

LEWES TOWN COUNCIL

REQUEST FOR 'MAJOR FUNDING'

Guidance notes for applicants, and Application form

These notes explain how the Council will deal with requests for significant financial grants

PLEASE READ THEM CAREFULLY BEFORE YOU COMPLETE THE APPLICATION FORM

Applications may be made at any time, but applicants are advised to discuss their proposals with the Town Clerk in the first instance.

TO SUBMIT AN APPLICATION:

This application must be submitted by email

1. Read these guidance notes
2. DOWNLOAD the application pack and save it to your computer.
3. RENAME the application file appropriately, to identify it as your application.
4. OPEN the renamed file and select the "fill&sign" tool to complete all sections.
 - a. It is possible to SAVE the part-completed form at any point and return to it later.
 - b. You will be asked to digitally SIGN the form in two places – simply follow the prompts to do this.
5. ONCE COMPLETED
 - a. Ensure you SAVE the file for your own records and then
 - b. send it, with any additional documents, as an email attachment to: townclerk@lewes-tc.gov.uk

Assessment of requests for ‘Major funding’

Background:

1. The system employed when assessing smaller grants (<£2,000) within the established Community Grants Scheme is that the Grants Panel evaluates applications in four ‘rounds’ each year, with members individually awarding scores on perceived merits in five categories; then collectively analyzing aggregate results, and reaching consensus having assessed comparative ‘ranking’ of applications and other factors. Recommendations for awards are made in a report to Council.
2. Requests arise from time to time for financial support in larger sums – **“Major funding”** - usually related to projects within the community that appear to the applicant body to have some resonance with the aims of a parish council, and these may be brought direct to Council or to a Committee or Working Party according to context.
3. Such requests are usually received individually, and a system of comparative ranking as used by the Grants Panel is not appropriate. Council has agreed a system (*Resolution FC2020/07.2 refers*), devised by the Audit & Governance Panel, giving a simple, structured, assessment that can be understood by both applicant and assessors. This follows the same principle of five equally-weighted elements and similar criteria. These are:
 - i) Closeness of match to the council’s objectives and underlying values*
 - ii) Overall “robustness” of the proposal – *ie* general likelihood of success/sustainability
 - iii) Financial planning exhibited – *ie* adequacy/prudence/appropriateness *etc.*
 - iv) Scope and sustainability of the proposal – *ie* beneficiaries; scale; thoroughness
 - v) A personal (subjective) assessment; based on any special insight or considerations.

Also considered are factors such as the balance or proportion of Council funding being sought, compared with other sources and the applicant’s own funds, and other detail elements of a proposal.

*These are inherent in the establishment of a parish Council and enhanced by published policies in specific areas of activity or aspiration.

Assessment:

4. When a relevant application is received, to be considered at any meeting of Council; Committee or Working party, a standard application form completed by the applicant will be accompanied by this briefing note and a blank scoresheet for Councillors to complete individually. An example is attached to this note.
5. Councillors should individually record a score for each of the five elements (maximum score 20 for each = total max 100) according to their own judgement. A median average of the scores recorded by those present will be entered on behalf of any absent Member. The resulting total score will be represented as a percentage of the maximum possible. This process is a first-stage to moderate any inherent ‘high’ or ‘low’ scoring tendencies among individuals. The final decision is reached following a discussion – informed by the ‘scoring’ of the application in terms of total score and proportion of the theoretical maximum.
6. Council should set a minimum threshold score required before a request might be eligible for further consideration (65% is recommended in most circumstances). Failure to reach the threshold will result in immediate rejection. If there is sufficient support, represented by a score at or above the threshold, the matter is then concluded following discussion.
7. Following discussion, any award should be agreed by a vote in the normal manner.

FUNDING APPLICATION ASSESSMENT SHEET

Larger sums or requests falling outside the Financial Grants Scheme *(Resolution FC2020/07.2 refers)*



**LEWES
TOWN
COUNCIL**

Ref: *report FCnnnn/20nn*

APPLICANT *name* Requested **£n,nnn**

Councillor _____

Date: **meeting date**

	AREA	COMMENTS	SCORE (Max 20)
1	Closeness of match to the Council's objectives and underlying values		
2	"Robustness" of proposal – general likelihood of success/sustainability		
3	Financial planning – adequacy/prudence/appropriateness		
4	Scope & Sustainability – beneficiaries; scale; thoroughness		
5	Personal (subjective) assessment – any special insight or consideration		
			TOTAL (max 100)

Signature _____



Dear Applicant,

Lewes Town Council is a member of the Living Wage Funder scheme – a movement of grant-makers that help organizations to pay the real Living Wage. We wanted to let you know about our Funder commitment and to share with you what this means.

The real Living Wage, (with a higher rate in London), is calculated every year by the Living Wage Foundation according to the cost of living.

Paying the Living Wage to staff has well documented benefits including improved productivity and retention together with team morale and reputational value. It is also the right thing to do.

