

Quick Response Grants (up to \$20,000)

* indicates a required field

External Grant Writer and Fundraiser Concerns

We have been concerned lately regarding organisations use of external grant writers or fundraisers.

While organisations are welcome to utilise external services for grant applications, we would like to raise the following concerns;

1. Organisations handing over the entire application process to an external contractor who "signs" and submits under a named person from the organisation without their involvement at all.
2. The quality of the applications submitted by external grant writers or fundraisers in several instances has been poor and can be detrimental to the Trust decision. This includes the use of generic cut and paste content.

We have added to the declaration at the end of the application to confirm that applications from external grant writers/fundraisers have been read and approved by the organisation.

Kia ora koutou,

This form is for applying to the current Quick Response Grants Round:

Quick Response grants up to \$20,000 that are designed to provide a 'quick response' to a range of community organisations, to provide modest operational support and/or funding to get a project started or purchase equipment etc.

For Quick Response the focus is on local smaller organisations, and it is the place to come if it is your first application to the Trust. Our other main grants round **Community Support** is for larger grants aimed at providing operational and other forms of support to established organisations that have previously been granted funds by the Trust. The Trust approves fewer **Community Support** grants, and these applications undergo a much more stringent review process to ensure alignment with the Trust's aims and priorities. Funding history and capacity to deliver are critical factors in the assessment process.

The majority of the Trust's grants are distributed under **Quick Response** grants. The assessment of applications is a more flexible consideration process than the Community Support Grants and wherever possible we try to contribute and support local organisations doing good work in the community.

All of our grant programmes are guided by the Trust's [2025 - 2028 Community Investment Strategy](#). Priority is given to organisations whose goals and outcomes align with and can advance the Trust's aims and pillars/pou.

The aims are:

- Thriving Community
- Healthy Environment
- Equitable Outcomes

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- Māori Aspirations

The Pillars/Pou are:

- Te Tiriti o Waitangi
- Working Collaboratively
- Equity & Equality

We encourage you to read the [2025-2028 Community Investment Strategy](#) to understand our aims, pillars/pou, priority SDGs, and the framework that guides our community grants.

For information on the closing dates for funding rounds, please visit our website.

The application review process takes up to 6 weeks after the closing date of the round, and all applicants will be notified via email.

Finally, make sure to click the submit button upon completion – if you do not receive a confirmation email, your application has not been submitted.

If you have queries, please don't hesitate you to contact us by phone or email. Our office phone number is (07) 838 0093.

Stacey Ward (Grants Advisor) stacey@welenergytrust.co.nz

Eligibility Check List

Please read the Eligibility guidelines on our [website](#) and see the [searchable map](#) of the Trust boundaries. The three eligibility criteria are outlined below.

Please select all statements that apply to your organisation. *

- ☐ My organisation is a Not For Profit organisation
 - ☐ My organisation is located or operating in the WEL Energy Trust region
 - ☐ My organisation has been operational for more than 12 months
- Evidence of operation may be required, for example Certificate of Incorporation, bank account statements or meeting minutes

I confirm that my organisation meets all the above criteria and I am eligible to apply *

- ☐ Yes
- ☐ No or unsure - I will contact the Trust Grants staff to discuss

Please contact us before proceeding if any of the above statements do not apply. Contact via email at funding@welenergytrust.co.nz or by phoning 07 8380093.

First time applicants

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If this is your first application to the Trust, we strongly advise contacting our grants team to discuss your organisation and project before proceeding with the application.

We can answer questions, discuss your proposal, and offer advice. This includes giving an indication as to whether your request is within our criteria, realistic and likely to be supported. We are happy to assist new applicants through the process.

Applicant Details

* indicates a required field

Organisation Details

Organisation Name *

Trading Name

If different from organisation name

Organisation Website

Must be a URL

Location/Street Address *

Address

Address Line 1, Suburb, Town/City, Postcode, and Country are required.

Postal Address *

Address

Address Line 1, Suburb, Town/City, Postcode, and Country are required.

Contact for Application

All communication regarding the application will be sent to the contact person below

Contact name *

First Name

Last Name

Position title *

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Phone number *

Mobile phone number

Contact email address *

Must be an email address

Is the above contact person the same as the head of organisation *

- ☐ Yes - no need to complete next section
☐ No - please complete next section

Head of Organisation Contact

Head of organisation *

First Name

Last Name

Position *

(President, chair, manager or CEO, etc)

Phone number *

Mobile phone number *

Email address *

Organisation Details

* indicates a required field

Legal status *

- ☐ Charitable Trust
☐ Incorporated Society
☐ Other

If other please describe

We may request information that demonstrates that your organisation is a not-for-profit entity.

Incorporated Societies

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Please attach a copy of your updated constitution as per the Incorporated Societies Act 2022. (Please note this is not the same as the certificate of incorporation). *

Attach a file:

Please note we will not fund incorporated societies that cannot provide evidence of current registration.

