

**DRAFT for F&G Committee**

**8 Jul – approved by Services 24 Jun**

**Doc 71176**

# **Salisbury City Council Grants Policy**

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## **Information**

A grant or subsidy is any payment made or charge waived by SCC to assist an organisation achieve a specific community service or support a community initiative. Salisbury City Council (SCC) supports a range of causes each year within a limited budget.

This document sets out the procedure for grant or subsidy applications being submitted to SCC and how SCC will determine which grants are awarded,.

## **Types of Grants or Subsidy**

There are four types of annual grant or subsidy

### **Minor Community Grant**

- For applications for up to £500

### **Medium Community Grant**

- For applications for £500-£3,000 per annum
- Grants can be for 1-3 years

### **Major Grant**

- For applications that exceed £3,000 for projects and activities that sit outside Community Grant criteria

### **Rent Reduction Subsidy**

- For sports, youth and social clubs that occupy buildings or land owned by SCC

## **Areas of Priority**

Applications must be for purposes that supports one or more of the following Council strategic aims as shown in [SCC City Plan 2017-2021](#)

- Making Salisbury a better place to live, work and visit
- Helping the community to help themselves
- Improving public open spaces

The Council also aims to

- Deliver community engagement activities to develop our community's self-confidence and resilience, and
- Ensure SCC's work with partners is effective

- Invest in the city's facilities and services

and therefore will support applications which:

- Encourage the development of community spirit
- Help to make our community healthier, through activities and sport
- Encourage initiatives within the community

Applications must also demonstrate value for money.

### **Mandatory Requirements**

Organisations must:

- Exist for charitable, sporting, youth development, community service or social purposes.
- Place any surpluses or profits into reserves, or spend them on pursuing its aims and objectives and ensure they are not paid to shareholders or officials
- Have clear and well defined aims and objectives
- Have officials, a constitution and a set of rules
- Have a bank or building society account which requires at least two signatories and is in the name of the organisation applying for the grant
- Organisations whose income exceeds £25,000 in their financial year will need to provide independently examined or audited accounts
- Be able to provide copies of 3 months most recent back statements
- Have public liability insurance for any events or projects involving third parties
- Have employee liability insurance, if staff are engaged
- Have building insurance, if a funding request is to be put towards improving a building
- Provide a registered address for the organisation and a contact name and number

### **Applications that are not usually eligible**

SCC will not accept applications for or from the following:

- General revenue costs (including wages and salaries), except in the case of Medium grants
- Loan repayments, rent, rates, council tax or utilities and insurance costs, except public liability insurance
- Statutory services
- Replacement for statutory funding
- Projects outside of Salisbury, which do not provide significant advantage to Salisbury city residents

- Individuals
- National Charities
- Local groups whose fund raising is sent to central HQ for redistribution
- Organisations who operate at a profit
- Costs of routine maintenance and repair of equipment
- Projects with party political links
- Organisations or projects that discriminate on the grounds of any of the nine protected characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex or sexual orientation
- Projects which do not benefit the residents of Salisbury City
- For buildings that are uninsured
- For projects that compete or conflict with any service, project or event being supported, organised or funded by SCC

Projects already receiving or having received funding within the last twelve months from SCC, except from organisations receiving Rent Reduction subsidy

## Application Process

**Applicants are to contact the Communities Team to discuss the application process before an application is submitted.**

Telephone: 01722 417100

Email: [bhc@salisburycitycouncil.gov.uk](mailto:bhc@salisburycitycouncil.gov.uk)

## Minor Community Grant

For applications for up to £500

1. Applicants must complete a **Grant Application Form** (Appendix 1) and forward it to SCC with the required supporting paperwork.
2. An SCC officer reviews the application against the **Mandatory Requirements**
3. shown above.
4. If the officer believes the application meets these requirements, it will be forwarded to the Communities Working Group (CWG).
5. If an application is refused submission to the CWG by the officer, the [Officer Refusal Notice](#) (Appendix 3) will be issued detailing the reason for refusal and initiating the appeal period. Applicants have 30 days from the issue of the Officer Refusal Notice to appeal this decision.

6. Members of the CWG are able to 'Call-in' or override the officer's decision if two or more members of the CWG agree to do so.
7. An appeal can be refused by either the Chairman of the CWG, or the City Clerk or an officer on behalf of the City Clerk
8. Once application is:
  - Progressed by an officer
  - Called-In by the CWG
  - Or is successful on appeal
 The application will be submitted to the CWG.
9. The CWG shall consider the application. The Chairman CWG may ask the applicant to present their application to the CWG. If the CWG requests further information before its makes its recommendation, the application will be deferred to a future CWG.
10. The CWG's has delegated authority from the Services Committee to award Community Grants ([CWG Terms of Reference](#)). The CWG will report the grants it awards to the next meeting of the Services Committee for information only.
11. If successful, applicants will be advised they have 60 days to accept the offer and apply for the funding to be released by signing and returning the [Grant Acceptance Form](#) (Appendix 3) sent with the formal offer.
12. Conditions may be placed on the offer which may need to be met before funds will be released.
13. The applicant will be required to complete an 'end of project/annual return' once the project is complete. The [Annual Report/End of Project Monitoring Form](#) is shown at Appendix 5.

### **Medium Community Grants**

- For applications for £500-£3,000 per annum
- Grants can be for 1-3 years

The application process for Medium Community Grants is the same as points 1-10 for Minor Community Grants with the addition of:-

1. The applicant must submit an [Annual Return](#) (Appendix 5) no later than the last day of the 10<sup>th</sup> month from the date the funding was drawn down or accepted. Applicants will be informed of this date by the Communities Team
2. The CWG will review the Annual Return and, if it is content to recommend its continuation, the grant will continue for a further twelve months, where grants are for more than one year.
3. An annual report will be submitted to Services Committee by CWG to update the Services Committee on the work of grant recipient's projects.
4. If the recipients of a Medium Community Grant:
  - Do not submit an Annual Return OR
  - Submit an unsatisfactory Annual Return OR

- Fail to show they are meeting their stated objectives

then the CWG may request additional reports or information, or recommend to the Services Committee that the grant be withdrawn.