Across the UK, one in four working people earns below the Living Wage, and two thirds of children in poverty have a working parent. We believe that a fair day's work should mean a fair day's pay, but we know that there is a huge amount of low pay in the third sector (with an estimated 27% of jobs paying below Living Wage).

At Lewes Town Council we already pay all directly employed staff the real Living Wage, and now we want to make sure that, where possible, we are funding posts at the Living Wage rate too.

We encourage applicants who are asking us to fund salaries or staff time, to cost this at the Living Wage rate as a minimum. We want grantees to know that we see responsible pay as a sign of good management; rather than a 'race to the bottom' we want to aim for a sustainable and fair sector, where employees are valued and can earn a wage that meets the cost of living.

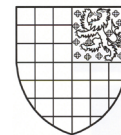
Crucially, though, if organizations aren't able to pay the Living Wage for any reason (for example, part-funded posts) this does not mean that we won't fund them; it simply means that we want to fund at the Living Wage wherever possible. This is about enabling the Living Wage, not about leaving people out in the cold.

While this policy does not affect any previous grant with us, we would like to encourage you to find out more about becoming a Living Wage accredited employer, if you are not one already. You can find out more at www.livingwage.org.uk.

- If your organisation is already Living Wage accredited, or plans to become so, please let us know so that we can celebrate this through our communications channels.
- There is a small cost for Living Wage accreditation (starting from £60 per year for charities with less than 10 staff)

Kind regards,
Lewes Town Council

Financial Grant Application



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It is **IMPORTANT** that you make comprehensive entries **ON THE FORM ITSELF**; DO **NOT** simply enter references to accompanying documents

Please read our guidance notes carefully before completing this form.

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Do **NOT** simply enter references to accompanying documents

LIMIT supporting information or documents to that which is requested

A Contact details

1 Name and address of your group or organisation

2 Any other name you use or name of your project if this is different

3 **MAIN CONTACT** for this application

This must be someone who knows about your project and can be contacted reasonably easily. This is normally the person completing the form.

Title First name Surname

4 Position held in the organisation

5 Contact address, including full postcode

6 **This address is:** (tick one box only):

Your organisation's office The main contact's home address Other (please specify)

Email address

Telephone: Day Evening

7 If you have a preferred means of communication, please tell us:

Telephone e-mail post Other (please specify)

B About your organisation

8 **What type of organisation are you?** Tick all boxes that apply.

Community group/club/society Company limited by guarantee Registered Charity in England

Registration number if applicable

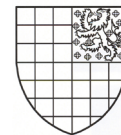
Do you directly employ any paid staff? Yes No

If Yes: how many? ...

..and do you pay them, as a minimum, the Living Wage Foundation Living Wage?* Yes No

* please also see the LWF "Friendly Funder" letter included with the guidance notes in this application pack

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It is **IMPORTANT** that you make comprehensive entries **ON THE FORM ITSELF**; DO **NOT** simply enter references to accompanying documents

9 When did your organization or group start? *ie* When did it first start meeting or running activities or projects?

Month Year

10 Briefly describe the purpose of your organisation.

Describe the usual activities/services you provide. If you are a new group, describe what you plan to provide.

If you have a written constitution, you must attach a copy with this application

11 If you are a branch of, or related to, a larger organisation, please give details.

12 How many people (approximately) are involved in your organisation ?

Management committee members Volunteers Paid officers/staff

Ordinary Members Others (please describe):

13 Do you have a "Friends" society or similar supporters group ? YES NO

If YES, how many members does it have ?

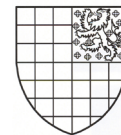
14 Please tick/complete if your group has any of the following:

Public liability insurance Maximum Cover £

Other insurance (specify) Maximum Cover £

Name(s) of governing or affiliated body(-ies):

Financial Grant Application



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C About your project/service

15 Describe the project or service. *eg* Does it have a working title? What does it aim to achieve? How will it work? *Please enclose any supporting documents, plans, projections etc. NB - brief summaries are preferable to complex documents!*

16 Please tell us why you think this should receive funding from Lewes Town Council.

Please refer to guidance notes.

17 How have you identified the need for this?

18 When do you intend your project or service to start and finish?

Start

Finish

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19 Approximately how many people do you *estimate* will benefit directly from your project ?

YOU MUST COMPLETE THIS QUESTION – ‘educated guess’ will be acceptable

<i>Age group</i>	<i>IN LEWES</i>	<i>outside Lewes</i>	
Under 5			
6 – 10			
11 – 16			
17 – 21			
22 – 59			
Over 60			
All ages			
Special or minority groups (please describe)			
TOTAL			

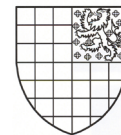
20 What, if any, special issues are related to your project ?

“Special issues” could be related to participants, organisers, general public and/or the environment.

21 How will you measure the success of your project ?

22 What experience does your organization, or individual members, have of running this type of project ?

Financial Grant Application



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D Your financial details

27 Your bank or building society account details. (for payment in the event that your application is successful)
If your application is successful you will be notified and funds will be paid by electronic transfer as promptly as possible.

