

OTTO PER MILLE: INSTRUCTIONS TO FILL IN THE APPLICATION FORM FOR FINANCIAL ASSISTANCE

General Information

Remittees

The remittees of OPM's funds (art. 4 of the law 409/1993 that extended to the Waldensian Evangelical Church – Union of the Methodists and Waldensians Churches, this type of financing) can be only the one's indicated below:

- a) Institutions that are part of the Waldensians system,
- b) National and international associatives organizations
- c) Ecumenical organizations

Applications

The applications may be written in English, or French or Spanish.

The applications must be written in one copy and submitted in a closed sealed envelope, or sent through by registered mail. The deadline of all the applications (Italians and abroad) is the **30th of November** of the year before the project's starts. For the application, the applying Institution must use only the hereby-attached form with the enclosures and statement of self-obligation.

The aims of the project must be in line with the resolutions of the Synod of the Methodist and Waldensian Churches. According to the Synod, the projects must exclusively concern the fields of culture, social work and charity in Italy and in developing countries and cannot be used to finance the Church itself (Synod 1991, Act No 36). Further detailed information (resolutions of the Synod, Italian laws concerning Otto per mille) is available on request.

Please note that as provided by law 409/93 Italian and foreign churches, different than those belonging to the Waldensian Church - Union of waldensian and methodist churches", cannot be remittees of the Otto per Mille's funds assigned to the Waldensian church. While they may receive such funds, organizations or institutions of churches as

Last updating: September 2010

Tavola Valdese, service handbook

long as they are formally constituted and carry out social, welfare, health and cultural activities.

The Otto per mille (OPM) Office of the Tavola Valdese (Waldensian Board) is ready to be contacted by those who need more explanations or further information about filling in the application form.

The applications presented beyond the deadline or without the required documents will not be taken into consideration.

Nevertheless, we invite the applicants of these projects to present them again before the next deadline. Application forms must be sent to: "Ufficio Otto per mille" Tavola Valdese via Firenze 38 - 00184 Roma

Enclosures

- All Institutions are bound to enclose to their project, as pointed out above, a copy of their Constitution, of the last two years balance and, if available, the letter of attorney of the legal representative.
- The Institutions applying for more than one project in the same year must attach the above mentioned enclosures only to the first project, and point out the name of the project with all the enclosures in the applications concerning the following projects.
- The Institutions applying for projects in consecutive years must present only the variations, when occurring, to the required enclosures (amendments to the Constitution, to the Act of establishment, of the name of the legal representative and the last year balance).
- The Institutions applying for more than one project are kindly asked to point out those having priority on others (e.g., the project that is regarded as more important must be labelled as Priority No 1). This will help the Commission to choose the projects labelled as priority, when not all the projects of the same Institution can be financially supported.
- All Institutions must say how they got to know about the possibility of applying for the Waldensian Church Otto per Mille's funds.
- All Institutions must name a physical person, a church, a group of churches, a national or international ecclesial organisation (e.g., the World Council of Churches), that the Otto per Mille Office can contact, if necessary, in order to receive further information about the applying Institution.

Last updating: September 2010

Other matter is the running costs projects, all that institution that uses the received funds for the running costs of the organization (salaries, dues etc...).

When the project concerns "running costs", that are the current budget expenses of the Institution (salaries, dues etc.), this must be clearly said in the application form: running costs project.

When the requested funding is partly assigned to cover the running costs and partly to carry out the project, there should be a right balance between them. Our suggestion is that the running costs should not exceed the cost of the project itself.

The Commission will decide whether or not the percentage allotted to the running costs is acceptable.

Other issues

➤ **Diversion of funds.** It must be clearly known that it is not possible to modify the assignment of funds decided by the Waldensian Board and approved by the Synod. If, after the Synod approval, the applying Institution wishes to assign the granted funds to another project, it must ask permission to the Tavola Valdese. The Institution will address its request to the Otto per Mille Office, which will forward it to the Tavola Valdese. Only in exceptional cases this authorisation will be granted.

➤ **Funds that have not been used.** If, after the allotment of the funding approved by the Synod, the applying Institution has not been able to use the fund of the project, the association must immediately inform the Otto per Mille Office. In the case that the organization has already granted one or more allocations, these must be given back to the Otto per Mille Office.

➤ **Long term funding.** The Office is aware of the fact that certain projects (especially those concerning agriculture, health and trade) may reach their aims only in a length of time of some years. In these cases, the Institution can represent the project the following years, even if there is no certainty that it will be financed.

