



Monitoring Report

for Installment Installment Five report due on 01/07/2009

APPLICATION/ORGANISATION DETAILS

SmartFund Ref: NDOE/HO.374.20209.16081
 Project Name: FOMANA Charitable Purposes Project
 Organisation Name: FOMANA Capital Ltd
 Address: 108 The Terrace,
 Wellington,

MONITORED DETAILS

Short Outcome	Increased knowledge by Maori pilot entities and their beneficiaries of the policy, processes and requirements of the Charity Act and tax regime.
Output	Report of case studies completed and generic compliance and audit model developed.
Success Indicators	Report and compliance/audit model completed within budget and timeline.
Status	Achieved

Risk Monitoring	
Risk	The demand for the new standards and audit models for Maori is not met.
Risk Comments	The project is progressing well and there are no impacts which affect the identified risk.
Status	Not Applicable

ASSESSOR COMMENTS

Report 4 dated July 2009 is comprehensive and confirms the case studies have been completed and the generic compliance and audit model have been developed.

QUALITY ASSESSOR COMMENTS

Confirm assessor's comments and receipt of report.

INVESTMENT MANAGER COMMENTS

concur with monitoring & assessment comments

Released under the Official Information Act 1982

Assessor: _____

Date: _____

Quality Assessor: _____

Date: _____

Investment Manager: _____

Date: _____

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