

# Update

September 2008

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## Annual meeting

### 27 November 2008 – you are invited!

Each year the Commission must hold an annual meeting where registered charities have the opportunity to ask questions and make submissions on the Commission's work.

In 2008, as part of our objective of providing education and support to charities, we will incorporate the meeting into a forum, with the theme 'Making effective use of charitable resources.' It will feature a panel discussion with guest speakers, who are yet to be announced, and a discussion workshop.

The Commission's Chair, Sid Ashton, will host the meeting.

Please mark your diary now! We would love to see you there.

**Venue:** Loaves and Fishes Hall, Wellington Cathedral, cnr Hill and Molesworth Streets, Thorndon, Wellington.

**Time:** 1.30pm to 4.30pm

**Date:** Thursday 27 November 2008

### Have any great tips for making the best use of charitable resources?

Our challenge to you - the charities that provide us with the best tips for making effective use of charitable resources will be presented with a prize at our annual forum.

Examples of effective use of resources could include: community house initiatives where the copier, cleaning service, and kitchen supplies are shared and paid for on a pro rata basis.

Or maybe you have set up a shared library for charities in your area, to save having to buy separate training and education resources.

Or perhaps you have set up a volunteer's carpool, to save petrol and unnecessary journeys.

We're sure you have many more great examples.

Please email your best tips to us at: [info@charities.govt.nz](mailto:info@charities.govt.nz) by Friday 24 October. The prize winning tips will be announced at the annual forum, published on our website, and will be promoted in our Update newsletter.

## Registration update

**Charities registered** as at 8 September 2008: 12,119

**Processing time:** Our registration analysts are currently making initial reviews of applications received from: 12 June 2008

Many straightforward applications, once they reach the front of our queue, are processed within several weeks

Our registration update is refreshed on our website each week.

## Snapshot

### Overview of types of charities registered as at 31 August 2008

The "big three" most common:

Sectors – Education/training/research, Religious activities, Other

Activities – Other, Provides religious services/ activities, Provides services (eg care/ counselling)

Beneficiaries – General public, Children/young people, Other charities

Areas of operation were as follows (note: the total is greater than the total number of registered charities, as some organisations tick two or more categories on their application):

New Zealand	
Auckland – 1,991	Northland – 626
Bay of Plenty – 780	Otago – 770
Canterbury – 1,412	Southland – 427
Chatham Islands – 21	Taranaki - 392
Gisborne – 220	Waikato - 928
Hawkes Bay – 525	Wellington – Wairarapa – 1,261
Manawatu - Wanganui - 652	West Coast - 248
Nelson - Marlborough - Tasman - 545	Nationwide – 2,786

**Overseas**

Africa – 197	North America - 116
Antarctica – 18	Oceania - 322
Asia – 325	South America - 112
Europe - 159	

**Time in the quality review queue**

Please remember that if your application for registration has any complex issues, it will be put into our quality review queue for referral to a senior analyst.

This means it will take longer to process than a 'straightforward' application, but the extra time taken is necessary to make sure that your application meets all the criteria of the Charities Act.

In particular, we need to make sure that each applicant has a charitable purpose, and there is no possibility of private pecuniary profit if the charity, once registered, is wound up. You can check your application's progress through our processing queue by logging into your account on our website.

**The difference between your reference number and your registration number**

Please remember that your charity reference number is not the same as your registration number.

We give you a reference number when we acknowledge receipt of your application, and it should be used in any further correspondence or phonecalls between us about your application (we will ask you for your reference number if you phone us for information about your application, so please have it available).

Once your application has been processed and approved we will allocate your unique registration number and send you a Registration Certificate. Your registration number then becomes the number you should use when talking to us or anyone else about your registered charitable entity.

It will be published on the Charities Register and printed on your Registration Certificate.

We encourage you to include your registration number on your promotional materials and website, and use it to show the public that your charity has met the requirements of registration under the Charities Act, and has proved it has a charitable purpose.

**Commission CEO meets South Canterbury's charitable community**

Charity Commission CEO Trevor Garrett recently visited South Canterbury, where he met with members of the local charitable community.

He also met local authority members, local mayors and was interviewed by several local newspapers.

Mr Garrett said it was a good opportunity to see what is happening outside Wellington and the other big cities. "We are keen to maintain open communications within the sector, and although we are based in Wellington we especially value opportunities to meet fact to face," he said.

The Commission is very mindful of the need to maintain its relationships

**Need to make any changes to your application before we process it?**

amongst the charitable sector, to answer questions and listen to feedback.

If anything changes – for example, you appoint new officers, change your address or change your rules – before we process your application, please send an email to [info@charities.govt.nz](mailto:info@charities.govt.nz) or write to us at Charities Commission, Processing Centre, PO Box 30112, Lower Hutt, 5040 to let us know.

Include copies of any replacement documents, and remember to tell us the charity reference number we gave you when we acknowledged your application.

**Notification of Changes and the Companies Office**

If your charity wants to change its name, or its rules and your charity is registered with the Companies Office as

- an incorporated society
- an incorporated charitable trust board (also known as a registered charitable trust), or
- a company

your changes must be approved by the Companies Office **before** you notify them to us.

This includes changes you make to your rules to meet the requirements of the Charities Act. So, for example, if during the application process, you need to add a clause to your rules to satisfy us - you must get the approval of the Companies Office first (to make sure the change doesn't alter your status with the Companies Office). After that you can let us know of the changes and we can continue to process your application.

So, wait for acceptance of the changes from the Companies Office before completing your notification of change to us. Then the Charities Commission can update your changes on the Charities Register.

