

C H Iazard Bequest guide

The C H Iazard Bequest is from the estate of the late Mr C H Iazard who created the trust for charitable or educational purposes or objectives as determined by Wellington City Council.

General grants criteria

1. Your project makes a positive contribution to achieving the Council's strategic outcomes and points of difference as listed in the Council's Annual Plan.
2. The project is Wellington based and primarily benefits the people of Wellington City.
3. The applicant is a legally constituted community group or organisation, not an individual or individuals. (Groups may apply under an appropriate umbrella organisation.)
4. The 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. The project should be physically and financially accessible either by a wide range of people or by the intended users.
8. The project should show evidence of community support, collaboration and building partnerships with other organisations (such as letters of support from other organisations/leaders).
9. The applicant must demonstrate that the project expands the capacity, range or level of similar types of services in the community and that it has involved users in identifying the need for the project.
10. The principal intent of the project is not for private or commercial financial gain, though such gains may occur as a side effect of the project.
11. The application must demonstrate an awareness of the Treaty of Waitangi, in particular when involving mana whenua and taura here.

C H Iazard Bequest criteria

12. Project is for a charitable and/or educational purpose.

Criteria notes

- The Wellington City ratepaying 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 APPLY

Fill in the C H IZARD **application form** by either typing into the grey shaded boxes or completing it by hand. All forms must be signed. If you are emailing the application form, please send a scanned copy that has been signed.

Application forms can be:

- posted to Grants coordinator, Council buildings, PO Box 2199, Wellington, 6140
- delivered to our service centre at 101 Wakefield Street, Wellington
- emailed to the Grants team at grants@wcc.govt.nz

If you have any problems using the document then contact the Grants team for assistance, phone 803 8562 or email grants@wcc.govt.nz

Keep a copy of the application for your own records.

Completed applications (along with the attachments required) must be **received** by the grants coordinator before 5pm on the closing date. Late applications will not be considered.

APPLICATION FORM – page 1

The 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.

APPLICATION FORM – page 2

Organisation name

Write the legal name of your organisation in the appropriate box.

Legal status

Tick the appropriate box or explain your circumstances.

If your organisation is not a legal entity, you will need to come 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.)

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 attach. (See notes over the page about GST.)

- As 'Other income/your contribution' state the total income that you expect to receive towards the project, excluding the grant amount you are requesting from Wellington City Council.
- The grant amount requested should be the total project cost minus the total of all other income.

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.

APPLICATION FORM – page 3

Project description

- Outline the project – 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? (eg youth, refugees, single parents)
- If the project has a regional focus, give details of what percentage of people involved will be from the Wellington ratepaying 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, eg 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 estimate the volunteer time contribution by stating the number of volunteers and hours involved per volunteer.

Promotion

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

APPLICATION FORM – page 4

Project budget

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

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 fees or ticket sales, explain how this is calculated. (This should relate to the numbers that you have estimated will attend, eg venue capacity 1000, ticket cost \$10 each, three shows, 50 percent attendance expected – expected income: \$10 x 500 people x 3 shows = \$15,000.)

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, eg 'staging costs \$5000' is not a detailed enough explanation.

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 in your budget. If your organisation is contributing resources other than a cash amount towards the project, please note your contribution separately as both income and expenditure.

Financial summary

Some form of accounts must be provided as evidence of your organisation's financial position and 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 your financial position.

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

- Provide a copy of your most recent accounts, if available.
- 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.

ATTACHMENTS REQUIRED

Checklist

Please attach all of the required documents to your application.

Project budget

Include written quotes for budgeted costs where possible.

Accounts

Attach a copy of your most recent audited accounts or other evidence of your organisation's financial situation.

Bank deposit slip

Attach a printed, bank-encoded deposit slip for the account you wish a grant to be paid into. Handwritten slips are not acceptable.

Letters of support

- If you have not been funded by Wellington City Council in the past three 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.

Declaration

If the declaration on the application form is not signed and dated, your application will not be valid. The reason the declaration must be signed is because the information you provide will be available to the public. 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.

APPLICATION AND ASSESSMENT PROCESS

- Completed applications (along with the all the required attachments) must be received by the grants coordinator before 5pm on the closing date. Applications should be posted or delivered to the Council's reception as they cannot be faxed or emailed. Late applications will not be accepted.

- Within two weeks of the closing date you will receive a letter to confirm your application has been received.
- In the four to six weeks following the closing date you may be contacted by a member of the Grants team for further information, or to discuss your project.
- About four to six weeks after the closing date the Grants Subcommittee will meet to decide what funding recommendations to make to the C H Iazard Bequest trustees.
- The trustees will confirm whether they accept the subcommittee'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 form 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.