Thus, it is understandable that the Otto per mille funding of such projects may be repeated for some years.

Nevertheless, the Otto per mille Office is also aware of the fact that the reiteration of the grant may make an applying Institution too dependent on the Otto per mille funding itself.

Moreover, the extension of the grant for some years to the same project prevents the Waldensian Church from sharing its Otto per Mille funds with other Institutions, which also deserve to be supported. This rotation is necessary as the total available amount of funding of the Waldensian Otto per Mille is not sufficient to finance all the submitted projects.

Tavola Valdese, service handbook

- **Visits.** The Office reserves the right to visit, even without notice, the associations that run projects funded by the Otto per Mille of the Waldensian Church.

- **Rules for submission of documentation in digital size.** Only the declaration letter and the forms must be in paper format and must bear the handwritten signature at the bottom of the legal representative. All other material, unless exempted, must be in electronic format, sent on CD with the documents in paper, according to the rules below.

Files' size: is only admitted the PDF/A format (<http://www.pdfa.org>), by the law ISO 19005-1:2005. In particular, it is sufficient the compliance with the PDF/A-1b. This format is based on the version 1.4 of the Adobe System Inc. PDF's size, implemented in Adobe Acrobat 5. There are free (Open Office) or fee-paying software (Adobe Acrobat) available, for the creation of the conforming documents. It must be note that the standard index allows the correct reproduction of documents and their preservation over time.

To check whether a document **IS NOT** compliant with the PDF/A standard, you may use, as example, the free version of Adobe Acrobat Reader 9. For more information see the website <http://www.pdfa.org>.

Number and type of file: The full documentation must be divided into 2 files, each in the format above. Each file must have a name that complies with the following convention:

- Are allowed only alphanumeric characters (letters and numbers);
- The names are composed from the name of the Institution that presents the project, in lowercase, followed by the identification of the file (more details in the following paragraph), with the initial letter capital letter plus the extension (*nameinstitutionIdentification.pdf*);
- The identification of the available files is: *Attachments* and *Others*.

There must be two distinct files to be sent:

- All attachments required (a copy of the statute, the budget of the last two years, the attorney of legal representative, etc.) must be sent in a single file in the specified format. Their identification is *Attachments*, so the resulting file's name, of the hypothetical home for the elderly "The flower" will be: *theflowerAttachments.pdf*
- All optional attachments (detailed project description, information material, etc..) must be send in a single file in the specified format. Their identification is *Others*, so the resulting file's name of the hypothetical home for the elderly "The flower" will be: *theflowerOthers.pdf*

WARNING! There will not be taken into consideration the projects, not faithful to the above set of laws.

Examination of the applications

After receiving the application forms, the Otto per Mille Office can ask the applying Institution for further information and enclosures, so that the application may reach the required standards.

If the requested information is with no answer, the application remains incomplete, and consequently this may bring about the rejection of the project itself.

Communicating the Synod resolutions

The Synod resolutions concerning the allotted funds will be communicated to the applying Institution by October.

FILLING IN THE FORM

Filling in this form is compulsory for any kind of project. More complex projects obviously require more enclosures, the number of which is decided by the applying Institution.

A APPLYING INSTITUTION

- 1 NAME OF THE APPLYING INSTITUTION: Full name of the applying Institution, according to the official documentation.

- 2 ADDRESS OF THE LEGAL HEAD OFFICE: The address which appears on official legal documents. Please, write street address, postal code, city/town, telephone, fax and e-mail.

- 3 ADDRESS FOR COMMUNICATIONS (If different from n°2): Enclose all necessary data that will allow us to contact the Institution, if different from the point above.

- 4 WEB SITE: Enclose the web site address of the Institution.

- 5 FISCAL CODE: Enclose the fiscal Code of the Institution.

- 6 LEGAL STATUS: Please clarify what kind of Institution it is (e.g., a Church, a Diaconal Agency, a Foundation, a Church Council, a Committee, a legally recognised association, ONLUS, ONG etc.).

- 7 YEAR OF ESTABLISHMENT: Please note the year of establishment of the Institution.

- 8 REGISTRATION NUMBER IN PUBLICS REGISTERS: Please note the registration number in the register of the ONLUS, Cooperative, prefect's register or the number of the notarial act and the name of the notary who deposited the Statute and/or the company Act.

