



# APPLICATION FOR COMMUNITY ORGANISATION ENERGY RELATED FUNDING

**INSTRUCTIONS:** Please read the attached Funding Policy and information sheets **BEFORE** you fill in the application form. This information will help you to answer all the questions. Please print clearly, and use a separate sheet if necessary.

*Energising our community's future - together*

## 1. ORGANISATION DETAILS

Name of organisation	<input type="text"/>		
Location address & District	<input type="text"/>		
Postal address	<input type="text"/>		
Telephone	<input type="text"/>	Fax	<input type="text"/>
Email	<input type="text"/>	Website	<input type="text"/>

## 2. ORGANISATION TYPE

*Please tick the box applicable to your organisation*

Iwi authority / marae	<input type="checkbox"/>	School	<input type="checkbox"/>	Sports club	<input type="checkbox"/>	District Council	<input type="checkbox"/>	Religious	<input type="checkbox"/>
Elderly / aged	<input type="checkbox"/>	Pre-school	<input type="checkbox"/>	Health / welfare	<input type="checkbox"/>	Community	<input type="checkbox"/>	Other	<input type="checkbox"/>

## 3. GST & INCOME TAX STATUS

*Please tick the box applicable to your organisation for Income Tax status*

Exempt  Non-Exempt  Evidence of the Income Tax status attached – please tick

**If you have an Exemption from Income Tax, under which category is your organisation exempt:**

Charitable Organisation [Section CB4(1)(c)]	<input type="checkbox"/>	Education Act	<input type="checkbox"/>
District Improvement [Section CB4(1)(j)]	<input type="checkbox"/>	Amateur Sports Organisation [Section CB4(1)(h)]	<input type="checkbox"/>

If your organisation has an IRD number, please write it here:

**Is your organisation registered for GST?**  Yes (if yes, use GST exclusive amounts in Question 11)  No (if no, use GST inclusive amounts in Question 11)

## 4. ABOUT YOUR ORGANISATION

What year was your organisation formed / incorporated / started?  *Attach signed & dated constitution / rules / deed. Schools to provide latest ERO Report & 5 Y Plan*

Total roll / membership  No of adults  No of children  School decile (if applicable)

State any other name your organisation has operated

Is your organisation responsible to, or controlled by, any other organisation / authority? Yes  No

If yes, briefly state who

Briefly state what your organisation does

List your organisation's objectives

Principal Officers	Name	Work phone	Home phone / mobile
Chairperson / President	<input type="text"/>	<input type="text"/>	<input type="text"/>
Secretary	<input type="text"/>	<input type="text"/>	<input type="text"/>
Treasurer	<input type="text"/>	<input type="text"/>	<input type="text"/>
Chief executive / Principal	<input type="text"/>	<input type="text"/>	<input type="text"/>

How many full time equivalent (FTE) 'staff' do you have?  Paid  Voluntary

(FTE = average weekly hours ÷ 37.5)

## 5. ABOUT YOUR BUILDING

**PLEASE NOTE:** Community organisations must own their building – EBET does not provide funding for buildings that are leased.  
Please provide additional information on a separate sheet if your application is for more than one building.

Please tick appropriate box(es)

Age and condition of your building

Age of building (approx)  Building materials

Building condition Very good  Good  Average  Below average  Poor

Building insulation Ceiling  Walls  Under floor  None

How often is the building used by your organisation?

Several times per day  Once per day  Several times per week  Once per week

Fortnightly  Monthly  Several times per month  Other

When your organisation is using the building as above, what percentage (approx) of your members are present?

Is the building used by other organisations? Yes  No  NOTE: If yes, attach list showing use over last 12 months

If yes, do they pay to use the building? Yes  No  NOTE: If yes, show income in Question 14 under revenue

## 6. ENERGY USE

What type of energy do you use? Electricity  Gas  Wood  Diesel  Coal  Solar  Other

Please specify

How much did you spend on energy over the last 12 months? \$  Please attach copies of energy bills - last 12 months

Does your organisation practise energy efficiency?  Yes  No

If yes, tell us about the energy efficiency activities that your organisation is involved in.

