

CHECKLIST - INFORMATION THAT MUST BE INCLUDED

(Please ensure you have included all of the following information. Incomplete applications could be returned) Tick the appropriate box

	Yes	No	N/A
1. At least two competitive quotes (even if you have a preferred supplier) for all goods and services for which you require funding	<input type="checkbox"/>		
a. Quotes must be less than 3 months old, be addressed to the applicant group and contain full supplier details (name, address, telephone, gst status, on letterhead, etc) and must show the GST exclusive amount			
b. Emailed quotes may be acceptable from reputable suppliers but must be less than 3 months old, be addressed to the applicant group and contain full supplier details (name, address, telephone, gst status, on letterhead, etc) and must show the GST exclusive amount	<input type="checkbox"/>		
c. Website quotes are not acceptable			
d. If funding is required towards general running costs then your most recent set of audited accounts must be supplied and copies of the last 3 months invoices	<input type="checkbox"/>		
e. If you are applying for funding for salaries include a copy of the signed contract, job description and any variations to the contract	<input type="checkbox"/>		
2. Funding Dates - It is Milestone Foundation Policy that funds must be spent within 6 months.			
a. Please provide details of the dates of when you intend to spend the funding or relevant dates	From	__ / __ / __	to __ / __ / __
3. The minutes of the committee/executive meeting including			
a. Full names of all committee members	<input type="checkbox"/>		
b. Signed meeting minutes in full including an approved resolution from committee/executive meeting approving application for funds, name of the trust and authorised purpose. The minutes must be certified as true & correct and signed by the Secretary/Chairperson or other executive member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Minutes should be on the letterhead of the applicant organisation	<input type="checkbox"/>		
4. For amateur sporting groups			
a. Proof of current affiliation to a national or regional body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Proof/itinerary/flyer and date(s) of events(s) for which funding is sought	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Names and roles of individuals in the team/organisation if travel funding is being requested	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Copy of Rules /Code of Conduct or Constitution	<input type="checkbox"/>		<input type="checkbox"/>
5. Charitable trusts must provide			
a. Certificate of Incorporation and/or Trust Deed and proof of Not-for-profit status	<input type="checkbox"/>		<input type="checkbox"/>
b. Charities Registered Number <input type="text"/>			
6. Other organisations must provide			
a. Proof of Not-for-profit status (eg. IRD tax exemption certificate)	<input type="checkbox"/>		<input type="checkbox"/>
b. In the case of Schools, endorsement from the Principal on School letterhead	<input type="checkbox"/>		<input type="checkbox"/>
c. In the case of Schools, the decile rating <input type="text"/>	<input type="checkbox"/>		
7. Bank account details for the applicant organisation must be			
a. Pre-printed deposit slip, or bank generated account details verified by the bank	<input type="checkbox"/>		
8. Financial statements – please provide latest financial statements	<input type="checkbox"/>		
9. Organisation information	<input type="checkbox"/>		
10. Project proposal	<input type="checkbox"/>		
11. Has the application been signed and dated by two authorised persons?	<input type="checkbox"/>		
12. Does your club/organisation operate gaming machines?	<input type="checkbox"/>		
13. Have you read and fully understood the terms and conditions of funding?	<input type="checkbox"/>		

Attach pre-printed bank deposit slip here

COST BREAKDOWN - THIS SECTION MUST BE COMPLETED

(You must include 2 quotes per item) IF GST REGISTERED ONLY SHOW GST EXCLUSIVE AMOUNT

	Supplier Name of Employee & Position Title	Items Timeframe for salary	Quote 1 Salary Amount	Quote 2	Office Use
A	e.g. The Uniform Shopp	7 x Sport Uniforms	\$ 600.00	\$ 650.00	
B	e.g. Jane Winter - Office Manager	1st Jan-31st Mar 2010	\$ 2500.00	\$	
C			\$	\$	
D			\$	\$	
E			\$	\$	
F			\$	\$	

TOTAL REQUEST - THIS SECTION MUST BE COMPLETED

Total costs of project \$ _____ Total amount requested \$ _____

Have you applied elsewhere for the same purpose? Yes No

If YES, where? _____

ORGANISATION DECLARATION

We (the undersigned) make a solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957. We declare that:

1. The information provided in this application form is true and correct to the best of our knowledge.
2. We have the authority to make this application on behalf of the applicant (if the applicant is not a natural person).
3. This application has not been completed by a person who has any management or ownership interest in a Milestone Foundation venue that hosts gaming machines ("a gaming machine venue key person")
4. When any grant money is obtained the persons who decide how that money is spent will not be Milestone Foundation gaming machine venue key persons.
5. When any grant money is obtained a check will be undertaken and no payment will be made from grant money to any Milestone Foundation gaming machine venue key person for any goods or service.

All of the information presented in this application – relating to the organisation I represent and to the specific proposal/project for which grant funds are requested – is true.

This application includes complete information relating to other sources of funding that my organisation has received, been pledged, applied for, or intends for future application, for this and other organisational projects. All prices and quotes included in this application represent the actual costs that will be incurred by my organisation. I have read and understand the Conditions for Allocation of Funds and Audit and Inspection requirements. My organisation hereby agrees to participate in an inspection, to provide further information if requested, and/or audit by the Department of Internal Affairs or Milestone Foundation if so requested. In the event of payment default, any legal or collection agent costs will be the responsibility of the applicant.