## Major Grants

For applications that exceed £3,000 for projects and activities that sit outside Community Grants criteria

1. **Applicants are encouraged to contact the City Clerk to discuss the application process before an application is submitted.**
2. Applicants must complete a **Grant Application Form** (Appendix 1) and forward it to SCC with the required supporting paperwork.
3. The Responsible Finance Officer (RFO) will review the application against the **Mandatory Requirements**
4. shown above and a recommendation will be made to the City Clerk.
5. The City Clerk, in consultation with the Leader of the Council will determine whether the application is to be progressed.
6. Applications which are accepted will be considered at the next meeting of the Finance and Governance Committee. In exceptional circumstances an application can be considered by Full Council.
7. Applicants maybe asked by the Council to attend the committee meeting at which the application will be considered to introduce their application and answer any questions from Councillors.
8. If the Committee or Full Council award a grant, then the applicant will be advised they have 60 days to accept the offer and apply for the funding to be released by signing and returning the [Grant Acceptance Form](#) (Appendix 3) sent with the formal offer.
9. Conditions may be placed on the offer which may need to be met before funds will be released.
10. The applicant will be required to complete an 'end of project/annual return' once the project is complete. The [Annual Report/End of Project Monitoring Form](#) is shown at Appendix 5.

## Rent Reduction Subsidy

For sports, youth and social clubs that occupy buildings or land owned by SCC

The process for **new** applications is as follows:

1. Applicants must complete a **Grant Application Form** (Appendix 1) and forward it to SCC with the required supporting paperwork.

2. An SCC officer reviews the application against the **Mandatory Requirements**
3. shown above.
4. If the officer believes the application meets these requirements, it will be forwarded to the Communities Working Group (CWG).
5. If an application is refused submission to the CWG by the officer, the [Officer Refusal Notice](#) (Appendix 3) will be issued detailing the reason for refusal and initiating the appeal period. Applicants have 30 days from the issue of the Officer Refusal Notice to appeal this decision.
6. Members of the CWG are able to 'Call-in' or override the officer's decision if two or more members of the CWG agree to do so.
7. An appeal can be refused by either the Chairman of the CWG, or the City Clerk or an officer on behalf of the City Clerk
8. Once application is:
  - Progressed by an officer
  - Called-In by the CWG
  - Or is successful on appealthen the application will be submitted to the CWG.
9. The CWG shall consider the application. The Chairman CWG may ask the applicant to present their application to the CWG. If the CWG requests further information before its makes its recommendation, the application will be deferred to a future CWG.
10. The CWG's has delegated authority from the Services Committee consider to Rent Reduction Subsidies ([CWG Terms of Reference](#)). The CWG make recommendations concerning these subsidies to the next meeting of the Services Committee. These recommendations will also be forwarded to members of the Finance and Governance Committee for comment in advance of the Services Committee's consideration.
11. If successful and the subsidy is agreed by the Services Committee, applicants will be advised they have 60 days to accept the subsidy and acknowledge any conditions which applied to the subsidy by signing and returning the [Grant Acceptance Form](#) (Appendix 3) sent with the formal offer.
12. All subsidy recipients are required to submit an Annual Return no later than the last day of the 10th month from the date the subsidy was received.
13. The Annual Return will be reviewed by an SCC officer and then will be submitted to the CWG for consideration.
14. If the Annual Return is considered satisfactory by the CWG, then the subsidy will be continue.
15. If the recipients of a Rent Reduction Subsidy:
  - Does not submit an Annual Return OR
  - Submits an unsatisfactory Annual Return OR
  - Fails to show they are meeting their stated objectives



then the CWG may request additional reports or information, or recommend to the Services Committee that the subsidy be withdrawn.

16. The CWG will refer its decision and any recommendations to the Services Committee for approval where appropriate at the next meeting. At the same time the Policy and Resources Committee will be notified of the decisions and recommendations by email and asked to comment in advance of the Services Committee.

17. Applicant is notified of the outcomes after the Services Committee.

### **Reasons for application refusal or rejection**

Below is a list of potential reasons for an officer refusing/rejecting an application - it is not an exhaustive list but provides key reasons.

- The application does not meet the [mandatory requirements](#)
- The application is not complete.
- Further information requested for an application has not been received in good time and no communication has been received from the applicant.
- The application does not meet with [SCC's Strategic City Plan](#) or the Key [Priorities](#) of the City Council.
- Such an application would set an unfair or unsustainable precedent to future applications of a similar nature.
- The project is too high risk for public funds and/or not good value for money
- The business case/budget, if presented, is considered flawed or unsustainable.
- SCC has awarded the allocated annual grant budget if full, and there are no identified reserves/contingency which it wishes to use.
- Any other relevant reason(s) which are considered significant to warrant refusal to safeguard SCC and local public funds.
- An application will be automatically refused with no right of appeal right if it is an application for the same or similar to a previously refused application and been submitted within 12 months following the refusal (same applicant/organisation etc.).

### **Appeals Procedure**

The appeals procedure is only available to applicants in the initial stages of the process when an officer has issued an [Officer Refusal Notice](#). The applicant has 30 days from the Date of the Notice to appeal.

To appeal the applicant needs to do the following:

- Response in full to any observations made to the satisfaction of the officer and provide information required.
- Set out why the appeal should be agreed

The Officer will submit valid appeals to the Chairman of the CWG/Finance and Governance Committee for approval to grant the appeal and so progress the application to Committee or CWG, OR to refuse the appeal.

