

## Terms of Reference

For reasons of openness, fairness and transparency, the Council wishes to emphasise that in view of decreasing funds, applications will **NOT be considered unless they meet the purpose, scope and criteria outlined in the Terms of Reference, and full supporting documentation is provided.**

Grants are intended to support projects or community activity through community, voluntary, or self-help groups with a membership of at least 10 which;

- carry out work in the community
- provide a long-term benefit to the community
- extend access and participation, increase skill and creativity, or generally improve the quality of life of people in their area
- support principles of equal access and opportunity
- are not otherwise excluded for reason of being outside scope of the scheme.

## Scheme: shall be as follows:

### Organisations which may apply

- Groups and organisations which
  - are established for social and charitable purposes rather than pursuit of profit (and which reinvest surpluses in their community activities)
  - which operate and deliver activities within the boundaries of the Newtown & Llanllwchaearn Council area
  - are open to all and allow anyone to join, unless there is a good reason why this is not appropriate.
- This may include
  - voluntary and community groups/ organisations and clubs
  - registered or unregistered charities
  - schools – subject to certain exclusion of activities below
  - self-governing branches of larger organisations which have their own governing document and be allowed to manage funds separately from the parent organisation and staff without referring to parent or another body subject to certain exclusions below.

### Activities (capital or running cost) which may be accepted:

- arts and entertainment
- care, health and/ or well-being
- cultural or built heritage
- education and skills
- environment and/ or conservation
- recreation and/ or sports
- social

### **Organisations which may not apply**

- Groups other than community, self-help and voluntary groups. Groups which use their surplus for the benefit of a business or individuals are also excluded from the scheme
- Party political organisations or organisations which directly support or campaign for party political organisations
- Armed forces
- Companies Limited by Guarantee unless they are a registered charity
- Organisations applying on behalf of another organisation
- Individuals, and/ or sole traders, and/ or private-profit-making organisations
- Statutory organisations (other than schools)
- National organisations unless being a branch which has its own governing document and manages funds, staff and activities separately from the parent organisation without reference to the parent or another body
- Supporting organisations whose purpose is to support or give wider benefit to another organisation
- In addition, the scheme is unlikely to fund organisations that are in poor financial health, or those that have had a previous grant(s) which have not been managed satisfactorily, or where the council has not received a report about a previous grant. Groups with more than 12 months running costs in free reserves are unlikely to be supported with a grant, unless their running costs are exceptionally low.

### **Activities which are not accepted**

- Schools activities: grants will not pay for activities or services that schools have a statutory responsibility to provide. This means activities that are in the school curriculum or directly related to it.
- Overseas activities: the scheme will not support projects for the benefit of communities overseas. However, the scheme does accept applications from groups from the community who will be travelling overseas as part of their project where the principle benefit lies with this group.
- Grant or loan schemes: Funding for the establishment of financial grant and loan schemes is excluded from the scheme
- Religious worship: the scheme will not support activity that is deemed to promote a particular religion. For example, an application to refurbish a building that is owned by a particular religious group but is open to all members of the community would be considered, but an application for prayer mats or new religious texts would not be supported.
- Core activities of statutory services: statutory services seeking funding for core activities such as a school library or essential hospital equipment are excluded from applying. However, statutory services seeking funding for special projects or initiatives that do not form part of their core provision are included.
- Party political activity: the scheme cannot support fundraising, campaigning or any other activity associated with any political party.
- Improvements to property not owned by the applicant, or leased to the applicant for a period of less than 5 years, are excluded from the scheme.

**Criteria for Validating and Assessing Grant Applications: should be transparent and as simple as possible and shall be as follows:**

Newtown & Llanllwchaiarn Town Council adopts fixed criteria against which to measure all applications for grant awards

The criteria must be fair, and seen to be fair, so that all applicants are asked the same questions, and applications are measured against the same criteria. The criteria shall be of a nature so they can be easily understood by applicants. It is stressed that applications which do not meet these criteria (including provision of the supporting documents) will not be accepted as valid. Criteria shall be as follows:

<b>Criterion</b>	<b>Requirement</b>
Purpose of group	Must be defined, and meet purpose & scope of scheme and not be specifically excluded.
Purpose of application (activity)	Must be defined, and meet purpose & scope of scheme and not be specifically excluded.
Proof of expenditure	Applicant must agree to provide proof of expenditure (failure to do so could result in requirement to repay) and adhere to the Terms and Conditions of the grant.
Bank Account	Required in the same name as the applying group and identified on application form. The bank account should have at least two signatories, who must not be related to each other.
Supporting Documentation	Financial statement required (most recent end of year accounts and bank statement). Constitution or Statement of Activities required. Evidence of what, if any, reserves the organisation holds

**Wider responsibilities of Applicants: the Council wishes to make clear the wider responsibilities of applicants, which do not fall on the council as a result of awards, as follows:**

**Projects working with children, young people or vulnerable adult**

- It is the responsibility of applicants to have acceptable safeguarding policies and procedures for children, young people and vulnerable adults in place

**Insurance and safety**

- It is the responsibility of applicants to ensure they have adequate insurance in place. This should include cover for assets purchased or activities run using the grant.