Organisation Oversight

Is your organisation responsible to or managed by another organisation? *

- ☐ Yes
☐ No

If yes, please give details

Year your organisation was established *

If less than 18 months, please put date established

New applicants

If this is your first application to the Trust please attach a copy of your trust deed, constitution and/or other similar organisational document.

Attach a file:

Charitable Status

The Trust is required to pay income tax on grants to organisations that are not tax exempt.

In order to make more funds available for distribution it is most advantageous for the Trust if organisations are registered with Charities Services or have an IRD income tax exemption.

Please note that an RWT (Resident Withholding Tax) exception is not the same as Income Tax Exemption.

We therefore strongly encourage all organisations to register with Charities Services or apply for IRD income tax exemption status.

Is your organisation registered as a charity with Charities Services? *

- ☐ Yes
☐ No
☐ Pending (application submitted to Charities Services)

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Please note - Registration as a Charitable Trust is not the same as being a registered Charity.

Charities Services Registration Number - Please enter your CC number, starting with CC

The Charity Registration Number provided will be used to look up the following information. Click Lookup above to check that you have entered the Charity Registration Number correctly.

New Zealand Charities Register Information
Charity Registration Number
Organisation Name
Other Names
Status
Street Address
Postal Address
Telephone
Fax
Email
Website
Date Registered

Must be formatted correctly

If pending, when was your application to Charities Services submitted and do you have any indication of when you expect hear back?

If your organisation is not registered with Charities Services, please answer below.

*

- ☐ Our organisation is not registered with Charities Services, but we are exempt from income tax and will attach a letter from IRD
- ☐ Our organisation is not exempt from tax

Please attach income tax exemption letter from IRD

Attach a file:

PLEASE NOTE - RWT income tax exception is NOT the same as income tax exemption.

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Organisation Background

* indicates a required field

Objectives

What are the purpose and objectives of your organisation? *

Word count:

Must be no more than 150 words

What activities, services or programmes do you currently provide? *

Word count:

Must be no more than 250 words.

Please include numbers of people involved in each of your activities.

Staff, members and volunteers

How many members/clients are associated with your organisation? *

- ☐ Members
☐ Clients

Number of paid full-time staff *

Number of paid part time staff

Number of volunteers

If an event how many participants are you expecting

Comments, if any

Funding Proposal

* indicates a required field

Application Title *

Must be no more than 150 characters.

For example "ABC Operating Costs 2026" or "XYZ Event Costs"

Is your proposal or project for a set time or ongoing? *

- ☐ Ongoing project or proposal (e.g. - operating, service delivery and other recurring generic costs)

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☐ Set time (e.g.- a specific project, one off expense or event related) Please put time frame below

Start date must be no sooner than 6 weeks from round closure. Note round closure is the last business day of the month, not the date your application is submitted.

Start Date

End Date

What are you specifically seeking funding for? *

Word count:

Provide a short description (120 words) of what the funds be expended on?

What outcomes (benefits) will people receive as a result of your activities? *

Word count:

Highlight specifics and details about the positive impact your work will create for your community and the people involved

Where are the beneficiaries located within our region? See link below for map. *

Word count:

Must be no more than 30 words.

Please note we are not able to fund projects without proof of benefits to our region.

Link to the [map of the Trust region](#) on our website.

How many people are expected to benefit from your work? *

This could be members, clients or wider community

Click here to view the WEL Energy Trust [Community Investment Strategy 2025-2028](#)

How will you know whether you have made a difference, what results do you expect to see? *

Please indicate how will you measure impact and what will you report on. If successful, this information will inform your acquittal.

Budget, IRD and GST

* indicates a required field

IRD Number

Please enter numbers only

Is your organisation registered for GST

☐ Yes

☐ No

Budget - Proposal or organisation

Outline your project or operating budget including details of other funding that has been applied for.

If your request is for a specific project or item please provide details of income (confirmed, anticipated or applied for). If you are seeking a grant towards general operating expenses please provide an indication of overall anticipated income and expenses. This may be easier in an attached spreadsheet, however you still will need to complete the first two required lines in the budget sheet below.

Please be aware the budget field can only accommodate a limited amount of text.

Please tick the Confirmed box to indicate if income is confirmed.

If you are registered for GST all figures need to be *GST exclusive*

Click here for an example [Example Budget Table](#)

Income Descr \$ iption		Confirmed	Expenditure \$ Description		Confirmed
Click Add Row if additional rows are required	Must be a dollar amount	Yes/No	Click Add Row if additional rows are required	Must be a dollar amount	Yes/No

If you wish you can add a supporting budget document.

Attach a file:

Project funding and amount requested

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Total proposal or project cost: *

\$

Must be a whole dollar amount

How will any shortfall be met? (please list any unconfirmed funding sources and related details)

Total confirmed funding *

\$

How much confirmed funding do you already have?

Amount requested: *

\$

Must be a whole dollar amount (no cents) and no more than 20000.

