

Community Grant Scheme (the Scheme)

Applicant Guidance Notes

Once you have read the About the Community Grants Scheme and spoken to our Officers, you will receive an application form. It may be helpful to read these guidance notes while completing the form. There are a number of supporting documents that you will need to supply when you submit your application and these are detailed under **Documents you must supply**. We will not be able to consider your application without these.

A. The Organisation

A1. The name of your organisation should be the same name as in your governing document.

If your organisation operates under a different working title, please include this as well.

Newly formed organisations

Newly formed organisations, that are not yet formally constituted, or organisations formed for the purpose of a single activity, may also apply. Please talk to us first, if this applies to your application, so that we can support and advise you.

You might be advised to partner with a willing third party organisation that can hold the grant on your behalf.

A1.i If you are a 'third party' organisation willing to hold a grant for a group that is not yet constituted and/or a group applying for funds for a one-off event, you need to tell us here. Your organisational status must be listed in A2 and you will need to complete all of Part A of the application form.

The group you are willing to hold the grant for, should complete Part B.

A2. To apply for a grant your organisation must be a voluntary and community organisation, including faith organisations and social enterprises, that is a:

- Constituted 'not for profit' group or club
- Registered charity or excepted charity
- Charitable incorporated organisation (CIO)
- Community interest company (CIC), limited by guarantee with appropriate 'asset lock'
- Community Amateur Sports Clubs
- School (as long as your project is not replacing a statutory function and benefits and involves the community around the school)

We cannot support applications from:

- Sole traders
- Organisations that are aimed at generating profits primarily for private distribution. Those not asset locked, or organisations that can pay profits to directors or shareholders.
- Any group that the Town Council considers to be working within a business or with profit making remit
- CICs limited by shares
- Local Authorities or other Public Sector Organisations

We won't fund projects:

- Where the aims and objectives are around party political activism
- That directly promote a particular religious belief
- That do not benefit the residents of Sutton Coldfield
- That have already been completed or items already purchased
- That cover contingency costs, loans, endowments, or interest and any VAT you can reclaim
- That are profit-making or fundraising activities
- That cover the cost of alcohol

A3. This must be the same as the number/s found on the governing document filed with the regulator, where relevant, for example the Charity Commission, Companies House, Office of the Regulator of Charitable Interest Companies.

A4. Contact details

We will ask you for the contact details of two unrelated people.

A4.i One should be the person filling in the application form.

A4.ii The other must be a senior contact who will be responsible for the application.

The senior contact is confirming that the project is supported by the organisation applying and will ensure that it is delivered in line with the COGA. They must not be related to the person completing the application.

If your organisation is registered with Companies House, this will be a Director, or Company Secretary, even if you are also a registered charity. If you only registered as a charity, then this should be a Trustee. If you are a constituted group or club, then this should be a member of your management committee.

You may have a registered address for the organisation for the purposes of the regulator if applicable. This might be different to the one that you use on a daily basis, such as the premises you use.

A5. Financial Information

A5.i Details of your organisation's bank account

The details of a UK bank account registered in the organisation's name.

Documents you must supply: A bank statement from within the last three months, that you would want us to pay the grant into.

NB If your organisation is a branch of a larger regional or national 'parent' organisation. You will only be eligible to apply for a grant if your organisation has its own governing document (or has adopted the parent organisation's governing document), own annual accounts, own bank account and a local management board/committee which is responsible for the locally held funds.

A5.ii Latest annual accounts

Documents you must supply: You must supply a copy of your latest annual accounts, independently audited if this is required. Where these are over 12 months old, we may ask you to submit recent management accounts to provide the latest information.

A6. Governing document

Documents you must supply: You must supply a copy of your organisation's approved governing document with your application (relevant to **A2**), for example, constitution, rules, memorandum of association, articles of association.

The document must be approved by your governing body, for example, committee or trustee board.

