

C H Iazard Bequest Application Guide

General Criteria

General Grants Criteria

1. Project makes a positive contribution to achieving the Council's Strategic Outcomes and Points of Difference as listed in the Council's current Annual Plan.
2. Project is Wellington based and primarily benefits the people of Wellington (exceptions may be made for projects based elsewhere in the region but which significantly benefit residents of Wellington City).
3. Applicant is a legally constituted community group or organisation, not an individual or individuals.
4. Applicant group provides evidence of (or, if a new group, systems for): sound financial management, good employment practice (where applicable), clear and detailed planning, clear performance measures, demonstrated ability to report back on past funding as appropriate.
5. Projects will not be funded for the same purpose more than once in any financial year.
6. Failure to report adequately on past Council funding can result in a group being considered ineligible for future funding.
7. Project is physically and financially accessible either by a wide range of persons or by the intended users.
8. Project shows evidence of community support, collaboration and building partnerships with other organisations (e.g. letters of support from other organisations/leaders).
9. Applicant must demonstrate that the project expands the capacity, range or level of similar types of services in the community and that there was user input into identifying the need for the project.
10. The principal intent of the project is not for private or commercial pecuniary gain, though it may be that such gains occur as a side effect of the project.
11. Application demonstrates an awareness of the Treaty of Waitangi, in particular when involving Mana whenua and Taura Here.

Specific Criteria:

12. Must be charitable and/or educational purposes. The practice is to make donations to smaller community-based charities.

Criteria Notes

- The Wellington City rate paying area includes Tawa but not the Hutt Valley or Porirua.
- Groups that are not legally constituted may apply under an appropriate umbrella organisation. A copy of the umbrella agreement should be provided with the application.
- Groups that have not reported back satisfactory on funding that is more than 12 months old will normally be considered ineligible.

Donations will not normally be given for:

- National organisations
- Projects that will solely benefit an individual

How to Complete Your Application

If you need help with your application ask a member of the grants team. As stated on the form we recommend that you discuss your project with the grants team prior to submitting an application to ensure that you meet the criteria. Make sure that you answer **all** the questions on the form. Please note that the application form needs to be printed and filled in by hand – we do not accept emailed or faxed applications.

Please do not enclose your application in a folder of any sort, as your application will need to be photocopied. As part of the photocopying process we may cull excessive pages.

Application Form

Page 1

- Write the legal name of your organisation at the top of the form and use this page as a cover sheet for your application. (Ignore the “No.” bit – this is for our use.)
- The general grants criteria are listed on the first page of the form. Ensure that you have read the criteria and thought about whether you meet them.

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Legal Status

Tick the appropriate box provided or explain your circumstances.

If your organisation is not a legal entity, you will need to apply under the umbrella of another organisation. If this is the case, please provide a copy of a written agreement between your group and the umbrella organisation. The grants team can provide a template for this and notes explaining the process.

Project Details

Put a two line description on the form – this will be entered into our database so should briefly summarise the key elements of your project.

Project Cost / Amount Requested

These figures should be taken from the budget that you will attach.

- As “Other Income / Your Contribution” state the total income that you expect to receive towards the project excluding the amount you are requesting from the Bequest.
- The amount requested should be the total project cost minus the total of all other income.

Declaration

If the form is not signed and dated your application is not valid. The form has a declaration that you sign because the information you provide becomes public when it enters the public domain. This means that certain items can be made public or asked for by members of the public. We are not permitted to withhold information if a formal request is made, so if any financial information is sensitive please clearly note this on the documents in question – in some cases where there are sensitive items, we can sight them and then return them to you so they are not held as records. If you have any concerns please discuss them with us and ensure they are noted in any covering letter with the application.

Attachments Required

1. Project Description

Please use the underlined headings and attach to this form. Your project description should be typed and should not exceed *four A4 pages* (excluding quotes).

Project Description

- Outline the project – include start and finish dates, where the project is taking place, who will be involved. Give specific numbers of people involved – as participants, beneficiaries, audience etc.
- Does the project focus on a particular group of people? (e.g. youth, refugees, single parents)
- If the project has a regional focus, give details of what percentage of people involved will be from the Wellington rate paying area.

