



Community Funding Committee

Te Komiti Motuhake o te Tohatoha Pūtea me ngā Whakawhiwhinga Rangatahi

Friday, 8 December 2023

Rāmere, 8 Hakihea 2023

Totara Room, Whakatāne District Council
14 Commerce Street, Whakatāne
commencing at 09:00 am

Chief Executive: Steph O'Sullivan
Publication Date: 29 November 2023

A Membership - *Mematanga*

A Membership - *Mematanga*

Councillor G Dennis - Chairperson

Councillor N Rangiaho

Councillor J Pullar

B Delegations to the Community Funding Committee - *Tuku Mahi ki te Komiti*

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To administer and allocate funds associated with the Creative Communities NZ Scheme, Sport NZ Travel Fund and Council Annual Grants.

- a. To consider applications for the Annual Grants Scheme and make allocations under this scheme within approved budgets, and in accordance with Council's Community Funding Policy.
- b. To allocate rural travel funds for youth, provided by SportNZ, in accordance with the rules and guidelines provided by SportNZ.
- c. To consider and assess applications and allocate funding provided by Creative New Zealand according to the specific priorities set by Creative New Zealand.
- d. To allow up to four and no more than eight community members from the local arts sector to assist the allocation of CCS funding.

The Committee's decisions do not need to be approved or confirmed by the Council.

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1 Apologies - *Te hunga kāore i tae*

1 Apologies - *Te hunga kāore i tae*

No apologies were recorded at the time of compiling the agenda.

2 Acknowledgments / Tributes - *Ngā mihimihi*

An opportunity for members to recognise achievements, to notify of events, or to pay tribute to an occasion of importance.

3 Conflicts of Interest - *Ngākau kōnatunatu*

Members are reminded of the need to be vigilant to stand aside from decision making when a conflict arises between their role as an elected member and any private or other external interests they might have.

The Elected Member Register of Interest is available on the Whakatāne District Council website. If you wish to view the information, please click this [Register link](#)

4 Public Forum - *Wānanga Tūmatanui*

The Committee has set aside time for members of the public to speak in the public forum at the commencement of each meeting. Each speaker during the forum may speak for five minutes. Permission of the Chairperson is required for any person wishing to speak during the public forum.

With the permission of the Chairperson, Elected members may ask questions of speakers. Questions are to be confined to obtaining information or clarification on matters raised by a speaker.

5 Confirmation of Minutes - *Te whakaaetanga o ngā meneti o te hui*

5 Confirmation of Minutes - *Te whakaaetanga o ngā meneti o te hui*

Confirmation of Community Funding Committee Minutes - 3 October 2023

The minutes from the Community Funding Committee Minutes - 3 October 2023 can be viewed via the Council Website.

Click on the link below in order to view the 'unconfirmed minutes'.

- [Council Website | Community Funding Committee | 3 October 2023](#)

6 Reports - *Ngā Pūrongo*

6 Reports - *Ngā Pūrongo*

6.1 Annual Grants Round – December 2023



To: **Community Funding Committee**

Date: **Friday, 8 December 2023**

Author: **S Major / Community Funding Advisor**

Authoriser: **E Hatch / General Manager People and Engagement**

Reference: **A2536783**

1. Reason for the report - *Te Take mō tēnei rīpoata*

To provide a summary of the applications received under the 2023-2024 Annual Grants programme, and for the Funding Committee to allocate the grant funds available.

2. Executive Summary – *Whakarāpopototanga*

The Annual Grants are financial grants provided to charitable social organisations based in the Whakatāne District area that provide services to the general public.

Priority is given to groups within the district that have a high volunteer base and groups that provide a community service for the residents of the district.

The Annual Grant budget is \$50,000; however, a multi-year grant option is provided in Year One of the Long-Term Plan (LTP) for groups to be able to apply for funding for a three-year period. The multi-year option allows applicants to plan for their future, provided they return a declaration of expenditure each year. The commitment to these organisations this year, in line with the decision made by the Funding Allocation and Young Achievers Special Committee (as it then was) on 16 September 2021, is \$43,000.00.

The balance of \$7,000 is available for single year annual grant applicants.

For the 2023-2024 Annual Grants, applications were open from Monday 2 October to Friday 27 October.

Seven applications were received, requesting a total of \$6,635. A summary of the applications is at the end of this report. Full applications and an assessment marking sheet will be forwarded to members separately.

6.1 Annual Grants Round – December 2023(Cont.)

3. Recommendations - *Tohutohu akiaki*

1. **THAT** the Community Funding Committee receives the report 'Annual Grants Round December 2023'.
2. **THAT** the Community Funding Committee receives the applications to the Annual Grants Round for 8 December 2023.
3. **THAT** the Community Funding Committee assess each application and resolve the available funds be allocated for 2023-2024.

4. Background - *He tirohanga whakamuri*

All applications are assessed according to the merit of the project, based on the following criteria:

- Proposed targets – real and well-defined need and aligned to community outcomes.
- Clear and significant impact on community need.
- Breadth and depth of community exposure and participation achieved.
- Appropriate planning, resourcing, risk management for project.
- Appropriate planning for building security of funding.

4.1. The following are not eligible for Annual Grants:

- Schools seeking funding for travel covered by the Rural Travel Fund.
- Groups seeking funding support for events or creative endeavours funded by other Council managed funds.
- Organisations that do not provide a community related service.

5. Issue/subject - *Kaupapa*

Applications opened on 2 October and closed on 27 October 2023.

A total of seven valid applications were received for the Annual Grants funding following verification of receipt of completed Accountability forms for any previous grants received, requesting a total of \$6,635. One application enquiry was outside the guidelines and the applicant was referred to the Community Board funding programme.

A summary of the valid applications is appended to the report, and a full copy of each application will be distributed separately.

6. Options analysis - *Ngā Kōwhiringa*

No options have been identified relating to the matters of this report.

6.1 Annual Grants Round – December 2023(Cont.)

7. Significance and Engagement Assessment - *Aromatawai Pāhekoheko*

7.1. Assessment of Significance

The decisions and matters of this report are assessed to be of low significance, in accordance with the Council's Significance and Engagement Policy.

7.2. Engagement and community views

The Annual Grants round was advertised on the Council website and included direct mail to interested parties.

Engagement on this matter is not being undertaken in accordance with Section 4.2 of the Council's Significance and Engagement Policy. This states that the Council will not consult when there is already a sound understanding of the views and preferences of the persons likely to be affected or interested in the matter.

8. Considerations - *Whai Whakaaro*

8.1. Financial/budget considerations

Annual Grants are budgeted for in the LTP at \$50,000 per year noting this amount covers multi-year and annual grants. There is an administrative cost to Council to promote and administer the grant programme.

8.2. Strategic alignment

No inconsistencies with any of the Council's policies or plans have been identified in relation to this report.

8.3. Climate change assessment

Based on this climate change assessment, the decisions and matters of this report are assessed to have low climate change implications and considerations, in accordance with the Council's Climate Change Principles.

8.4. Risks

There are no known risks associated with the matters of this report.


6.1.1 Alzheimers BOP

- A summary of the applications follows.
- All applications are appended to the report.

Individual or Organisation Applying	Amount Requested \$
Alzheimers Bay of Plenty	\$500.00
HALO Whakatane	\$865.00
Harmony and Hope	\$500.00
Have a Heart	\$500.00
Nukuhou North Settlers Hall	\$1,500.00
Parent2Parent	\$1,270.00
Whakatāne Accessible and Inclusive (WAI)	\$1,500.00
TOTAL REQUESTED	\$6,635.00

6.1.1 Alzheimers BOP

6.1.1 Alzheimers BOP(Cont.)


Annual Grants- Single Year Funding
APPLICATION FORM

All sections must be completed and supporting material attached to the back of the form (see section 8. Checklist).
More information can be found on our website www.whakatane.govt.nz
or by contacting Sharon Major, Community Funding Advisor on (07) 306 0500

Applications must be submitted by 5pm on 27 October 2023

Completed applications must be emailed to: [Community Funding Advisor
grants@whakatane.govt.nz](mailto:grants@whakatane.govt.nz)

1 CONTACT DETAILS

1.1 Name of organisation: Alzheimers Society Eastern Bay of Plenty

1.2 Name of principal contact: [REDACTED]
Position held in group: Manager
Phone (day): [REDACTED] Website: www.alzheimers.org.nz/eastern-bay-of-plenty
Email: [REDACTED]
Postal address for correspondence:
PO Box 13 Whakatane 3158

1.3 Name of secondary contact: [REDACTED]
Position held in group: Office Administrator
Phone (day): [REDACTED] Website: www.alzheimers.org.nz/eastern-bay-of-plenty
Email: [REDACTED]
Postal address for correspondence:
PO Box 13 Whakatane 3158

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6.1.1 Alzheimers BOP(Cont.)

2 ABOUT YOUR ORGANISATION	
2.1	Which of the following describes your organisation? Incorporated society: <input checked="" type="checkbox"/> Trust: <input type="checkbox"/> Other (please specify): _____
2.2	How long has your organisation been operating? 35 Years
2.3	What are your group's main objectives and activities? To provide support to those with dementia mate wareware, their carers and whanau to enable them to live their best possible lives. We do this by providing Navigators to guide and support them through the dementia journey. We provide post diagnostic education, the provision of carer support meetings, a companion volunteer to assist in providing respite care to the carer and additional social interaction for the person with dementia mate wareware. In addition, we provide education to the community to support making the EBOP more dementia friendly and understanding. We have been providing regular Cognitive Stimulation Therapy sessions to clients over the past 12 months and volunteers have supported our staff in providing and preparing for delivery of these sessions. We also rely on our volunteers to manage the provision of the Wanda Trak service to those at-risk clients who need it. This tracking device is issued to clients who have the potential to wander, and we work in conjunction with NZ Police and Land SAR in administering this system. Of note – all our Board members are also volunteers who, in addition to their Board role are also involved in fundraising and companion support.
2.4	How many paid staff in your organisation? 7 How many volunteer staff in your organisation? 51 How many people does your group work with in a typical week? (i.e. the total number including clients, members, participants) In a typical week we work with 55 clients and their carers, 10 clients attending CST programs, 1 community group of up to 25 people in terms of education and 20 volunteers.
2.5	Is your group GST registered? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If Yes, record your GST number here: ██████████
2.6	Please record your Bank Account number here: ██████████ <small>* please attach a bank generated deposit slip to the back of this application form to confirm account details</small>

6.1.1 Alzheimers BOP(Cont.)

3 ABOUT YOUR FUNDING REQUEST		
3.1	Please provide a title for the project, service or proposal for which you are seeking funding (max 8 words):	
	Volunteer attendance at Repositioning Dementia Conference 2024	
3.2	Cost of your project or service: (This should match table 5.1)	Amount requested from Council: (This should match table 5.1)
	TOTAL \$ 760.00	\$ 500.00
3.3	Give a brief description of the project, service or proposal for which you are seeking funding (if you have a separate project plan or require more space, please list the key points here and attach a full description of your proposal to the back of this form):	
	We would like to support 2 of our companion volunteers to attend the National Repositioning Dementia conference being held in Auckland on 21-22 nd March 2024.	
	This conference provides National and local speakers on a range of topics.	
	The 2023 conference this year covered such aspects as the latest international research, dementia training and resources, understanding of human rights and the lived experience of dementia care workers. We consider that enabling some of our long-term companion volunteers to this program will enhance their knowledge and opportunity to contribute positively to the dementia sector in upcoming years.	
	Alzheimers will supply a vehicle for volunteers to travel to the venue. We are seeking a contribution to cover conference registration fees and some travel costs.	
	Registration fees are based on the 2023 costs \$160 per person excl gst (example invoice attached)	
	Travel costs are estimated at \$90 for petrol, meals at \$50 each per day and accommodation for 2 nights at \$250 shared.	
	Any excess costs not funded by this grant will be met by fundraising efforts.	
3.4	How long does the project, service or proposal run?	
	Starts:	21 March 2024
	Finishes:	22 March 2024
	Ongoing:	<input type="checkbox"/>