If an application:-

- Is unsuccessful
- Is not called in
- Is refused on appeal
- Is not appealed within the deadline set or
- Has been turned down by members at a previous meeting or
- A grant or Rent Reduction Subsidy has been withdrawn

then the applicant cannot re-apply for the same or similar project/grant for a period of not less than 12 months from the date expiration of the 30 days appeal deadline or date of the final decision notice from an officer, the CWG, or the F&G Committee.

If a grant be re-applied for which is a similar or same request to that which is under the 12 month embargo, it will be automatically refused.

### Further Information

1. In most cases, if a grant has been successful in the past, then there will be a limit to the number of times the same or similar grant can be requested again.
2. If an organisation is successful in obtaining a Minor or Major Grant in one financial year, it is unlikely it will receive another grant for a period of not less than 23 months, except in exceptional circumstances.
3. It is a condition of any grant application that the group or project must bring direct benefit to the residents of Salisbury. All applications must clearly demonstrate how this will be achieved in their application form.
4. Application forms **must** be submitted along with the latest set of the group's accounts which must include full details concerning the organisation's reserves if held. It is important that all questions on the application form are fully answered and that any appropriate additional information, which supports an application, is provided at the time of the submission.
5. Grant applications cannot be submitted retrospectively.
6. The Medium Community Grant scheme provides start-up awards for new organisations as well as grants for existing organisations. Applications will be considered for day-to-day running expenses and individual projects – full details must be provided in the application form.
7. Applications from religious & faith groups will be considered where a clear benefit to the wider community of Salisbury can be demonstrated, irrespective of

their religious beliefs. Compliance with this requirement will need to be demonstrated throughout the project.

8. Grants must only be used for the purpose for which it was awarded unless written approval of SCC has been obtained in advance. The Council reserves the right to reclaim the grant if prior approval is not sought.
9. Any unspent portion of the grant must be returned to SCC within 12 months of when the grant was awarded to the applicant.
10. Although SCC's Community Team will support applicants, the administration of and accounting for any grant or subsidy shall be the responsibility of the recipient.
11. SCC reserves the right to request any further information that it deems necessary to assist the decision making process.
12. Awards made for projects seeking additional funding from other sources will be made available once **all** other funding is secured and will be available for 12 months from the date the request was approved (unless otherwise determined by SCC).
13. If the grant cannot be spent with 12 months from the award, a Grant Renewal Request must be submitted in writing to the Communities Team. This must give a full update, reasons for any delays, and details of the short, medium and long term project plans. This request will be considered by the CWG and where appropriate the F&G Committee.
14. Awards may be subject to additional conditions and requirements as deemed appropriate by the CWG/F&G Committee.
15. The awarding Committee/CWG may award any proportion of the grant/subsidy requested.
16. Grant application forms are available from the Communities Team or the City Council website.

### **Banking Arrangements**

The organisation should have a bank account in its own name with at least two authorised representatives required to sign each cheque. Grant payments will be made by BACS.

### **Deadlines/Timelines**

#### **Successful Grants**

Subject to relevant conditions being in place, successful applicants have 60 days to accept the grant and request the release of the funds before it is automatically re-allocated. An extension can be requested, but this is usually only granted for larger/capital projects. If the funds are automatically re-allocated after 2 months, then the applicant would need to re-apply for the grant, as well as submitting reasons for not drawing down funds within the 60 days/extended time. There is no guarantee that such applications will be successful

**Notice of Officer Refusal**

The applicant has 30 days from the date of the Refusal Notice to appeal or for a councillor to call-in the application to a future CWG/F&G Committee meeting

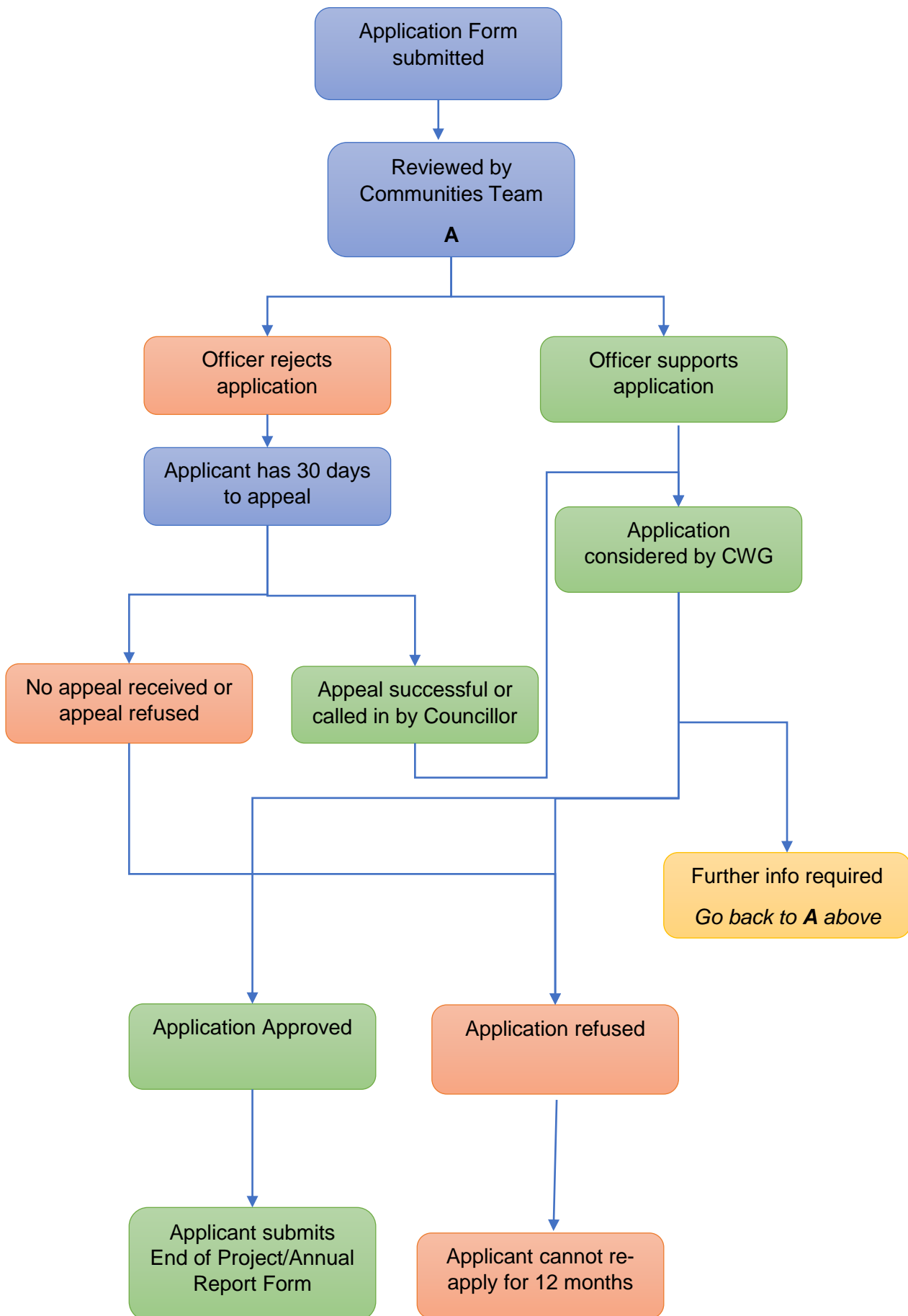
**Application refused by CWG or F&G Committee**

