

APPLICATION FOR GRANT

The West Coast *Community* Trust



*The initial capital of the Trust resulted from the sale of
Shares of Westland Bank Limited in 1989*

CRITERIA - REGION

Applications will be considered from groups and organisations carrying out their activities in the West Coast region, that is the local government districts of Buller, Grey and Westland.

WHO MAY APPLY

Groups and organisations performing a community service by :

- contributing to community well-being
- promoting education and learning
- offering activities and services for the benefit and/or enjoyment of the public
- giving time and resources to alleviate social problems.

These groups and organisations **should** be :

- an incorporated society
- a registered charitable trust, or
- a body (or club) controlled by an association of persons under an adopted constitution and rules with annual accounts and report.

Projects that are **not eligible** include :

- commercial ventures
- endowments or a capital fund
- completed or retrospective projects
- promotion or benefit of an individual.

POLICY ON GRANTS

The Trust's policy on grants is included with this form to assist organisations in their application.

TAXATION

- *Please note that this is a tax law requirement and relates to question 13 on the application form.*

To satisfy these requirements the Trust needs to know whether your organisation is exempt from **Income Tax**.

If you are Tax Exempt because you have been approved for **Charitable** status by the IRD, then a copy of this letter from IRD must be provided with this application.

If you have **Income Tax** exempt status from the IRD as a promoter of an amateur game or sport or as a district improvement society, then a copy of this letter from IRD must be provided with the application.

TRUST MANAGEMENT

Trustees are appointed by Government for a period of up to 4 years. The current Trustees' names are available by writing to the Secretary.

CONDITIONS & ADMINISTRATION

1. The donation must be used for the specific project applied for.
2. The recipient organisation must agree to a project audit if requested. Failure to adhere to this requirement may disqualify the applicant organisation from future grants.
3. Completion of the application form does not constitute approval of a donation.
4. **Applications close each year 30th April and 31st October**
5. Applications limited to one per annum (Trusts Financial year, 1 April - 31 March).

HOW TO APPLY

The application form is the 2nd page of this document.

Please complete and return to:

Secretary

West Coast Community Trust

PO Box 190

Hokitika

Phone/Fax: 03 755 7914

Email: wccomtrust@actrix.co.nz

GENERAL INFORMATION

Check list

PLEASE NOTE YOUR APPLICATION WILL NOT BE PROCESSED UNTIL ALL OF THE FOLLOWING CHECKLIST ITEMS HAVE BEEN TICKED AND ARE ENCLOSED

- Have you completed all sections relevant on this form?

Please attach the following:

- A copy of your organisation's most recent annual audited financial statements.(must show grants received from the WC Community Trust)
- A letter (if we do not already have a copy on file) from IRD explaining your Tax Exempt status - refer to the taxation section. An IR15C certificate is not acceptable.
- Letters of support (if appropriate)
- Quotes (if applicable) minimum of two quotes required.

APPLICATION FOR GRANT

(Return this panel only)

INFORMATION NEEDED ABOUT YOUR ORGANISATION

1. Official Name of Organisation.....
.....
2. Postal Address
3. Name of Contact Person
4. State briefly the aims and objectives of your organisation
5. Area or district your organisation serves

Buller, Grey, Westland or All

INFORMATION NEEDED ABOUT YOUR PROJECT

6. Purpose for which donation is required.....
 7. Total project cost \$ Funds already raised \$
 8. Amount requested from this Trust \$
- | List Organisations applied to: | Amount: | Declined/Approved
Still waiting |
|--------------------------------|----------|------------------------------------|
| | \$ | |
| | \$ | |
| | \$ | |
9. How do you propose to raise any shortfall

INFORMATION NEEDED ABOUT YOUR PROJECT

10. Name of your Bank and Branch
11. If a donation is approved state bank account number to which you wish the funds to be deposited

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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12. Attach your latest annual accounts - **your application will not be considered unless these are enclosed.**

TAXATION STATUS OF YOUR ORGANISATION

13. Please read the explanatory notes and then indicate below which category your organisation falls into. Tick which one applies

- | | |
|---|---|
| <input type="checkbox"/> Tax exempt as charitable organisation | IRD No. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> Tax exempt as amateur game or sport | IRD No. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> Tax exempt as district improvement society | IRD No. <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> Not tax exempt (all others) | <input type="checkbox"/> Already provided and letter on file. |

INFORMATION ABOUT YOUR ORGANISATION

14. Name of Chairperson/President
- Secretary
- Treasurer.....
15. Address and designation of contact person named at question 3.
- Address
- Designation
16. Contact's phone No: Organisation email
17. Who will benefit from this project
- Number of Members Others.....

