

Albert D Hally Trust Fund Application Form

Applications Close: 30 April 2019
31 October 2019

Organisation Contact Details

Organisation's Full Legal Name:

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Postal Address:

Town/City:

Post Code: Phone:

Fax: Email:

Website:

Contact Person for this Application

Name: Phone:

Position: Email:

Organisation Information

1. What is your organisation's legal structure?

Charitable Trust

Incorporated Society

Other Legal Body - if other legal body give details:

2. Please specify your Registration Number:

3. Your organisation's GST Number (if applicable)? - -

4. What is your organisation's vision or kaupapa?

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Funding Details

5. Please specify the number of Clients your Organisation has in South Canterbury (refer to map at back of form for area):

6. Briefly outline the project/programme you wish to fund with this grant. [Attach copies of quotes]:

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7. Total Cost of Project: \$

8. Amount requested: \$

Note: If your organisation is registered for GST, the above figures must be GST exclusive.

9. The projected completion date of the activity (leave blank if it is ongoing):

10. What will this grant enable your organisation to achieve? How is it aligned with the purpose of this grant?

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11. What are the intended outcomes? What will change as a result?

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12. Please provide details of grants received and applications made for this particular project/programme:

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13. How would the over all project/programme be impacted if this application was part funded or unsuccessful?

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14. Have you previously applied for a Grant from this Trust? Yes No

If 'No' attach a copy of your Consistution to be retained by the Trustee.

If 'Yes' detail any changes to your Constitution since last Application.

Electronic Funds Transfer Information

If successful, grants will be direct credited to your bank account via electronic funds transfer.

Please pay my grant into the bank account nominated below.

Account Name:

Account Number:

(Bank) (Branch) (Account Number) (Suffix)

Enclosed is evidence of verified bank account details (e.g. original deposit slip)

Supplementary Information

Requested

Financial Accounts	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Letter of Support from the Community This is a letter from someone in the community who uses your service	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Letter of Support from Community Partner This is a letter from someone who you are carrying out an activity with	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Suggested

Cover Letter (if necessary)	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Charities Commission Registration Certificate	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Certificate of Incorporation	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

Optional

Project specific budgetary information if applicable (e.g. funds required/raised for overall project costs)	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Project Specific quotes if applicable (e.g. quotes obtained for planned activities, equipment, building costs)	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Copy of Constitution (or details of changes) where relevant (see #14)	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Any other supporting documentation relevant to this application	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

[Please note that failure to provide all the required information will result in your Application being discounted for the purpose of the current application period].

Declaration

By signing this declaration I confirm that I am authorised to make this application on behalf of our organisation and we agree to all the Terms and Conditions.

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Full Name

.....

Signature

...../...../.....

Date

Nature of your authority (e.g. as CEO, as funding manager):.....

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Terms And Conditions

Company Information

Perpetual Guardian is the trading name of Perpetual Trust Limited and The New Zealand Guardian Trust Company Limited. In relation to the Funding, Perpetual Guardian is acting at all times as trustee of various charitable trusts and not in its personal capacity.

Information Held/Provided

The representations made in the application and the attached supporting documentation must be true and correct to the best of the knowledge and belief of the applicant.

All information provided will be held by Perpetual Guardian for the purposes of assessing applications for funding, and if the application is successful, for the purposes of processing the grant payment.

Where any personal information is submitted as part of any application, Perpetual Guardian will only use this information in accordance with any legislative requirements.

Application Process

The decision of Perpetual Guardian to provide any funding will be at its absolute discretion and any decision as to funding will be final. Perpetual Guardian need not provide an explanation for any decision made regarding any application.

Perpetual Guardian accepts no responsibility for applications filled out incorrectly and is under no obligation to check the accuracy of submitted applications before the closing date.

Perpetual Guardian will not be liable for any loss or liability resulting from any application made.

If successful applicants fail to provide further documents when required within 90 days of the notice date, Perpetual Guardian reserves the right to terminate the grant.

An applicant will not refer to the grantor trust as a funder of the applicant while any application is still pending.

Promotional Activities

The applicant may be asked to publicly acknowledge that the Funding is by way of a distribution from a charitable trust administered by Perpetual Guardian.

If the application is successful, the results may be published, at the discretion of Perpetual Guardian.

Perpetual Guardian (and its associated entities) may use photographs or videos of successful applicants, together with personal information and any approved quotes given for the purposes of:

- Providing details to media outlets for use in publicity
- Posting information to its website, Facebook page or other online channels
- Using information in newsletters and other promotional materials produced by Perpetual Guardian.

The successful applicant will not be paid or rewarded for providing any such publicity or media material.

Parental permission to use personal information will be required for applicants under the age of 18.

Grant Expenditure Requirements

Funding will only be provided to a successful applicant in accordance with the purposes contained in the application, the funding guidelines and any requirements stipulated in writing by Perpetual Guardian.

Accountability Requirements

Recipients of grants must provide an accountability report to Perpetual Guardian within the time stipulated in the grant confirmation email.

Perpetual Guardian may at any time request further accountability documentation to ensure funds have been spent appropriately.

In order to monitor the use of the funding, Perpetual Guardian reserve the right to request information including accountability reports, evaluation assessments, audits, or any other form of monitoring criteria that Perpetual Guardian decides to introduce.

In the event that Perpetual Guardian determines that the Funding has not been applied in accordance with the application then it reserves the right to require repayment of any such funding. Such amount so demanded will immediately constitute a debt with payment due 20 working days of demand being made in writing by Perpetual Guardian.

Generally Perpetual Guardian will not make a grant to any organisation who has not:

- Spent all the funds given in previous years
- Returned the relevant accountability documentation
- Refunded any outstanding amounts

Where information is obtained by Perpetual Guardian indicating that a grant recipient has received funding from another source it may take steps to obtain a return of the money from the grant recipient.

Audit and Inspection Requirements

Perpetual Guardian may request and the applicant agrees, if such request is made, to and participate in (at the expense of the applicant) in an audit in relation to any grant. Perpetual Guardian may also request information and verification as to how the funds were used.

Privacy Act 1993 Disclosure

The information supplied by you will be retained by Perpetual Guardian in terms of the Privacy Act 1993 and will be used for the purposes of assessing applications for funding. You have the right to see all personal information held about you by Perpetual Guardian. If the information held about you is inaccurate, you have the right to request correction.

Subject to any statutory or regulatory requirements, the information held will not be disclosed without your consent outside of Perpetual Guardian.

You are advised that your Application may be shared with other Charitable Grant Committees in South Canterbury. If you have any questions please contact Grant Hamel, 03 687 7593, Geraldine area freephone 0800 484 632, email fundingenquiry@timdc.govt.nz.

Please return your Application to:

AD Hally Trust
C/- Timaru District Council
2 King George Place
PO Box 522
Timaru 7940