Bank Account

All grant payments from the Trust are direct credited to a verified bank account. Even if you have previously submitted a bank deposit slip or signed bank verification, we require this again.

Please ensure the account number, including suffix, corresponds with the deposit slip or bank verification that you have attached below.

Please attach a scanned bank verification form, bank statement or deposit slip with your organisation's bank account number. *

Attach a file:

This must include organisation name and bank account number

Account Name *

Please only use letters, numbers, spaces and the following special characters () * - / &

Applicant Bank Account Number *

between 15 and 16 characters

. Please only use numbers, no spaces or dashes

Annual Accounts Upload & Current Financial Position

*** indicates a required field**

Latest Annual Accounts

The Trust requires your latest annual financial statements to be submitted. These need to be certified, independently reviewed or audited, depending on your annual level of expenses. Please note that we have adopted the latest reporting requirements of Charities Services.

If your Deed/Constitution outlines a higher level of review or auditing than that of Charities Services, please attach those.

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Please indicate your annual level of expenses below as this will determine the type of document we require. Please then attach accordingly.

Please indicate your annual expenditure level. *

- ☐ Under \$550,000 annual operating expenses
- ☐ Between \$550,000 and \$1.1m annual operating expenses for each of the last two years
- ☐ Over \$1.1m annual operating expenses for each of the last two years

PLEASE NOTE: Accounts need to be in acceptable statement of accounts formats (as above) and include consolidated income and expenditure as well end of year position, (balance sheet).

We will not accept unconsolidated transaction lists.

Applications that do not meet the requirements will not be considered.

If you have any queries regarding acceptable formats, please seek advice or contact us.

Under \$550,000 annual operating expenses - a certified copy of your latest annual accounts *

Attach a file:

Must be signed and certified by an official in your organisation (not the person who prepared the accounts). We will NOT accept uncertified accounts.

Between \$550,000 and \$1.1m annual operating expenses - an independently reviewed copy of your latest annual accounts *

Attach a file:

Must be signed and certified by a qualified reviewer independent of your organisation

Over \$1.1m annual operating expenses - a copy of your latest annual accounts that have been audited by a qualified auditor *

Attach a file:

Must be signed and certified by a qualified auditor

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If your annual accounts are for a period end that is more than 18 months ago, and the subsequent accounts have not been finalised please ALSO attach a set of your latest draft accounts.

Attach a file:

Financial Summary from latest accounts

Financial Summary for year ending

Or period from

To

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Please ensure you report the full income and expenditure figures from your annual accounts.

These figures should be the same those in your attached annual accounts.

Income: *

\$

Must be a dollar amount

Surplus or deficit: *

\$

This number/amount is calculated.

Expenditure: *

\$

Must be a dollar amount

Balance sheet equity *

\$

Must be a dollar amount

Current funds - please include all bank accounts

Current funds in hand: *

\$

Must be a dollar amount

As at *

Must be a date

Please attach copies of latest bank statement(s) for all accounts *

Attach a file:

Must be a formal bank statement or screenshot of bank login including: bank provider name/ logo, organisation account name and number, and current balance of all accounts.

If your organisation has surplus or investment funds please indicate if these are tagged for a specific purpose and if so, when they will be used.

Please also mention any directly associated entities (e.g. other trusts etc) that may hold funds for your organisation.

Supporting documents

Annual Report

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If your organisation has produced an annual report, please either attach this below or include a website link.

Attach an electronic copy of your most recent Annual Report:

Attach a file:

Annual Report website link:

Support Material:

If you wish to attach any other documents supporting your application, please attach here.

Note the information must be directly relevant to the application.

Attach a file:

Feedback and Declaration

* indicates a required field

Declaration and submission

I solemnly declare that all details contained in this application are true and correct to the best of my knowledge and that I have the authority to commit the organisation to this application. I acknowledge that the Trust's decision on this application will be final and no correspondence will be entered into.

- I confirm that I have read and accept the Trust's [Terms and Conditions](#).
- I agree that I will contact the WEL Energy Trust immediately if any information provided in this application changes or is found to be incorrect.
- I am authorised to complete the application, and have read and understood the declaration.
- If using an external grant writer or fundraiser, they are paid at a flat fee or hourly rate which is paid irrespective of the outcome of the grant request.

Pursuant to the Privacy Act 2020, you are advised that the information supplied will be used by the Trust to make such inquiry as it sees fit to establish the accuracy of the details supplied and such other information as it considers appropriate to make a decision on the application.

Who has completed the application? *

- ☐ I have completed the application myself and was authorised to do so on behalf of the organisation. I have read and understood the declaration above.
- ☐ An external grant writer/fundraiser has completed the application and an authorised person in the organisation has reviewed it and confirm the declaration above.

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I am authorised to complete this application and have read and understood the declaration *
☐ Yes

Authorised Person's Name *

First Name	Last Name

Position held in organisation *

Date of declaration *

Contact phone number *