



GRANT APPLICATION FORM

Please read the Rotorua Energy Charitable Trust's Funding Guidelines on our website 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 , call us on (07) 347 6239 or email admin@rotoruatrust.org.nz

FUNDING REQUEST

TELL US ABOUT YOUR ORGANISATION

NAME of your ORGANISATION _____

Postal Address	Project address (if different)
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.

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.

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

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

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?

When will your project start? _____

TELL US ABOUT THE FINANCIAL DETAILS OF THE PROJECT

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.**

EXPENDITURE (cost of the project)	\$	INCOME (how you intend to fund the project)	\$
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?

FINANCIAL SUMMARY FROM THE LATEST ANNUAL ACCOUNTS

Please attach a copy of the latest audited accounts SUMMARY for financial year ending

INCOME	\$ _____
EXPENDITURE	\$ _____
SURPLUS (deficit)	\$ _____
CURRENT BANK BALANCES	\$ _____

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

Do you anticipate any significant change in your organisations financial circumstances in the next 12 MONTHS?

Yes

No

If YES, please explain

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

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

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