Outcomes

- What are the aims of the project and how will these aims be achieved?
- What are the specific benefits to be achieved for Wellington residents?
- How will you know whether the project has been successful?
- Please give specific targets or milestones for the project, e.g. numbers of people involved, positive evaluation results.

Need Identification:

- Show how the needs for the project were identified, and list supporting community groups.
- Is this a new initiative or an ongoing activity?
- If a new initiative, how did the need for this project arise?
- If ongoing, what measures are in place to evaluate the ongoing effectiveness of the programme?
- Please indicate an estimate of volunteer time contribution by stating the number of volunteers and hours involved per volunteer.

Marketing:

- What steps have you taken to ensure access for people with limited opportunities to participate?
- How will you advertise/promote the project?

Previous Funding Details:

List any funds received during last two years from Wellington City Council, Creative NZ, Lottery Grants, Community Trust, and any other sources. (If listed in your accounts please note the page number.)

2. Project Budget

Your budget must show all income and expenditure relating to the project. We need to see the full cost of the project even if you are only requesting the cost of a specific item. Use a format that will allow you to later enter your actual income/expenditure against budgeted figures to make reporting easy.

Income

- List all other income that has been or will be received for the project.
- List any other grants that have been (or will be) applied for, and note the date that you expect to know the outcome of each application.

- If any income will be received from participant or membership fees, explain how this is calculated, e.g. 10 people x \$5 x 10 workshops = \$500

Expenditure

- **Budget items should be supported by quotes where possible.** All quotes should clearly show whether GST is included or excluded. Quotes are particularly important for new projects or new organisations to show that the budget is realistic.
- Large budget items should be clarified – e.g. “programme costs \$5000” is not detailed enough

GST

- Show your project costs using columns: *Net cost / GST component / Gross cost*
- GST is **not** added to C H IZARD Bequest donations, so income, expenditure totals and the amount you request should all include GST, whether or not you are registered for GST.

In-kind Sponsorship

- If you are receiving any in-kind sponsorship please list this separately at the bottom of your budget.
- If your organisation is contributing resources other than a cash amount towards the project, please note your contribution separately and *not* as both income and expenditure.

3. Accounts

Some form of accounts must be provided as evidence of your organisation’s sound financial management. It is important for us to be able to see how you manage your finances. We are unlikely to fund a project where the organisers are insolvent, or where past grants cannot be identified in a group’s accounts.

If you are applying for \$5000 or more:

- Provide a copy of your most recent audited accounts
- If these accounts are more than **15** months old please state when more recent accounts will be available and provide an up to date statement of financial position

If you are applying for *less than* \$5000:

- If available, provide a copy of your most recent accounts
- If you do not have compiled accounts, please provide any of the following that are available:
 - A copy of a recent bank statement
 - A copy of your cash book to show how you have managed over the past year
 - A budget from a previous project of a similar scale that you have organised

4. Bank Deposit Slip

- You need to attach a printed, bank-encoded deposit slip for the account you wish a donation to be paid into. Handwritten slips are not acceptable

5. Letters of Support

- If you have not been funded by Wellington City Council or the CH Izard Bequest in the last 3 years, you must provide at least one letter of support from a reputable, established organisation
- If your project involves working closely with another community group, a letter of support from that group would be helpful

Application & Assessment Process

- Completed applications (along with the attachments required) must be received by the grants co-ordinator before 5pm on the closing date. Late applications will not be considered
- Within 2 weeks of the closing date you will receive a letter to confirm your application has been received
- In the 4-6 weeks following the closing date you may be contacted by a member of the grants team for further information, or to discuss your project
- Approximately 4-6 weeks after the closing date the grants sub-committee will meet to decide what funding recommendations to make to the C H Izard Bequest trustees.
- The trustees will confirm whether they accept the sub-committee's recommendations.
- The grants team will write to all applicants to let them know the outcome. Payments will come from the trustees.
- If you are successful you will be sent a funding agreement to sign and return, and also a report back guide to be completed at the end of your project
- Trustees' decisions cannot be appealed, as decisions are final
- Any complaints about the grants process need to be made in writing to the Director, Citizen Engagement within 14 days of the date of the letter of notification of grants results