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GRANT APPLICATION FORM

Funds bestowed from the Otago Central Electric Power Board

Please contact the Trust office to discuss your project or service PRIOR to completing this application form. Please also ensure that you:

- *Read the Guidelines first which are bound inside this document.*
- *Enclose all the supporting documentation as per the checklist in Section 6 of this application form.*
- *DO NOT WRITE "See Attached" as an answer to any question in this Application Form. If there is insufficient room, please provide a summary on the application form in the box provided, and attach further details if necessary.*
- *Allow up to THREE FULL MONTHS for a decision to be advised from the time a completed application form is submitted. If however your application is incomplete when received by our office, it may be returned to you, which will inevitably delay any decision.*

Enquiries are always welcome

SECTION 1: ORGANISATION DETAILS (ALL Applicants to complete)

Registered or Official Name of Organisation:
Postal Address:
Postcode:
Organisation's Physical Address:
Website Address:

Contact persons for this application:

(a) Name:	Position:
Home Telephone:	Mobile:
Work Telephone:	Fax:
Email:	
(b) Name:	Position:
Home Telephone:	Mobile:
Work Telephone:	Fax:
Email:	

1. Names of the Principal Officers of your Organisation:

Chair:	Telephone:
Email:	
Secretary:	Telephone:
Email:	
Treasurer:	Telephone:
Email:	

2. Organisation's Legal Status (please tick one):

- Incorporated Society Non-Constituted Body (i.e. not a Legal Entity)
 Charitable Trust Other (e.g. School, Church, Local Authority etc)

3. Charities Commission Number (if applicable)

4. Is your organisation registered for GST? YES GST Number: NO

5. What year was your organisation formed?

6. What is your financial year end date, e.g. 31 March, 30 June, 30 Sept, 31 Dec

7. (a) Amount being requested from Central Lakes Trust \$

(b) Total Project/Operational Costs (or total budgeted expenses) \$

8. What is your organisation's Mission or Purpose?

9. What services or programmes does your organisation provide? *(Please do not write "See Attached")*

10. What geographical area within the Central Lakes Trust region does your organisation cover?

11. How many members does your organisation have? Total Number

12. How many people are involved in running your organisation?

Paid Full Time Staff Paid Part Time Staff Volunteers

13. Do you charge an annual subscription? YES NO

If yes, please detail below how much you charge e.g. juniors, adults etc:

14. Is your organisation affiliated to a regional or national organisation: YES NO

If yes, please give details below:

15. Who are the current Trustees and/or Committee Members of your organisation?

16. What other service providers in the Central Lakes Trust region does your organisation collaborate with?

ALL APPLICANTS PLEASE GO TO SECTION 2



SECTION 2: GRANT DETAILS (ALL Applicants to complete)

17. Please indicate below the type of grant you are applying for:

EITHER **PROJECT GRANT:** This includes one-off community projects, facilities, events, pilot programmes, new initiatives and equipment e.g. (the construction of a community centre, pavilion), etc.

PLEASE COMPLETE 17(a) BELOW:

OR **OPERATIONAL GRANT:** This includes the delivery of existing programmes or services, e.g. operational costs such as salaries/wages, rent, power, telephone etc. This type of grant is generally only available for education, welfare, religion or social service related organisations. It is not usually available to national organisations unless a direct community benefit to the people of the Central Lakes Trust region can be clearly demonstrated.

PLEASE COMPLETE 17(b) BELOW:

17(a) **PROJECT GRANT:** Please describe the project that your organisation requires the grant for. This question must be answered here. If you wish to expand on this description, you may enclose a separate page.

(Please do not write see attached)

PLEASE GO TO SECTION 3 

17(b) **OPERATIONAL GRANT:** Please describe what Central Lakes Trust funding is required for. This question must be answered here. If you wish to expand on this description, you may enclose a separate page.

(Please do not write see attached)

PLEASE NOTE: If your organisation is applying for both a new initiative and an existing programme, please complete BOTH sections 3 and 4. If you are unsure, please contact our office to discuss this further on 0800 00 11 37.

PLEASE GO TO SECTION 3(c) 

SECTION 3: PROJECT GRANT

18. Why is the project needed? *(Please do not write see attached)*

19. Has an analysis been undertaken to provide evidence of need? YES NO
If yes, please provide details:

20. Approximately how many people in the Central Lakes Trust region will directly benefit from this project/event?

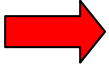

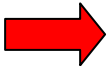
21. Which geographical area(s) of the Central Lakes Trust region will benefit from your project/event?

22. What are the proposed project time frames? Please remember to allow up to **three full months** from when an application is submitted before an outcome will be advised. A project cannot commence prior to an outcome being advised by the Central Lakes Trust as it would be deemed to be "retrospective".

