



THE COMMUNITY TRUST OF MID & SOUTH CANTERBURY INC

Working with community groups to achieve a region of healthy, vibrant and caring communities

APPLICATION FORM

The Trust's objective is to provide financial assistance to organisations carrying on charitable, cultural, philanthropic and recreational work which is of benefit to the community principally in the regions of Mid and South Canterbury

Organisation Name

Ashburton/Methven Geraldine Temuka

Mackenzie Timaru/Pleasant Point Waimate

Description of Project
.....

Amount applied for \$.....

Application Category: Community Health & Welfare Education
Recreation & Sport Youth Activities
Culture & Heritage The Environment

Your Organisation

Contact Details for your organisation

Street P O Box

Town

Phone Fax

Email

Please identify an appropriate person who can be contacted by the Trust, regarding your application.

Contact Person Name Position

Phone No (Day) (Evening)

Email

Names of Principal Officers of your organisation

Name Position

Name Position

Name Position

Legal Status

Is your organisation a Trust, Incorporated Society or other? If other please specify

Trust Incorporated Society Other

Is your organisation registered under the Charities Act 2005? Yes Number _____ No

Is the organisation exempt from paying **INCOME TAX**? Yes No

IF YOU HAVE INDICATED THAT YOUR ORGANISATION IS TAX EXEMPT YOU MUST ATTACH A LETTER FROM THE INLAND REVENUE DEPARTMENT CONFIRMING THAT YOUR ORGANISATION IS EXEMPT FROM THE PAYMENT OF INCOME TAX.
PLEASE NOTE: A CERTIFICATE OF EXEMPTION FROM RESIDENT WITHHOLDING TAX IS NOT A LETTER OF EXEMPTION FROM INCOME TAX.

How long has your organisation or branch been in existence?

Is your organisation responsible to or controlled by any other organisation?

What services or programmes do you currently provide?

.....

.....

Number of paid staff (full time equivalents) Number of members..... Number of Volunteers.....

What role do the volunteers and members play in your organisation?

.....

Previous donations

Has your organisation received a donation from the Community Trust in the past five years?

Yes No \$..... Year

Has this project received a donation from the Community Trust in the past five years?

Yes No \$..... Year

Your Project

Please summarise what you are seeking this current donation for. Additional details may be attached for new or major projects e.g. feasibility studies, business plans, budgets, at least two quotes, etc

.....
 .

Has your organisation raised at least 50% of the funds for the project? Yes No

Please comment on contribution by your organisation

.....

How will the project benefit the community?

.....

Financial Details of Project – (Please specify *exactly what you want the Trust to fund*)

If you are registered for GST do not include GST in these costs. Round figures to nearest dollar. **Please indicate ALL income sources INCLUDING those not yet confirmed and list all Applications to other Organisations for this project.** Provide a Project Budget on a separate page if necessary.

Project Costs are:	\$	Project Funding	Confirmed (Yes/No)	\$
		Grants/Donations applied for		
		Contribution from own funds		
Total Cost of Project	\$		Total Income	\$
Surplus/(Deficit)			\$	
AMOUNT APPLIED FOR TO COMMUNITY TRUST			\$	

If applicable, when will the project startand finish

Financial Information

What are the usual sources of funds for your organisation?

.....

.....

Financial summary from latest annual accounts (please also attach a copy)

Summary for financial year ending/...../..... or period from/...../..... to/...../.....

Income \$

Expenditure \$

Surplus (deficit) \$

Current funds in hand (to include investments) \$ at/...../.....

Please indicate if any of the funds are tagged for specific purposes

.....

.....

Please specify the bank account to be credited if donation approved, and attach coded bank deposit slip.

Bank	Branch Number	Account Number	Suffix
.....

Please specify your organisation's IRD number (if known)

Have you answered all the questions and signed the application form?

Additional Information Required

The following documents and information must be enclosed with your application. If you do not enclose these, then regretfully your application cannot be considered.

- | Have you enclosed the following documents? | Yes | No | N/A |
|---|--------------------------|--------------------------|--------------------------|
| 1. A verified copy of the Minutes and resolution to apply for funding from The Community Trust of Mid & South Canterbury Inc which states the purpose and amount for which your organisation is applying for funding. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Copy of the latest audited financial accounts (including the Auditor's Report and list of Office Bearers) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Copies of the latest bank statement for each account held. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. A bank deposit slip. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Copy of two quotes for each capital item in this application, or an explanation if not available. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Copy of the organisation's Constitution, Deed, Rules, etc if not already held by the Trust. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The following information is to be provided if it is relevant to your application:

- | | | | |
|--|--------------------------|--------------------------|--------------------------|
| 1. Copy of title or ownership certificate to the land/buildings. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Copy of resource management consent or appropriate local authority consent. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Copy of lease or agreement or licence to occupy property. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Any other information you consider would support your application. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Applicant's Declaration

Please read the following statements carefully before you print your name and place your signature on the space provided below. Your declaration must be countersigned by your President or Chairperson.

