



The TOC H New Zealand - Bowerbank Charitable Trust.

Information Sheet

The Toc H New Zealand – Bowerbank Charitable Trust was established by a Deed in March 1992. The trust is a perpetual trust where Public Trust as trustee is given the objective and the discretion to use the trust funds income towards charitable purposes in New Zealand with special consideration given to:

- Organisations and activities that support and promote the welfare of youth in all fields of endeavour, including sport;
- Organisations that support and promote the welfare of underprivileged persons in all age groups (but with preference being given to young persons) in all fields of endeavour, including sport.

The Trustee invites organisations, nominated by members of the Trust Board, to apply for funding. Grants are to be for a specific programme or activity, rather than general operating expenses.

Applications will need to include:

- Latest set of audited or reviewed accounts.
- Supporting information such as proposal, budget for the year, copy of quotes etc.
- Your organisations bank account for payment of a successful grant. Also, if your bank account has changed since your last grant from the Toc H New Zealand – Bowerbank Charitable Trust.

Closing Date

Please fully complete the application form and submit along with supporting documents, to Public Trust at funding@publictrust.co.nz by **31 July**. It is important that details on the form be concise and easy to read.

The Trust Board will make a decision as to the grants and the Trustee will notify all applicants on the outcomes.

General

Decisions regarding grants are made on the basis of information provided in the application and other enquiries. The information provided by your organisation becomes the property of the Toc H New Zealand – Bowerbank Charitable Trust and may be made available to other parties in the course of enquiries regarding applications or in publishing the results of grants approved.

Contact

Further enquiries, contact Public Trust on 0800 371 471 or email funding@publictrust.co.nz



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Application for grant

Applicant details

Organisation		Charities Registration Number (if held)	
		Have you applied in the past?	Yes <input type="checkbox"/> No <input type="checkbox"/>

Primary contact		Postal address	
Position title			
Phone			
Email			
Website			

What is the primary purpose of your organisation?

What is the activity/programme?

Number of people assisted by your organisation		Number of paid staff	
Number of people assisted by this grant		Number of voluntary staff	

Please provide a brief summary on how your organisation will use the grant sought and who will benefit from it? *(Please be as specific as possible).*



Please provide a brief summary on how this grant will benefit the people your organisation is supporting i.e. what difference will this make for them? *(Please be as specific as possible).*

Amount applying for (excl. GST)

What is the total funding required for the project?

Please provide a budget for the project spend.

Financial information *(please refer to your audited accounts)*

Donations/Grants <i>(excl. Govt funds)</i>	\$	Audited accounts enclosed to	/ /
Fundraising	\$		
Income from Investments	\$	Total assets <i>(current+fixed)</i>	\$
All Government funding	\$	Total liabilities <i>(current+long term)</i>	\$
Other income	\$	W/Cap <i>(current assets-current liab)</i>	\$
TOTAL INCOME <i>(a)</i>	\$		
EXPENDITURE <i>(b)</i>	\$		
NET INCOME <i>(a-b)</i>	\$		

Authorised signatory/signatories

Executive Officer name

Executive Officer name

Signature

Signature

How did you hear about the trust?

In signing this application form the applicant(s) acknowledge that they have read the terms and conditions and accept any terms and conditions stated. The applicant(s) consent to the information collected by Public Trust being used for the purposes of assessing applications for any grant provided by a trust administered by Public Trust. The applicant(s) consent to the information supplied in this application being made available to other parties in the course of enquiries regarding applications and/or in publishing the results of grants approved.



Terms and conditions

- Grants are given at the discretion of the Board. There are no guarantees that applicants who have previously received a grant will receive further grants.
- The Toc H New Zealand - Bowerbank Trust, and the grant amount, is to be acknowledged in the recipients' annual accounts and/or annual report.
- Any unspent portion of the grant belongs to the trust and must be returned.
- While it is not compulsory for an organisation to be registered on the Charities Register, the organisation must have a charitable purpose.
- Once a successful applicant has received the grant, they must forward confirmation of receipt to the trustees as soon as possible.
- For any grants totalling \$25,000 or more, the trustees may request, at any time from the recipient, reports on the project and application of funds.
- Where the grant has been provided in respect of a project, the project must be completed within 12 months from receipt of the grant. On completion of the project, a report of less than two pages must be sent to the trustees in electronic form. It should include the proposed and actual budget and contain:
 - the number of people who benefited;
 - a brief description on how they benefited;
 - what worked and what did not.