6.1.1 Alzheimers BOP(Cont.)

4 OUTCOMES AND OUTPUTS OF YOUR PROJECT, SERVICE OR PROPOSAL	
4.1	<p>How will you know if your project, service or proposal is successful, and what are the benefits to the community?</p> <p style="text-align: center;">A debrief with volunteer companions will be conducted post conference and this information will be shared as part of our local volunteer training group.</p> <p>The benefits to the community will be in having upskilled, knowledgeable volunteers who can be more proactive in providing a volunteer companion services to those with dementia mate wareware</p>
4.2	<p>How does your proposal directly support one or more of the Community Outcomes of the Whakatane District?</p> <p><input type="checkbox"/> Effective Leadership - Striving for our Future Wellbeing</p> <p><input checked="" type="checkbox"/> Community Needs – A caring community</p> <p><input type="checkbox"/> Quality Services – Excellent Value for Money</p> <p><input type="checkbox"/> Valuing our Environment - Sustaining for future generations</p> <p><input type="checkbox"/> Reliable and Affordable Infrastructure – Meeting current and future needs</p> <p><input type="checkbox"/> Sustainable Economic Development – Working in partnership</p>
4.3	<p>What will happen to the project, service or proposal if this funding application is unsuccessful, or if only a portion of the funds are received?</p> <p><input type="checkbox"/> The project will proceed as outlined</p> <p><input type="checkbox"/> The project will be delayed (please specify expected length of delay): _____</p> <p><input checked="" type="checkbox"/> The project will be downgraded *</p> <p><input type="checkbox"/> The project will be prevented from being carried out</p> <p>* We will reduce the number of attendees from 2 to 1.</p>

6.1.1 Alzheimers BOP(Cont.)

5

5.1

Income for project or service			
Description of cost*	\$	Income source	\$
Salaries / wages	\$	Applicant organisation's contribution	\$
Postage / telephone / administration	\$	Fundraising	\$ 260.00
Advertising / promotion	\$	Donations / sponsorship	\$
Professional fees	\$	Entry fees	\$
Travel costs (Petrol / Accommodation/Meals)	\$ 440.00	Value of donated material	\$
Project materials	\$	Grants (please specify):	\$
Labour cost	\$		
Venue / equipment hire	\$		
Other costs (please specify):	\$ 320.00		
Conference Registration based on 2023			
Fees \$160 x 2		Other income (please specify):	\$
TOTAL ESTIMATED COST	\$ 760.00	TOTAL INCOME	\$260.00

TOTAL FUNDING SHORT FALL \$ 500.00

6.1.1 Alzheimers BOP(Cont.)

6 FINANCIAL DETAILS OF YOUR ORGANISATION

Note: All figures to include GST (if any).

6.1	Last financial year	This financial year (to date of application)
What was your organisation's total income (money received)? *	\$368,729	\$ 144,500
What was your organisation's total expenditure (money spent)? *	\$ 273,228	\$ 102,067

* Please attach a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year

6.2	What is the current total of your bank balances (including savings and investments)?	\$ 257,688
	How much (if any) of this total is tagged or committed to other purposes?	
	<i>Tagged or committed means a sum of money that has been set aside from your day to day operating funds, for a specific project or purpose (e.g. building project, forthcoming event)</i>	
	Amount tagged	Purpose
	\$ 55,460	Contingency fund as per our constitution
	\$ 202,228	Part of our operating budget as per attached
	\$	
	\$	
	\$	

6.3	What funding assistance has your group/organisation received from the Council over the past 3 years:	
	Year	Amount received
		Purpose
	2023	4025.00
		Rent and operating costs
	2022	4025.00
		Rent and operating costs
	2022	4025.00
		Rent and operating costs

6.1.1 Alzheimers BOP(Cont.)

7 DECLARATION

We the undersigned do solemnly and sincerely declare and acknowledge that:

- The details we have given in all sections of this application are true and correct to the best of our knowledge.
- We have the authority to commit our group to this application.
- All information contained in this application is subject to the Local Government Official Information and Meetings Act 1987, and therefore this information may be released upon request.
- The Council may collect from third parties any information it deems necessary about the applicant or the application.

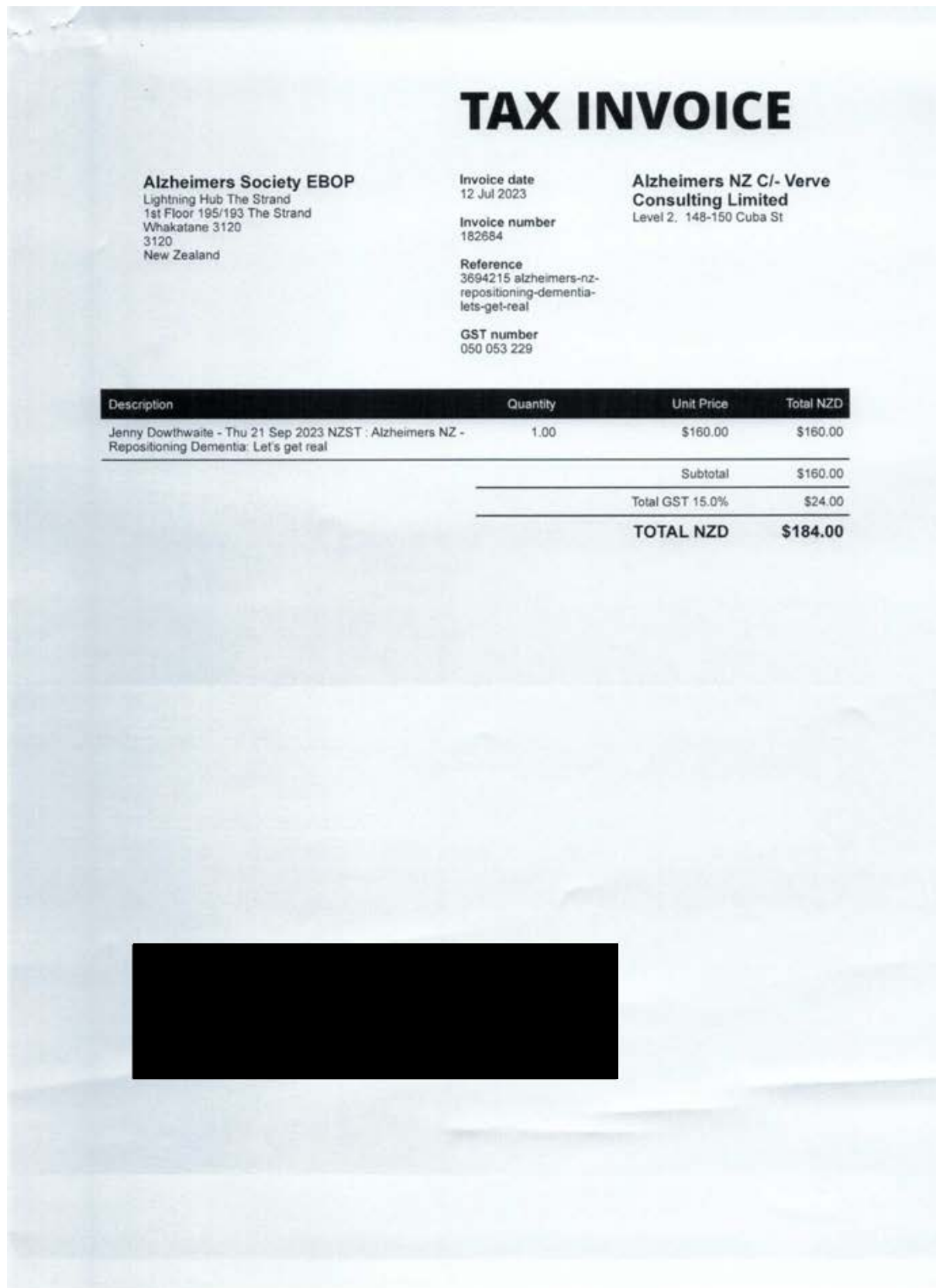
Name:	[REDACTED]
Position held in group:	Manager
Signature:	[REDACTED]
Date:	18/10/23
Name:	[REDACTED]
Position held in group:	Office Administrator
Signature:	[REDACTED]
Date:	18/10/23

8 CHECKLIST

Please complete the following checklist to ensure you have completed the application process and attached all necessary information:

- All sections of this form have been completed
- You have attached a bank generated deposit slip verifying your bank account details (2.6)
- N/A You have attached a separate copy of your project plan where one has been developed (3.3)
- You have attached quotes for expenses for your project service or proposal where these have been obtained (5.1)
- You have attached a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year (6.1)
- The declaration form has been signed by two members of your organisation that have the authority to do so (7)
- You have made a copy of this application for your future reference

6.1.1 Alzheimers BOP(Cont.)



6.1.2 HALO Whakatane

6.1.2 HALO Whakatane

6.1.2 HALO Whakatane(Cont.)



All sections must be completed and supporting material attached to the back of the form (see section 8. Checklist).
More information can be found on our website www.whakatane.govt.nz
or by contacting Sharon Major, Community Funding Advisor on (07) 306 0500

Applications must be submitted by 5pm on 27 October 2023

Completed applications must be emailed to: [Community Funding Advisor grants@whakatane.govt.nz](mailto:grants@whakatane.govt.nz)

1 CONTACT DETAILS

1.1	Name of organisation: HALO Whakatāne Incorporated	
1.2	Name of principal contact: [REDACTED]	
	Position held in group: Lead Community Igniter	
	Phone (day): [REDACTED]	Website: halowhakatane.org.nz
	Email: [REDACTED]	
	Postal address for correspondence: 35 Quay Street, Whakatāne, 3120	
1.3	Name of secondary contact: [REDACTED]	
	Position held in group: Treasurer	
	Phone (day): [REDACTED]	Website: As above
	Email: [REDACTED]	
	Postal address for correspondence: As above	