- We have the authority to commit the organisation to this application.
- We solemnly declare that the information we provided herein and on the supplementary sheets is true and correct, and that further information provided by any one of us or by any representative of our organisation, during the course of assessment will be true and correct.
- We acknowledge that any decision made by the Community Trust of Mid & South Canterbury Inc is final and binding on our organisation.
- We accept that no reasons for such decision will be given, nor will any correspondence be entered into.

For and on behalf of our organisation:

Name (Print): Position:

Signature: Date:

Countersign by either the President or Chairperson of the organisation:

Name (Print): Position:

Signature: Date:

Privacy Act

Please Note:

- Any personal information about individuals you provide in this application will be used only to assist with the administration and assessment of your application.
- The information you provide is restricted to the Community Trust of Mid & South Canterbury Inc and staff, other parties that may need to be consulted, officers of, and people contracted to act on behalf of the Community Trust of Mid & South Canterbury Inc.
- Names of Donees will appear in the Community Trust of Mid & South Canterbury Inc Annual Report and may appear in publicity material. You are entitled to access the information and correct it.

Please keep a copy of this form and all supporting information

Note: the application will be declined if the project is completed prior to the application being considered or if it appears unlikely to proceed within the next two years.

Who May Apply?

Groups and organisations providing community benefits in the Mid and South Canterbury Region which includes the districts of Ashburton/Methven, Geraldine, Mackenzie, Timaru/Pleasant Point, Temuka, Waimate.

Groups and organisations should be;

- Incorporated societies or
- A registered Charitable trust, or
- A body or club, controlled by an association of persons under an adopted constitution that has audited accounts and an Annual Report.
- Not for profit pre schools and playgroups.

Applicants must demonstrate that they are performing a community service in one or more of the following areas;

- Providing services for those who may be denied a quality of life enjoyed by the majority, and/or
- Offering their services or otherwise providing for the benefit or enjoyment of the public, contributing to community wellbeing, and/or
- Giving time and resources to assist with social problems.

Projects that are eligible will fit into one of these categories;

- Community Health and Welfare
- Education
- Recreation and Sport
- Youth Activities
- Culture and Heritage
- The Environment

Applications will not be received from;

- Individuals
- Organisations or groups operating for private profit
- Commercial entities
- Primary or Secondary Schools or Kindergartens that are eligible for annual formula funding from the Trust

Applications will not be considered for;

- Projects that the trustees consider are the primary responsibility of local or central government
- Projects that have been completed by the date the application is considered by the Trust.
- Projects that do not specifically benefit the community of the Mid & South Canterbury region.

Conditions

1. The requirement to complete an Accountability Report
2. The donation must generally be uplifted within two years from the date of approval

3. The donation will be spent within twelve months from the date that it is uplifted unless special arrangements are made with the Trust.
4. The donation will not be paid unless the Trust is satisfied that the balance of the funding is in hand and that the project can be completed.
5. If required by the Trust, the recipient agrees to a project audit being carried out.
6. Unless specifically authorised by the Trust, the donation must be used for the specific project applied for, with any conditions attached to the donations being adhered to.
7. It is the responsibility of the donee to declare any income received from the Trust and to pay any taxes that may be incurred as a result of that donation income.
8. The Trust has the right to publicise any donation made.
9. The donee organisation shall acknowledge any donation made by the Trust in the Annual Report of the organisation.

Trust Governance

The Trustees are appointed by the Minister of Finance. The names of current Trustees are available on the website or by phoning the Trust Office (03) 687 7360.

2010 – 2011 Closing Dates

Applications for up to \$10000.00 will close on:

- 3rd Friday in March 2010
- 3rd Friday in May 2010
- 3rd Friday in July 2010
- 3rd Friday in September 2010
- 3rd Friday in January 2011

Applications up to \$10,000 are considered at the Trust meeting the month following the closing date.

Applications for more than \$10000.00 will close on:

- 3rd Friday in March 2010 (to be considered in May 2010)
- 3rd Friday in September 2010 (to be considered in November 2010)

Trust meetings are usually held the last Monday of each month. There is no Trust meeting in December.

The General Manager of the Trust is available to discuss your application with you and to offer guidance and advice. He can be contacted at, and applications should be sent to;

**Community House
27 Strathallan Street,
P O Box 983
Timaru.**

Phone (03) 687 7360 fax (03) 688 9972
0800 MSCCTRUST
(0800 67 22 87)

email john.trust@xtra.co.nz.

Application forms are available on our website:

www.comtrust.org.nz