- 9 NUMBER OF MEMBERS: Please note the number of members of the Institution, association, cooperative; in case of a foundation note the number of the founders.

- 10 MEMBERS OF THE MANAGEMENT COMMITTEE: Please note the names of the members in the administration's Committee of the Institution (management committee, administration committee, executive committee).

- 11 MEMBERS OF THE AUDITORS COLLEGE: Please note the names of whom form the auditors college or the audit committee.

- 12 OUTLINE OF STATUTORY AIMS: Short sum-up of the aims present in the Constitution of the Institution (the full version of the Constitution must be enclosed anyway).

- 13 ACTIVITIES DONE BY THE ORGANIZATION: Please write down all the activities that the Institution carries out at the date of submitting the project, even if they are not related to the project.

- 14 MEMBERS OF THE ORGANIZATION: Please specify the number of person include in each category, for employee we mean workers with open-ended contract; with casual workers we mean those with a forward contract (temporary worker, interns etc...); for volunteers we mean all those who carries out their activities for free; for others we intend all those who have other relations with the Institution, like administrators or the employee of another association etc...

- 15 PRIVATE, PUBLIC, NATIONAL OR INTERNATIONAL PARTNERS OF THE INSTITUTION: Please specify all type of partners that works or cooperates with the Institution.

16 NAME OF THE LEGAL REPRESENTATIVE of the applying Institution: please enclose the documents stating that the person who signs the application is authorised by the association.

17 DID THE ASSOCIATION APPLY PREVIOUSLY FOR AN OTTO PER MILLE GRANT? YES NO..... If yes, when? (Please write down the year, the name of the project and the result.

18 How did you know about the possibility of the Waldesian Church to finance projects in Italy and abroad?

19 Indicate a Church, an organization or a person (for example a Christian Church in your country or region, a Church Council or another Christina organization) with whom you've collaborate in the past years.

B PROJECT

1 NAME OF THE PROJECT: The name given by the applying Institution.

2 AIM OF THE PROJECT: Outline of the aim of the project.

3 DESCRIPTION OF THE PROJECT: Short outline of the project, pointing out the basic information.

For projects concerning buildings, please enclose drawings, plans and elevations (which may be detailed if relevant for the understanding of the project), sketches or axonometric views, photographs, cadastral or topographic maps needed to localise exactly the work site.

For basically financial projects, please enclose calculations of economic feasibility, amortisation, return of investment, extinction of debts or mortgages etc.

For any purchase implying a certain amount of money (e.g. the purchase of a computer), please enclose a copy of the estimated budget or of the price offers (three alternatives, at least).

In all cases, all parts of the projects must be outlined in the description, and those for which the funding is required, must be clearly marked out.

Tavola Valdese, service handbook

Moreover, the applicant is required to enclose an overall estimate budget, which outlines the share of the Otto per Mille's grant.

Example:

Activity	Donor: Tavola Valdese	Donor: Local City Council	Donor: Local County Council
Purchase of seeds	5.000,00		
Purchase of threshing-machine		2.500,00	
Training of farmers		2.700,00	
Training courses for women	2.000,00		
Educational training		2.000,00	
Refurnishing works			10.000,00
Water depurator			15.000,00
Total	7.000,00	7.200,00	25.000,00

- 4 LENGTH OF THE PROJECT: Please specify the period in which it will be develop.
- 5 PUBLIC, PRIVATE, NATIONAL OR INTERNATIONAL PARTNERS OF THE PROJECT: Please indicate all type of partners that will work or cooperate in this project.
- 6 PROJECT'S FIELD OF ACTION: Please specify the field in which the Institution will realize the project: welfare, elderly, health, culture, peace and human rights, refugees, migrants, children and youth, agriculture development and productive activities.
- 7 MEMBERS OF THE PROJECT: Please specify the number of person include in each category, for employee we mean workers with open-ended contract; with casual workers we mean those with a forward contract (temporary worker, interns etc...); for volunteers we mean all those who carries out their activities for free; for others we intend all those who have other relations with the Institution, like administrators or the employee of another association etc....
- 8 LOCATION OF THE PROJECT: Indicate where the project will take place, city/town and province (if in Italy), city/town and nation (if outside Italy).
- 9 LEGAL OWNER OF THE BUILDING SITE WHERE THE PROJECT WILL BE CARRIED OUT: If the project regards building either on existing structures or to be built, please write the name of the owner of the building site where the project will be carried out. Usually, the land-owner is the applying Institution.