6.1.2 HALO Whakatane(Cont.)

2 ABOUT YOUR ORGANISATION	
2.1	<p>Which of the following describes your organisation? Incorporated society: <input checked="" type="checkbox"/></p> <p style="text-align: center;">Trust: <input type="checkbox"/></p> <p style="text-align: center;">Other (please specify): _____</p>
2.2	<p>How long has your organisation been operating? 7 years</p>
2.3	<p>What are your group's main objectives and activities?</p> <p>The HALO Effect – The 'halo effect' in ecology is where efforts to protect one species radiates throughout the environment and unintentionally protects many others.</p> <p>HALO Whakatāne Strategic Vision</p> <hr/> <p>HALO Whakatāne was born from a shared vision that the community can expand on the success of our volunteer restoration programmes, taking conservation to the next level, a sanctuary for the whole community. The nature of HALO Whakatāne is that it provides support to people and groups working on a wide range of projects.</p> <p>While it's ultimate measure of success is having tieke/saddleback living on the mainland, it will take significant social, lifestyle and attitude changes to achieve that. HALO is about helping navigate the pathway to that outcome.</p> <p>By responding to project growth and a changing environment, HALO Whakatāne has continued to seek opportunities and be open to lessons that have given our project journey clarity and strength.</p> <p>HALO Whakatāne has woven the strands of our key principals and goals into our Te Whanki, our woven mat.</p> <ol style="list-style-type: none"> 1. <u>Community Engagement</u> <ul style="list-style-type: none"> - Supporting the creation of urban corridors - Connecting to nature – <i>Completed</i> - Bob's Hauora Trail. Ensuring the 'whole' community can access and enjoy the forest and its inhabitants in our backyard. Leading the accessible walkway project from Whitehorse Drive to Wainui Te Whara Bridge. (Mokorua Scenic Reserve). <i>In progress</i> – wheelchair access to the Awatapu/Otamakaokao Lagoon for special education students. <i>Exploring</i> – The opportunity to create an accessible track at the Ōhope Spit Reserve. 2. <u>Education</u> <ul style="list-style-type: none"> - The development of the Collaborative Community Education Programme, with the Awatapu/Otamakaokao Lagoon at its heart, but reaching from Otamarakau, to Opotiki to Ruatoki. - Building the skill base of Rangatahi through student-driven and supported initiatives. - Supporting school-based pest suppression and restoration programmes, parting with council, DOC and Trees for Survival. 3. <u>Pest Suppression</u> <ul style="list-style-type: none"> - Urban and Landscape pest suppression - Leading, in collaboration with the community, i.e., Pest Free Ōhope Spit 4. <u>Creating a regenerative systems action plan.</u> <ul style="list-style-type: none"> - Minimising our carbon footprint
2.4	<p>How many paid staff in your organisation? 3.5 FTE</p> <hr/> <p>How many volunteer staff in your organisation? 475 people registered as volunteers (including backyard trappers)</p> <hr/> <p>How many people does your group work with in a typical week? (i.e. the total number including clients, members, participants)</p>

6.1.2 HALO Whakatane(Cont.)

	During school term, +/- 100 including students	
2.5	Is your group GST registered?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	If Yes, record your GST number here: [REDACTED]	
2.6	Please record your Bank Account number here*: [REDACTED]	

** please attach a bank generated deposit slip to the back of this application form to confirm account details.*

6.1.2 HALO Whakatane(Cont.)

3 ABOUT YOUR FUNDING REQUEST

3.1 Please provide a title for the project, service or proposal for which you are seeking funding (max 8 words):

Fuelling our community engagement vehicle costs

3.2	Cost of your project or service: (This should match table 5.1)	Amount requested from Council: (This should match table 5.1)
TOTAL	\$3,645.00	\$ 865.00

3.3 Give a brief description of the project, service or proposal for which you are seeking funding (if you have a separate project plan or require more space, please list the key points here and attach a full description of your proposal to the back of this form):

As a community-led conservation organisation HALO Whakatāne is regularly visiting schools, many of which are in the wider Whakatāne region, Otamarakau, Ruatoki to Ōpotiki. We have our project education Kaupapa Te Whakaora I Te Mauri O Te Repo (Restoring the mauri of the awa), but we have also partnered with Trees for Survival NZ (TFSNZ). This has meant that our team need to support TFSNZ member schools on-site, in addition to our other core schools. Our program brings the opportunity for teachers and students to learn and experience Education Outside the Classroom (EOTC), with many rural schools exploring the rural environment and investigating ways to restore and enhance the habitat on their back door. This is an exciting initiative to lead, but there is a need to travel and deliver project resources. We also host volunteer working bees, attend workshops & hui across the region and collect our HALO Kaitiakitanga Kadets when we have an event. Our team recognised that as our organisation expanded, we were using our personal, yes mainly still petrol and diesel, vehicles more. So, in April this year, HALO Whakatāne purchased a Mitsubishi Outlander PHEV, a hybrid vehicle. This vehicle is a great asset and supports our commitment to align with the United Nations' global Sustainable Development Goals (SDGs), especially SDG 7: Clean Energy and paves the way for action on SDG 13: Climate Action for a low carbon future. This application to for funds to support the operational costs of our project vehicle; charging, insurance, WOF, Registration, servicing and general maintenance.

3.4 How long does the project, service or proposal run?

Starts: _____

Finishes: _____

Ongoing:

6.1.2 HALO Whakatane(Cont.)

4 OUTCOMES AND OUTPUTS OF YOUR PROJECT, SERVICE OR PROPOSAL

4.1 How will you know if your project, service or proposal is successful, and what are the benefits to the community?

- We will be able to continue expanding our reach with kura/schools to deliver our education programme.
 - The vehicle is fit for propose and allows us to bring resources and equipment to schools and working bee activities.
 - Our team will not need to use personal vehicles to undertake project work, which also reduces the reimbursement cost to the project.
 - We are actively leading by example in our commitment to the Sustainable Development Goals (SDG's).
 - The vehicle becomes a method of engaging with the community through visual graphics.

4.2 How does your proposal directly support one or more of the Community Outcomes of the Whakatane District?

Effective Leadership - Striving for our Future Wellbeing

Community Needs – A caring community

Quality Services – Excellent Value for Money

Valuing our Environment - Sustaining for future generations

Reliable and Affordable Infrastructure – Meeting current and future needs

Sustainable Economic Development – Working in partnership

4.3 What will happen to the project, service or proposal if this funding application is unsuccessful, or if only a portion of the funds are received?

The project will proceed as outlined

The project will be delayed
 (please specify expected length of delay): _____

The project will be downgraded

The project will be prevented from being carried out

Other (please specify): We will fundraise and/or apply for costs through other potential funders.

5

6.1.2 HALO Whakatane(Cont.)

5.1

Income for project or service			
Description of cost*	\$	Income source	\$
Salaries / wages	\$	Applicant organisation's contribution	\$
Postage / telephone / administration	\$	Fundraising	\$ 1,000
Advertising / promotion	\$	Donations / sponsorship	\$
Professional fees	\$	Entry fees	\$
Project Vehicle costs	\$ 3,645	Value of donated material	\$
Project materials	\$	Grants (please specify):	\$
Labour cost	\$	Bay Trust	\$ 1,200
Venue / equipment hire	\$	Trust Horizon (charging)	\$ 160
Other costs (please specify):	\$	Kelly's Garage (in kind)	\$ 420
		Other income (please specify):	\$
TOTAL ESTIMATED COST	\$ 3,645.00	TOTAL INCOME	\$ 2,780.00
TOTAL FUNDING SHORTFALL	\$ 865.00		

6.1.2 HALO Whakatane(Cont.)

6 FINANCIAL DETAILS OF YOUR ORGANISATION

Note: All figures to include GST (if any).

6.1	Last financial year	This financial year (to date of application)
What was your organisation's total income (money received)? *	\$238,611	\$246,520
What was your organisation's total expenditure (money spent)? *	\$277,698	\$133,100

* Please attach a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year

6.2	What is the current total of your bank balances (including savings and investments)?	
	\$267,165	
How much (if any) of this total is tagged or committed to other purposes? <i>Tagged or committed means a sum of money that has been set aside from your day to day operating funds, for a specific project or purpose (e.g. building project, forthcoming event)</i>	Amount tagged	Purpose
	\$217,019	Bay Trust - building a Halo project
	\$14,377	DOCCF - trapping network in urban area
	\$13,949	Environmental Enhancement Fund - Ohope Spit rejuvenation
	\$2,400	WDC Community Board - Trees for survival costs
	\$1,413	Gow Trust - Educational resources

6.3		
What funding assistance has your group/organisation received from the Council over the past 3 years:		
Year	Amount received	Purpose
2021	\$7,235.51 (inc gst)	Rental rebate

6.1.2 HALO Whakatane(Cont.)

7 DECLARATION

We the undersigned do solemnly and sincerely declare and acknowledge that:

- The details we have given in all sections of this application are true and correct to the best of our knowledge.
- We have the authority to commit our group to this application.
- All information contained in this application is subject to the Local Government Official Information and Meetings Act 1987, and therefore this information may be released upon request.
- The Council may collect from third parties any information it deems necessary about the applicant or the application.

Name:	[REDACTED]
Position held in group:	Lead Community Igniter
Signature:	[REDACTED]
Date:	19/10/2023
Name:	[REDACTED]
Position held in group:	Treasurer/ Board Member
Signature:	[REDACTED]
Date:	18/10/2023

8 CHECKLIST

Please complete the following checklist to ensure you have completed the application process and attached all necessary information:

- ✓ All sections of this form have been completed
- ✓ You have attached a bank generated deposit slip verifying your bank account details (2.6)
- ✓ You have attached a separate copy of your project plan where one has been developed (3.3)
- ✓ You have attached quotes for expenses for your project service or proposal where these have been obtained (5.1)
- ✓ You have attached a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year (6.1)
- ✓ The declaration form has been signed by two members of your organisation that have the authority to do so (7)

6.1.2 HALO Whakatane(Cont.)

Statement of Service Performance



	2023	2022
Description and Quantification of the Entity's Outputs		
Hectares covered	74,538	-
Number of landowners/managers providing access and actively participating in pest eradication	12	-
Km of active predator trap network	52	-
Number of Backyard Trappers (Target 15% increase per annum)	391	385
Number of active Halo volunteers including Backyard Trappers) (Target 10% increase per annum)	469	442
Number of working bees held	19	-
Number of Public Events Participated in (Target Minimum 6 per annum)	12	10
Number of native vegetation species planted annually	1,174	-
Number of accredited training opportunities provided for Halo Kaitiakitanga Kadets	3	-
Number of Kaitiakitanga Kadet programmes supported by youth leaders	2	-
Number of students engaged in our education programme for year	650	-
Teachers linked to local opportunities to explore in nature (Target 3 per annum)	5	12
Workshops and conferences attended (Target 2 per annum)	4	4

6.1.2 HALO Whakatane(Cont.)



Statement of Financial Performance

Halo Whakatane Incorporated
For the year ended 31 March 2023

'How was it funded?' and 'What did it cost?'

	NOTES	2023	2022
Revenue			
Donations, fundraising and other similar revenue	1	229,761	324,078
Fees, subscriptions and other revenue from members	1	696	535
Revenue from providing goods or services	1	4,710	1,885
Interest, dividends and other investment revenue	1	3,445	124
Total Revenue		238,611	326,622
Expenses			
Volunteer and contractor related costs	2	165,406	130,825
Costs related to providing goods or service	2	106,439	30,067
Other expenses	2	5,854	3,844
Total Expenses		277,698	164,736
Surplus/(Deficit) for the Year		(39,087)	161,886

This statement has been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.

6.1.2 HALO Whakatane(Cont.)



Statement of Financial Position

Halo Whakatane Incorporated As at 31 March 2023

'What the entity owns?' and 'What the entity owes?'

	NOTES	31 MAR 2023	31 MAR 2022
Assets			
Current Assets			
Bank accounts and cash	3	86,125	226,751
Debtors and prepayments	3	24,745	3,214
Inventory	3	27,244	12,796
Other Current Assets	3	101,097	31,197
Total Current Assets		239,212	273,959
Non-Current Assets			
Vehicles, tools, furniture and equipment	5	15,572	8,494
Total Non-Current Assets		15,572	8,494
Total Assets		254,784	282,452
Liabilities			
Current Liabilities			
Payables	4	21,023	11,170
Other current liabilities	4	-	-
Total Current Liabilities		21,023	11,170
Non-Current Liabilities			
Loans	4	7,961	6,395
Total Non-Current Liabilities		7,961	6,395
Total Liabilities		28,984	17,566
Total Assets less Total Liabilities (Net Assets)		225,799	264,887
Accumulated Funds			
Assets introduced at market value 31st March 20	6	11,257	11,257
Accumulated surpluses or (deficits)	6	214,542	253,630
Total Accumulated Funds		225,799	264,887

This statement has been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.

