and young people*

We strongly support those programmes which deal with the underlying causes of social problems. This includes projects which support families, protect children and promote participation of young people in community activities.

We are keen to help make sure all members of our communities have access to quality health, welfare, recreation and education services.

### *Supporting Iwi and Māori communities*

Trust Waikato has a significant commitment to honouring Te Tiriti o Waitangi.

The Trust wishes to support projects and organisations which are at the heart of resilient and vibrant whanau, hapu and iwi.



### *Preserving cultural identity*

Our community's history and sense of identity is important to us all.

Alongside our desire to work in partnership with Māori, we also wish to support significant initiatives of Pacific peoples and other ethnic communities.

We support projects that preserve and protect our history and artifacts and those which promote understanding of the culturally diverse nature of our region.

### *Strengthening communities*

Ensuring that all people have opportunities to feel part of their community – for education, work or leisure – is important to Trust Waikato. The Trust will support projects or programmes provided for people who have been denied a quality of life enjoyed by the wider community.

Some communities have distinct needs – perhaps because of their size, location or population characteristics. We'll support community groups working actively to service these needs in identified areas.

Improving community resources is, literally, a building block towards improving social well-being for a community. We encourage schools, sports and recreation clubs and community groups to share resources and facilities where possible.

#### TIP

Please give us a call to discuss your project. We welcome your enquiries.

## *Promoting organisational effectiveness*

Great work in the community requires strong and viable organisations. The Trust funds the management and operational infrastructure of groups. Getting (new) people involved in community work is a common problem through the region, so we are going to focus on promoting, training and supporting volunteers and their contributions.

Trust Waikato would also like to show it is taking responsibility for reducing its own ecological footprint – we'll be working hard to improve our business practices to ensure long-term sustainability of our organisation. The Trust is also keen to see other community organisations working to reduce their environmental impact.

**TIP****Visit**

For a comprehensive copy of the Trust's donation policy visit

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



## What are some examples?

There are many donation examples for you to check out on the Trust Waikato website.

Here are just a few:

Equipment

Operational funding e.g. power, phone, rent, stationery

Training

Salaries

Youth leadership opportunities

Marae projects

Cultural groups/activities

Coach/player development

Volunteer expenses

Community facilities and maintenance

Recreational activities

Community research



## Do we have target groups?

Trust Waikato supports a wide range of projects, programmes and organisations, including those who work to support Māori, Pacific peoples and ethnic communities. We recognise the cultural and ethnic diversity of our communities and seek to reflect that in our support.

## Generally the Trust will not fund:

- Individuals
- Travel overseas or outside the region
- Conference attendance
- Vehicles
- Completed projects
- Sports uniforms
- Prizes and trophies
- Commercial organisations
- Loan repayments or other debt instrument repayments
- Venture capital
- Endowments
- Fundraising

## Do we fund capital/building projects?

The Trust considers making contributions towards capital projects but does not fund entire project costs. It's important to have other funding partners when undertaking a major development. Make contact with our Donation Advisors early on in your planning to discuss the proposal.

**TIP**

Get an idea of the amounts we donate by visiting [www.trustwaikato.co.nz](http://www.trustwaikato.co.nz), look under the 'Donation Database' menu.

## What if your group receives Government funding?

Trust Waikato won't fund projects which are government's responsibility.

Groups which receive significant government/local government support will generally only be eligible for reduced donations.

## How can your group apply?

The Trust has one application form and three donation rounds each year.

Eligible groups can apply for multi-year donations by completing both the main application form and the multi-year donation insert.

There are a number of ways you can get a copy of the application form:

<b>Collect</b>	<i>from Trust House, 2 London St, Hamilton</i>
<b>Post</b>	<i>freephone 0800 436 628 or 07 838 2660</i>
<b>Website</b>	<i>a writeable application form available at <a href="http://www.trustwaikato.co.nz">www.trustwaikato.co.nz</a></i>
<b>Sport Waikato</b>	<i>offices throughout the Waikato</i>
<b>Public Libraries</b>	<i>throughout the Waikato</i>
<b>District Councils</b>	<i>your local District Council office</i>

## Are some applications declined?

Unfortunately Trust Waikato's donation budget is never big enough to meet all requests.

We will explain to your group the reason(s) why your application has been declined. The most common reasons for decline are:

### **Incomplete applications**

Applicants have not supplied all that is requested on the form.

### **Late applications**

We cannot receive applications after the closing date. Make sure you get them in early.

### **Outside policy**

The Trust allocates donations according to its policy. For example, the Trust does not donate to things it sees as the responsibility of government. Read the policy at [www.trustwaikato.co.nz](http://www.trustwaikato.co.nz).

### **Level of resources**

Groups have significant untagged funds in their accounts.

### **Low priority**

We assess applications with an eye to giving money where the most community benefit will be derived. Our resources are limited which may mean we think certain requests are lower priorities than others.

### **Unlikely to proceed**

Projects or programmes that are unlikely to go ahead within the next twelve months.

## What about tax status and GST?

Trust Waikato donations do not attract GST; donations are exempt from GST.

We encourage groups to become recognised by the IRD as being tax exempt.

Your group may wish to register with the Charities Commission which will mean you are eligible for tax exempt status.

**TIP**

Visit these websites for more information.

[www.charities.govt.nz](http://www.charities.govt.nz)  
[www.ird.govt.nz](http://www.ird.govt.nz)

## How much will your group get?

Trust Waikato rarely funds the entire sum that groups request. We prefer to make a fair contribution and encourage organisations to secure funds from other sources as well.



## We do expect donations to be used for the purpose applied for.

### TIP

Your report for a previous donation might also include photos, personal statements or media articles.

If this becomes difficult for some unforeseen reason, please call us to talk about it.

## Can donations be for more than one year?

Trust Waikato now offers multi-year donations. If your organisation fits the multi-year donation criteria, you can apply for a 2 or 3 year commitment.

See the policy at [www.trustwaikato.co.nz](http://www.trustwaikato.co.nz).

To apply for a multi-year donation, complete both the usual application and the one page multi-year donation insert.

## What about accountability?

We require groups to report on their last donation before applying for another donation. There are two ways to go about this:

### TIP

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

- 1 If your group is applying for another donation, you can fill out the accountability question on the application form, or attach a brief report on how you used the donation and how it benefited the community.
- 2 If your group is not applying for another donation for some time, it's best to send us a report including a project summary, benefits to the community and receipts, or a set of annual financial statements.



**TRUST WAIKATO**  
TE PUNA O WAIKATO

**The Waikato Community Trust (Inc)**

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

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## Funding rounds in 2010

Your organisation can choose when it best suits you to apply for funding.

Remember, generally we can only fund one approved donation per group during a calendar year.

### The 2010 dates are:

1

Apply by 19 February 2010  
for a donation in early May 2010

or

2

Apply by 11 June 2010  
for a donation in early September 2010

or

3

Apply by 17 September 2010  
for a donation in early December 2010

Check out our **Frequently Asked Questions Sheet, Application Form and Donation Policy** at...

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

## Need to talk some more?

You can contact us on 07 838 2660 or  
freephone 0800 436 628



**SANDRA**  
LARSEN

**RONGO**  
KIRKWOOD

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