Applicants cannot re-apply for 12 months from the date of the CWG or Finance & Governance Committee meeting at which refusal was agreed.

# Flowcharts

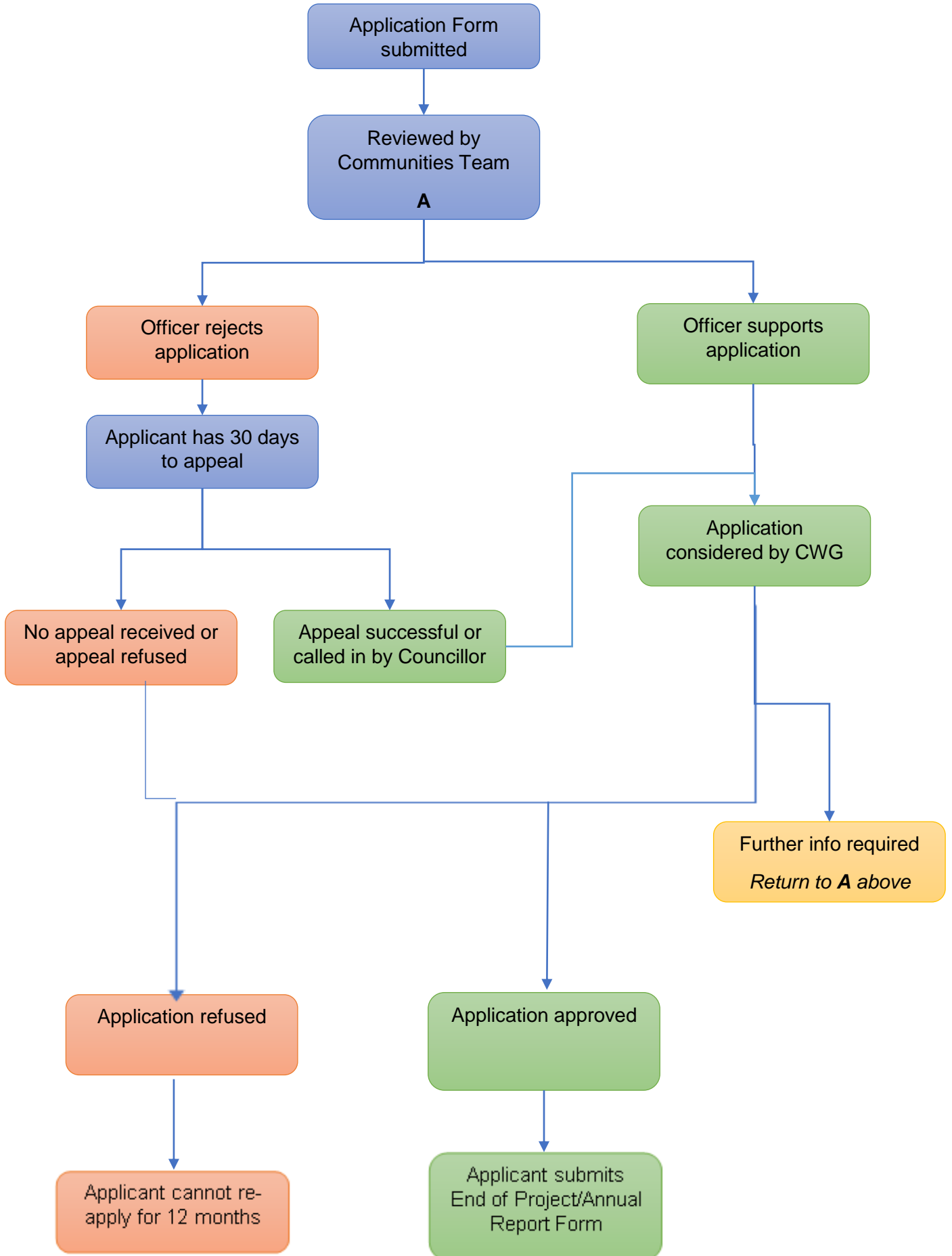
## Application flow chart – Minor Community Grants

