

**GRANT APPLICATION FORM**

Please read the Rotorua Energy Charitable Trust’s Funding Guidelines on our website [www.rotoruatrust.org.nz](http://www.rotoruatrust.org.nz) before completing this application form. The Guidelines will help you decide whether your organisation is eligible for funding.

If you require assistance in completing your application, please contact us during office hours (see contact details below).

**Application Close-Off Date**

Applications close on the last working day of each month.

Applications received by the end of each month will be considered by trustees in the following month.

**Contact Details**

If you have any questions about the application process please check our website [www.rotoruatrust.org.nz](http://www.rotoruatrust.org.nz) , call us on (07) 347 6239 or email [admin@rotoruatrust.org.nz](mailto:admin@rotoruatrust.org.nz)

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| --- | --- |
| **FUNDING REQUEST** |  |

TELL US ABOUT **YOUR ORGANISATION**

NAME of your ORGANISATION \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Postal Project address (if different)

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| --- | --- | --- | --- |
| Address |  |  |  |
| Street |  | Street |  |
| Town |  | Town |  |
| Phone |  | Phone |  |
| Email |  | Fax |  |
| Fax |  |  |  |
| Website |  |  |  |

NAME of the **MAIN CONTACT** for this application

This must be someone who knows about the activities that you are planning and who we can contact if necessary for further information.

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| --- | --- | --- | --- |
|  |  |  |  |
| Name |  | Position |  |
| Phone |  |  |  |
| Email |  |  |  |

THE NAMES OF PRINCIPAL OFFICERS

|  |  |  |  |
| --- | --- | --- | --- |
| Chair |  |  |  |
| Secretary |  |  |  |
| Treasurer |  |  |  |

LEGAL STATUS

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Does your organisation have legal status? |  |  | **Yes** |  | **No** |

If yes, please specify

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Trust | **\_\_\_\_\_\_\_\_\_\_\_\_** | Incorporated society | **\_\_\_\_\_\_\_\_\_\_\_\_** | Other | **\_\_\_\_\_\_\_\_\_\_\_\_\_** |

How long has your organisation been in existence?

Is your organisation affiliated with, or part of, any national organisation?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| If yes, please specify |  |  | **Yes** |  | **No** |

CHARITIES COMMISSION REGISTRATION NUMBER \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If you are **NOT** registered with the Charities Commission please explain why.

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How many people are involved in running your organisation?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Full-time paid staff |  | Part-time paid staff |  | Volunteers |  |

What do your volunteers do?

Approximately how many people directly benefit from your organisation’s service? \_\_\_\_\_\_\_\_\_\_\_\_

Please provide the number of members in each age group category.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 0 - 20 |  | 21 - 65 |  | Over 65 |  |

Please explain the purpose of your organisation highlighting the services and Programmes your organisation provides

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TELL US ABOUT **YOUR PROJECT**

What are you seeking funding for? Describe what the funding will be used for. Additional detail may be attached e.g. feasibility studies, business plans, etc

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WHAT WILL THE BENEFIT OF YOUR PROJECT BE? Who will benefit? How many people? How will they benefit? Is there general benefit to the community? What are the objectives?

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When will your project start? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELL US ABOUT **THE FINANCIAL DETAILS OF THE PROJECT**

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| --- | --- | --- | --- | --- | --- |
| Are you GST registered? |  |  | **Yes** |  | **No** |

If you are NOT registered for GST, the GST component of your project costs will be funded.

If you are registered for GST do not include GST in your project costs, as the Trust will not fund the GST component. Round figures to the nearest dollar. Please indicate with an asterisk if any

Income sources have not been confirmed.  **Please attach budgets and at least two quotes.**

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| --- | --- | --- | --- |
| EXPENDITURE  (cost of the project) | $ | INCOME  (how you intend to fund the project) | $ |
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|  |  |  |  |
| **A**. Total cost of the project | $ | **B.** Other funds for the project | $ |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Total cost of the project (**A**) |  | $ |
| LESS | Other funds for the project (**B**) |  | $ |
| EQUALS | Amount applied for to the Rotorua Trust |  | $ |

TELL US ABOUT HOW YOUR **ORGANISATION IS FINANCED**

WHAT ARE YOUR USUAL SOURCES OF INCOME?

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FINANCIAL SUMMARY FROM THE LATEST ANNUAL ACCOUNTS

Please attach a copy of the latest audited accounts

SUMMARY for financial year ending

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| --- | --- | --- |
| INCOME | $ |  |
| EXPENDITURE | $ |  |
| SURPLUS (deficit) | $ |  |
| CURRENT BANK BALANCES | $ |  |

Please indicate if any of the funds that you hold are tagged for a specific purpose

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Do you anticipate any significant change in your organisations financial circumstances in the

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| --- | --- | --- | --- | --- | --- |
| next 12 MONTHS? |  |  | **Yes** |  | **No** |

If YES, please explain

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**ADDITIONAL INFORMATION**

THE FOLLOWING INFORMATION IS REQUIRED FROM ALL APPLICANTS

□ A copy of your latest bank statement for each account, including investments

□ Annual Accounts for the last financial year (preferably audited)

□ A copy of the budget and quotations to support your funding request

□ A copy of a letter from Inland Revenue confirming Income Tax Exemption if you are not registered with the charities commission

□ A printed bank deposit slip

□ Letters of support for your organisation and the work it does

We may require ADDITIONAL information if your organisation is applying for the

first time for funding from the Rotorua Trust.

We will contact you to get this information.

DECLARATION

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| In making this funding application I declare that: |
| I am authorised to do so and to the best of my knowledge the information contained herein is true and correct. |
| Any funding received will be used for the project for which it was approved. |
| The organisation will comply with any reasonable request from the Rotorua Energy Charitable Trust to monitor performance and accountability. |
| The organisation acknowledges that any decision made by the Rotorua Energy Charitable Trust is final. We accept that no reasons for such decision will be given, nor will any correspondence be entered into. |
| **PRIVACY ACT** |
| Any personal information about individuals you provide in this application will be used only to assist with the administration and assessment of your application and in publishing results of approved funding. |
| The group and personal information collected will be restricted to the Rotorua Energy Charitable Trust Board and staff along with other parties that may be consulted or contracted to act on behalf of the Trust. |
| Groups and individuals have the right to check and correct any personal information held by the Trust. |
| The information you provide is restricted to either the Rotorua Energy Charitable Trust’s Board and Staff, other parties that may need to be consulted, officers of and people contracted to act on behalf of the Rotorua Energy Charitable Trust. |

FOR AND ON BEHALF OF OUR ORGANISATION

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| --- | --- | --- | --- |
|  |  |  |  |
| Full Name |  | Position |  |
| Signature |  | Date |  |

Counter sign by either the PRESIDENT or CHAIRPERSON of your organisation:

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
| Full Name |  | Position |  |
| Signature |  | Date |  |

SENDING US YOUR FORM

When you have completed the application and signed the declaration then please send your application with the necessary documents to: Rotorua Energy Charitable Trust, P O Box 1418, Rotorua 3040 or;

Hand Deliver to: 1358 Eruera Street, Rotorua