**Equal Opportunities**

- We expect projects to be open to all who want to be involved, unless the group can give a good reason why this should not be the case. If the group plans to restrict who can take part you should explain why in the application, so that we can consider if this is acceptable.

**Data Protection Statement: the Council will be collecting and holding data about applicants (including names and addresses), so makes the following statement:**

Newtown & Llanllwchaiarn Town Council will use the information you supply on the applications to administer your request for a Newtown Community Fund Grant and analyse grants and for its own research purposes. The council may share the information with auditors, accountants, and government bodies in the interests of safeguarding public funds.

**Terms and Conditions of the Grant: Applicants must agree to Terms and Conditions as follows:**

The terms and conditions below set out the basis for the grant award as a contract with the council

- The council can ask your group for extra information to support your application
- The council can ask your group to return the funding in full if we find that you have used it for a purpose other than that set out in your application
- The amount the council provides is final and it will not increase it if your group overspends or has worked out costs incorrectly
- If your group does not spend all the funding we provide, it must return any unspent money to the council within six months of the estimated end date of the project, as set out in the application
- The council will not be responsible for any spending (on assets, equipment, or your project) that arises before your group receives the letter confirming details of the funding provided
- The council does not have to issue further amounts for a particular project once funding has been provided, although your group can apply for further help Your group is only eligible to reapply to the scheme annually
- The council can use your group's name and address, the information it provides about what your group does, and the information your group provides about the project it is seeking funding for in any publicity and marketing relating to the scheme. This includes, but is not limited to using this information in the press, council publications, websites, and social media channels
- The council may use the information your group provides to contact it for additional information relating to funding, for example to request information or quotes relating to how it has used funding, to request photographs of your group or to arrange interviews or photography with your project/group in relation to funding
- Your group agrees to tell the council about any details which should be kept confidential
- A governing document sets out in writing how an organisation works. It may be called a number of things, such as a constitution, memorandum and articles of association, set of rules or trust deed. It explains what your organisation is set up to do and how it does it.
- If your reserves are greater than one years running cost then please explain why this money should not be spent funding the activity
- The council's decision on your group's application for funding is final and they will not enter into any discussion about the decision
- The council may check on projects being carried out with help from the scheme, and your group agrees to co-operate with any follow-up visits
- The council may withhold all or part of the funding, or recover all or part of any payment from your group, if the council discovers that:
  - your group has broken any part in this contract
  - any information in the application form or a supporting document was incorrect or misleading
  - your group or the project ends for any reason
- Your group will provide the council with a written report on the activity undertaken with the grant by the following March. Failure to provide a written report will mean that no further applications by your group for financial support will be considered.
- To be considered for the May committee please supply you application by the end of April and by the end of September for the October committee.

## The Funding Process

To help applicants understand how we assess and allocate the fund the following process is followed.

- Identify all applicants that fit the prescribed criteria (terms of reference and application form) and set aside those that do not qualify.
- The committee would look to fully fund those activities that are newly formed groups or first time applicants. All subject to a maximum grant of £1000. Identify these as Round 1.
- The committee then seeks other groups applying for equal or less than £500. Identify these as Round 2. Identify others as Round 3.
- If at any round the monies available, in the opinion of the Responsible Finance Officer, is insufficient to warrant distribution then the money & qualifying applications will be considered at the next grant allocation.
- For May committee half the budget would be available to allocate. (For October it's the other half plus any underspend from May).

### Round 1:

- If sufficient monies available vs the amounts requested (up to max £1000) then they would be fully funded.
- If sufficient monies were not available then each amount would be reduced by a calculated percentage to bring it down to the monies available.
- If all the monies have been allocated by the end of round 1, this is the end of the process.

### Round 2:

- If there is money left then those applications at equal or less than £500 would be identified with a view to fully funding them.
- If sufficient monies were not available then each amount would be reduced by a calculated percentage to bring it down to the monies available.
- If all the monies have been allocated by the end of round 2, this is the end of the process.

### Round 3:

- If monies are still left after this round then the remaining applications are treated in the same way i.e. a maximum of £1000, fully fund if money available and if not reduce by a calculated percentage.

### **Help to fill in the application form?**

- PAVO offers a range of support to groups seeking funding. They can help you to complete the application and offer advice. Contact them on 01597 822191 or visit the web site [www.pavo.org.uk](http://www.pavo.org.uk)
- Newtown and Llanllwchaiarn staff can also answer queries about how to complete this form

### **Have you supplied?**

- Your signed application form
- A signed copy of your constitution
- A copy of your latest accounts
- Photocopies of the last two months statements and/or building Society entries
- Evidence of what, if any, reserves the organisation holds

In addition the Council would welcome a representative at the relevant meeting to answer any questions which may arise whilst the grant is being considered please will you inform the clerk if you will be attending. Please call 01686 625544 to let us know if you are coming

### **Applications to be returned to –**

**Town Clerk, Newtown and Llanllwchaiarn Town Council, Brisco House, The Cross, Broad Street, Newtown, Powys, SY162BB**

Do you want any of your documents returned to you – if YES please supply a Stamped Addressed Envelope. Thank you.