

2024 GRANT APPLICATION FORM - ORGANISATION

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| Make sure you read the guidelines before completing this form |
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| Use separate sheet if necessary. Please ensure additional detail is indexed to the question number |
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| **Part 1**  **Your Organisation** |
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| 1. Name: |
| 1. Other names used by your organisation: |
| 1. Mailing address of your organisation: |
| 1. Your organisation’s phone number: and email address: |
| Are you a Trust? Incorporated Society Other (tick one only)  If other, please specify |
| 1. Is your organisation registered for GST?   Yes  No |
| 1. Is your organisation responsible to or controlled by any other organisation/authority? (Please specify) |
| 1. Month and year your organisation was formed: |
| 1. The type of work your organisation does: |
| 1. Do any of your organisation’s activities take place outside Mt Albert?   Yes  No |
| 1. Date of the most recent Annual General Meeting in which your last audited accounts were approved by your members: |
| **Part 2** People in your Organisation |
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| 1. Name of your contact person: |
| 1. Contact persons numbers: Phone work Phone home   E mail address |
| 1. Mailing address of your contact person: |
| 1. Names of principal officers:   Chairperson/President Chief Executive  Secretary Treasurer |
| 1. Number of people working for your organisation: (Full time equivalent)   Paid Voluntary |

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| **Part 3** Your Project |
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| 1. Summary of the purpose of this application: |
| 1. The total cost of your project (excluding GST)? $   Please provide a copy of the detailed breakdown of the total cost: |
| 1. How much money (excluding borrowing) have you already raised towards this project? (*including grants and donations)*:   $ |
| 1. By what means was the money already raised obtained? Provide the name of the organisation and the amount donated or granted (*if any*): |
| 1. How much money are you asking from us? $ |
| 1. Balance required to complete your project (excluding GST): $ |
| 1. How does your organisation propose to raise the balance of funds? |
| 1. If your organisation has money put aside for any reason/project, please explain what those funds are tagged for and why they cannot be used for this project? |
| 1. Is your organisation entitled to receive funding assistance towards this project from any other source, e.g. central or local government, your head office or other? Please specify: |
| 1. Have you applied to any other organisation for financial support in respect of any of the items requested from us?   Yes  No  List the name of the group and the amount sought: |
| 1. Detail breakdown of the items (and costs) that will be funded by the money requested from us: |
| 1. Street address where the item or project in this location will be located: |
| 1. When will your project (a) commence:   (b) be completed: |
| 1. How do you propose to ensure the adequate security and proper maintenance of assets or items to be acquired through this application? |
| 1. The number of people expected to benefit from the funds you are requesting:   Members Others |
| 1. Will any of the requested funds be spent to benefit people outside Mt Albert:   Yes  No |

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| **Part 4** Previous Grants |
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| 1. Have you previously received any funding from the Kerr Taylor Foundation?   No  Yes  No  If yes state date and amount of grant:  Yes  No  If yes – did you provide a follow-up report back to the Trust? |
| 1. How many people have benefited from the grant?   Directly Indirectly |
| 1. Please tell us what your community gained from your previous grant from us: |
| 1. Any further information you believe would support your application: |
| **Part 5** Applicant’s declaration |
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| 1. Please read the following statements carefully before you print your name and put your signature on the space provided below. Your declaration must be countersigned by your President or Chairperson  * We have the authority to commit the organisation to this application. * We solemnly declare that the information we provided herein and on the supplementary sheets is true and correct, and * That further information provided by any of us or by any representative of our organisation during the course of this assessment will be true and correct. * We acknowledge that any decision made by the trustees of the Kerr Taylor Foundation is final. We accept that no reasons for such decision will be given, nor will any correspondence be entered into: |
| **For and on behalf of our organisation:**  Name (print) Position  Signature Date |
| **Counter signed by either the President or Chairperson of the organisation:**  Name (print) Position  Signature Date |

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| **Part 6** Privacy Act |
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| 1. Please note:  * Any personal information about individuals you provide in this application will be used only to assist with the administration and assessment of your application. * The information you provide is restricted to the Kerr Taylor Foundation Trustees and staff, other parties that may need to be consulted, officers of, and people contracted to act on behalf of the Kerr Taylor Foundation. * Names of successful applicants may appear in the Kerr Taylor Foundation annual report, in publicity material, including our website. You are entitled to access the information and correct it. |

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| **Part 7** Your check list |
| Yes  No |
| 1. Have you answered **all** the relevant questions? |
| No  Yes   1. Have you indexed the question number to all your   answers on additional sheets? |
| 1. have you supplied all the relevant information requested?   Yes  No  Yes  No |
| 1. have you completed **Part 5** of this application form? |

### Please keep a copy of this form and all supporting information

Applications should be forwarded to:

The Secretary

Kerr Taylor Foundation

22 Wairata Place

Te Atatu South

Auckland 0610

### Applications for 2024 grants close on the 5th April 2024

Inquiries or requests for further information can be made through the Secretary at:

22 Wairata Place, Te Atatu South, Waitakere 0610 or by e-mail to [kerrtaylor@xtra.co.nz](mailto:kerrtaylor@xtra.co.nz)

Or via the website www.kerrtaylor.org.nz or cell phone 027 646-0477

**APPLICATION GUIDE**

The Trust was set up in 1978 to advance the objectives of a bequest made by Muriel Kerr Taylor in 1970. Trust Board members are appointed to represent Mt Albert churches, Service Clubs, and the Albert-Eden Local Board.

The objective of the Trust is to do whatever may seem helpful for people in the former Mt Albert City area in need of physical, mental or spiritual help. To further that objective, the Trust will make available a relatively modest sum for distribution to those undertaking projects in keeping with the objectives of the Trust

The following guide should not discourage individuals of organisations from making application for a grant. Innovative or proactive projects may override some of the listed criteria

Priority will be given to projects and initiatives that fit all or most of the following criteria:

1. Are likely to have the most effect in working for change
2. Aim to address underlying structural causes as well as remedy effects
3. Will make people more self sufficient
4. Are innovative and/or proactive
5. Have little or no access to other funding

##### **Our specified geographical area**

Priority will be given to applications from individuals or organisations that are from within the former Mt Albert City boundary. (see website for map outline if required) Projects and initiatives should also assist people from within this area.

##### **The applicants**

Applications may be from an individual or an organisation.

##### **Individuals**

1. ***If you have previously received a grant from the Trust, generally you are not eligible to reapply for 12 months from the date of the previous grant.***
2. In making application the Trust expects the applicant to be the innovator of a project to help the needy.
3. Only projects and innovations that help people will be considered.

##### **Organisations**

In general, an organisation must:

1. Be controlled by an organisation of persons under an adopted constitution and rules with annually audited accounts and annual reports.
2. Not be run for private profit.
3. Be neither a commercial organisation or operated for commercial purposes.

##### **General guidelines**

1. Both individuals and organisations applying for funding grants should be aware that:

* The Trust prefers to make seeding grants.
* The Trust will not make ongoing commitments for further funding.

1. In general, funding grants will be made to innovative and practical projects that provide services for those who have been:

* Denied a quality of life enjoyed by the majority.
* Address social problems.
* Contribute to community wellbeing,

1. The Trust will generally not make grants.

* For travel.
* For salaries, wages or other forms of remuneration.
* For church, school or community buildings.
* For projects provided or owned by Auckland Council or Central Government or their agents.
* Towards completed projects or expenditure incurred prior to the approval of the grant.

1. It is expected that successful applicants will provide a follow-up report on the outcome of their project.