6.1.2 HALO Whakatane(Cont.)



Statement of Cash Flows

Halo Whakatane Incorporated For the year ended 31 March 2023

'How the entity has received and used cash'

	2023	2022
Cash Flows from Operating Activities		
Donations, fundraising and other similar receipts	212,645	344,078
Fees, subscriptions and other receipts from members	800	615
Receipts from providing goods or services	5,192	2,168
Interest, dividends and other investment receipts	3,445	124
GST	23,930	(11,456)
Payments to suppliers and contractors	(309,582)	(173,788)
Total Cash Flows from Operating Activities	(63,570)	161,741
Cash Flows from Investing and Financing Activities		
Receipts from sale of property, plant and equipment	435	-
Receipts from sale of investments	232,306	-
Proceeds from loans borrowed from other parties	5,371	7,941
Payments for tools, furniture and equipment	(9,089)	(2,303)
Payments to purchase investments	(302,206)	(115)
Repayments of loans borrowed from other parties	(3,805)	(2,395)
Cash flows from other investing and financing activities	(67)	-
Total Cash Flows from Investing and Financing Activities	(77,056)	3,128
Net Increase/(Decrease) in Cash	(140,626)	164,869
Bank Accounts and Cash		
Opening cash	(226,751)	(61,882)
Closing cash	(86,125)	(226,751)
Net change in cash for period	140,626	(164,869)

This statement has been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.

6.1.2 HALO Whakatane(Cont.)



Notes to the Performance Report

Halo Whakatane Incorporated For the year ended 31 March 2023

	2023	2022
1. Analysis of Revenue		
Donations, fundraising and other similar revenue		
Contribution - Eastbay REAP Schools	-	1,000
Contribution - Toi Kai Rawa	-	1,000
Contribution - Whakatane Kiwi Trust (Bobs picnic table)	-	1,739
Donations	3,597	1,179
Grant Received - BOP Community Bay Trust	190,000	190,000
Grant Received - DOC Community Fund	-	26,700
Grant Received - DOC re Volunteer Gathering	700	916
Grant Received - Environmental Enhancement Fund	24,272	18,689
Grant Received - Rotary re T shirts	-	609
Grant Received - Southern Trust (Bobs walkway)	-	35,435
Grant Received - Waste Minimization Business Grant	-	520
Grant Received - WDC Community Board (Bobs Walkway)	-	40,000
Grant Received - WDC Community Board (TFSNZ)	2,400	-
Host Organization Funding - Royal Society Te Aparangi	2,500	-
Rental Rebate - WDC (Halo Hub)	6,292	6,292
Total Donations, fundraising and other similar revenue	229,761	324,078
Fees, subscriptions and other revenue from members		
Membership fees	696	535
Total Fees, subscriptions and other revenue from members	696	535
Revenue from providing goods or services		
Sales - Traps	1,249	1,885
Trees for Survival Income	3,460	-
Total Revenue from providing goods or services	4,710	1,885
Interest, dividends and other investment revenue		
Interest Recd - 50 acc	69	9
Interest Received	3,375	115
Total Interest, dividends and other investment revenue	3,445	124
	2023	2022
2. Analysis of Expenses		
Volunteer and contractor related costs		
Contractors	159,931	129,738
Wages - Youth	451	812
Training - Contractors	602	-
Training - Volunteers	2,643	-
Travel - National	1,778	275
Total Volunteer and contractor related costs	165,406	130,825

6.1.2 HALO Whakatane(Cont.)

Notes to the Performance Report



	2023	2022
Costs related to providing goods or services		
Closing stock on hand adj - Traps	(14,144)	(3,087)
Bobs Track - costs	75,473	4,350
Educational Resources	2,936	216
Insurance	2,125	515
Licences and permits	89	-
Motor Vehicle Expenses	160	-
Native Plants	5,098	575
Graphic design and signage	1,542	2,740
Rabbit Control	3,490	-
Rent	9,333	9,333
Subscriptions	100	100
Internet	165	297
Traps - materials	15,690	10,830
Traps - purchased	-	521
Trapping Kit Resources	92	1,059
Volunteer Dinner	1,828	1,239
Website hosting & maintenance	125	313
Weed Control	2,337	1,067
Total Costs related to providing goods or services	106,439	30,067
Other expenses		
Advertising	81	507
Bank Fees	45	42
Consulting & Accounting	2,963	2,790
Depreciation	1,576	-
Light, Power, Heating	1,189	505
Total Other expenses	5,854	3,844
	2023	2022

3. Analysis of Assets

Bank accounts and cash		
Society Acc - 00	76,761	201,275
Streamline DOCCF - 01	1,145	19,063
Omni Acc - Debit Card	127	-
On behalf of Community Groups - 50	8,092	6,413
Total Bank accounts and cash	86,125	226,751
Debtors and prepayments		
Accounts Receivable	24,745	3,214
Total Debtors and prepayments	24,745	3,214
Inventory		
Educational Resources on hand	3,000	2,696
Stock on hand - Traps	24,244	10,100
Total Inventory	27,244	12,796

6.1.2 HALO Whakatane(Cont.)

Notes to the Performance Report



	2023	2022
Other current assets		
Term Deposit - 072 (8 July 21 .35%)	-	20,865
Term Deposit - 073 (21 July 21 .35%)	-	10,332
Term Deposit 76-6 Jun 23 4.45%	101,097	-
Total Other current assets	101,097	31,197

	2023	2022
4. Analysis of Liabilities		
Payables		
Accounts Payable	22,009	13,648
GST	(986)	(2,478)
Total Payables	21,023	11,170
Other current liabilities		
Rounding	-	-
Total Other current liabilities	-	-
Funds held for Community Organisations		
Apanui Salt Marsh Care Group	153	153
Otamakaokao Kaitiaki Trust	863	581
Whakatane Bird Rescue	6,945	5,662
Total Funds held for Community Organisations	7,961	6,395

	2023	2022
5. Vehicles, tools, furniture and Equipment		
Furniture and Fittings		
Accumulated depreciation - furniture and fittings owned	(284)	-
Total Furniture and Fittings	(284)	-
Tools, furniture and Equipment		
Fixed assets	11,574	8,494
Owned fixed assets	356	-
Accumulated depreciation - fixed assets owned	(119)	-
Total Tools, furniture and Equipment	11,812	8,494
Total Vehicles, tools, furniture and Equipment	11,528	8,494

	2023	2022
6. Accumulated Funds		
Accumulated Funds		
Opening Balance	264,887	103,001
Accumulated surpluses or (deficits)	(39,087)	161,886
Total Accumulated Funds	225,799	264,887
Total Accumulated Funds	225,799	264,887

6.1.2 HALO Whakatane(Cont.)

Notes to the Performance Report



7. Commitments

There are no commitments as at 31 March 2023 (Last year - nil).

8. Contingent Liabilities and Guarantees

There are no contingent liabilities or guarantees as at 31 March 2023 (Last year - nil).

9. Significant Grants and Donations with Conditions not Recorded as a Liability

As at 31st March 2023 Halo Whakatane Incorporated had received grants which had not been fully spent as per the terms of the Grant. These unspent balances are as follows:

Bay Trust	\$118,093
DOC Community Fund	\$3,998
Environmental Enhancement Fund (BOPRC)	\$17,680
Rotary Club Whakatane	\$609
Total Unspent Tagged Funds	\$140,380

10. Assets Held on Behalf of Others

Funds are held on behalf of the following community environmental organisations:

Apanui Salt Marsh Care Group	\$153.04	(2022	\$153.04)
Otamakaokao Kaitiaki Trust	\$862.63	(2022	\$580.63)
Whakatane Bird Rescue	\$6,945.17	(2022	\$5,661.75)
Total	\$7,960.84	(2022	\$6,395.42)

11. Related Parties

There were no transactions involving related parties during the financial year.

12. Events After the Balance Date

There were no events that have occurred after the balance date that would have a material impact on the Performance Report (Last year - nil).

13. Ability to Continue Operating

The entity will continue to operate for the foreseeable future.



Depreciation Schedule

Halo Whakatane Incorporated
 For the year ended 31 March 2023

NAME	COST	OPENING VALUE	PURCHASES	SALE PRICE	DEP RECOVERED	LOSS	RATE	DEPRECIATION	CLOSING VALUE	PRIVATE USE AMOUNT
Computer Equipment										
Epson Ecotank Printer	356	-	356	-	-	-	40.00%	119	237	-
Total Computer Equipment	356	-	356	-	-	-		119	237	-
Motor Vehicles										
Trailer	5,217	-	5,217	-	-	-	30.00%	1,174	4,043	-
Total Motor Vehicles	5,217	-	5,217	-	-	-		1,174	4,043	-
Tools, Furniture and Equipment										
3 backpacks for carrying in traps	748	748	-	-	-	-		-	748	-
3x Recycle bins plus labels	391	391	-	-	-	-		-	391	-
BBQ	250	250	-	-	-	-		-	250	-
Community Banners (x7)	1,050	1,050	-	-	-	-		-	1,050	-
Dolly	50	50	-	-	-	-		-	50	-
Event Table Large (x 2)	160	160	-	-	-	-		-	160	-
Event Table Small	50	50	-	-	-	-		-	50	-
Gazebo (x2)	200	200	-	-	-	-		-	200	-
Gorilla Cart	173	-	173	-	-	-	20.00%	14	159	-
Halo Banner	150	150	-	-	-	-		-	150	-
Halo Feather Flag	290	290	-	-	-	-		-	290	-
Halo Sandwich Board	50	50	-	-	-	-		-	50	-
Halo Small Blue Fabric Banner	20	20	-	-	-	-		-	20	-
Halo Small Wall Sign	20	20	-	-	-	-		-	20	-
Halo Teardrop flag and stand	100	100	-	-	-	-		-	100	-
Kids gloves (5 pairs)	50	50	-	-	-	-		-	50	-

These financial statements have been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.



Depreciation Schedule

NAME	COST	OPENING VALUE	PURCHASES	SALE PRICE	DEP RECOVERED	LOSS	RATE	DEPRECIATION	CLOSING VALUE	PRIVATE USE AMOUNT
Kids hammers (x 8)	96	96	-	-	-	-		-	96	-
Kids picnic table and chair set	50	50	-	-	-	-		-	50	-
Large Hammers (x 9)	162	162	-	-	-	-		-	162	-
Large Printed Wall Banners (x2)	800	800	-	-	-	-		-	800	-
Ryobi Drills - x3	258	-	258	-	-	-	20.00%	4	254	-
Saw horses (x 4)	200	200	-	-	-	-		-	200	-
SHMAKP Kit	2,649	-	2,649	-	-	-	20.00%	265	2,384	-
Small Spades (x 2)	30	30	-	-	-	-		-	30	-
Solo Knapsack Sprayer	413	413	-	-	-	-		-	413	-
Trapping App	2,553	2,553	-	-	-	-		-	2,553	-
Weeding tools	461	461	-	-	-	-		-	461	-
White Board	50	50	-	-	-	-		-	50	-
Wifi Modem	100	100	-	-	-	-		-	100	-
Total Tools, Furniture and Equipment	11,574	8,494	3,080	-	-	-		284	11,291	-
Total	17,148	8,494	8,654	-	-	-		1,576	15,572	-

These financial statements have been prepared without conducting an audit or review engagement, and should be read in conjunction with the attached Compilation Report.

6.1.3 Harmony and Hope

6.1.3 Harmony and Hope

6.1.3 Harmony and Hope(Cont.)



All sections must be completed and supporting material attached to the back of the form (see section 8. Checklist).