Will this project result in increased energy use?  Yes  No

Will this project result in energy savings?  Yes  No

Comments:

## 7. PREVIOUS FUNDING

Have you received any funds from any organisation in the **LAST 3 YEARS** for any projects? Yes  No

If yes, provide the following details:

FUNDING ORGANISATION	PROJECT	AMOUNT \$	YEAR
<b>Eastern Bay Energy Trust</b>			
Local Authority grants			
Local Authority loans			
NZ Lottery Grants Board			
Pub Charities / Licensing Trust			
Any Government Department			
Other			

## 8. PROJECT SUPERVISOR

Contact person (*the person supervising this project*)

Name	<input type="text"/>	Position	<input type="text"/>
Phone (work)	<input type="text"/>	Phone (home)	<input type="text"/>
Mobile	<input type="text"/>	Email	<input type="text"/>

Is your project supervisor being paid, or working as a volunteer on this project?      Being paid       Volunteer

## 9. ABOUT THIS PROJECT

Briefly describe your project

*Eastern Bay Energy Trust funds must be for 'Energy Related Purposes'.*

Please tell us how you see your project fitting into our 'Energy Related Purposes' criteria.

How will this project help you to achieve your organisation's objectives?

*EBET is keen to support projects that produce quality community outcomes.*

Tell us - what is the need for this project and how will it benefit your organisation, and/or the wider community?

Will this project benefit people from outside the Eastern Bay of Plenty?    Yes     No     If yes, who are these people and how will they benefit?

Will this project contribute to regional economic growth by attracting visitors to the Eastern Bay of Plenty?    Yes     No

## 10. FINANCING THIS PROJECT

What is the **TOTAL** cost of your project?

How much money have you already raised towards this project (excluding borrowings)?

Expected start date

Expected completion date

**How do you intend financing this project?**

Grants	\$
Sponsorship	\$
User fees / membership fees	\$
Fund raising	\$
Loans / mortgages / debentures	\$
Funds on hand	\$
\$ already spent on this project	\$
Donated materials	\$
Voluntary effort	\$
Other (see Question 14)	\$
Other	\$
<b>YOUR TOTAL CONTRIBUTION IS:</b>	\$

## 11. FUNDING REQUESTED FOR THIS PROJECT

Itemise the **ENERGY RELATED** items for which you are seeking EBET funding, and the **amount of funding requested**

ENERGY RELATED ITEM / WORK	TOTAL COST (EX GST) <small>Use this column if you are registered for GST</small>	TOTAL COST (INC GST) <small>Use this column if you are NOT registered for GST</small>	EBET FUNDS REQUESTED	2 QUOTES ATTACHED
Electrical wiring				
Electricity supply				
Heating				
Air conditioning				
Lighting - interior				
Lighting - exterior				
Insulation				
Appliances				
TOTAL	\$	\$	\$	

Duplicate this work sheet if more item lines are needed – please tick if extra work sheet is attached

How much of the **TOTAL COST** of your project is energy related?

How much are you seeking from the Eastern Bay Energy Trust?

If this application for funding is declined by EBET, will your organisation be able to continue with the project?

Yes

No

Will your organisation accept money by way of a low-interest loan if EBET is unable to make a grant of the amount applied for?

Yes

No

If we approve a percentage of the amount requested, how will you meet any shortfall?

Prices of materials can rise dramatically, what contingencies do you have for price rises or cost overruns?

Is this project part of a larger project which will be completed in stages?

Yes

No

If yes, will you be applying to EBET for funding for the later stage(s) of the project?

Yes

No

## 12. OTHER FUNDING APPLICATIONS

List other organisations to which you have applied for funding assistance for this project

NAME OF ORGANISATION	HOW MUCH HAVE YOU REQUESTED?	WHAT HAVE YOU REQUESTED FUNDING FOR?	WHEN WILL YOU KNOW THE OUTCOME?

If successful, will you still require Eastern Bay Energy Trust assistance?

Yes

No

Does your organisation receive funding from Central Government, Local Government or any Government agencies? Yes  No

If yes, what does that funding cover?

If your organisation has any funds readily available which are not going towards this project, please explain what they are tagged for.

**13. POST PROJECT MANAGEMENT**

If your organisation ceases to operate, what will happen to the equipment, facility or other assets?

What arrangements are there for the security of the equipment, facility or other assets?

What arrangements are there for servicing and repaying any loans, and for meeting any future operational and maintenance costs?

If your application is successful, you may need to update or increase your insurance cover. Please provide details of your organisation's insurance provider and type of insurance cover.

**14. YOUR FINANCIAL POSITION**

Please summarise and consolidate your most recent audited financial information below (to nearest \$).  
(Not all of these items may be applicable to your organisation)

**THE SECTION BELOW MUST BE COMPLETED - DO NOT SAY 'REFER ATTACHED'.**

You must also include a full copy of your latest audited financial report.