Start Date:

Finish Date
(if applicable)

23. Which of the following does your project relate to? *(Please tick box)*

- Facilities**, e.g. upgrades/extensions etc **PLEASE GO TO SECTION 3(a)** 
- Other** (Includes one-off community projects, events, pilot programmes & new initiatives) **PLEASE GO TO SECTION 3(b)** 
- Purchase of equipment or resources** **PLEASE GO TO SECTION 3(c)** 

SECTION 3(a): PROJECT GRANT (Facilities):

24. Has your organisation obtained relevant consents for the project, i.e. building and/or resource consents?
 YES NO

If yes, please detail what they are and their current status and attach any relevant information.

If No, please explain why not.

25. Has your organisation undertaken a feasibility study or any other form of background research in respect of the project?

YES NO

If Yes, please summarise below the findings AND /recommendations AND please attach a copy of any feasibility study or other background research.

26. What is the outcome(s) / result(s) that your organisation wants to achieve by undertaking this project?

- 27(a). What consultation and/or collaboration have you had with any of the following organisations regarding your project? Please attach any relevant correspondence.

Organisation	Type of Consultation
<i>Local Authorities</i>	
<i>Iwi</i>	
<i>Historic Places Trust</i>	
<i>Sport Central/Sport Otago</i>	
<i>Ministry of Education</i>	
<i>Department of Conservation</i>	
<i>Creative New Zealand</i>	
<i>Ministry of Social Development</i>	
<i>Other Government Departments or Agencies</i>	
<i>District Health Boards</i>	
<i>SPARC</i>	
<i>Other groups or organisations (Please specify)</i>	

27(b). How does your proposed facility align to any long-term planning documents of the organisations that you have consulted or collaborated with in question 27(a)?

28.

(a) Who will deliver the project?

(b) What are their relevant qualifications and/or experience?

29. Where is the nearest similar facility? (If there is a similar facility close by, please detail how your facility is different).

30. Does your organisation own the land the facility is located/will be located on? YES NO
If no, please detail the land ownership and attach any relevant information (e.g. copy of lease)

31. Does the project have historical significance? YES NO
If yes, please provide evidence from the District Plan, Historic Places Trust or Maori Heritage endorsement.

32. How does your organisation plan to measure the community benefit of this facility once it is completed?

PLEASE GO TO SECTION 3(c) 

SECTION 3(b): PROJECT GRANT (Other)

(Includes one-off community projects, events, pilot programmes and new initiatives etc)

33. Has this project been delivered previously? YES NO

If YES:
Where?

By Whom?

How was it funded?

34. Are there any other organisations/groups that provide a similar project to yours in the Central Lakes Trust region? YES NO

If YES, please provide details:

35. If this application relates to a pilot project:

(a) How will your organisation promote it to potential participants?

(b) How will people be referred to it?

36.

(a) Who will deliver the project?

(b) What are their relevant qualifications and/or experience?

37.

(a) What outcome(s)/result(s) does your organisation want to achieve by undertaking this project?

(b) How does your organisation plan to measure the outcome(s)/result(s)?

PLEASE GO TO SECTION 3(c) 

**SECTION 3(c): PROJECT & OPERATIONAL GRANTS
(ALL Applicants MUST complete)**

38. Has your organisation sought quotes (if applicable)?

YES (Please attach copies) NO

If no, please explain why not.

39. How do you plan to pay for any future operational costs?

40. What contingency plan does your organisation have in place if this application is unsuccessful or if reduced funding is approved?

41. BUDGET

ALL Applicants MUST complete the Budget Template which follows:

- It is important to ensure that TOTAL COST equals TOTAL FUNDING
- The budget that you provide below should only include the figures relating to this application for a project or service your organisation provides in the **Central Lakes Trust region**, not those of your organisation/group's national body.
- Please provide costs in round figures i.e. do not include cents

GST:

- If your organisation is registered for GST, please ensure the budget is GST EXCLUSIVE
- If your organisation is not registered for GST, please ensure the budget is GST INCLUSIVE.

"Funds raised to date", means funds raised by way of fundraising activities already undertaken by your own organisation (i.e. cake stalls, raffles etc) and funding already received/confirmed from other Trusts and Funders.

"Funds still to be raised" means fundraising activities your organisation is planning to undertake and what you anticipate being able to raise, and funding applications which will be, or have already been submitted, but an outcome has yet to be advised.

"Voluntary/In Kind Contributions" means voluntary labour @ \$13.50 per hour (adult minimum wage), equipment hire, donated goods etc. These amounts must be shown on both the income and expenditure columns to balance.


SECTION 3(c) Continued:

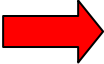
BUDGET TEMPLATE (ALL Applicants MUST complete)

41.

