



## Funding Application Guidelines for Olive Tree Charitable Trust

**Funding Criteria** - The Trustees meet bi-monthly to evaluate and approve funding applications made to the Olive Tree Charitable Trust. The Trust aims to promote, encourage, and support the relief of poverty, the advancement of education, religion, and for other charitable purposes in accordance with the law of New Zealand and beneficial to the Palmerston North and Manawātū communities.

The Olive Tree Charitable Trust is a small trust and the amount available annually for donations is limited. All funding requests are considered on their merit, aligned with the Trust's community-focused aims, and prioritised against other requests.

The Trustees wish to receive with each funding request the following three documents:

- ☐ An application letter, with the amount of funding sought clearly stated.
- ☐ A copy of your organisation's latest audited financial statements, if any.
- ☐ A copy of your organisation's budget for the current year.

**Application Letter** – There is no formal application form as such, rather Trustees invite you to write a brief, but concise letter to provide Trustees with sufficient information about your organisation, and a brief summary of proposed project or funding need addressed, along with the amount of funding required.

*You may consider commenting in your Application on any of the following areas:*

### **Your Goals & Objectives**

- ☐ State your organisation's aims and objectives.
- ☐ How you contribute, or plan to contribute, to the communities of Palmerston North and Manawātū District.
- ☐ If your organisation has similar aims and objectives to other community groups, please provide evidence of how you collaborate together.

### **Your Organisation**

- ☐ State whether you are a charitable organisation.
- ☐ The number of years you have been in existence
- ☐ Your decision-making structure - informal or elected committee, Board, Trust, etc.
- ☐ Membership numbers within Palmerston North city or Manawātū District.
- ☐ Whether you are allied/affiliated to any national body (*if so, which*)?
- ☐ The composition and number of people you serve – members, clients, or your community, etc.

### **People Power**

- ☐ How you do what you do, e.g. workshop, person-to-person counselling, lectures, printed material, or other.
- ☐ The number of people involved at the “service delivery” end, whether volunteers or paid employees.
- ☐ How you measure, or plan to measure, your project’s success or achievements.

**The Need**

- ☐ The amounts of funding you seek.
- ☐ What you seek the funds for, such as a scholarship, cost of resources, running event, training, workshop, or a special project.
- ☐ A project or event budget (expected sources of income and level of expenses), indicating your priorities, if any.
- ☐ Would our donation make a difference to the success of your organisation and/or the project
- ☐ Your current sources of funds, such as Government funds, donations, sponsorship/s, fees, member contributions, fund raising, raffles, etc.
- ☐ Whether reserve funds have been tagged for a special purpose (*if so, what for?*)

**Other things Trustees should know**

- ☐ Is there anything else that you would like to inform the Trust which you feel could further your cause or matters relevant that you wish to disclose.

**Note:** If possible, please e-mail your funding application, financial accounts, and budget in electronic form or as PDFs. This is preferable to mailing hard copies.

**Please check:** *that all documentation contains:*

- ☐ Date
  - ☐ At least one contact name, telephone, and/or e-mail address.
- If possible, please e-mail the completed documents in PDF format. Thanks.*

Should your funding application be successful, you are expected to submit an accountability report to the Trust on how the donated funds have been used. (*Accountability Report Guidelines - available to download*).

Your funding application, inquiries, and all correspondence should be addressed to:

**Trust Secretary** - Olive Tree Charitable Trust

**E-mail:** [secretary@olivetreetrust.org](mailto:secretary@olivetreetrust.org)

**Mobile:** (027) 506 8200 [*preferably outside work hours*]

Or **Postal Address:** C/o PKF Rutherfords, 336 Broadway Avenue, Palmerston North, 4414.