

APPLICATION FOR DONATION

Whanganui Community Foundation
&
Whanganui Charitable Foundation



PURPOSE

The purpose of the Whanganui Community Foundation and its subsidiary charitable company is to provide charitable, cultural, philanthropic, educational, recreational and other community benefits to the community principally in the area comprising; Rangitikei, Waimarino, Wanganui, Waverley and Patea, through donations to community organisations.

WHO MAY APPLY

Groups and organisations performing a community service by:

- Contributing to community well being
- Promoting education and learning
- Providing services or activities for the benefit or enjoyment of the public
- Helping to alleviate social problems

These groups or organisations should be:

- an incorporated society or
- a registered charitable trust or
- a body or club with an adopted constitution and rules and annual accounts and a report

The Foundation will not generally support the following:

- Applications where the donation will be passed on to another organisation
- Prizes or sponsorship for tournaments
- National organisations unless it is for a purpose that will confer specific benefit on the trust region
- Travel or clothing for competitive or recreational activity
- Individual research projects
- Activities or services which the trustees consider to be the responsibility of local or central government
- The promotion of a message rather than the provision of an activity or service

Projects that are not eligible include:

- Commercial ventures
- Endowments or a capital fund
- Completed or retrospective projects
- The promotion or benefit of an individual

CRITERIA USED BY THE TRUSTEES IN ASSESSING APPLICATIONS

- The number of people who will benefit
- The length of time the community will benefit
- The ability of the organisation to raise funds from other sources
- The degree to which those who will benefit are a disadvantaged group
- Contribution to social capital

DONATIONS CATEGORIES

General Donations

These are for requests less than \$10,000.

Special Donations

These are for applications of \$10,000 or greater. 11 copies of a business, development or strategic plan must accompany all such applications. Ideally the documentation will be succinct, 15 pages is a useful limit.

TAXATION

Please note that this is a tax law requirement and relates to question 16 on the application form.

To satisfy these requirements the Foundation needs to know if your organisation is exempt from income tax. Please note that this will not affect your entitlement to a donation.

You may be exempt from taxation as either a charity, a promoter of an amateur game or sport, or a district improvement society.

Charitable Organisations

To be charitable an organisation must be established solely for one of the following purposes:

- the relief of poverty
- the advancement of religion
- the advancement of education
- other purposes beneficial to the community not falling under the preceding heads

In addition there is an overriding requirement that the wider public should benefit from the organisation's activities and not just a small group of people.

For examples of activities that fall within these purposes refer to IRD booklet IR255 Charitable Organisations at pages 28 - 32.

The tax law requires that the content of the constitution or rules of the organisation are as follows:

- The organisation's aims must be exclusively charitable such that funds can be applied only for charitable purposes
- Funds must not be able to be used to provide personal benefits of any kind to members, trustees or associates
- Any ability to alter the constitution must exclude the introduction of non-charitable purposes
- The rules for winding up allow no resources to be distributed to non-charitable or private purposes

Non Charitable but Tax Exempt Organisations

Promotion of Amateur games or sport

The organisation must be established primarily for the purpose of promoting any amateur game or sport and that game or sport is conducted for the recreation or entertainment of the general public. It must be available to all members of the public.

The tax law requires that the contents of the constitution or rules of the organisation are as follows:

- The organisation is open to the public
- No income or funds of the organisation are to be used for private benefit of any member, proprietor or associate
- If the organisation is to be wound up there must be no distribution of resources to any members or associates

In response to specific applications the IRD have agreed that the following organisations qualify:

- District and national wrestling associations and boxing associations
- Rugby league clubs and associations
- Clubs and associations connected with amateur cricket, tennis, golf, rugby and association football.
- The New Zealand Rowing Foundation Incorporated

Generally any body or association formed for the promotion of any amateur game or sport other than horse racing or trotting. Hobbies such as stamp collecting are not considered to be a game or sport.

District Improvement Society

The organisation must be established primarily for the purposes of advertising, beautifying or developing any city or district. Its activities must be intended to attract trade, tourists or visitors or population or to increase or develop amenities for the general public.