Common Seal

Signature One _____

Date ____ / ____ / ____

Full name in CAPITALS

Position (e.g. CEO/Chairperson/Trustee)

Signature Two _____

Date ____ / ____ / ____

Full name in CAPITALS

Position (e.g. Treasurer/Finance Administrator)

CONDITIONS FOR ALLOCATION OF FUNDS

1. Any grant allocation must be applied to the specific purpose stated on this application and to no other purpose. Acceptance of payment will be deemed to confirm that the grant allocation has or will be applied accordingly.
2. The allocation is made as a grant, a gift from Trust funds, made on the condition that no procurement fee, commission and/or discount has been paid to any person and that no identifiable direct beneficiaries or may arise in the form of a supply of goods or services to any party involved as a result of the payment being made.
3. In the event of non-compliance to these conditions, an amount equal to the allocation amount is immediately repayable to the Trust.
4. Any grant made by the Trust is exempt of Goods and Services Tax.
5. The Trust requires that an acknowledgement of grant be completed and returned to the Trust, once funds have been received by the recipient.
6. Any uniforms or equipment purchased from grant money will need to remain the property of the club/group/school.

AUDIT AND INSPECTION

Milestone Foundation records will be inspected and audited by the Department of Internal Affairs. Milestone Foundation is required to render details of all donations to the Department of Internal Affairs. This grant application is made with the understanding that if any Department of Internal Affairs officer so requests, the applicant organisation shall agree to and participate in (at its own expense) any such inspection and/or audit. Milestone Foundation may also request information and verification as to how the funds were used.

GRANT CRITERIA

Milestone Foundation Limited may make grants for any charitable purpose and any non-commercial purpose that is beneficial to the whole or a section of the community. Priority funding will be given to education, health and matters that promote and support the Asian culture. The above authorised purpose includes (but is not limited) providing grants for:

- a. Increasing access to technology resources to educate and skill people at a primary and secondary level;
- b. Scholarships and prizes for academic achievement;
- c. The provision of non-profit childcare and educational services for children;
- d. Public health services including education, counselling and rehabilitation services;
- e. Providing healthcare equipment to public hospitals and non-profit health clinics;
- f. Relieving poverty through access to advice, support and assistance to recent immigrants to New Zealand;
- g. Guidance services aimed at enabling Asian immigrants to settle faster and take up responsibilities as part of New Zealand society;
- h. The provision of advice and training to Asian immigrants on access to job training and work experience;
- i. The provision of training to assist unemployed Asian immigrants in gaining the confidence and initiative to handle themselves in all aspects of communication and job seeking;
- j. The provision of education and training for the improvement of road safety, with a particular focus on recent Asian immigrants to NZ;
- k. The promotion, planning, organisation and running of non-profit events that celebrate or concern Asian culture;
- l. Classes that teach Asian languages and culture;
- m. Classes that teach the English language to new immigrants;
- n. The provision of advice, assistance and information about Asian cultures;
- o. Providing milk and breakfasts to decile one schools;
- p. The promotion of health via encouraging participation in amateur sport, including participation in table tennis, badminton and soccer;
- q. The promotion of public amenities such as parks or museums.

Grants will not be made for:

- groups or individuals standing for an election to public office;
- lobby groups or action/pressure groups (e.g. Greenpeace, or Sensible Sentencing Trust);
- social events e.g. school balls, family reunions, entertainment in pubs or clubs, sporting trips for supporters or spectators;
- personal or commercial gain; or
- professional sport.

THE FOLLOWING ARE FURTHER EXAMPLES OF PURPOSES THAT ARE DEEMED UNAUTHORISED FOR GRANT CONSIDERATION. THIS LIST IS NOT EXHAUSTIVE BUT RATHER IS INTENDED AS A SAMPLE. FOR MORE DETAILED INFORMATION, PLEASE CONTACT US DIRECTLY.

Applications are deemed retrospective if goods/services have been paid for or the event has taken place before the application has been presented and a decision made by the Milestone Foundation Directors.

1. Anything intended to further the activities of professional sports persons or teams.
2. Any individual sport person unless the grant is made to and administered by an incorporated sporting body.
3. Anything related to a hotel social club.
4. Third party donor organisations (eg. service clubs).
5. Food and entertainment.
6. Dress uniforms.
7. Funding for fundraising events.
8. Purchase or subsidy of vehicles intended for purposes associated with social functions.

A substantial portion of the net proceeds received during a financial year will be distributed to the community for authorised purposes on, at least, a quarterly basis. Details of application cut-off dates will be available on the website in due course.

Please ensure grant applications are submitted at least two months before the due date of when the funding is required, otherwise they will be declined or not meet your funding deadline.

Please note original application forms are only accepted, but please photocopy this application before submitting then forward directly to Milestone Foundation PO Box 9356, Waikato Mail Centre, Hamilton 3240 | Phone 07 847 0312 | www.milestonefoundation.co.nz