Please make sure that the information you have filed with the relevant regulator for example, the Charity Commission, Companies House, Office of the Regulator of Community Interest Companies, is up to date. We will check the information that is filed, against the information supplied in your application form.

Please note, organisations that apply, including companies limited by guarantee, must have at least two people on their board or committee who are not related. By related, we mean:

- Married to each other
- In a civil partnership with each other
- In a long-term relationship with each other
- Living together at the same address
- Related by blood

B. About your organisation and your project

B1. Please describe your organisation and its work. These are the areas you should cover.

- When it was formed and why it was formed.
- What activities or services you provide.
- The people who access them.
- How it is run - staff and/or volunteers.
- How it is governed - the composition of your management committee or board and how often it meets.
- How you fund your organisation and its activities. For example, do you charge a subscription or membership fee, or is it free to users and funded through grants or other fundraising

(NB) A description of the project you are seeking funding for, should follow in B3.

B2. Please provide a project name, that distinguishes it from your organisation's.

B3. We want you to tell us about your project in more detail.

(NB) The term 'project' is a general heading for activities, events, services.

The need:

- What is the issue or opportunity your project will address?
- How do you know that there is a need for your project? What consultation have you carried out, or what other evidence do you have?
- Who and how many do you expect to benefit from your project?
- How will you make sure that your project is open and inclusive? This could be how you reach people who are socially isolated, or those with additional needs, or those who have other barriers to participation, such as mobility or financial circumstances.
- What difference do you think your project will make to their lives and the community?

The project:

- When is the project expected to start and finish?
- How will you raise awareness of it?
- Who will deliver it, and where, in Sutton Coldfield?

Monitoring and reporting impact:

- How will you capture evidence of impact of your project?

This could be the numbers of/increase in people accessing your project. It should also include feedback from people accessing your project, such as evaluation forms, videos, anonymised case studies.

We will ask for you to provide general information during your project and an end of grant monitoring report (proportionate to the size and duration of the grant). This will be a Condition of Grant Agreement which sets out the parameters of the funding agreement..

B4. Which one, or ones, of the RSCTC priorities will your project support?

- Regenerating the town centre
- Planning a sustainable future for our town
- Enhancing Sutton Park as a vital community asset
- Preserving and promoting out local arts, heritage and culture
- Delivering more services locally to meet the needs and aspirations of our community for a better and safer environment
- Supporting people, groups and organisation to help create and maintain thriving local communities

B5. Please indicate the main area of interest your project will cover.

Whilst your project may span more than one category, we only need you to identify the main one, so we can monitor the range of projects that are being funded.

B6. Please indicate whether your project is open to everyone, or aimed at a specific group of people.

Your project can be aimed at a specific group, but please be mindful of the Town Council's - and your organisation's - responsibility to meet the requirements of the *Equality Act 2010*.

B7. If your project is aimed at a specific group of people (B6.ii), please indicate the main one/s.

The categories we have indicated in the application form are to provide RSCTC with a general idea of who the publicly funded grant is reaching and help the town council identify trends, gaps and future priorities. They are an indication only, so please provide more information in 'other', if we have not captured the group of people you intend to benefit. For example, you may be working with faith communities, refugees or asylum seekers, or those facing a particular type of disadvantage. Please use the expanding box to describe the nature of this work.

(NB) Section **F**, which is optional, provides an opportunity for you to enter more detail about any specific groups of people your project will support.

B8. There are eight electoral Wards in Sutton Coldfield: Four Oaks, Mere Green, Reddicap, Roughley, Trinity, Vesey, Walmley and Minworth, Wylde Green.

Your project may be delivered in one Ward, or across several. If you are unsure of your Ward, Officers can help you.

C. Financial information

C1. How is your organisation currently funded?

Please describe your current income sources. This could be subscriptions, grants, trading activities, sponsorship, donations, fundraising activities, yield from investments.

If you have applied for or received funding from other organisations, please provide details about the project and what the funding would be used for.

C2. Please provide the following details from your most recent set of annual accounts.