10 NUMBER OF PEOPLE WHO WILL BENEFIT FROM THE PROJECT: Approximate number of beneficiaries, possibly parted in men and women.

11 NAME OF THE PROJECT LEADER: The project leader is a member of the applying Institution, who usually deals with technical or administrative matters. In case if he or she is an external adviser, please point it out. Name, surname, position, full address, e-mail, phone and fax numbers of the person must be entered.

12 OVERALL COST OF THE PROJECT: It is the overall cost, including building expenses (if it is a building project), planning expenses, unforeseen events, forecasted inflation or salary and wage increase, possible taxes and permit expenses, VAT (Value Added Tax). For projects concerning purchases, the overall cost must include VAT (if due) and possible setting up expenses.

For financial projects it is sufficient to point out the total, referring to the detailed enclosures.

For big projects, the cost must be written in Euros and Eurocents. If the project will not be carried out with Euros, please indicate the exchange rate (e.g., 1 Euro= x,xxx US Dollars).

13 OPM FUNDS REQUESTED: Please note the amount requested to the OPM for the project

14 FUNDING SOURCES: please write all the funding sources (both those already granted and those only requested).

15 REQUESTED FUNDING TO OTHER NATIONAL OR INTERNATIONAL ORGANISATIONS: if part of the funding (see point No 9) are grants from abroad please write down the amount and donor.

16 LONG-TERM LOANS AND DEBTS: Please attach correlated enclosures or declare that there are neither loans nor debts.

17 BANK DETAILS: Please write the name of the bank and of the branch, name of account holder, account number, IBAN and SWIFT code.

18 INSTITUTION DESCRIPTION: Description of the general situation of the applying Institution (e.g.; associations with xxx members, the usual funding sources are the private and public finance).

19 SIGNATURE OF LEGAL REPRESENTATIVE: Autograph readable signature.

20 DATE OF APPLICATION: Day, month and year.

21 ENCLOSURES: the following list is not all-inclusive: the applying Institution may add as many enclosures as it considers necessary in order to help the project to be financed. Please, find hereafter some more precise information.

Last updating: September 2010

COPY OF THE CONSTITUTION AND OF THE COMPANY ACT: it is to be enclosed if the institution has its own Constitution. If not, please enclose an alternative explanation of the organisation and aims of the Institution.

COPY OF THE BUDGET OR OF THE FINANCIAL REPORT OF THE LAST TWO YEARS APPROVED BY THE PREDISPOSED AUTHORITY: Please enclose, if existent, a copy of the budget or of the financial report of the last two years (statement of assets and profit and loss account). The entries must be comparable. The copies must be examined, checked and approved by a registered auditor, or through a declaration to be obtained by the following people:

- A member of the auditing committee of the Tavola Valdese,
- The director of the Centro Servizi of the Tavola Valdese (for applicants who are under the Waldensian Church Rules and Regulations),
- An internal auditor of the applying Institution,
- An auditor of a neighbouring Institution, who can control the accounts of the applying Institution.

The Commission has the right to ask for further information regarding the presented enclosures. If the budgets or financial reports are not fully convincing, the Commission has the right to verify them through its own auditors.

REPORT ABOUT THE APPROVAL OF THE AUDITORS ACTION: attach a report of the Auditors college related to the last two years financial report.

LETTER OF ATTORNEY OF THE LEGAL REPRESENTATIVE: To be enclosed, if existent.

PLANS: Only for building's projects.

GEOGRAPHICAL SITE: Site where the project will be carried out. This information is particularly relevant in case of projects to be carried out outside Italy.

CADASTRAL MAP: Only if it is a building project.

PHOTOGRAPHS: If possible, in order to better understand where and how the project will be carried out.

ESTIMATED BUDGET OR COSTS: They are required in order to estimate the size of the project, and thus of the required grant.

INFLATION TREND: It is particularly needed for projects in countries with unstable economy.

Tavola Valdese, service handbook

CASH FLOW: It is very useful to discern the project. It is the description of all income and expenditures (of both cash and bank) of the applying Institution. It must be stated for a REASONABLE amount of time, which is in the short term (e.g. 3 or 6 months). This is an enclosure linked with the ordinary activities of the applying Institution, and NOT with the project. So the starting date can be different from the one of the project. The income should include credit collections, donations, and special funding activities. The expenditures should include all entries linked to debt payments.