We enclose a copy of our latest audited financial report for the 12 months ended (date) / /  
(Please note: accounts must have been audited within the last 12 months)

<b>INCOME</b>	
Donations	\$ <input type="text"/>
Fundraising & membership	\$ <input type="text"/>
Government subsidies or grants	\$ <input type="text"/>
NET bar profit	\$ <input type="text"/>
Net trading income	\$ <input type="text"/>
Other	\$ <input type="text"/>
Total Income	\$ <input type="text"/>
<b>EXPENSES</b>	
Salaries & wages	\$ <input type="text"/>
Rent	\$ <input type="text"/>
Interest paid	\$ <input type="text"/>
Non-cash (eg depreciation)	\$ <input type="text"/>
Other	\$ <input type="text"/>
Total Expenses	\$ <input type="text"/>
NET INCOME OR LOSS	\$ <input type="text"/>

<b>ASSETS</b>	
Cash, bank etc	\$ <input type="text"/>
Amount owed to you by others	\$ <input type="text"/>
Investments	\$ <input type="text"/>
Fixed assets Eg buildings, vehicles, equipment, etc	\$ <input type="text"/>
Other	\$ <input type="text"/>
Total Assets	\$ <input type="text"/>
<b>LIABILITIES</b>	
Bank overdraft	\$ <input type="text"/>
Amount you owe to others	\$ <input type="text"/>
Loans or mortgages	\$ <input type="text"/>
Other	\$ <input type="text"/>
Total Liabilities	\$ <input type="text"/>
NET ASSETS	\$ <input type="text"/>

## 15. CHECKLIST FOR SUPPORTING INFORMATION

An incomplete application or missing documentation may delay or prejudice consideration of your application. Please tick the boxes below to show that you have provided the required information.

- All questions fully answered
- Attached: Foundation Document (Constitution, Deed, Rules, Charter, etc.)
- Attached: Detailed quotes (*at least two quotes per item / work to be done*)
- Attached: Copy of most recent **AUDITED** accounts (*must have been prepared within the last 12 months*)
- Attached: Photocopies of latest bank statement for each account held
- Attached: Income Tax Exemption Certificate if appropriate (*not Resident Withholding Tax or GST exemption*)
- Attached: Letter of support from 'parent' organisation (where appropriate)
- Attached: Latest ERO Report and 5 Year Plan (schools)
- Attached: Plan or drawing of building showing dimensions

## 16. CERTIFICATION BY TWO AUTHORISED PERSONS

### This application has the formal approval of our controlling Committee / Executive / Board / Authority

- o To the best of our knowledge the information provided herein and in supporting documents is true, correct and complete, and further information provided by us during the course of the assessment of this application will be true and correct.
- o We acknowledge that any decision made by the Eastern Bay Energy Trust is final. We accept that no reasons for such decision will be given, nor any correspondence entered into.
- o We understand that any funds provided by the Eastern Bay Energy Trust will be for the specific purposes outlined in this form, and the Trust will carry out an audit to confirm that any donation has been properly applied.
- o We understand that any funds provided by the Eastern Bay Energy Trust will be for the specific purposes outlined in this form, and the Trust will carry out an audit to ensure that any donation has been properly applied.
- o We agree to provide the Eastern Bay Energy Trust with such information and reports as it may reasonably require regarding the use of any donations it makes to this organisation.
- o Privacy: We authorise the Eastern Bay Energy Trust to make such enquiries as it deems fit in considering the application; and we accept and agree that details of any donation the Trust makes to our organisation may be made public.

### For and on behalf of our organisation

Name	<input type="text"/>	Name	<input type="text"/>
Signature	<input type="text"/>	Signature	<input type="text"/>
Position	<input type="text"/>	Position	<input type="text"/>
Date	<input type="text"/>	Date	<input type="text"/>

### SEND YOUR COMPLETED APPLICATION TO

Postal: Eastern Bay Energy Trust, PO Box 567, Whakatane  
Delivery: Eastern Bay Energy Trust, Concordia House, 17 Pyne Street, Whakatane

**All enquiries to be addressed to:  
Kaye Jamieson, Manager**

Phone 07 307 0893  
Freephone 0800 323 800  
Fax 07 307 0896

Email: [ebetrust@xtra.co.nz](mailto:ebetrust@xtra.co.nz)  
[www.ebet.org.nz](http://www.ebet.org.nz)