*For applications up to £500*



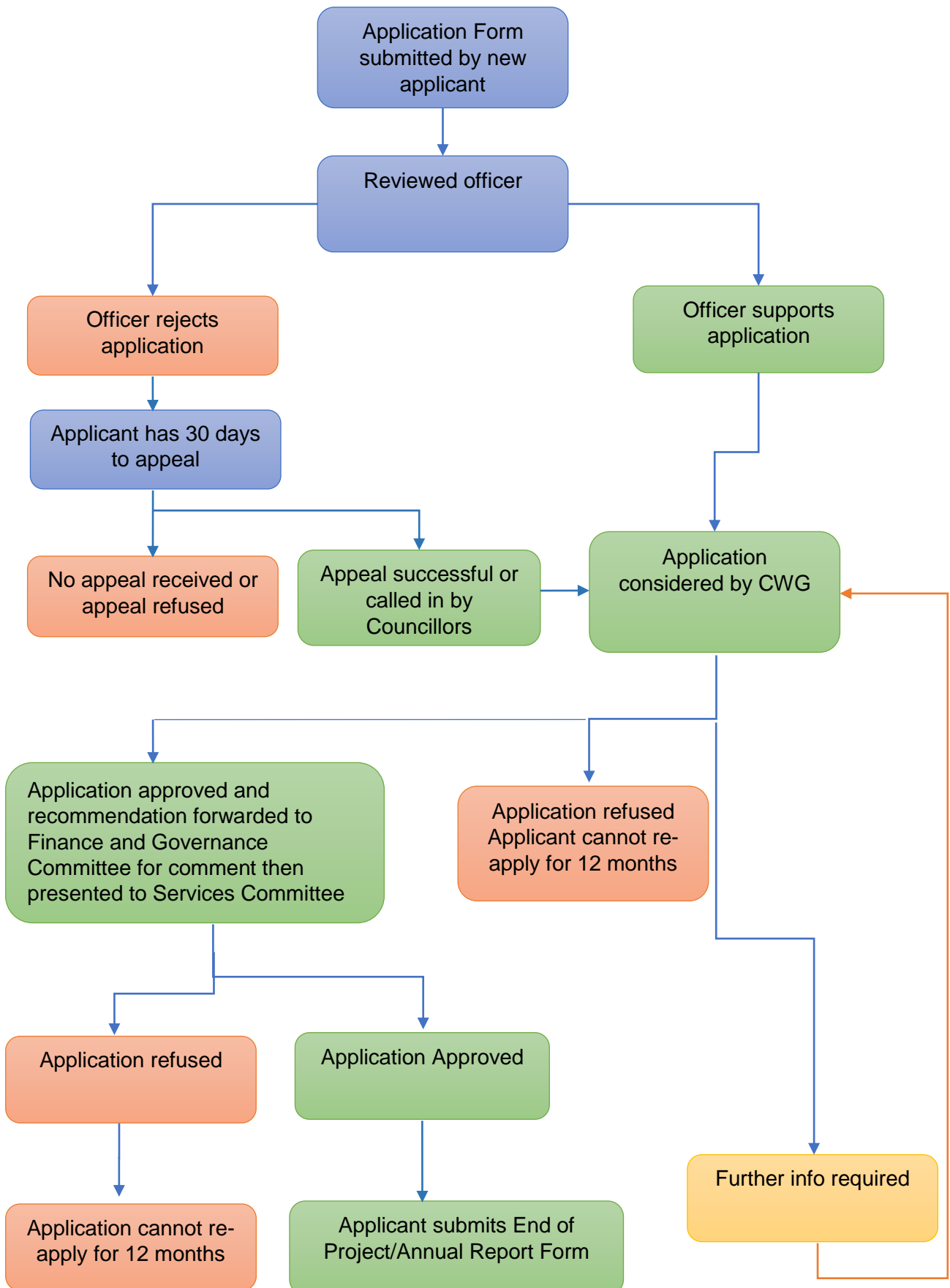
# Application Flow Chart – Medium Community Grant

For applications of £500 - £3,000 over 1 – 3 years



# Flow chart for Rent Reduction Scheme (New applications and Annual Reports)

*For sports, youth and social clubs that are occupy buildings or land owned by SCC*







## Appendices

### Appendix 1



### Grant Application Form

Which type of Grant or Subsidy are you applying for? (please ✓)

- |                           |                          |
|---------------------------|--------------------------|
| 1. Major Grant            | <input type="checkbox"/> |
| 2. Rent Reduction Scheme  | <input type="checkbox"/> |
| 3. Medium Community Grant | <input type="checkbox"/> |
| 4. Minor Community Grant  | <input type="checkbox"/> |

If you are applying for a Medium Community Grant please indicate below if you are applying for a grant over 1, 2, or 3 years?

1 year     2 years     3 years (please ✓)

Contact Name:		
Position:		
Organisation:		
Contact Address:		
Telephone Number:		
Email:		
Status of Organisation:		
Charity/Company number if (if applicable)	Charity No:	
	Company No:	
What geographical area does your organisation cover?		
How long has your organisation been in existence? (Please ✓)	Less than one year	
	Between one and five years	
	More than five years	

**Please be aware for all applications of £1000 or more, the applicant may be required to provide a presentation about the project to the Communities Working Group**

**If you have any specific communication needs, tell us what they are**

Text phone   
(please specify)

Sign language

other language



Other

### 1. Organisation Background

Have you applied for or received a grant/subsidy from SCC in the last <u>5 years</u> ?	Date Applied	Project	Amount Applied for	Were you successful
(Please list – continue on a separate sheet if necessary)				
<p><b>What are the aims and objectives of your organisation</b></p>				
<p><b>What are the main activities of your organisation?</b></p> <p><i>If you are a new group describe the services/activities you plan to provide</i></p>				
<p><b>Please demonstrate your organisation's commitment to equal opportunities</b></p> <p>(please enclose any relevant policies)</p>				

	Yes / No or NA
Is this a retrospective application?	

