



Berinsfield Grant Policy

April 2022

The council provides grants to voluntary and community organisations to help build and support thriving communities and improve the quality of life for the residents of South Oxfordshire. We recognise the value of local community organisations delivering projects and key services to our residents and their need for grants that extend for more than a one-year period.

The aim of the Berinsfield grant scheme is to fund community projects, services and initiatives to support community partners in delivering the best outcomes for Berinsfield residents as well as contributing to the council's Corporate Plan priorities (2020 – 2024).

We will encourage organisations who are actively exploring partnership/joint working with other voluntary organisations, businesses or the public sector and who want to invest in becoming more sustainable, plus those organisations having a greater impact in Berinsfield.

Basic rules of the scheme

A summary of key points, generally as detailed later in this document:

- projects/services/activities must take place directly in Berinsfield and be able to demonstrate direct benefits to meet a clearly identified need for Berinsfield residents
- only one application can be submitted per organisation
- applications can be submitted that include both revenue and capital funding of projects, services and activities
- the combined total amount of all grants to be potentially awarded under this scheme shall not exceed £345,000, of which total revenue awards shall not exceed £225,000 and total capital awards shall not exceed £120,000
- the minimum revenue grant is £500 per annum and the maximum £25,000 per annum up to a five-year period for each organisation
- the minimum capital grant is £5,000 and the maximum £60,000 per project
- the total amount for **joint** revenue and capital applications that an organisation can apply for is a minimum of £5,500 and a maximum of £185,000

Who can apply to the scheme?

- Any constituted local not-for-profit organisation delivering services that will benefit the residents of Berinsfield and by local we mean ideally based in Oxfordshire, preferably based in Berinsfield
- Berinsfield Parish Council

- Not for profit preschools and PTAs for local authority run schools or academies, can apply for non-statutory elements of the education programme
- Local 'not for profit' organisations, this can include a company limited by guarantee which does not distribute any surplus it makes to its members, whose primary purpose is to benefit the residents of Berinsfield

The council is committed to promoting equality and diversity and welcomes applications from all sectors of the community, regardless of race, gender, disability, sexual orientation, age, status, religion or belief.

Who is not eligible?

- Other local authorities/public sector bodies (for example Oxfordshire County Council, NHS trusts). Please note: Berinsfield Parish Council is eligible to apply
- Organisations that are funded by public sector/statutory bodies
- Groups who raise funds on behalf of or will improve/create facilities that will predominately benefit an ineligible organisation
- Individuals (this includes making any payments to individuals on behalf of community groups)
- Profit-based businesses (private businesses)
- Political and lobbying groups
- Organisations who operate a grant scheme of their own or who budget for giving grants/donations in their annual budget. Please note: Berinsfield Parish Council is eligible to apply
- Nationwide organisations (except where they have a local constitution and/or local bank account but at its sole discretion, the council may make exceptions if a project clearly relates to a local hub/branch of the organisation)

What kind of work/services can we fund?

We will fund projects/services/activities that deliver the beneficial outcomes for Berinsfield residents as well as contributing to the achievement of the council's Corporate plan priorities (2020-2024):

- protect and restore our natural world
- action on the climate emergency
- improved economic and community well-being
- homes and infrastructure that meet local needs

Applications should focus on projects/services/activities that deliver a clear and demonstrable benefit to the people and environment of Berinsfield. This includes supporting ongoing work for community delivery partners and improving facilities that are developed in line with the community's needs and aspirations to support the transformation of Berinsfield into a thriving garden village.

Appropriate **core revenue** funding/costs includes, but are not limited to:

- salary costs relating to the services/activities being supported including training staff in new skills
- rent and rates, utilities for the location of the service (preferably in Berinsfield)

- transport costs (such as mileage expenses) where they are clearly required as part of the objectives of the organisation
- professional fees directly linked to collaborative working with others, or starting or extending a service
- marketing and publicity for new/extended services such as a community newsletter, walking or cycling routes/trails, community website or digital archive (but not ongoing publishing, maintenance or hosting costs)
- volunteer training or support costs that would enable more volunteers help or take on more responsibilities within an organisation
- surveys or studies to assess improvements needed to community facilities which could include improving accessibility, energy efficiency etc. feasibility studies, consultancy fees and seed funding for new organisations. Please note we will not fund costs that relate to other council services e.g. planning applications or building regulation fees
- community festivals and event costs, subject to government guidance regarding COVID-19