Please set out the level of reserves you have and whether they are restricted funds, designated funds, unrestricted funds (free reserves). We understand that most organisations need reserves and may have a reserves policy. However, if your free reserves are high, we may ask you to provide further detail on what the reserves are allocated for.

Please note that if your last annual accounts are over twelve months old, we may ask you for a copy of your most recent management accounts.

(NB) If your organisation has audited accounts please ensure your most recent audited accounts are submitted.

C3. What is the total cost of the project?

This might be more than the grant you are applying for.

(NB) In kind support should not be included in the project costs.

C4. How much of this cost are you seeking a grant for?

We can fund up to 100% of the cost, within the upper limit of the grant you are applying for - up to £5,000 or between £5,001 - £20,000.

C5. If the total cost in C3 is more than the amount you are applying for in C4, please indicate how you will meet the difference in costs.

If there is a difference between the grant you are seeking and the total costs for your project, please set out how you will meet this gap. You might list other organisations who may have committed funding, or who you have applied to even if the outcome isn't known, or your own income/reserves, or any fundraising plans.

(NB) Possible and current funding pots should also be referenced in C1.

C6. If your project will continue after the grant ends, please indicate how you will then fund it.

RSCTC has a finite grant budget each year and wishes to encourage new groups and activities in the town. If a grant is awarded, RSCTC can only commit to that grant and there should not be any expectation of continuation funding. Organisations can only hold one grant within a 12-month period unless, in exceptional circumstances, a three year grant is awarded. If your project is ongoing, we need to understand that you have plans in place to meet any gap in funds, once the grant ends.

C7. Project costs summary

C7.i We can fund the following, for all grant applications:

Revenue costs such as:

- Staffing costs - direct delivery and support costs
- Volunteer expenses
- Training fees for staff and volunteers
- Travel costs for staff, volunteers and people participating in your project
- Premises / rent costs
- Publicising your project (printing etc.)
- Professional fees
- Event costs, such as food and drink (not alcohol), equipment hire, audio visual systems etc.
- General repairs

Capital costs such as:

- Building and land improvements
- Vehicle purchase
- Recreation facilities
- Play equipment
- IT equipment
- Sports equipment
- Facilities for people with disabilities
- Energy efficiency measures

Please make sure you only include the proportion of these costs that relate to the delivery of the project. For example, where a full-time member of staff is delivering a project for part of their contractual hours, you should indicate the proportion (as a percentage or number of hours) that you are seeking funding for.

Where a room is booked for a set amount of time, to deliver an activity or event, the hourly rental rate and number of hours should be indicated. The Officers will be able to advise you on this.

Please note:

- ° You will need to supply three quotes for each piece of equipment over £1,000, or any pieces of work being carried out. We will want to make sure that there is no conflict of interest or unfair competition, such as a relationship between a member of the organisation's staff or governing body and the supplier.
- ° Receipts should be obtained for all cash purchases. All financial documentation such as invoices and receipts should be kept for up to seven years after the project has ended. We may ask you to provide us with information at any time during the grant, or up to seven years after the grant has ended.

C7.ii For grant applications between £5,001 - £20,000 over 24 or 36 months.

We will only consider these awards by exception. Please speak to an Officer in the first instance.

We will need to complete the form in **C7.i**, for each 12-month period you are seeking funding for. If we agree that you can submit an application, we expect your request for RSCTC grant funding to taper (reduce) at the end of each 12-month period, until the end of the grant award. As an example, if you apply for £12,000, the first year might be £7,000, second year £3,000 and the final year £2,000; or if over two years £8,000 and £4,000 respectively.

D. Policies, procedures, insurances and permissions

Details of policies, procedures and insurances that you must provide.

Some of the information you must provide will be standard ones that you need for your organisation's or group's day to day work. Others may be specific to your project.

Documents you must supply: You will need to provide copies of your approved policies and procedures, as well as insurance certificates.

