

Preliminary Application

Form Preview

Your details

* indicates a required field

In this WDC Community Loans Scheme Preliminary Application, you'll be asked to provide:

- contact details and organisation details
- cashflow forecast
- financial records
- evidence of the organisation's endorsement.

This stage is about determining your ability to afford a loan.

Stage 2 is the Project Proposal, where you will be required to provide more information about the project and the community support for it.

Save your progress regularly.

Organisation details

Eligible applicants must be Whangarei-based, not-for-profit organisations with a formal structure.

Read our full criteria on our website or in our Community Funding Guide to make sure you are eligible to apply.

Organisation name *

Organisation Name

Make sure you provide the same name that is listed in official documentation.

Are you GST registered?

- ☐ No - include the full cost of items in your budget (GST inclusive)
- ☐ Yes - exclude GST in your figures as necessary

GST number

Format: 000-000-000

NZBN look up

Please enter your organisation's NZBN number (the 13 digit number listed on your charities or incorporated societies register) and click on Lookup.

If you do not have this number, please provide a certificate of incorporation or similar with your supporting documents.

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NZBN

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

New Zealand Companies Register Information
NZBN
Entity Name
Registration Date
Entity Status
Entity Type
Registered Address
Office Address

Must be formatted correctly.

Your contact details

Please provide your name, phone number and email address so we can contact you about this application.

Project contact *

First Name

Last Name

What position do you hold in the organisation?

- ☐ I am a paid staff member
- ☐ I am on the trust/board/committee as an executive member
- ☐ I am on the trust/board/committee as a general member
- ☐ Other:

If other, please describe your relationship to the organisation (e.g. third party fundraiser). You may also need to provide proof of the organisation's support of this application.

Phone number *

Please include area code.

Email address *

Organisation's administration contact

Please provide alternative contact details for someone who provides administrative support to the organisation.

Preferably this is an official, generic email and phone number for the organisation that will always be monitored, rather than a personal one.

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Admin phone

Admin email

Admin contact name

First Name

Last Name

If applicable

Project summary

* indicates a required field

Project title *

Word count:

Must be no more than 5 words.

Provide a name for your project that clearly tells us what it is about, e.g. Squash courts upgrade, Stage 1 - sports hub

Short project description

Provide a short description (100 words recommended) of your project - what are you out to do?

What is the physical address for this development/project?

What is the legal description of the land (for land title search)?

Your request

How much loan funding are you requesting? *

If you are GST registered, exclude GST from this amount.

Is this 50% or less of the total project cost?

- ☐ Yes
☐ No

How are you funding the other 50% required for the project?

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- ☐ We already have this secured through fundraising
- ☐ We are in the process of applying for funding for this
- ☐ We haven't looked at other options yet

What loan term would you like?

- ☐ 5 years or less
- ☐ 6-8 years
- ☐ Other:

What income sources do you have to support paying back the loan?

Preliminary supporting information

Upload your documents

Latest financial performance report

Attach a file:

Cashflow forecast

Attach a file:

Organisation's endorsement of the application

Attach a file:

Meeting minutes or official letter confirming intent to apply for this loan

Declarations

* indicates a required field

Declaring interests

Please declare any financial or non-financial interests in this project, whether real, potential, or perceived.

Interests can include:

- **you, your family or a business you are associated with** stands to benefit financially or materially from a successful application (for example, if the application includes a request for wages that will be paid to you);
- **members of the Trust, their families or businesses** stand to benefit financially or materially from a successful application (for example, if a family member of one of the

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trustees is a contractor who will be engaged to do the work that this funding would pay for);

- **any elected members (Councillors) or staff of Council, or their businesses** are in any way involved with the project or the Trust (for example, if an elected member is on your board or a staff member is providing advice whether in a personal or professional capacity).

Please describe any known interests below:

Declaration

Please select: *

- ☐ I declare that I have authority to make this application on behalf our organisation and that the information supplied here is true and correct.

Privacy statement and feedback

Privacy statement

As part of the community funding application process the Whangarei District Council collects information, including contact details, to assist in processing applications.

Information obtained as part of the grants and loans process may be used by Council to communicate with applicants about future community funding opportunities, and to inform the community about successful funding granted and promote funding schemes.

The Privacy Act 2020 gives you rights to request access to and correction of any personal information we hold about you. Likewise, if you wish to opt out of receiving grants communication from Council please let us know by emailing funding@wdc.govt.nz.

Information held by Council may also be subject to the Local Government Official Information and Meetings Act 1987 and may need to be released where a formal request is received under that Act.

For the SmartyGrants and SmartyFile privacy policy, refer to: [SmartyGrants | Policies](#)

Acknowledgement - privacy statement

- ☐ I understand and accept the privacy statement

Feedback

Before you review and submit your application please take a moment to provide some feedback.

Please indicate how you found the online application process:

- ☐ Easy ☐ Neutral ☐ Difficult

Comments and suggestions:

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Next steps

Upon receiving your Preliminary Application, our legal and financial advisors will assess your application and recommend on whether to proceed. They may contact you for more information.

If it passes this stage, you will be sent a Project Proposal form to complete which will help us to determine the merits of the project.

Loan approvals are made by Council's Community Development Committee.