More information can be found on our website www.whakatane.govt.nz
or by contacting Sharon Major, Community Funding Advisor on (07) 306 0500

Applications must be submitted by 5pm on 27 October 2023

Completed applications
must be emailed to:

Community Funding Advisor
grants@whakatane.govt.nz

1 CONTACT DETAILS

1.1 Name of organisation: Harmony and Hope Animal Rescue Trust

1.2 Name of principal contact: [REDACTED]
Position held in group: Trustee
Phone (day): [REDACTED] Website: hhar.org.nz
Email: [REDACTED]
Postal address for correspondence:
46 Kirk St Whakatane

1.3 Name of secondary contact: [REDACTED]
Position held in group: trustee
Phone (day): [REDACTED] Website:
Email: [REDACTED]
Postal address for correspondence:
46 Kirk St Whakatane

6.1.3 Harmony and Hope(Cont.)

3 ABOUT YOUR FUNDING REQUEST

3.1 Please provide a title for the project, service or proposal for which you are seeking funding (max 8 words):

Veterinary Desexing bills

3.2	Cost of your project or service: (This should match table 5.1)	Amount requested from Council: (This should match table 5.1)
	TOTAL \$500	\$500

3.3 Give a brief description of the project, service or proposal for which you are seeking funding (if you have a separate project plan or require more space, please list the key points here and attach a full description of your proposal to the back of this form):

We constantly get requests to assist with desexing costs of pets, so this funding will help desex pets in our community and avoid unwanted animals being born and discarded.

3.4 How long does the project, service or proposal run?

Starts: _____

Finishes: _____

Ongoing:

6.1.3 Harmony and Hope(Cont.)

4 OUTCOMES AND OUTPUTS OF YOUR PROJECT, SERVICE OR PROPOSAL

4.1 How will you know if your project, service or proposal is successful, and what are the benefits to the community?

Benefits include no dumped animals. Cats kittens left to fend for themselves and destroy bird populations.

Desexed animals are less stressed, less aggressive. No unwanted pregnancies and the stress of having to deal with the unwanted puppies and kittens.

4.2 How does your proposal directly support one or more of the Community Outcomes of the Whakatane District?

Effective Leadership - Striving for our Future Wellbeing

Community Needs – A caring community Yes

Quality Services – Excellent Value for Money

Valuing our Environment - Sustaining for future generations YES

Reliable and Affordable Infrastructure – Meeting current and future needs

Sustainable Economic Development – Working in partnership

4.3 What will happen to the project, service or proposal if this funding application is unsuccessful, or if only a portion of the funds are received?

The project will proceed as outlined

The project will be delayed (please specify expected length of delay): _____

The project will be downgraded

The project will be prevented from being carried out

Other (please specify):

6.1.3 Harmony and Hope(Cont.)

5

5.1

Income for project or service			
Description of cost*	\$	Income source	\$
Salaries / wages	\$0	Applicant organisation's contribution	\$
Postage / telephone / administration	\$	Fundraising	\$
Advertising / promotion	\$	Donations / sponsorship	\$
Professional fees	\$	Entry fees	\$
Travel costs	\$	Value of donated material	\$
Project materials	\$	Grants (please specify):	\$500
Labour cost	\$		
Venue / equipment hire	\$		
Other costs (please specify):	\$500		
Veterinary costs			
		Other income (please specify):	\$
TOTAL ESTIMATED COST	\$500	TOTAL INCOME	\$500

TOTAL FUNDING SHORT FALL

\$

6.1.3 Harmony and Hope(Cont.)

6 FINANCIAL DETAILS OF YOUR ORGANISATION

Note: All figures to include GST (if any).

6.1	Last financial year	This financial year (to date of application)
What was your organisation's total income (money received)? *	\$130903	\$168752
What was your organisation's total expenditure (money spent)? *	\$33266	\$162207

* Please attach a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year

6.2	What is the current total of your bank balances (including savings and investments)?	\$6635	
	How much (if any) of this total is tagged or committed to other purposes?	Amount tagged	Purpose
	<i>Tagged or committed means a sum of money that has been set aside from your day to day operating funds, for a specific project or purpose (e.g. building project, forthcoming event)</i>	\$6635	Veterinary costs and pet food
		\$	
		\$	
		\$	
		\$	

6.3	What funding assistance has your group/organisation received from the Council over the past 3 years:		
	Year	Amount received	Purpose
	2022	500	Desexing pets

6.1.3 Harmony and Hope(Cont.)

7 DECLARATION

We the undersigned do solemnly and sincerely declare and acknowledge that:

- The details we have given in all sections of this application are true and correct to the best of our knowledge.
- We have the authority to commit our group to this application.
- All information contained in this application is subject to the Local Government Official Information and Meetings Act 1987, and therefore this information may be released upon request.
- The Council may collect from third parties any information it deems necessary about the applicant or the application.

Name:	[REDACTED]
Position held in group:	Trustee
Signature:	[REDACTED]
Date:	19/10/23
Name:	[REDACTED]
Position held in group:	Trustee
Signature:	[REDACTED]
Date:	19/10/23

8 CHECKLIST

Please complete the following checklist to ensure you have completed the application process and attached all necessary information:

- All sections of this form have been completed
- You have attached a bank generated deposit slip verifying your bank account details (2.6)
- You have attached a separate copy of your project plan where one has been developed (3.3)
- You have attached quotes for expenses for your project service or proposal where these have been obtained (5.1)
- You have attached a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year (6.1)

6.1.4 Have a Heart

6.1.4 Have a Heart

6.1.4 Have a Heart(Cont.)



All sections must be completed and supporting material attached to the back of the form (see section 8. Checklist).

More information can be found on our website www.whakatane.govt.nz
or by contacting Sharon Major, Community Funding Advisor on (07) 306 0500

Applications must be submitted by 5pm on 27 October 2023

Completed applications
must be emailed to:

Community Funding Advisor
grants@whakatane.govt.nz

1 CONTACT DETAILS

1.1 Name of organisation: Have a Heart Charitable Trust

1.2 Name of principal contact: [REDACTED]
Position held in group: Funding Coordinator
Phone (day): [REDACTED] Website: <https://haveaheart.org.nz>
Email: [REDACTED]
Postal address for correspondence:
Have a Heart, 8B Merritt Street, Whakatane

1.3 Name of secondary contact: [REDACTED]
Position held in group: CEO
Phone (day): [REDACTED] Website: <https://haveaheart.org.nz>
Email: [REDACTED]
Postal address for correspondence:
Have a Heart, 8B Merritt Street, Whakatane

6.1.4 Have a Heart(Cont.)

2	ABOUT YOUR ORGANISATION
2.1	Which of the following describes your organisation? Incorporated society: <input checked="" type="checkbox"/> Trust: <input checked="" type="checkbox"/> Other (please specify): _____
2.2	How long has your organisation been operating? 11 years
2.3	What are your group's main objectives and activities? <p>Our purpose is to grow great families at the heart of our community, connecting with those most vulnerable, creating safe homes and happy families.</p> <p>To assist in the creation and development of projects, providing benefits to people who due to difficult circumstances, are in need of assistance and support. We collaborate with various agencies, supporting & making referrals as required. We work with other organisations, providing opportunities, through events, projects, activities, and services, to make connections.</p> <p>We manage, administer, and organise community events and 9 community projects. We also work in collaboration with several other social service providers who run projects in the community. The community events include Heart to Heart Expo and Family which is run yearly, we also opened our Have a Heart Community Op Shop in Kopeopeo on 9th May this year. Our projects include the Clothing Hub, Food Hub, The Te Taurahere Whatamanawa Project - Hughes Place Project, Whai project & Mahi Kai Youth.</p>
2.4	How many paid staff in your organisation? 4 How many volunteer staff in your organisation? 10 but will increase at events. How many people does your group work within a typical week? (i.e. the total number including clients, members, participants)
2.5	Is your group GST registered? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If Yes, record your GST number here: ██████████
2.6	Please record your Bank Account number here*: ██████████

* please attach a bank generated deposit slip to the back of this application form to confirm account details.

6.1.4 Have a Heart(Cont.)

3 ABOUT YOUR FUNDING REQUEST

3.1 Please provide a title for the project, service or proposal for which you are seeking funding (max 8 words):

Heart to Heart Expo and Family Festival

3.2	Cost of your project or service: (This should match table 5.1)	Amount requested from Council: (This should match table 5.1)
	TOTAL \$24,518.94	\$500.00

3.3 Give a brief description of the project, service or proposal for which you are seeking funding (if you have a separate project plan or require more space, please list the key points here and attach a full description of your proposal to the back of this form):

We require funding for the design and printing of posters and flyers for our annual Heart to Heart Expo and Family Festival.

Our Have a Heart Expo and family festival, is held every year to create connections in the Community with service providers. Last year's event saw over 1,200 people from the Whakatane community attending this event. This year's event also saw an increase in service providers attending these included Diabetes NZ, Hearing Support, Te Puna Ora o Mataatua, Bluelight, Big Brother Big Sister, Kindergartens plus two main Iwi groups, Ngati Awa and Tuhoe participate in this event. Our Heart to Heart Expo and family festival aims at working together to create change, with strong collaboration across multiple Organisations.

3.4 How long does the project, service or proposal run?

Event is on for 1 Day

Starts: 23rd March 2024

Finishes: 23rd March 2024

Ongoing:

6.1.4 Have a Heart(Cont.)

4 OUTCOMES AND OUTPUTS OF YOUR PROJECT, SERVICE OR PROPOSAL

4.1 How will you know if your project, service or proposal is successful, and what are the benefits to the community?

This free event is of huge benefit to our most vulnerable members of our community, where they can gain access and support from relevant charity, service provider or gain access to free warm clothing or bedding, these benefits are not just one off but can last with continuous connections, we aim to strengthen our communities creating community pride and coming together. We know this project/ event is successful due to the amount of people that attend and the number of service providers that want to attend/have a stall at our event, this year we increased the number to 37.

4.2 How does your proposal directly support one or more of the Community Outcomes of the Whakatane District?

Effective Leadership - Striving for our Future Wellbeing

Community Needs – A caring community

Quality Services – Excellent Value for Money

Valuing our Environment - Sustaining for future generations

Reliable and Affordable Infrastructure – Meeting current and future needs

Sustainable Economic Development – Working in partnership

4.3 What will happen to the project, service or proposal if this funding application is unsuccessful, or if only a portion of the funds are received?

The project will proceed as outlined

The project will be delayed (please specify expected length of delay): _____

The project will be downgraded

The project will be prevented from being carried out

Other (please specify):

6.1.4 Have a Heart(Cont.)

5

5.1

Income for project or service			
Description of cost*	\$	Income source	\$
Salaries / wages- Volunteers	\$0	Applicant organisation's contribution	\$
Poster Design	\$299.00	Fundraising	\$
Poster Printing	\$400.00	Donations / sponsorship	\$849.00
Advertising/Promotion-1XX, Beacon, SunFM	\$2,357.00	Entry fees	\$Free Event
Rides, face painter, balloon man, bouncy castle	\$8,735.00	Value of donated material, sausage sizzle, scone mix, water & other food items	\$1,200.00
Venue Hire-War Memorial & Rex Morpeth	\$1,968.94	Grants (please specify):	\$
Traffic Management	\$1,984.00	NZCT, rides,face painter etc	\$8,735.00
Sausage Sizzle	\$800.00	Lotteries, prizes, hangi meat & some food	\$3,750.0
Hangi Meat	\$250.00	Bay Trust, advertising	\$2,357.00
Hangi veg	\$400.00	Whakatane/Ohope Community Board, venue hire, traffic management	\$3,952.94
Scone mix, sugar,tea,coffee, water bottles	\$650.00	Trust Horizon, Mics, PA System etc	\$3,175.00
Prizes	\$3,500.0		
Mics, PA System, stage monitors etc	\$3,175.00		
1 st Aid - TPOOM	\$Free		
TOTAL ESTIMATED COST	\$24,518.94	TOTAL INCOME	\$24,018.94
TOTAL FUNDING SHORT FALL	\$500.00		

6.1.4 Have a Heart(Cont.)

6 FINANCIAL DETAILS OF YOUR ORGANISATION

Note: All figures to include GST (if any).