- Public Liability Insurance of up to £5m to cover costs relating to third party injury or property damage should a member of the public, such as clients, volunteers, service users, customers or contractors, make a claim against your organisation.
- Employers Liability Insurance, for those who employ staff.
- Professional Indemnity Insurance, for those organisations that provide advice, or hold personal data.

This list is not exhaustive, and you may also require other insurance relating to your application, such as Motor Insurance, or Contents Cover.

- Health and Safety Policy
- Equal Opportunities Policy
- Safeguarding Policy, for those working with children, young people and vulnerable adults

This list is not exhaustive, and you may require other policies relating to your application.

Work on land or buildings

Documents you must supply:

If:

- You do not own the land or building, please include written permission from the landowner.
- You don't hold the lease on the building before applying, you will need a letter from the owner indicating the land or building will be leased to you if you are successful in your application.
- You need planning or other permission, then you must include this in your application. If you don't yet have it, we might make this a Condition of Grant Agreement and release the grant when this is confirmed.

E. Publicity, monitoring and reporting

For grants of up to £5,000, we will ask you to provide a short report at the end of the project, on what you have achieved, in relation to what you expected to deliver set out in your application form. For example, we may ask you to send in some photographs of the event.

You will also need to provide a summary of what the grant was spent on - all 12-month grants need to be spent within that period.

For grants of between £5,001 - £20,000, we will ask you to capture more detail on the impact of the grant. For example, how you promoted your project, how you made it inclusive, how many people it helped and their experience. This could be via publicity, photographs, evaluation forms and feedback, video clips, or capturing anonymised case studies.

Similarly for grants of between £5,001 - £20,000, you will also need to provide a summary of what the grant was spent on - all 12-month grants need to be spent within that period.

For multi-year grants, we will require a similar report at the end of each 12-month period, including detail of any underspends in the grant within that period.

All organisations and groups will be expected to retain financial information relating to the grant, such as invoices and receipts. These will be required for the organisation's internal purposes, and may need to be accessed if RSCTC's auditors ask to undertake a sample of projects for their annual audit.

F. Equality, diversity and inclusion (optional)

F1. This is an opportunity for you to provide more detailed information on any specific groups of people your project will support.

The Town Council promotes equality, diversity and inclusion (EDI) through its work and wants to ensure that the projects it funds reflect the diversity of the residents of Sutton Coldfield.

Local organisations are close to the community they serve and this information helps the Town Council better understand how organisations are responding to local needs and how the community is changing over time.

If your project is focused on a particular group of people, please indicate who these are by putting an X in each box that applies.

G. Declaration

Signature one: This should be a senior contact who will be responsible for the application. The senior contact is confirming that the project is supported by the organisation applying and will ensure that it is delivered in line with the COGA. They must not be related to the person completing the application.

If your organisation is registered with Companies House, this will be a Director, or Company Secretary, even if you are also a registered charity. If you only registered as a charity, then this should be a Trustee. If you are a constituted group or club, then this should be a member of your management committee.

Signature two: This should be the person completing the application form, who we will contact if we have any questions.

G. Checklist: what do I need to include, or check that my organisation has?

For all applications

I have included:

- The organisation's governing document. ☐
- A bank statement from within the last three months. ☐
- A copy of the latest annual (audited) accounts. ☐
- Details relating to premises (lease, planning consent etc.) ☐
- Other (please state) ... ☐

I have included a copy (as relevant) of our:

- Health and Safety Policy ☐
- Safeguarding Policy ☐
- Equal Opportunities Policy ☐
- Other ☐

I can confirm that we have the following, current insurance (as relevant):

- Public Liability Insurance ☐
- Employers Liability Insurance ☐
- Professional Indemnity Insurance ☐
- Motor Insurance ☐
- Contents Insurance ☐
- Other ☐

Relating to land or buildings only

- Lease ☐
- Freehold ☐
- Planning consent ☐
- Other ☐

**Three quotes for each piece of equipment over £1,000,
or any work relating to land or buildings**

☐