Are you part of a religious group	
If this application is for a school is this for a project that benefits the wider community and is in addition to statutory services?	
If application is from Education, health or social service establishment – is the project in addition to statutory services?	

## 2. Your project

<b>Project</b>	Start Date	/ /
	Finish Date	/ /
	Total Cost	£
	Grant Applied For	£

<b>Project title</b>	
<p><b>Description of project</b> - <i>Try to be specific about what you will achieve and how you will achieve it, telling us how your grant or subsidy will benefit your community</i></p> <p>(please continue on a separate sheet if necessary)</p>	
<b>Where in Salisbury will the project / activity take place?</b>	
<p><b>Who will benefit from the project?</b></p> <p><i>Please tell us what groups will benefit and approximately how many people will benefit in total, please give a number, do not put 'everyone in the area' an estimate is fine if you cannot be exact</i></p>	
<b>What evidence do you have that this project/activity is required?</b>	

<p><i>Tell us how you have identified the need for the project, whether within your group or community and how you think your project will meet this need</i></p>	
<p><b>What support have you received for this project/activities?</b></p> <p><i>Please tell us about any expressions of support you have received from outside your organisation</i></p>	
<p><b>How will the project/activities be managed and how will you measure its success?</b></p>	
<p><b>Please give the timescale and key changes/benefits and objectives for your project/activities, including start date and finish date</b></p> <p><i>These will be used in your end of year/end of project monitoring report for you to report against</i></p>	

**What arrangements do you have in place to ensure safeguarding of children and young people**

*Applicable only if your project involves working with this client group*

**What are the main risks for the success of the project/activity and how will these risks be managed?**

**E.g. health and safety, financial challenges**

**If your organisation/group has financial reserves, what is the value of these reserves and for what purpose are they held?**

**If your reserves are more than the amount you are requesting, please explain why you are seeking external funding**

**3. How will you pay for your project?**

**Tell us how much money you need for your project/activity**

- a) Provide a FULL breakdown of the costs involved in your project**
- b) Show how much of the funding you are requesting towards this element**

*Include extra sheets if necessary*

<b>Item or activity</b>	<b>Total cost</b>	<b>Funding requested</b>
<b>Totals</b>		

**3.1 If you are applying for a Medium Grant or to the Rent Reduction Scheme please also complete the table below**

**Please use general headings indicated in the FULL breakdown listed previously, using columns A-C to tell us how much funding you are requesting in years 1-3.**

*Use extra sheets if required*

<b>Item or activity</b>	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Total Cost</b>
	£	£	£	£
	£	£	£	£

	£	£	£	£
	£	£	£	£
	£	£	£	£
	£	£	£	£
	£	£	£	£
	£	£	£	£
<b>Totals</b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>

**3.2 Please list any applications you have made for funding from other organisations in the table below:**

<b>Organisation</b>	<b>Contribution Sought (£)</b>	<b>Applied (please tick as appropriate)</b>	<b>Granted (please tick as appropriate)</b>

**4.0 Further information enclosed Checklist**

	<b>Enclosed (please ✓)</b>
<b>A copy of your organisations bank statements for the previous three months (mandatory)</b>	
<b>Copies of all relevant Employer's, Building &amp; Public Liability Insurance Certificate if appropriate (mandatory)</b>	
<b>A copy of your constitution and articles of association (or similar documents if the above do not exist, showing the organisations status)</b>	
<b>A copy of your organisations latest set of accounting statements (if any exist)</b>	
<b>Copies of any letters of support for your project</b>	
<b>Other (please list)</b>	

If any of the above documents have not been enclosed, please give reasons why in the box below:

Please confirm that the bank account from which this project is funded is in the name of the organisation and that 2 authorised representatives are required to authorise payments	

**Declaration by the applicant**

I/we declare that, to the best of my /our belief, the information on this application form and in any enclosed supporting documentation is correct

I/we declare that, I/we have read the City Council’s Grant Policy and believe to the best of my/our knowledge, that we meet the criteria set out by the Policy

I/we accept the following:

- I. That any false information we provide, even if provided in good faith, may lead to the withdrawal of the grant offered,
- II. That for applications of £1000 or more, a presentation is required by the applicant(s) to the City Council. This will be arranged prior to any meeting by the City Council Active Communities Team
- III. That any grant offered will be used only for the purpose set out in this application and
- IV. That we will provide reports on progress at the request of the City Council
- V. That should any grant offered, not be used in accordance with the terms and conditions set out by the City Council, I/we undertake on behalf of the organisation to repay the outstanding amount to the City Council on demand

Please be aware that the decision as to whether you have been successful in your application will be communicated to you shortly after the relevant council meeting

<b>Signed :</b>		
<b>Name(s):</b>		
<b>Position(s):</b>		
<b>Date:</b>		



**SCC will not sell or rent your personally identifiable information to anyone, or use the data for any other purpose incompatible with the purpose for which it was originally collected (Medium Grants Application).**

**We will only hold your information for as long as necessary for the purposes (a year after the event)**

**I consent for my personal data being held for the purposes listed**

**Please remember:**

If you have not answered all the relevant questions and sent all the information we require, **we will return your application to you and this will cause a delay.**

Please send your application to:

Communities Team, SCC, Bemerton Heath Centre, 58-60 Pinewood Way,  
Salisbury, SP2 9HU