Appropriate **capital projects** could include, but are not limited to:

- purchasing new or replacement equipment
- improvements to community centres/halls or other facilities that provide services
- installing play zones
- investment in new energy saving measures
- creating new or improved multi-use areas
- development of software
- purchasing electronic hardware e.g. laptops
- repairs to facilities (providing it improves a facility rather than simply maintaining it)
- sustainability and environmental projects to protect and restore our natural world, such as nature recovery planning projects (with the appropriate permissions in place) or improving biodiversity within your community

Applicants must make sure they have all necessary permissions in place **before** applying for capital project funding including planning, listed building, licensing, landlords etc.

What we will not fund

- projects that do not demonstrate a clear benefit to the Berinsfield community, or where the residents of Berinsfield are not the primary beneficiaries
- retrospective funding for work/projects that will complete before our decision is made (we will consider projects that have started; however, we will not be able to fund any retrospective costs)
- statutory activities/requirements that either the council or another public-sector organisation is responsible for delivering, such as schools, public highways, public rights of way and road safety measures
- projects that further develop council assets or land for which the council has a statutory or non-statutory duty to provide; however, we will consider activities that the Berinsfield Parish Council has the powers to deliver, but not a

- statutory duty to provide
- projects for residential buildings
- projects that specifically benefit private businesses
- political activities, lobbying or campaigning
- projects that don't align with the council's equalities objectives and/or the Equality Act 2010
- projects that usually fall to other public sector/statutory bodies to provide or will primarily benefit organisations under their remit

In addition, we will not fund **revenue costs** such as:

- topping up savings and reserves, or setting up an endowment fund
- redundancy costs
- staff bonuses
- repayment of debts or loans

In addition, we will not fund **capital projects costs** such as:

- vehicles

Scheme eligibility criteria

In addition to meeting the requirements above, all applicants must:

- agree to enter into either a formal grant agreement or sign up to our standard conditions (as required by the council) before any grant payment is released.
- have a specific and relevant activity, service or project they provide in Berinsfield and that contributes to at least one of our Corporate Plan priorities and/or equality objectives
- provide evidence that there is a need for such a project, activity or service, that it benefits residents of Berinsfield with clear outcomes
- provide a signed copy (or evidence of adoption) of a constitution, articles of association or equivalent
- confirm their organisation has named officers, members or trustees on a management committee/board
- a copy of the latest statements for any bank/building society accounts in the name of the organisation, as identified in the application and on their constitution
- provide financial records e.g. income/expenditure for the most recent complete financial year– or projections for new organisations
- have insurance, safeguarding, H&S, equalities, data protection and other relevant policies in place
- demonstrate how their service users and other stakeholders, where appropriate, are consulted and involved in service/project planning and delivery
- provide two references from other funders (for organisations the council has not worked with before)
- ensure and confirm that their organisations have the correct authority in place for their representatives to apply and enter into the grant agreement and legally bind the organisation. Parochial Church Councils and parish councils shall duly comply with their own governing arrangements

- confirm your organisation has not received any Minimal Financial Assistance, in excess of £315,000 (this may also have been called De Minimis State aid if you received it prior to 1 January 2021) in this financial year and/or the previous two financial years. Providing relevant evidence if subsidy has been paid
- provide additional information to help us evaluate their application on request
- submit all required documentation at the point of application to be eligible

In addition to meeting the requirements above, all applicants applying for **revenue funding** must:

- provide details of the estimated costs to provide the activity or service each year for the period of years they are applying for and how they will fund the rest of these costs
- submit outcomes or targets we can use to help measure the success of the service/activities for each year over the grant period – these will be subject to agreement with the council each year and should focus on the achievable outcomes for residents

In addition to meeting the requirements above, applicants applying for **revenue funding over £20,000** per annum must:

- provide financial forecasts for the number of years you are applying for including income and expenditure for the organisation, and a breakdown of your income streams

In addition to meeting the requirements above, applicants applying for **capital funding of up to £10,000** must provide the following:

- a breakdown of the budget for the project including all the sources of funding
- two quotes for the project or a professional estimate for any building work
- confirmation that the project will not complete before a decision has been made and grant conditions or legal agreement has been signed, as we cannot pay for retrospective costs

Applicants must also confirm they have all the necessary consents such as planning permission, listed building consent, Diocese faculty, landlord or Head lease consent, compliance with any restrictions on the property title etc. and could provide these on request. Please note, we cannot fund planning permission and building regulations.