The tax law requirements as regards the constitution or rules are that no funds may be used for any non charitable purpose.

Examples of the types of organisations that fall within these categories are in the IRD booklet IR 254 Clubs and Societies on pages 19 and 20.

APPLICATION FOR DONATION

(Return this panel only)

INFORMATION NEEDED ABOUT YOUR ORGANISATION

- 1 Official Name of the Organisation
- 2 Charities Commission Registration number (if applicable)
- 3 Postal Address
- 4 Name of Contact person
- 5 Contact telephone numbers.....dayevening
- 6 Names of Office holders
- 7 State briefly the aims and objectives of the organisation
- 8 Area or district your organisation serves
- 9 Number of unpaid workers Number of paid workers

INFORMATION NEEDED ABOUT YOUR PROJECT

- 9 Description of project or programme
- 10 How did your organisation decide on the project or programme(s)? (eg. Board decision, staff decision etc.) Please give references of any research used in making the decision.
- 11 Cost of the project (GST Inclusive) \$.....
- 12 Funds already raised \$.....
- 13 Amount requested from this Foundation \$.....
- 14 How will any shortfall be raised
- 15 How will your organisation know if the project or programmes have been successful?

Attach your latest annual accounts. Your application will not be considered unless these are enclosed

TAXATION STATUS OF YOUR ORGANISATION

16 Please read the explanatory notes on pages 1 and 2 and then indicate below which category your organisation falls into.

- Tax exempt as a charitable organisation
- Tax exempt as an amateur game or sport promoter
- Tax exempt as a district improvement society
- Not tax exempt (all others)

If you have indicated that your organisation is tax exempt and you are applying for a donation of \$3,000 or more you must attach a copy of a letter from the IRD confirming that your organisation is tax exempt.

APPLICANTS DECLARATION ON BEHALF OF THE ORGANISATION

I solemnly and sincerely declare that:

- I have read and understood the application form and supporting information.
- This application has the formal approval of the above named organisation.
- To the best of my knowledge the information in this application is true and correct.
- The organisation will comply with the conditions of the Whanganui Community Foundation Inc. or the donation will be returned to the Foundation.
- The organisation accepts that any decision made by the Trustees is final
- The funds will be spent for the benefit of the community within the Wanganui, Rangitikei, Waimarino, Waverley and Patea areas.
- Privacy Act 1993. The applicant acknowledges that the information supplied in this application may be made available to other parties in the course of enquiries regarding applications or in publishing the results of applications approved. Personal information collected will be held by the Trustees for the purpose of assessing applications to the Whanganui Community Foundation Inc. and Whanganui Charitable Foundation Ltd.

And I make this declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957

Signed Print Name

Declared this day of year

before me Print Name

Solicitor/Justice of the Peace/Person authorised to take a statutory declaration

CONDITIONS

- 1 The Foundation expects an acknowledgement in your Annual [Report](#)
- 2 The project must be started within 12 months of the donation being [approved](#)
- 3 The donation must be used for the specific project applied for
- 4 The recipient organisation must agree to a project audit if requested

ADMINISTRATION

The Trust advises that:

- 1 Receipt of your application will not be acknowledged. Applicants will be contacted within 3 months
- 2 Completion of an application form does not constitute [approval of a donation](#)
- 3 Generally only one application each 12 month period will be [accepted](#)
- 4 A list of all successful recipient organisations will be published annually in the Wanganui Chronicle
- 5 Donations do not attract GST
- 6 Faxed applications will not be [accepted](#)

HOW TO APPLY

Please complete and return the application form to :

The Executive Director
Wanganui Community Foundation
PO Box 365
WANGANUI

Please ensure that your completed application form is posted to the above address. No responsibility will be accepted by the Foundation if completed forms are delivered or posted to any other destination.

If you require additional information or assistance please telephone the office on (06) 348 83 00

GENERAL INFORMATION

Checklist. Have you:

- Answered all the questions
- Enclosed your latest annual accounts
- Completed the statutory declaration