



LIVE HERE GIVE HERE

## Funding Application Form

## Our potential

## Our responsibility

## Our community

### **About us:**

Clutha Foundation supports charities and not for profit community organisations that benefit the people of the Clutha District.

The Foundation was established to inspire and enable generosity in the Clutha District. It promotes 'giving back' to the community by encouraging people to give where they live for the sustained and ongoing benefit to our Community.

### **Where does the money come from?**

Funds come through generous donations from individuals, clubs and organisations – either by way of a one-off donation, regular contributions (big or small) or bequests. Donations are invested, building a fund that provides income which together with any pass through funding is made available for distribution.

The Foundation also benefits from pass through funding from time to time and is currently fortunate to have pass through funding from the Otago Community Trust.

### **Where does the money go?**

To initiatives that promote wellbeing of people in the Clutha District. Current policy focuses on the advancement and benefit of youth, health and education.

### **Where can you get more information about applying for a grant?**

- See our granting policy and procedures at [www.cluthanz.com/clutha-foundation/](http://www.cluthanz.com/clutha-foundation/)
- Email our executive officer at [denise@cluthafoundation.org.nz](mailto:denise@cluthafoundation.org.nz)
- Phone our Executive Officer on 020 41894868

### **Applicable Dates for this funding round?**

- The closing date for funding applications is 10<sup>th</sup> February 2020
- Notification date is 28<sup>th</sup> February 2020

## APPLICANT DETAILS

Name of Organisation:

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Date: ..... Legal Status: .....

Charities Commission Registration # (if applicable): .....

Postal Address:

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Street Address:

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Contact Person: ..... Position: .....

Phone: ..... Email: .....

Is the organisation GST registered? .....

Website: (if applicable): .....

Initiative Name:

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Total Cost of Initiative: \$ .....

Amount Requested: \$ ..... %

## YOUR INITIATIVE

Tell us about your initiative by answering the following questions (maximum 150 words for each)

**1. Tell us about the purpose of this initiative?**

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**2. Tell us how you know this is needed?**

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**3. Who and how many people will benefit?**

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**4. What plan do you have to make it happen?**

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**5. Who (individuals or organisations) will you partner with to deliver the initiative?**

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**6. Tell us about the qualifications and experience of the key people who will implement this initiative.**

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**YOUR ORGANISATION**

**1. Tell us what your organisation is about? What are your aims and how do you achieve them?**

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**2. Tell us who your office bearers are:**

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## LINKS TO YOUR COMMUNITY

Tell us about the organisations and networks with which you have regular contact and the links to the community you serve:

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## MEASURES OF SUCCESS

Tell us about how you will measure the success of the initiative. Be sure to think about these outcomes carefully as successful applicants need to report back on the project and these measures will be used as part of that process.

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## SOURCES OF FUNDING FOR THIS INITIATIVE

Tell us how the initiative will be funded showing your own contribution, other funds applied for and if confirmed.

Source	Amount Applied For	Applied/Confirmed
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	

Please indicate (where relevant) how funding for this initiative will be sustainable in the future.

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## REFEREE DETAILS

Please provide names and contact details for two referees. Referees should be individuals who can comment on the integrity and the services provided by the applying organisation, and preferably be external to this organisation. Referees must not be directly involved with the Clutha Foundation.

Name: .....	Name: .....
Phone: .....	Phone: .....
Email: .....	Email: .....
Position: .....	Position: .....
Relationship to the Organisation: .....	Relationship to the Organisation: .....
.....	.....

## APPLICANTS DECLARATION

**We confirm:**

- that we have read the granting procedures of the Clutha Foundation and agree to the granting conditions and accountability requirements;
- this application has the formal approval of our controlling Board/Committee/Authority;
- that any grant made will be used for the purposes specified in our application or as directed by the Clutha Foundation;
- that we will immediately inform Clutha Foundation should the initiative depart from that agreed.

**We authorise Clutha Foundation or its agents to:**

- make any enquiries of any third parties, even though that may involve disclosing information contained in the application in order to carry out due diligence;
- use our name/photograph for publicity purposes and participate in promotional work as may be reasonably required by the Foundation, free of charge.

**We acknowledge that:**

- any decision made by Clutha Foundation is final and we accept that no reasons for such a decision may be given, nor any correspondence entered into;
- this application and details of the Trustees' decision may be shared with other funders and made publicly available.

**We commit to:**

- acknowledging the support of the Foundation in our literature, announcements and interviews;
- providing all financial information requested including invoices and receipts as proof of purchase.

**We declare to the best of our knowledge the information provided in this application is true and correct.**

**Signed for and on behalf of (organisations name):** .....

Signatories must not be directly involved with Clutha Foundation (e.g. trustees or employees).

Name: .....

Name: .....

Position: .....

Position: .....

Date: .....

Date: .....

Signature:.....

Signature: .....



## CHECKLIST

**Is your organisation not for profit?**

In order to be eligible for a grant your organisation must be not for profit

**Do you have an IRD income tax exemption letter?**

If you do not have at least one of these, we are unable to consider your application, but you are welcome to contact us to find out how to go about it.

**Have you attached a full set of your most recent annual financial accounts?**

These must be prepared by a chartered accountant but are not required to be audited. They should be less than 12 months old.

**Is your request something we can fund?**

Please refer to the application guidelines on our website to determine whether your request can be funded. Should you require further clarification, please contact us.

**Have you attached a pre-printed deposit slip or bank account details verified by the Bank?**

All bank details must be pre-printed, or bank verified.

**Have you attached evidence of costings?**

Please include the project budget – including all income and expenditure expected. For any capital purchases, supply at least two quotes.

**Have you kept a photocopy of the full application and all associated documents for your records?**

**Have you supplied full contact details for two referees?**

**Have you answered every question on the application form?**

**Have you signed the declaration?**

**Once completed please send this form, with supporting information via email, post or hand deliver to:**

**Email** [denise@cluthafoundation.org.nz](mailto:denise@cluthafoundation.org.nz)

**Post** Clutha Foundation, 6 John Street, Balclutha 9230

**Deliver** Clutha Foundation, Development House, 6 John Street, Balclutha