## Appendix 2

### Grant Application – Officer Refusal Notice

<b>Grant Application received from:</b>	
<b>Organisation Name</b>	
<b>Name of Project</b>	
<b>Date of Refusal Notice</b>	

Your grant application has been assessed by the Active Communities Manager and has been refused on the grounds selected below:

	✓
The application does not meet the <a href="#">mandatory requirements</a>	
The application is not complete.	
Further information requested for an application has not been received in good time and no communication has been received from the applicant.	
The application does not meet with <a href="#">SCC's Strategic City Plan</a> or the Key <a href="#">Priorities</a> of the City Council.	
Such an application would set an unfair or unsustainable precedent to future applications of a similar nature.	
The project is too high risk for public funds and/or not good value for money	
The business case/budget, if presented, is considered flawed or unsustainable.	
SCC has awarded the allocated annual grants budget if full, and there are no identified reserves/contingency which it wishes to use.	
Any other relevant reason(s) which are considered significant to warrant refusal to safeguard SCC and local public funds.	
*An application will be automatically refused with no right of appeal right if it is an application for the same or similar to a previously refused application and been submitted within 12 months following the refusal (same applicant/organisation etc.).	

The application has been refused on these grounds because:

You have 30 days from the date of this notice to submit an appeal

\*Except in the case of automatic refusal where there is no right of appeal

Signed:	Annie Scadden Communities Manager
---------	--------------------------------------

**Appendix 3**

**SCC COMMUNITY GRANT FUND SCHEME  
Grant/Subsidy Acceptance Form**

**Name of project:**

**Amount of grant/subsidy:**

**Decision: The \*Communities Working Group/Service Committee/Finance and Governance e Committee\* has agreed to fund the bid.**

*(\* delete as appropriate)*

**The following conditions apply to this award:**

*(To be completed by Communities Manager/City Clerk appropriate)*

I accept the grant on the terms as offered

Signed ..... Date .....

Name of Group/Organisations:  
(BLOCK CAPITALS) .....

Position/Representing .....

Address .....

..... Postcode.....

Telephone .....

Email .....

The Grant will be paid by BACS into the account shown on the application form. If the applicant prefers a cheque please state to whom the cheque must be made payable to – please complete in block capitals

.....

Please return completed form to:

**SCC, The Guildhall, Salisbury SP1 1JH**

## Appendix 4 Annual Report/End of Project Monitoring Form

### Annual Report/End of Project Monitoring Form



#### What is this form for?

This form is to enable you to describe what you've achieved through your work, by this we mean the activities, services or facilities you have been able to provide by being awarded a Medium Grant, or relief from your rent via the Rent Reduction Scheme, as detailed in your application

Please complete the whole form and send to:

Communities Manager  
SCC  
Bemerton Heath Centre  
Pinewood Way  
Salisbury  
SP2 9HU

**Date by which completed form  
must be received by SCC:**

**INSERT DATE**

<b>Organisation Name</b>	
<b>Project Name</b>	
<b>Telephone Number</b>	
<b>Contact Name</b>	
<b>Email Address</b>	
<b>Details of award/subsidy</b>	£

#### Agreed changes/benefits/objectives for the year (from application)

<b>1.</b>	
<b>2.</b>	
<b>3</b>	

<b>4</b>		
<b>Can you confirm that the whole of the award was spent on the purpose for which it was given</b>	Yes/No <i>(please be aware that if the answer is NO, the remaining balance may need to be repaid)</i>	
<b>Have you enclosed copies of accounts, receipts and invoices to support this monitoring form?</b>	Yes/No	
<b>If you have answered NO to either question, please explain why</b>		

<b>Comment and evaluation</b>	
Briefly describe your outputs as a result of the award e.g.: actual services provided, activities run, publications produced etc. (examples in Guidance Notes)	
<b>Number of beneficiaries supported through this award</b>	
<b>Were there any changes/benefits you were not expecting? (include here any results that were in addition to your original aims, or difficulties/challenges experienced)</b>	

--

**What can you take from the changes/benefits to plan or develop for the future**

--

**Did you need to raise any additional funds for this project? Yes/No**

If Yes, what other funds did you manage to raise and from where? If you plan to, how will you continue to do this work? (Indicate financial and other arrangements made)

Please add any other relevant information, highlights or comments

--

Signed:	Position:	Date:

***Please return this form along with your accounts, invoices and receipts to:  
Communities Manager, SCC, Bemerton Heath Centre, Pinewood Way, Salisbury SP2  
9HU***

<b>Publicity</b>	
<b>Organisation Name</b>	
<p><b>COMMENTS</b> It would be helpful if you could provide us with a quote we can use on what the award has meant to your organisation or to the people that you project/organisation helps in accordance with the changes/benefits you have reported. (Please keep this to a maximum of 50 words)</p>	
<p>This has been written by:</p> <p>Name.....Position .....</p> <p>(Capitals please) (E.g. Committee Member, Client, Helper etc.)</p>	
<b>PHOTOGRAPHS</b>	
<p>Do you have a photograph that is suitable for inclusion in our Annual Report or similar publication Yes/No - if yes please send it via email to <a href="mailto:BHC@salisburycitycouncil.gov.uk">BHC@salisburycitycouncil.gov.uk</a> with your organisation name and details of the activity etc.</p>	

If NO, would you be agreeable if we were able to arranged for a photographer to visit  
Yes/No

If you are agreeable, the following information would be helpful

Is there a regular day, time and place that would be convenient? If so please give details:

Alternatively please provide a name and telephone number of the person to contact if we can arrange for a photographer to visit

Name:.....

Telephone Number.....

### Monitoring and evaluation guidelines:

Monitoring and evaluation of your project is not just important to us and our residents, but also to your organisation for future planning purposes and possible funding applications.

Being organised to monitor progress from the outset will help you evaluate your work and most importantly, the difference made to your beneficiaries. Focussing on the changes/benefits your project has achieved will help with your report.