Bank/Building Society name

Bank/Building Society address

Branch Sort Code:

Account number or Building Society roll number

Account Name

28 List all the people who are authorised to sign cheques or other withdrawals on this account.

<i>Name</i>	<i>Position in organization</i>

If your organisation is less than one year old, do not complete section 29 below, but instead please give details of information on which you have based your planning (state clearly any assumptions upon which you have relied when making projections, *etc.*).

Then go to section E

29 Please provide the following summary details from your most recent annual accounts.

Account year ending:

Total (gross income) £

Minus total expenditure £

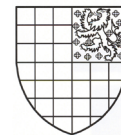
Equals loss/profit for the year £

Savings (reserves, cash or investments) £

and

A COPY OF ANY FINANCIAL CONTROL PROCEDURES, OR SIMILAR DOCUMENT

Financial Grant Application



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E Authority and application

30 Declaration and signature of applicant

DECLARATION

This must be signed by the person who completed this application, normally the person named as main contact in section A

I confirm that, to the best of my knowledge and belief, all the information in this application form is true and correct.

I understand that you may ask for additional information.

I am authorized to act for the organization or group in making this application for financial assistance

Signature

Date

Name (please print)

Contact details (*if different from those given in section A*):

31 Please give details of a senior member of your organisation, who can confirm details if required

For example: this may be the Chair, Vice-Chair, Secretary, Treasurer, Chief Executive or Director.

If this is the person who has completed and signed above, please tick here

Title

First name

Surname

Position in the organization

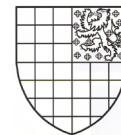
Contact address, including postcode

Telephone: Day

Evening

Email address

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F Agreement

I confirm that the group or organisation named on the front of the application form has authorised me to sign this agreement on their behalf.

I certify that the information given in this application is true to the best of my knowledge, and confirm that all enclosures are current, accurate and adopted or approved by the organisation.

If this application is successful, in full or in part, the organisation will keep to the following terms and conditions.

I understand that this is an agreement between the organisation named above and Lewes Town Council, which is intended to be legally binding, under the laws of England and Wales.

We understand and agree to the following:

- 1 We will deliver the commissioned service or project as set out in this application.
- 2 We will not make any major change to the commissioned service without first receiving Lewes Town Council agreement.
- 3 We will not sell or dispose of any equipment or other assets which we have purchased in connection with this service/project without Lewes Town Council agreement. If we sell any equipment or assets, we may have to pay Lewes Town Council part of the money we receive for them. The amount we repay will be in direct proportion to the share of the service/project cost represented by Lewes Town Council's grant.
- 4 We will comply with all relevant legislation affecting the way we carry out our service/project.
- 5 We will acknowledge Lewes Town Council's grant in any report; any accounts which cover the period of the grant and in any publicity materials we produce about the project. We will supply copies of these documents to Lewes Town Council if requested.
- 6 We will show the grant separately in our annual accounts (*where applicable*) as a 'restricted fund' and will not include it under general funds.
- 7 Lewes Town Council may use our name and the name of our service/project in its own publicity materials. We will inform Lewes Town Council of any situation where confidentiality is a particular issue.
- 8 We will monitor the success of the project and report to Lewes Town Council on the proforma provided.
- 9 We understand that Lewes Town Council will not normally increase the grant, and that monitoring and control of service/project expenditure is our responsibility.
- 10 We will keep all financial records and accounts, including receipts for items bought. We will make these available to Lewes Town Council if requested.
- 11 Lewes Town Council may hold back payment or ask us to repay, in whole or in part, in the following circumstances:
 - If we fail to keep to this contract in any way;
 - If the application was completed dishonestly or supporting documents gave false or misleading information;
 - If we close down, become insolvent, go into administration, receivership or liquidation, or make an arrangement with creditors;
 - If our organisation closes down we will not sell or dispose of any equipment or assets without first receiving Lewes Town Council agreement in writing.
- 12 If we have bought any equipment or assets with the grant, these terms and conditions will apply until the end of the normal expected working life of the assets.

Name

Position in group

Signed

Date

Financial Grant Application



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H Checklist

We have read and understood the guidance notes

We have fully completed all the sections of the application unless otherwise directed.

We have enclosed all the relevant documents/ information we need to send:

(As applicable):

- Constitution/Governing documents
- Accounts or financial information
- Project profile or description
- Statement of authority to make application
- Other relevant material

The main contact named has signed the declaration

A person with the authority to do so has signed the Agreement (section F).

We have made a copy of this completed application to keep for our reference.

Please return your completed application form to us at:
townclerk@lewes-tc.gov.uk

We only accept applications by email

TO SUBMIT YOUR APPLICATION

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4. **ONCE COMPLETED**

- a. Ensure you **SAVE** the file for your own records and then

SEND it, with any additional documents, as an email attachment to: townclerk@lewes-tc.gov.uk **If**

you need any assistance with any part of the application, please telephone 01273 471469 or e-mail townclerk@lewes-tc.gov.uk