6.1	Last financial year	This financial year (to date of application)
What was your organisation's total income (money received)? * Last financial year we received monies from MSD for our food hub-COVID Packs provided	\$690,669.13	\$473,588.34
What was your organisation's total expenditure (money spent)? *	\$660,414.89	\$456,547.53

* Please attach a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year

6.2	What is the current total of your bank balances (including savings and investments)?	\$ see financial accounts	
	How much (if any) of this total is tagged or committed to other purposes? <i>Tagged or committed means a sum of money that has been set aside from your day to day operating funds, for a specific project or purpose (e.g. building project, forthcoming event)</i>	Amount tagged	Purpose
		\$	Food Hub
		\$	Have a Heart Op Shop & Clothing Hub
		\$	Rent & operational costs for Merritt Street premises where food hub is based and our offices.
		\$	PETRA Programme
		\$	Mahi Kai Youth

6.3	What funding assistance has your group/organisation received from the Council over the past 3 years:	
	Year	Amount received
		Purpose
	2021, 2022 yet to receive this year.	\$4,300.00
		Multi Year Grant Funding \$2,300 (including gst) each year

6.1.4 Have a Heart(Cont.)

7 DECLARATION

We the undersigned do solemnly and sincerely declare and acknowledge that:

- The details we have given in all sections of this application are true and correct to the best of our knowledge.
- We have the authority to commit our group to this application.
- All information contained in this application is subject to the Local Government Official Information and Meetings Act 1987, and therefore this information may be released upon request.
- The Council may collect from third parties any information it deems necessary about the applicant or the application.

Name:	[REDACTED]
Position held in group:	
Signature:	[REDACTED]
Date:	
Name:	[REDACTED]
Position held in group:	
Signature:	[REDACTED]
Date:	

8 CHECKLIST

Please complete the following checklist to ensure you have completed the application process and attached all necessary information:

- All sections of this form have been completed
- You have attached a bank generated deposit slip verifying your bank account details (2.6)
- You have attached a separate copy of your project plan where one has been developed (3.3)
- You have attached quotes for expenses for your project service or proposal where these have been obtained (5.1)
- You have attached a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year (6.1)
- The declaration form has been signed by two members of your organisation that have the authority to do so (7)
- You have made a copy of this application for your future reference

6.1.5 Nukuhou North Settlers Hall

6.1.5 Nukuhou North Settlers Hall

6.1.5 Nukuhou North Settlers Hall(Cont.)


Annual Grants- Single Year Funding
APPLICATION FORM

All sections must be completed and supporting material attached to the back of the form (see section 8. Checklist).

More information can be found on our website www.whakatane.govt.nz
or by contacting Sharon Major, Community Funding Advisor on (07) 306 0500

Applications must be submitted by 5pm on 27 October 2023

Completed applications
must be emailed to:

Community Funding Advisor
grants@whakatane.govt.nz

1 CONTACT DETAILS

1.1 Name of organisation: NUKUHOU NORTH SETTLERS HALL.

1.2 Name of principal contact: [REDACTED]
Position held in group: SEC/TREASURER.
Phone (day): [REDACTED] Website:
Email: [REDACTED]
Postal address for correspondence: [REDACTED]
R.D. WAMANA
ESOP. 3196.

1.3 Name of secondary contact: [REDACTED]
Position held in group: CHAIRMAN
Phone (day): [REDACTED] Website:
Email: [REDACTED]
Postal address for correspondence: [REDACTED]
R.D. WAMANA
ESOP 3196

WHAKATĀNE DISTRICT COUNCIL
20 OCT 2023

6.1.5 Nukuhou North Settlers Hall(Cont.)

2 ABOUT YOUR ORGANISATION

2.1 Which of the following describes your organisation? Incorporated society:
Trust:
Other (please specify): _____

2.2 How long has your organisation been operating? SINCE 1952

2.3 What are your group's main objectives and activities?
COMMUNITY HALL
PROVIDING A VENUE FOR DISTRICT ACTIVITIES
AND POTENTIAL CIVIL DEFENCE FACILITY.

2.4 How many paid staff in your organisation? NONE
How many volunteer staff in your organisation? 9
How many people does your group work with in a typical week? (i.e. the total number including clients, members, participants)
N/A.

2.5 Is your group GST registered? Yes No
If Yes, record your GST number here

2.6 Please record your Bank Account number here* XXXXXXXXXXXXXXXXXXXX

* please attach a bank generated deposit slip to the back of this application form to confirm account details.

6.1.5 Nukuhou North Settlers Hall(Cont.)

3 ABOUT YOUR FUNDING REQUEST		
3.1	Please provide a title for the project, service or proposal for which you are seeking funding (max 8 words):	
	HELP TO PAY ANNUAL INSURANCE PREMIUM	
3.2	Cost of your project or service (This should match table 5.1)	Amount requested from Council (This should match table 5.1)
	TOTAL \$3,800	5
3.3	Give a brief description of the project, service or proposal for which you are seeking funding (if you have a separate project plan or require more space, please list the key points here and attach a full description of your proposal to the back of this form):	
	WE REQUEST HELP TO PAY OUR ANNUAL INSURANCE PREMIUM. FOR OUR COMMUNITY HALL WE HAVE LIMITED INCOME AND LOUSTANTLY FUNDRAISE TO COVER POWER, INSURANCE AND MAINTENANCE COSTS ANY HELP BY WAY OF YOUR ANNUAL GRANTS WILL BE GRATEFULLY RECEIVED.	
3.4	How long does the project, service or proposal run?	Starts: _____ Finishes: _____ Ongoing: <input type="checkbox"/>
	N/A	

6.1.5 Nukuhou North Settlers Hall(Cont.)

4 OUTCOMES AND OUTPUTS OF YOUR PROJECT, SERVICE OR PROPOSAL	
4.1	How will you know if your project, service or proposal is successful, and what are the benefits to the community? N/A
4.2	How does your proposal directly support one or more of the Community Outcomes of the Whakatane District? <input type="checkbox"/> Effective Leadership - Striving for our Future Wellbeing <input checked="" type="checkbox"/> Community Needs – A caring community <input type="checkbox"/> Quality Services – Excellent Value for Money <input type="checkbox"/> Valuing our Environment – Sustaining for future generations <input type="checkbox"/> Reliable and Affordable Infrastructure – Meeting current and future needs <input type="checkbox"/> Sustainable Economic Development – Working in partnership
4.3	What will happen to the project, service or proposal if this funding application is unsuccessful, or if only a portion of the funds are received? <input checked="" type="checkbox"/> The project will proceed as outlined <input type="checkbox"/> The project will be delayed (please specify expected length of delay) _____ <input type="checkbox"/> The project will be downgraded <input type="checkbox"/> The project will be prevented from being carried out Other (please specify): SMALL COMMITTEE WILL DO MORE DINNERS MARKETS ETC TO FUNDRAISE

6.1.5 Nukuhou North Settlers Hall(Cont.)

5

5.1

Income for project or service			
Description of cost*	\$	Income source	\$
Salaries / wages	\$	Applicant organisation's contribution	\$
Postage / telephone / administration	\$	Fundraising	\$
Advertising / promotion	\$	Donations / sponsorship	\$
Professional fees	\$	Entry fees	\$
Travel costs	\$	Value of donated material	\$
Project materials	\$	Grants (please specify):	\$
Labour cost	\$		
Venue / equipment hire	\$		
Other costs (please specify):	\$		
INSURANCE PREMIUM	3,800.	Other income (please specify):	\$
TOTAL ESTIMATED COST	\$	TOTAL INCOME	\$
TOTAL FUNDING SHORT FALL	\$		

6.1.5 Nukuhou North Settlers Hall(Cont.)

6 FINANCIAL DETAILS OF YOUR ORGANISATION

Note: All figures to include GST (if any).

6.1	Last financial year	This financial year (to date of application)
What was your organisation's total income (money received)? *	\$ 19477.41	\$ 12402.77
What was your organisation's total expenditure (money spent)? *	\$ 20109.45	\$ 5667.44

* Please attach a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year

6.2	What is the current total of your bank balances (including savings and investments)?	\$ 27456.27	
	How much (if any) of this total is tagged or committed to other purposes?	Amount tagged	Purpose
	Tagged or committed means a sum of money that has been set aside from your day to day operating funds, for a specific project or purpose (e.g. building project, forthcoming event)	\$	ALL FUNDS BEING
		\$	ACCUMULATED FOR
		\$	MAINTENANCE ON THE
		\$	HALL INTERIOR AND
		\$	EXTERIOR.

6.3	What funding assistance has your group/organisation received from the Council over the past 3 years.	
	Year	Purpose
	2020	} INSURANCE
	2021	
	2022	

6.1.5 Nukuhou North Settlers Hall(Cont.)

7 DECLARATION

We the undersigned do solemnly and sincerely declare and acknowledge that:

- The details we have given in all sections of this application are true and correct to the best of our knowledge.
- We have the authority to commit our group to this application.
- All information contained in this application is subject to the Local Government Official Information and Meetings Act 1987, and therefore this information may be released upon request.
- The Council may collect from third parties any information it deems necessary about the applicant or the application.

Name:	[REDACTED]
Position held in group:	Sec/Treasurer.
Signature:	[REDACTED]
Date:	16.10.23
Name:	[REDACTED]
Position held in group:	Chairman
Signature:	[REDACTED]
Date:	16.10.23

8 CHECKLIST

Please complete the following checklist to ensure you have completed the application process and attached all necessary information:

- All sections of this form have been completed
- You have attached a bank generated deposit slip verifying your bank account details (2.6)
- You have attached a separate copy of your project plan where one has been developed (3.3)
- You have attached quotes for expenses for your project service or proposal where these have been obtained (5.1)
- You have attached a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year (6.1)
- The declaration form has been signed by two members of your organisation that have the authority to do so (7)
- You have made a copy of this application for your future reference

6.1.5 Nukuhou North Settlers Hall(Cont.)

NUKUHOU NORTH SETTLERS HALL
 INCOME AND EXPENDITURE ACCOUNT

Year ended 31.03.2023

Opening Balance 1.04.2022	\$6907.01	Power.	\$2193.41
Hall hire	2375.00	Advertising.	77.22
Fundraising	11728.72	Repairs and Maintenance.	2153.95
Donations	3660.00	Serious Saver	5140.00
Miscellaneous	1653.95	Fundraising Expenses	2670.46
Interest.	59.74	Insurance	3981.26
		Closing Balance 30.03.2023	6274.97
	\$26384.42		\$26384.42

SERIOUS SAVER ACCOUNT

Opening Balance 1.04.2022	\$8123.88
Transfer from cheque a/cc.	5240.00
Interest	271.08
Closing Balance 31-03-2023.	\$13634.96

6.1.6 Parent2Parent

6.1.6 Parent2Parent

6.1.6 Parent2Parent(Cont.)



All sections must be completed and supporting material attached to the back of the form (see section 8. Checklist).