Please take time to familiarise yourself with this form and the information you will be required to supply – ensure everyone knows what is required and when the form is to be returned.

Think about what you said the award would be used for and why. If this was for a small project within your organisation you need to report on the changes/benefits of the project itself, not on those of the organisation as a whole.

Changes/benefits should be linked to the aims of the project, though some may be unexpected. Use/adapt your existing systems and information wherever possible. Examples could include questionnaires, feedback forms, recorded observation, interviews, and attendance sheets and so on

### Here are some examples of the types of information we are looking for

#### Example 1

<b>Purpose for which award was made</b>	Towards refurbishment of the community hall kitchen
<b>Activities</b>	Hall bookings increased 50% Luncheon club for 40 elderly people launched, once a week Toddler group now prepares fresh healthy snacks on the premises for 35 under fours Youth club now teaches 30 teens simple food prep
<b>No of beneficiaries</b>	450
<b>Unexpected outcomes</b>	Five of the volunteers who took part in the project have joined the management committee and further improvements to the hall are being planned and funding sought



## Example 2

<b>Purpose for which award was made</b>	To buy IT equipment for a disability help-line support group
<b>Activities</b>	Two computers purchased and broadband installed New marketing material produced Website designed
<b>Changes/Benefits achieved</b>	Email facility now available in addition to telephone help (now averaging 12 emails per day) Four new volunteers recruited and IT training took place Four existing and four new volunteers gained basic certificates in IT communication skills Website launched to allow signposting to resources outside help-line hours
<b>No of beneficiaries</b>	85 per week on average
<b>Unexpected changes/benefits</b>	Now working in partnership with a recycling project that installs computers, free of charge, into home of people with disability. Recipients identified through helpline Client surveys suggests that we are now helping a wider range of disability needs though email / website for those that find telephone a difficult medium, due to hearing or speech difficulties. This will require additional training for the staff and volunteers for the organisation

### Remember – you have signed a contract with SCC

Non return of the Monitoring and Evaluation form may result in your organisation having to pay Rent to the value of the award unaccounted for and prevent your organisation from applying to the Rent Reduction Scheme in the future.

Here are some general hints and tips regarding managing and returning monitoring on time for any award recipient:

- Share and pass on the monitoring requirements and form with others in your organisation
- Diary return dates for Monitoring and Evaluation forms (Check with your Salisbury City contact if unsure)
- If you are unclear about what is expected ASK!
- Put systems and good practices in place to collect quantitative data (things that can be measured numerically) as a matter of course over the award period
- Incorporate required monitoring data into feedback forms completed by your users and volunteers
- Keep copies of all receipts and invoices

- If someone moves in your organisation, hand the requirements over and inform us of the new contact straightaway
- If there are changes to, or problems with your planned activities, talk to your SCC contact before your monitoring is due, don't assume you can use the award for other purposes
- Regard the exercise as a positive one. Lessons learned from monitoring and evaluation can feed into your future strategic plans and other funding applications
- Allow good time for posting the report and take copies of completed monitoring forms for your files before you send them to us
- Focus on the changes/benefits achieved through your activities
- Do not wait to be reminded or chased for monitoring – it may appear unprofessional, and chasing by SCC puts a strain on administrative resources

## Appendix 5

### Terms of Reference for the Communities Working Group (CWG)

As agreed by CWG on 20 May 2019  
As approved by the Services Committee on 24 Jun 2019

#### 1. Purpose of Working Group:

- 1.1. To discuss the strategic development of the communities service delivery
- 1.2. To discuss the management, budget and standards of the Council's communities services, in order to provide strategic direction to officers
- 1.3. To make recommendations to the Services Committee concerning these matters.

#### 2. Membership:

- 2.1. Members – Nominated by the Leader of the Council in consultation with the City Clerk.
- 2.2. Officer in routine attendance: City Clerk (CC) and Communities Manager (CM)
- 2.3. Other officers to be invited as necessary
- 2.4. Substitutes are encouraged to ensure the meeting is quorate
- 2.5. The quorum is 3 members

#### 3. Meetings:

- 3.1. As required –approximately 4 times per year
- 3.2. Meeting will be chaired by an elected member. A vice chairman will also be an elected member.
- 3.3. The CM will be the working group's secretary and will be supported an officer from within their team as note taker
- 3.4. Notes from the meeting will be circulated only to members of the group.

#### 4. Accountability:

- 4.1. The CWG will work in accordance with the Council's Standing Order
- 4.2. In accordance with the SCC's Standing Order, any proposal put forth by CWG will be considered by the Services Committee

- 4.3. The Chairman of the CWG will make a verbal or written report to the Services Committee at each Services Committee meeting, at their discretion
- 4.4. The CWG has delegated responsibility from the Services Committee to discuss the management, budget and standards of SCC's Communities work area in order to provide strategic direction to officers including assessing Community Grant applications and making awards as agreed by members, and to oversee strategic development

**5. Issues to be considered by CWG to include (but not exclusively):**

- 5.1. Community Grant Applications – the CWG has delegated authority to award Minor and Medium Community Grants within the agreed budget. It will report it award to the Services Committee. Major grants are considered by the Finance and Governance Committee.
- 5.2. Rent Reduction Subsidy – the CWG will new review applications and make recommendations to the Services Committee for approval
- 5.3. The scrutiny of Annual Returns relating to grants and the rent reduction scheme awarded is delegated to CWG in accordance with the SCC's Grants Policy
- 5.4. The Council's ambition for active communities, engagement and involvement
- 5.5. Consideration of future budgets and budget monitoring
- 5.6. Opportunities for working with volunteers, community groups and partner organisations
- 5.7. Any other issues raised by working group members relating to communities services