DECLARATION AND PRIVACY ACT 1993 AUTHORISATION

I declare that :

18. This application has the formal approval of the above named organisation **Yes/No**
19. To the best of my knowledge all information provided in this application is true and correct.
20. We agree to comply with the conditions of The West Coast Community Trust or the donation will be returned to the Trust.
21. We acknowledge that any decision made by Trustees is final and that no comparison to another organisation's application will be made.
22. We authorise the West Coast Community Trust to advertise or publish the name of our organisation and the amount of the grant approved if this application is successful.
23.

signature

Print Name

And I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

DECLARED at this day of year

before me

signature

print name

Solicitor/Justice of the Peace/Person authorised to take Statutory Declarations.

WEST COAST COMMUNITY TRUST

POLICY ON GRANTS

The West Coast Community Trust will give financial assistance to charitable, cultural, philanthropic, recreational and other purposes being beneficial to the community principally in the West Coast region, that is the local government districts of Buller, Grey and Westland.

Policy

- a. Only formal applications on the appropriate form will be considered. All questions must be answered and applications for grants will not be considered unless accompanied by the latest statement of income and expenditure.
- b. Only not-for-profit organisations are eligible to apply. i.e. not for personal financial gain.
- c. Application organisations do not need to be incorporated to be eligible to apply.
- d. Applicants will generally be expected to have undertaken fund raising of their own towards the cost of the project.
- e. Grants will not be made to nationally or regionally based organisations except where they directly benefit the West Coast region or fall within the Combined Community Trusts 'NZ Wide Policy'.
- f. An organisation must use the grant for the purpose for which it has applied and be spent within that financial year. If an extension is required, written permission must be obtained from the trust.
- g. The organisations must fill a charitable, cultural, philanthropic, recreational or any other role which the Trust considers is of benefit to the region.
- h. A new organisation shall have the backing or support of a recognised agency or a community group. Letters of support should be provided from national bodies, local authorities, etc.
- i. Account will be taken of 'Special Year' appeals and national appeals or any other special activity being conducted locally that will have an impact on our region.
- j. In the case of sporting organisations, the grant should preferably be made to assist that sport at a junior level.
- k. Grants to organisations of a similar nature should be made in proportion to the number of members they have or parties they assist.
- l. Grants are not generally for the use of individuals or for wages, for overseas travel or use while overseas, travel costs, motor vehicles. Exceptions can be made in special circumstances where the impact of that travel will be of major benefit to the region.
- m. Funds granted must be spent for the purpose allocated and successful applicants could be required to verify this. Failure to adhere to these requirements will require the grant to be refunded to the trust and may disqualify the applicant/organisation from future grants.
- n. Each application shall be judged on its merits. All eligible organisations will be treated without bias or prejudice.
- o. Under normal circumstances applicants who are successful may only apply once within a 12 month period.
- p. It is the policy of the Trust generally not to make grants to other Trusts which are accumulating money to give away.

CHECKLIST - HAVE YOUR INCLUDED SUPPORTING DOCUMENTATION:

- A copy of the latest bank statement
- A copy of your organisation's most recent annual audited financial statements.
- A copy of a letter from Inland Revenue confirming Income Tax Exemption
- A printed bank deposit slip
- Letters of support from your National/regional body and/or organisation.
- Copy of the registration certificate of your organisation i.e. incorporated certificate (if not already on file with our trust)
- A signed and registered copy of your constitution/rules/trust deed/charter (if not already on file with our trust)
- Quotes (minimum of two quotes required)

Clarifying your Tax Status:

The **letter** required from IRD will clarify whether your organisation is exempt from paying income tax. The relevant sections in the approval letters are:

For Registered Charities:

Section CB4 (1) (c) Income Tax Act (1994) and CB4 (1) (e) Income Tax Act (1994)
OR
Section CW34 Income Tax Act (2004) and CW35 Income Tax Act (2004).

For Sports Clubs/Associations or Not-for-Profit organisations:

Section CB4 (1) (h) Income Tax Act (1994)
Section CB4 (1) (j) Income Tax Act (1994)
OR
Section CW34 Income Tax Act (2004) and CW39 Income Tax Act (2004).

Please complete all relevant sections and return the Application for Grant section of the application form with the above documentation.

Closing dates for grants are 30th April and 31st October. Grants are considered at the monthly meetings in May and November. If you have any queries please contact the Secretary at:

Email: wccomtrust@actrix.co.nz or Phone: (03) 755 7914 (Angela Keenan)