More information can be found on our website www.whakatane.govt.nz
or by contacting Sharon Major, Community Funding Advisor on (07) 306 0500

Applications must be submitted by 5pm on 27 October 2023

Completed applications must be emailed to: [Community Funding Advisor grants@whakatane.govt.nz](mailto:grants@whakatane.govt.nz)

1 CONTACT DETAILS

1.1 Name of organisation: Parent to Parent Coastal Bay of Plenty

1.2 Name of principal contact: [REDACTED]
Position held in group: Funding Lead
Phone (day): [REDACTED] Website: www.parent2parent.org.nz
Email: [REDACTED]
Postal address for correspondence: [REDACTED]

1.3 Name of secondary contact: [REDACTED]
Position held in group: Regional Coordinator
Phone (day): [REDACTED] Website: www.parent2parent.org.nz
Email: [REDACTED]
Postal address for correspondence: [REDACTED]
[REDACTED]

6.1.6 Parent2Parent(Cont.)

2 ABOUT YOUR ORGANISATION

2.1 Which of the following describes your organisation? Incorporated society:
 Trust:
 Other (please specify): _____

2.2 How long has your organisation been operating? 40 Years since 1983.

2.3 What are your group's main objectives and activities?

Parent to Parent's mission is to empower families and whānau of people with disabilities/health impairments/neurodiverse through support and information. Raising a child with a disability is an experience that is rarely planned, and we know it can be a challenging journey. We inform, educate, inspire and support families as they navigate the way through their family's experience with disability. Our Outreach programme allows us to offer a range of services for the whole family that contributes to this mission and deliver on the outcomes we strive to achieve for our families.

Inform - Information service tailored to each individual on more than 3600 conditions. Local information provided by our Regional Coordinator.

Educate - Workshops, Community conversations, seminars and programmes.

Inspire - Connections with others in similar situations and providing the skills and knowledge to inspire and enable families to live a good life.

Support - Weekly Support Groups, Matching service for parents and family events.

2.4 How many paid staff in your organisation? 2
 How many volunteer staff in your organisation? 79
 How many people does your group work with in a typical week? (i.e. the total number including clients, members, participants)
 100

2.5 Is your group GST registered? Yes No
 If Yes, record your GST number here: ██████████

2.6 Please record your Bank Account number here*: ██████████

** please attach a bank generated deposit slip to the back of this application form to confirm account details.*

6.1.6 Parent2Parent(Cont.)

3 ABOUT YOUR FUNDING REQUEST

3.1 Please provide a title for the project, service or proposal for which you are seeking funding (max 8 words):

Tane Talks Programme – Men’s Support Group

3.2	Cost of your project or service: (This should match table 5.1)	Amount requested from Council: (This should match table 5.1)
TOTAL	\$1500.00	\$1270.00

3.3 Give a brief description of the project, service or proposal for which you are seeking funding (if you have a separate project plan or require more space, please list the key points here and attach a full description of your proposal to the back of this form):

We are requesting financial support for our Tāne Talks programme. This programme offers Dad’s, Uncles and Grandads a place to connect with other men, to share stories about their tamariki and mokopuna, who have some form of disability or health impairment. Parent to Parent does not charge for its services, removing financial concern from the many barriers which can be faced by those looking to gain our support. As part of this programme we offer an online chat support group and events.

We would like to use the funding on an fishing trip event for Dads from the Whakatane area. This event has been successful in the past and is a great way to get the dads to relax and open up about any struggles that they may be having and to share experiences with other dads in similar situations.

3.4 How long does the project, service or proposal run?

Starts: _____

Finishes: _____

6.1.6 Parent2Parent(Cont.)

Ongoing:

4 OUTCOMES AND OUTPUTS OF YOUR PROJECT, SERVICE OR PROPOSAL

4.1 How will you know if your project, service or proposal is successful, and what are the benefits to the community?

Having Tane Talks as a place for males to talk, connect and debrief with other males in similar situations helps their spiritual, mental, physical, social and emotional wellbeing. The more we can do to support these men helps to improve the resilience of the family, resulting in better life outcomes for the whole family.

Our hope with being able to offer this programme in community is that it achieves the following;

- To improve the wellbeing of the men who attend
- To provide men with tools to create a happy home environment, strengthen relationships within the home and make connections and networks to support each other.

From the feedback we receive from our attendees and the continued increase in numbers we are able to gauge the success of the programme.

4.2 How does your proposal directly support one or more of the Community Outcomes of the Whakatane District?

Effective Leadership - Striving for our Future Wellbeing

Community Needs – A caring community

Quality Services – Excellent Value for Money

Valuing our Environment - Sustaining for future generations

Reliable and Affordable Infrastructure – Meeting current and future needs

Sustainable Economic Development – Working in partnership

6.1.6 Parent2Parent(Cont.)

4.3 What will happen to the project, service or proposal if this funding application is unsuccessful, or if only a portion of the funds are received?

The project will proceed as outlined

The project will be delayed
(please specify expected length of delay): _____

The project will be downgraded

The project will be prevented from being carried out

Other (please specify): We will need to apply to other funders or we will need to change the event activity that to reflect the level of funding received.

5

5.1

Income for project or service			
Description of cost*	\$	Income source	\$
Salaries / wages	\$	Applicant organisation's contribution	\$
Postage / telephone / administration	\$	Fundraising	\$
Advertising / promotion	\$	Donations / sponsorship	\$
Professional fees	\$	Entry fees	\$
Travel costs	\$100.00	Value of donated material	\$
Project materials	\$	Grants (please specify): COGS	\$230.00
Labour cost	\$		
Venue / equipment hire	\$1270.00		
Other costs (please specify):	\$130.00		
		Other income (please specify):	\$
TOTAL ESTIMATED COST	\$1500.00	TOTAL INCOME	\$230.00

TOTAL FUNDING SHORT FALL \$1270.00

6.1.6 Parent2Parent(Cont.)

6 FINANCIAL DETAILS OF YOUR ORGANISATION

Note: All figures to include GST (if any).

6.1	Last financial year	This financial year (to date of application)
What was your organisation's total income (money received)? *	\$45,522.00	\$
What was your organisation's total expenditure (money spent)? *	\$41,140.00	\$

* Please attach a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year

6.2	What is the current total of your bank balances (including savings and investments)?	\$14968.00												
	How much (if any) of this total is tagged or committed to other purposes? <i>Tagged or committed means a sum of money that has been set aside from your day to day operating funds, for a specific project or purpose (e.g. building project, forthcoming event)</i>	<table border="1"> <thead> <tr> <th>Amount tagged</th> <th>Purpose</th> </tr> </thead> <tbody> <tr> <td>\$11968.00</td> <td>Wages</td> </tr> <tr> <td>\$1500.00</td> <td>Monthly Support Groups</td> </tr> <tr> <td>\$</td> <td>Workshops</td> </tr> <tr> <td>\$1000.00</td> <td>Travel Expenses</td> </tr> <tr> <td>\$500.00</td> <td>Administration Costs</td> </tr> </tbody> </table>	Amount tagged	Purpose	\$11968.00	Wages	\$1500.00	Monthly Support Groups	\$	Workshops	\$1000.00	Travel Expenses	\$500.00	Administration Costs
Amount tagged	Purpose													
\$11968.00	Wages													
\$1500.00	Monthly Support Groups													
\$	Workshops													
\$1000.00	Travel Expenses													
\$500.00	Administration Costs													

6.3	What funding assistance has your group/organisation received from the Council over the past 3 years:	
	Year	Amount received
		Purpose
	2022	1000.00
		Sib Shop

6.1.6 Parent2Parent(Cont.)

7 DECLARATION

We the undersigned do solemnly and sincerely declare and acknowledge that:

- The details we have given in all sections of this application are true and correct to the best of our knowledge.
- We have the authority to commit our group to this application.
- All information contained in this application is subject to the Local Government Official Information and Meetings Act 1987, and therefore this information may be released upon request.
- The Council may collect from third parties any information it deems necessary about the applicant or the application.

Name:	██████████
Position held in group:	Funding Lead
Signature:	████████████████████████████████████████
Date:	24/10/2023
Name:	██████████
Position held in group:	Office Manager
Signature:	████████████████████████████████████████
Date:	24/10/2023

8 CHECKLIST

- Please complete the following checklist to ensure you have completed the application process and attached all necessary information:
- All sections of this form have been completed
 - You have attached a bank generated deposit slip verifying your bank account details (2.6)
 - You have attached a separate copy of your project plan where one has been developed (3.3)
 - You have attached quotes for expenses for your project service or proposal where these have been obtained (5.1)
 - You have attached a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year (6.1)
 - The declaration form has been signed by two members of your organisation that have the authority to do so (7)
 - You have made a copy of this application for your future reference

6.1.7 Whakatane Accessible and Inclusive WA

6.1.7 Whakatane Accessible and Inclusive WA

6.1.7 Whakatane Accessible and Inclusive WA(Cont.)


Annual Grants- Single Year Funding
APPLICATION FORM

All sections must be completed and supporting material attached to the back of the form (see section 8. Checklist).

More information can be found on our website www.whakatane.govt.nz
or by contacting Sharon Major, Community Funding Advisor on (07) 306 0500

Applications must be submitted by 5pm on 27 October 2023

Completed applications
must be emailed to:

Community Funding Advisor
grants@whakatane.govt.nz

1 CONTACT DETAILS

1.1 Name of organisation: Whakatāne Accessible and Inclusive (WAI)

1.2 Name of principal contact: Ruth Gerzon

Position held in group: member and funding adviser

Phone (day) [REDACTED] Website: none

Email [REDACTED]

Postal address for correspondence:

[REDACTED]

1.3 Name of secondary contact: Scott Saunders

Position held in group: chair

Phone (day) [REDACTED] Website: none

Email [REDACTED]

Postal address for correspondence:

[REDACTED]

WHAKATANE DISTRICT COUNCIL

30 OCT 2023

6.1.7 Whakatane Accessible and Inclusive WA(Cont.)

2 ABOUT YOUR ORGANISATION	
2.1	<p>Which of the following describes your organisation?</p> <p>Trust: <input type="checkbox"/></p> <p>Other (please specify): _____</p>
2.2	<p>How long has your organisation been operating? Four years but it only recently became a charitable trust. It was under the umbrella of the Virtual Eastern Bay Villages earlier. It was once called Inclusive and Accessible Eastern Bay Group and had a grant from Council under that name in 2021. We did not apply for a grant in 2022.</p>
2.3	<p>What are your group's main objectives and activities?</p> <ol style="list-style-type: none">1.1. Vision: Accessible, inclusive Eastern Bay of Plenty communities that meet everyone's needs.2. Mission: To enable disabled people/tāngata whaikaha, whānau whaikaha and seniors/pakeke in the Eastern Bay of Plenty to address issues around inclusion and access for all.<ol style="list-style-type: none">2.1. To give guidance to local and regional government, the business community, non government agencies, marae and runanga, recreational groups and clubs2.2. To support government and non-government agencies to develop disability and age-friendly strategies.2.3. To ensure disabled people/tāngata whaikaha, whānau whaikaha and seniors/pākeke know their rights and have access to services that promote their autonomy.2.4. To challenge instances of discrimination against disabled people/tāngata whaikaha, whānau whaikaha and seniors/pākeke.2.5. To network, share information, provide training, and promote issues of inclusion and access for all.
2.4	<p>How many paid staff in your organisation? One person 1 ½ hours a week</p> <p>How many volunteer staff in your organisation? 12</p> <p>How many people does your group work with in a typical week? (i.e. the total number including clients, members, participants)</p> <p>We meet monthly to share ideas (15 members) but we also visit other disability and senior groups on a regular basis to find out their ideas and let them know about our work. We also meet to respond to Council issues: such as making long term plan submissions, and currently to advise on emergency response planning for seniors and disabled. We held a public meeting this year on emergency response and that attracted 65 people.</p>
2.5	<p>Is your group GST registered? <input type="checkbox"/> No</p>

6.1.7 Whakatane Accessible and Inclusive WA(Cont.)

3 ABOUT YOUR FUNDING REQUEST

3.1 Please provide a title for the project, service or proposal for which you are seeking funding (max 8 words):

Promoting accessible and age friendly initiatives and policies in the Whakatāne District

3.2	Cost of your project or service: (This should match table 5.1)	Amount requested from Council: (This should match table 5.1)
TOTAL	\$ 1500	\$ 1500

3.3 Give a brief description of the project, service or proposal for which you are seeking funding (if you have a separate project plan or require more space, please list the key points here and attach a full description of your proposal to the back of this form):

Our members have personal experience of physical disability, vision impairment, mental illness, learning (intellectual disability) and ageing. We come with knowledge and experience of the barriers to inclusion in our district from a number of different angles.

