

Pub Charity Limited Grant Application Form

We want your application to go as smoothly as possible – we can't process applications that have missing or incorrect information, so read the instructions below carefully.

CHECK THAT YOUR APPLICATION MEETS OUR DONATIONS CRITERIA

Your application must be for an authorised purpose and must meet Pub Charity Limited's Donations Criteria – see www.pubcharitylimited.org.nz/donations/policies-and-criteria

CHECK THERE ARE FUNDS AVAILABLE IN YOUR AREA

Most Pub Charity Limited grants are made within the territorial authority area where they were raised – that means, to have your application considered, there generally need to be Pub Charity Limited member hotels and taverns where your organisation is based – you can check this at www.pubcharitylimited.org.nz/donations/funds-available/

IMPORTANT – PLEASE READ

1. You can't apply for things you will have bought, or events which will have passed, prior to when your application is considered by our committee (visit www.pubcharitylimited.org.nz for committee dates and deadlines).
2. You need to be applying for a non-profit organisation which keeps financial records.
3. Applications need to be for costs/events within New Zealand.
4. Applications must be for the benefit of the applicant organisation (not another organisation – i.e. 3rd party).
5. You have to use your grant for the purpose(s) stated in your application (we expect receipts, bank statements etc as proof).
6. You can apply for more than one grant to support your project but you cannot apply to more than one organisation for the same money. Double dipping is illegal under New Zealand's gaming legislation. It happens when an organisation takes money for the same thing twice: if an organisation needs \$5,000 and they successfully apply to two trusts for the money and pocket \$10,000 they are breaking the law. If you receive other funds for the same purpose(s) from another society, you must return the grant provided by Pub Charity Limited.
7. Commission based (or partly commission based) fundraisers can't apply. Nor can any individual in your organisation profit financially from the approval of a donation.
8. If your organisation is GST registered you should apply for goods and/or services exclusive of GST (our donations do not contain GST – we do not claim any portion of the donation as deductions on GST paid).
9. If you fail to comply with any of the above conditions Pub Charity Limited reserves the right to seek full repayment.
10. Pub Charity Limited operates under a Class 4 Operator Licence issued by the Department of Internal Affairs. To view the licence go to: www.pubcharitylimited.org.nz/donations/policies-and-criteria.

DOCUMENTATION REQUIRED

Your application must include the following documents – we will not be able to process your application without them. Please tick to confirm you have included them.

A resolution from the executive committee of your organisation that confirms your organisation's decision to apply for a Pub Charity Limited grant. It must include:

- a statement that a decision has been made to apply to Pub Charity Limited for a grant
- the name of your organisation
- the date the decision was made (it must be no more than 3 months old)
- the amount requested
- what the funds will be used for
- confirmation that this resolution is a true and correct record of the decision
- must be signed by an executive committee member.

Your organisation's financial information. This will preferably be the past year's audited or reviewed accounts as appropriate for your organisation. Please note there are 4 different types of audit or review depending on the size and nature of your organisation. Your auditor must indicate that the audit they have carried out is appropriate for your organisation.

Your accounts must include:

- a performance report (Income Statement or Statement of Financial Performance)
- a position report (Balance Sheet or Statement of Financial Position)
- a cash flow statement
- a signature by the Treasurer or Chairperson, or person doing the audit.

If you cannot provide audited accounts, we may be able to accept the following:

- accounts that are not audited (these must be signed by the Treasurer or Chairperson)
- your Treasurer's financial records (these must be signed by the Treasurer or Chairperson).

If your organisation has been operating for less than 12 months you need to provide your budget for the first 12 months, showing actuals for the period you have been operating, along with bank statements for at least 6 months. This must be signed by the Treasurer or Chairperson.

Proof of your organisation's bank account. This should either be a bank deposit slip, or a bank statement that shows the bank logo and your organisation's name and bank account number.

Copies of two quotes, a preferred quote and a competitive quote for every item for which you are seeking funding (unless your application is for salary or wages, in which case you need to provide a copy of the employment contract). If you cannot provide a second quote (because this is the only organisation in New Zealand that can provide the goods or service), you must provide a letter of explanation stating why there is only one quote.

Quotes must:

- be no more than 3 months old
- be addressed to your organisation
- include the supplier's name, address, phone number and GST status
- if GST applies, show the amount of GST.

Incorporated Society Certificate

You can look this up online at www.societies.govt.nz

Charities Certificate

You can look this up online at www.charities.govt.nz

For certain applications we require further documents:

If your organisation is affiliated to a regional or national organisation, proof of affiliation

If your application includes a request for funding for salary or wages, as well the employment contract outlined above you'll also need to provide a job description

YOUR CONTACT DETAILS

First name:

Last name:

Position in your organisation:

Phone:

Mobile:

Email:

Are you a professional applicant?

YES NO

Xtra emails: please note that we will need to email you about your application and due to changes to Xtra's spam filters you may not receive emails from us, so where possible do not use an Xtra email.

ORGANISATION DETAILS

Organisation name:

Physical address *(this must not be your personal address):*

Postal address *(if different from physical address):*

Phone number:

After hours number:

Is your organisation an incorporated society?