Project/Operational Costs Expenditure		Sources of Funding/Fundraising Income		
Actual Expense Items	Amount \$	Funds raised to date:	Amount \$	
		Funds still to be raised:	Amount \$	Date Funding Confirmed/Received
		Central Lakes Trust		
Voluntary/In Kind Contributions	\$	Voluntary/In Kind Contributions	\$	
TOTAL COST	\$	TOTAL FUNDING	\$	

IT IS IMPORTANT TO ENSURE THAT TOTAL COST EQUALS TOTAL FUNDING

FOR OPERATIONAL GRANTS – PLEASE CONTINUE ON TO SECTION 4 

FOR PROJECT GRANTS – PLEASE GO TO SECTION 5 

SECTION 4: OPERATIONAL GRANT DETAILS

PLEASE ATTACH YOUR ORGANISATION'S FULL ANNUAL OPERATING BUDGET FOR THE YEAR THAT RELATES TO THIS APPLICATION/GRANT.

Please note that if your request is for a contribution towards salaries/wages, please attach a copy of the relevant Job Descriptions and signed Employment Agreements.

42. How has your organisation been funded in the past?

43. Please provide a clear explanation of why Central Lakes Trust funding is needed.

44.

(a) What other organisations provide a service similar to yours in the Central Lakes Trust region?

(b) Please detail how your organisation and/or services are different from those supplied by the organisations detailed in 44(a) above:

45. Approximately how many people in the Central Lakes Trust region will directly benefit from your organisation's services?

SECTION 4: OPERATIONAL GRANTS Continued

50. **Objectives & Measures:**

Please complete the following. If your grant is successful, you will be required to complete a “Results” against this “Objectives and Measures” form during the grant period as part of your organisation’s accountability obligations to this Trust.

OBJECTIVES	STRATEGY	MEASURES
<p>What do you want to achieve in the Central Lakes Trust region? Please identify the FOUR key outcomes in priority order that you wish to achieve for the year that relates to this funding request. e.g,</p> <ul style="list-style-type: none"> ➤ to increase the levels of adult literacy in the community. 	<p>How do you plan to achieve these? e.g.</p> <ul style="list-style-type: none"> ➤ to deliver a tailored adult literacy programme ➤ to provide one-to-one tutoring 	<p>What are your targets/milestones for this year? e.g.</p> <ul style="list-style-type: none"> ➤ 100 new enrolments this year ➤ 96% of those enrolled complete the course

PLEASE GO TO SECTION 5 

**SECTION 5: YOUR ORGANISATION'S FINANCIAL DETAILS
(ALL Applicants MUST complete).**

Please enclose your organisation's latest audited or reviewed annual financial statements and a copy of your latest monthly bank statement (for ALL accounts including investments).

51. Please provide the following details from your organisation's latest annual financial statements:

Total Annual Income \$	Total Annual Expenses \$	Surplus/(Deficit) \$
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52.

(a) What level of reserves, if any, does your organisation have as at the date of this application? \$
(b) If it is significantly different from the reserves shown in your latest financial statements, please explain why.
(c) If there is any reason why these reserves CANNOT be used for the purposes of this application, please explain why.
(d) If you anticipate any significant change in your organisation's financial circumstances in the next 12 months, please explain.

ALL APPLICANTS PLEASE GO TO SECTION 6 

SECTION 7: DECLARATION & PRIVACY ACT 1993 AUTHORISATION (ALL Applicants to complete)

This declaration and authorisation relates to information in this application that the Central Lakes Trust may hold about your organisation now or in the future.

- We hereby declare that we are authorised to submit this application and that any grant received will be used for the purpose for which it was approved.
- We authorise the Central Lakes Trust to use this information for the purposes of administration and consideration of this application.
- We authorise the Central Lakes Trust to make any enquiries of any third parties, (which may involve discussing information contained in this application), or undertake audits of our organisation in connection with this application.
- We hereby declare that the project has not been started or financially committed to.
- We hereby declare that the information provided in this application is true and factual, to the best of our knowledge.
- We hereby agree that the Central Lakes Trust may make public the name of our organisation and the amount of the grant approved if this application is successful, including the use of any photographs provided by our organisation, and disclose any information to other funding agencies.
- The organisation will comply with any reasonable request from the Central Lakes Trust to monitor performance and accountability.
- We acknowledge that any decision made by the Central Lakes Trust is final and no correspondence will be entered into.
- We acknowledge that if this application is incomplete in any respect, the entire application may be returned to us for completion, thus delaying any decision.

1. Name of contact person:	Signature:	Date:

2. Name of contact person:	Signature:	Date:

SUBMITTING YOUR APPLICATION FORM:

- Please DO NOT BIND any part of this application form or other enclosed documents, or place in a folder.
- Please ensure you have ticked ALL the relevant boxes in Section 6 and provided ALL the required documentation. Incomplete applications may be returned unprocessed. If in doubt, please contact the Trust Office.
- This form MUST be signed by the two contact persons your organisation listed at the front of this form. These two people must be familiar with the contents of this application.
- Only ONE copy is required of the application form and supporting documentation.
- Please remember that you need to allow up to three FULL months from the time a fully completed application has been submitted to Central Lakes Trust before an outcome will be advised; and LASTLY
- Please ensure you take a photocopy of this completed application form and attachments for your own records.

THANK YOU