We meet monthly to share ideas on changes needed that will remove barriers to accessibility and inclusion.

We respond to proposed policies and community events where advice on inclusion is needed, or where barriers become evident, promoting universal design.

Our group began under the guidance of the Disability Resource Centre Trust (The Disability and Age Friendly Advisory Group) and our members have a track record of submitting proposals and working alongside the Council. We have negotiated a draft Memorandum of Understanding with Council and now we are a charitable trust we hope to have that signed soon.

We also look to highlight disability issues in other ways. E.g. we are currently working with the Chamber of Commerce to incorporate a disability award in the 2024 business awards.

In 2024 we plan to organise advocacy training for disabled people and seniors to ensure their voices can be heard.

Now we are independent we are seeking a small amount of funding in order to pay for our meeting venue, secretarial skills transport and to reimburse members' expenses when making submissions and meeting with community leaders.

Most of our members are disabled so many cannot complete tasks undertaken by volunteers in other organisations e.g. drive and give lifts to others/organise hui/take minutes

3.4 How long does the project, service or proposal run?

Ongoing:

6.1.7 Whakatane Accessible and Inclusive WA(Cont.)

4 OUTCOMES AND OUTPUTS OF YOUR PROJECT, SERVICE OR PROPOSAL

4.1 How will you know if your project, service or proposal is successful, and what are the benefits to the community?

Sometimes changes can take some time but we are thrilled this year to see the safe passages project with safe ways for people on mobility scooters, with prams, for children to move between Kopepeo towards town. We proposed this (then called the Blue Line Project) in 2019.

We are now working with other disabled people and seniors to look at how further changes could be made to enhance the inclusion and safety of all people.

We want also to make our presence more visible. Once we can access communities more easily we will be able to participate in many more ways. 25% of the population has some form of disability or long term illness so we are a significant group of people whose needs can be overlooked.

4.2 How does your proposal directly support one or more of the Community Outcomes of the Whakatane District?

Effective Leadership - Striving for our Future Wellbeing

Community Needs – A caring community

Reliable and Affordable Infrastructure – Meeting current and future needs. (We note that if we are consulted before infrastructure is built the Council can avoid costly changes later.)

4.3 What will happen to the project, service or proposal if this funding application is unsuccessful, or if only a portion of the funds are received?

The project will be downgraded - it will be just that much harder for people who already sometimes struggle to get to meetings to attend and to offer their ideas, ideas that will benefit our town. We would like to run two advocacy courses (basic and advanced) but if we run out of funds we will run only one.

Other (please specify):

6.1.7 Whakatane Accessible and Inclusive WA(Cont.)

6 FINANCIAL DETAILS OF YOUR ORGANISATION

Note: All figures to include GST (if any).

6.1	Last financial year	This financial year (to date of application)
What was your organisation's total income (money received)? *	\$2810.00	\$3840.00
What was your organisation's total expenditure (money spent)? *	\$2701.09	\$15.00

* Please attach a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year

6.2	What is the current total of your bank balances (including savings and investments)?	\$5033.91												
	How much (if any) of this total is tagged or committed to other purposes? <i>Tagged or committed means a sum of money that has been set aside from your day to day operating funds, for a specific project or purpose (e.g. building project, forthcoming event)</i>	<table border="1"> <thead> <tr> <th>Amount tagged</th> <th>Purpose</th> </tr> </thead> <tbody> <tr> <td>\$ 1800</td> <td>This is for the advocacy training early 2024 as per budget. \$1000 for facilitator, \$450 for project materials and \$350 of the venue costs</td> </tr> <tr> <td>\$</td> <td></td> </tr> <tr> <td>\$</td> <td></td> </tr> <tr> <td>\$</td> <td></td> </tr> <tr> <td>\$</td> <td></td> </tr> </tbody> </table>	Amount tagged	Purpose	\$ 1800	This is for the advocacy training early 2024 as per budget. \$1000 for facilitator, \$450 for project materials and \$350 of the venue costs	\$		\$		\$		\$	
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\$ 1800	This is for the advocacy training early 2024 as per budget. \$1000 for facilitator, \$450 for project materials and \$350 of the venue costs													
\$														
\$														
\$														
\$														

6.3	What funding assistance has your group/organisation received from the Council over the past 3 years:	
	Year	Amount received
	2021	\$1250
		Promoting accessible and age friendly initiatives and policies

6.1.7 Whakatane Accessible and Inclusive WA(Cont.)

7 DECLARATION

We the undersigned do solemnly and sincerely declare and acknowledge that:

- The details we have given in all sections of this application are true and correct to the best of our knowledge.
- We have the authority to commit our group to this application.
- All information contained in this application is subject to the Local Government Official Information and Meetings Act 1987, and therefore this information may be released upon request.
- The Council may collect from third parties any information it deems necessary about the applicant or the application.

Name:	Ruth Gerzon
Position held in group:	Funding coordinator
Signature:	
Date:	25 October 2023
Name:	Poihaere Morris
Position held in group:	Founding member
Signature:	
Date:	27 October 2023

8 CHECKLIST

Please complete the following checklist to ensure you have completed the application process and attached all necessary information:

- All sections of this form have been completed
- You have attached a bank generated deposit slip verifying your bank account details (2.6)
- You have attached a separate copy of your project plan where one has been developed (3.3)
- You have attached quotes for expenses for your project service or proposal where these have been obtained (5.1)
- You have attached a copy of your latest audited accounts or balance sheet or, if you are a new group, a statement of estimated income and expenditure for your first year (6.1)
- The declaration form has been signed by two members of your organisation that have the authority to do so (7)
- You have made a copy of this application for your future reference

6.1.7 Whakatane Accessible and Inclusive WA(Cont.)

Suspense Transactions - Funds Held in Suspense Account on Behalf of Whakatane Accessible & Inclusive

Eastern Bay Villages

For the period 1 July 2021 to 31 October 2023

2021-2022

2022-2023

2023-2024

Date	Source	Description	Reference	Debit	Credit	Running Balance
Suspense						
Opening Balance				0.00	0.00	0.00
15 Oct 2021	Receive Money	Whakatane District Council - Whakatane Accessible & Inclusive funding - to be held in suspense account (EBV is umbrella organisation)	WAI funding - to be held in suspense account (EBV is umbrella organisation)	0.00	1,250.00	1,250.00
27 May 2022	Payable Invoice	Whakatane Presbyterian Church (Knox) - WAI EXPENSE (payment made on behalf) Knox Church facility hire	WAI EXPENSE Inv 0143	150.00	0.00	1,100.00
11 Aug 2022	Payable Invoice	Saunders, Scott - Reimbursement for Canon Printer & printer ink (WAI)	Reimbursement #220811 WAI	119.10	0.00	980.90
19 Aug 2022	Receive Money	Department of Internal Affairs - WAI - COGs Funding Received 19/8/22	WAI - COGs Funding Received 19/8/22	0.00	2,810.00	3,790.90
21 Sep 2022	Payable Invoice	McKenzie, S N - Reimburse from WAI Funds for Pizza	Reimbursement #220921 WAI	18.00	0.00	3,772.90
22 Sep 2022	Payable Invoice	Ruth Gerzon - Reimbursements - Reimburse from WAI funds for refurbished iPhone and 2 year guarantee	Reimbursement #220922 WAI	604.99	0.00	3,167.91
01 Oct 2022	Payable Invoice	Ruth Gerzon - Reimbursements - Reimburse from WAI funds for Skinny credit for iPhone set up & phone case and screen	Reimbursement #221001 WAI	66.50	0.00	3,101.41
07 Oct 2022	Payable Invoice	Whakatane Printers - Nomination forms & posters (WAI expense)	Inv 8303 (WAI)	184.00	0.00	2,917.41
20 Nov 2022	Payable Invoice	Annelle Prince - Contract work for WAI re: Awards Ceremony	Inv 1 (WAI expense)	900.00	0.00	2,017.41
24 Nov 2022	Payable Invoice	Whakatane Printers - Printing costs re: WAI Awards Ceremony	Inv 8346 (WAI)	138.00	0.00	1,879.41
24 Nov 2022	Payable Invoice	Annelle Prince - Reimburse expenses re: WAI Awards Ceremony	Reimbursement #221124 WAI	96.00	0.00	1,783.41
30 Nov 2022	Payable Invoice	Ruth Gerzon - Reimbursements - Reimburse expenses re: WAI Awards Ceremony	Reimbursement #221130 WAI	8.40	0.00	1,775.01
01 Dec 2022	Payable Invoice	Blue Duck Design Ltd - Flowers for WAI Awards Ceremony	Inv F4 (WAI)	120.00	0.00	1,655.01
07 Dec 2022	Payable Invoice	Annelle Prince - Reimburse expenses re: WAI Awards Ceremony	Reimbursement #221207 WAI	9.95	0.00	1,645.06
08 Dec 2022	Payable Invoice	Annelle Prince - Reimburse expenses re: WAI Awards Ceremony	Reimbursement #221208 WAI	37.66	0.00	1,607.40
09 Dec 2022	Payable Invoice	Annelle Prince - Contract work for WAI re: Awards Ceremony	Inv 2 (WAI expense)	210.00	0.00	1,397.40
09 Dec 2022	Payable Invoice	Whakatane Presbyterian Church (Knox) - Facility hire 8/12/22 - WAI	Inv 0200 (WAI expense)	37.50	0.00	1,359.90
13 Dec 2022	Payable Invoice	Whakatane Contract Bridge Club - Venue Hire 30 Nov for WAI Awards Ceremony	Venue Hire 30 Nov (WAI)	125.00	0.00	1,234.90
13 Dec 2022	Payable Invoice	McKenzie, S N - Reimburse for WAI Awards Ceremony expenses	Reimbursement #221213 WAI	25.99	0.00	1,208.91
01 Aug 2023	Receive Money	Department of Internal Affairs - WAI - COGS funding received 1/8/23	WAI - COGS funding received 1/8/23	0.00	3,840.00	5,048.91
30 Sep 2023	Payable Invoice	Eastern Bay Accessible Transport Charitable Trust - Journey charges Sept 2023 - Scott Saunders and Grant Chase	INV-0001	15.00	0.00	5,033.91
Total Suspense				2,866.09	7,900.00	5,033.91
Closing Balance				0.00	3,825.00	5,033.91
Total				2,866.09	7,900.00	(5,033.91)