YES NO

If yes, please enter your organisation's Incorporated Societies number:

You can look this up online at www.societies.govt.nz/cms/customer-support/learn-about-our-online-services/banner_template/SOCAGENT

Is your organisation a registered charity?

YES NO

If yes, please enter your organisation's Charities Commission number:

You can look this up online at www.charities.govt.nz/charities-in-new-zealand/the-charities-register

Is your organisation registered for GST?

YES NO

If yes, please enter your organisation's GST number:

Which best describes your organisation?

The purpose of your application doesn't matter here – for example, if you are a school applying for sports uniforms, select 'Education' and not 'Charitable Sporting Activity'.

- | | | | |
|---|---|--|--|
| <input type="checkbox"/> Education (schools, universities, early childhood education and other education and training facilities) | <input type="checkbox"/> Community (community groups, arts, heritage) | <input type="checkbox"/> Charitable Sporting Activity (all types of sports groups) | <input type="checkbox"/> Emergency and Health (emergency services, hospitals, health organisations, aged care facilities, hospices). |
|---|---|--|--|
-

Is your organisation affiliated to a national or regional organisation?

YES

NO

If yes, please enter the name of the organisation you're affiliated with:

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You will need to provide proof of affiliation – see the 'Documentation required' checklist.

How long has your organisation been established for?

Less than 1 year

1–5 years

More than 5 years

What is the total number of members and/or students for your organisation?

Bank details

Bank

Branch

Bank account name

Bank account number

.....
Please note: your account name and number must match the deposit slip or bank statement you provide as part of 'Documentation required', including the suffix – please check this.

Key contacts

Please provide the details of two people aside from yourself who are authorised to act on behalf of your organisation. They must also be able to answer questions about this application if we contact them.

CONTACT 1

Full name:

Position:

Email address:

Contact number:

CONTACT 2

Full name:

Position:

Email address:

Contact number:

If your organisation already has funds available in your bank account, why are they not being used for this project?

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Please provide details of any applications to other trusts for this project or purchase.

Trust name: Amount applied for:

Status of application:

Approved Pending Declined

Trust name: Amount applied for:

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Approved Pending Declined

Quotes

You need to complete a row in this table for each item you are seeking funding for that is itemised on your supplier quotes (see 'Documentation required') – you cannot combine items.

If you only have one quote for an item or items, put n/a in the Competitive supplier – Supplier name column. You can only do so if there is not another supplier available in New Zealand – see 'Documentation required'.

| Item | PREFERRED SUPPLIER | | COMPETITIVE SUPPLIER | | Amount requested from Pub Charity Limited |
|---------------------------|-------------------------|---------------|--------------------------|---------------|---|
| | Supplier name | Amount quoted | Supplier name | Amount quoted | |
| <i>Tennis balls x 100</i> | <i>Bob's Sport Shop</i> | <i>\$250</i> | <i>The Tennis Centre</i> | <i>\$300</i> | <i>\$200</i> |
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Salary or wages

If your application includes a request for funding for salary or wages, please fill out the table below.

| Employee name and job title | Salary timeframe | Salary amount | Amount requested from Pub Charity Limited |
|-----------------------------|------------------|---------------|---|
| Jane Smith – Office Manager | 1 year | \$75,000 | \$50,000 |
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PRIVACY ACT 1993 STATEMENT

The personal information in this form is collected for the purpose of considering your application for financial assistance. You have the right of access to, and correction of, personal information about you that we hold.

APPLICANT SIGNATURE

- I agree to the privacy statement above.
- I certify that the information provided in this application is true and correct to the best of my knowledge.
- I have the authority to make this application on behalf of the organisation.

Signature

Date

DECLARATION

Please note: this must be signed by two members of the executive committee for the organisation applying for funding. It cannot be signed by a fundraiser or other person completing the application on behalf of the organisation who is not a member of the executive committee.

We (the undersigned) declare, to the best of our knowledge, that:

1. All the information presented in this application about the applicant organisation and the specific proposal/project for which grant funds are requested is true and correct.
2. We have the authority to make this application on behalf of the applicant organisation.
3. This application has not been completed by a person who has any management or ownership interest in a Pub Charity Limited venue that hosts gaming machines (“a gaming machine venue key person”).
4. If our application is successful, the person or people who decide how the grant money is spent will not be Pub Charity Limited gaming machine venue key persons.
5. If our application is successful, a check will be undertaken and no payment will be made from the grant money to any Pub Charity Limited gaming machine venue key person for any goods or service.
6. The person who completed this application is not a member or employee of the organisation providing the services or goods for which funding is sought.
7. No individual in this organisation will profit financially from the approval of any grant.
8. This application includes complete information relating to other sources of funding that our organisation has received, been pledged, applied for, or intends for future application for this project.
9. All prices and quotes included in this application represent the actual costs that will be incurred by our organisation.
10. We have read, understood and will comply with the full terms and conditions, including Pub Charity Limited’s accountability and audit requirements, relating to this application. We also agree to participate in, at our organisation’s own expense, any inspection or audit by the Department of Internal Affairs if the Department so requests

Signed by:

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The Secretary (or executive member)
of the Applicant Organisation

.....
Another executive member
of the Applicant Organisation

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Print the full name of above member

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Print the full name of above member

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Date

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Date