Click here for more information on [notifying us of your changes](#).

For further information on notifying changes to the Companies Office, please contact the Companies Office on 0508 762 438 or visit [their website](#).

**Timeframes for Notification of Changes and Annual Returns**

**Notification of changes**

Once you are registered, you must notify us of changes to your name, address, officers, balance date, rules or purposes. To do this you will need to send a Notification of Changes to the Commission. See our information sheet [What to do when something about your charity changes](#)

The Notification of Changes must be sent to us no later than three months after:

- the change takes place, or
- your charity becomes aware of the change, whichever is the later.

Some changes that you need to tell us about may take place at your annual general meeting (AGM). In this case, you may choose to notify us of changes as part of your Annual Return; in which case we must receive your *Annual Return Form* within three months of the changes being made.

**Annual returns**

You must send your completed Annual Return to the Commission **no later than six months** after your balance date (the end of your financial year).

However, if you use your *Annual Return Form* to notify the Commission of changes to your organisation's details, you must send the Return back **within**

**three months** of the date of the changes or of you becoming aware of them. See our information sheet [What to do when something about your charity changes](#) for more details:

Please note that if you do use your *Annual Return Form* - Form 4 to notify us of changes (either online or paper), then we do not need a separate *Notification of Changes Form* - Form 3, as well. You can access a [Notification of Changes Form](#)

The Commission can require a charity to pay a penalty if it does not send a Notification of Changes or provide an Annual Return within the required time (three months for a Notification of Changes, six months after its balance date for an Annual Return). If a charity persistently fails to meet these requirements, it could be deregistered.

### Examples of Annual Returns and Notification of Changes online

Are you in the process of filing your Annual Return or a Notification of Changes? Did you know you can go to the Register on [our website](#) for examples of how others have completed theirs?

For example, you might like to look at the records of :

1. Schizophrenia Fellowship Otago Branch Inc – this is an example of a Notification of Changes Form filed on paper
2. Wellington Botanical Society Incorporated – this is an example of a Notification of Changes Form filed online
3. Shalom Court Auckland Inc – this is an example of an Annual Return filed on paper
4. Tiaho Trust – this is an example of an Annual Return filed online

### Funding information workshop – 17 September

The Charities Commission will be presenting at the Funding Information Workshop hosted by the Local Government and Community branch of Internal Affairs on Wednesday 17 September. We will be presenting a workshop on 'The Benefits of Registration with the Charities Commission' and will also cover support services and information resources offered by the Commission.

We are also happy to answer any questions about registration and the Commission's work.

Other presenters include Crown Funding Trusts and Fellowships, Community Net, COGS, Lottery Grants Board Funding and Local Government & Community (DIA).

See the [events page](#) on our website for more details.

### Speaking invitations

We are always pleased to receive invitations to speak to community groups and professional advisors to the sector and will do our best to accommodate your requests.

We can present information about the Commission and its work, and can also provide workshops about the registration process, and how to use the Register and its benefits. Please email us on [info@charities.govt.nz](mailto:info@charities.govt.nz) to request a speaker, providing details of the date, time, venue, audience, and how long you would like us to speak for.

### IRD discussion

Inland Revenue has issued a discussion document looking at streaming and refunding imputation credits. This can apply to charities.

## document

Imputation credits are credits attached to dividends for income tax that has been paid by the company in which shares are held. New Zealand shareholders who pay tax in New Zealand can use imputation credits to offset their income tax. Some organisations – including charities registered with the Charities Commission – cannot currently fully use imputation credits because they are exempt from income tax.

The discussion document can be found on the [IRD website](#)

Responses to the discussion document are due to IRD by 10 October 2008.

## Our information sheets and forms

Have you taken a good look at all our information sheets and checklists? These can be easily found on the top right of our website homepage and are designed to make your life easier. They explain – in plain language – the main things you need to know about the Charities Commission, the Charities Act, registration, Annual Returns, and give our views on important issues such as “What is a charitable purpose?”

All our information sheets are listed on our [Information Finder](#)

You might like to take a look at [The Charities Register – benefits for charities](#). This information sheet outlines the seven main benefits for charities who choose to register with us, and is useful for organisations who may earlier have decided not to register with the Commission, or for new organisations considering applying for registration.

We review all our information sheets and forms regularly and develop new ones as needs are identified.

Copies are available on our website, by calling our free information line 0508 242 748, or by emailing [info@charities.govt.nz](mailto:info@charities.govt.nz)

## Password reminders

If you have tried to login for the first time, or reset your password, and you have not received an email from us with your new password, there are two common reasons for this.

Some applicants didn't provide an email address with their original application, or the email address that was provided is incorrect for some reason – for example, a typo, or the person who applied has changed internet providers.

If you have asked for a new password to be sent to you, and haven't received it, please contact us on our free information line – 0508 242 748, and quote **your charity reference number** to us. This is the number that we gave you when we acknowledged your application, and would have been sent to the address for service provided in your application.

Once they have verified your reference number, our call centre can look up the email address provided on the original application and update it if necessary.

## No longer want Update?

If you no longer wish to subscribe to this newsletter, simply [email us](#).



Update is a regular newsletter of the Charities Commission.

If this is not your copy and you wish to subscribe, simply email [info@charities.govt.nz](mailto:info@charities.govt.nz) with your contact details or call our free information line 0508 242 748. Use these channels or visit our website at [www.charities.govt.nz](http://www.charities.govt.nz) for further information about registration under the Charities Act.