In addition to the above, applicants applying for **capital funding of over £10,000** must also provide:

- their most recent financial accounts or their working budget and financial plan for the year if they're a new organisation. Parish Councils are required to submit their full accounts
- a project plan including ongoing maintenance arrangements
- In respect of a building related project provide evidence of; ownership of the property, interest in the property, or a lease with at least ten years remaining, including a copy of the Land Registry title register and plan of no more than three months old. If the property is leased, or the Land Registry documents show another organisation has a claim on the title, please provide valid permission for the works from the third party (freeholder)/landlord

Projects awarded up to £25,000 must complete within 12 months of accepting the offer.

Projects awarded over £25,001 must start work within 12 months of accepting the offer and signing the legal agreement, and complete within 24 months.

What are the minimum and maximum awards?

We will accept revenue grant applications for a minimum grant of £500 per annum and a maximum grant of £25,000 per annum up to a five-year period. We will limit awards to a maximum of 50 per cent of an organisations total annual running costs in any financial year.

We will accept capital grant applications for a minimum grant of £5,000 and a maximum grant of £60,000 per project.

The total amount for **joint** revenue and capital applications that an organisation (or organisations applying together) can apply for is a minimum of £5,500 and a maximum of £185,000.

We will not award more than the amount requested.

Opening and closing dates

The scheme will open for applications in April 2022 and will close eight weeks later. We will publish the opening and closing dates on our website.

Decision-making

The Community Enablement team will review the eligibility of every application and liaise with the applicant, if necessary, to establish eligibility. If an application is not eligible the officers will discuss the issues with the organisations and will notify the Garden Villages team of the reasons why any applications aren't eligible.

The Garden Village team will review the application using the scoring matrix in Appendix 1 to suggest scores to the Head of Policy and Programmes in consultation with the Cabinet member for Community Wellbeing.

In addition, an advisory group will support the oversight of the grant award process. The advisory group will include two independent representatives who are key stakeholders in Berinsfield (excluding voluntary organisations and their trustees who apply to the scheme).

The Head of Policy and Programmes in consultation with the Head of Finance and the Cabinet member for Community Wellbeing will consider officers suggested scores and recommendations for each application and determine the grant applications. Competition for the grant means that it is possible not all worthy and eligible organisations will be successful in securing the funding they apply for.

Even if an application scores enough points, the Head of Policy and Programmes in

consultation with the Cabinet member for Community Wellbeing can recommend not funding an application if they:

- have serious concerns around the management of the organisation now or in the future
- believe the applicant has sufficient unrestricted reserves to fund the service/project/activities themselves
- have serious concerns about the appropriateness of the service/project/activities or its financial viability, such as if the organisation has not demonstrated having a sound fundraising plan with contingencies should any of their grant applications (to the council and others) be unsuccessful or award less than requested
- believe the service and/or organisation doesn't meet the criteria or help deliver the council's Corporate Plan objectives and /or equality objectives

Application and Payment of Grants

Organisations can apply using the council's online grants management system, accessible from our website www.southoxon.gov.uk/south-oxfordshire-district-council/community-support/grants

The Head of Policy and Programmes in consultation with the Cabinet member for Community Wellbeing will make a decision and the Community Enablement team will inform each applicant of the result. Applicants will receive a grant offer letter that will include a grant agreement (containing any special conditions). The agreement type and any special conditions will be determined at the time of the award following completion of due diligence; plus, a grant acceptance form must be completed and returned.

Standard conditions will be applicable for capital grants up to £25,000 and for all revenue grants up to £25,000, with discretion to lower this amount if there are concerns with risk of the project being awarded.

Grant agreements will be applicable for capital projects £25,001 and over and annual revenue grants for £25,001 and over.

If an application has been submitted for both capital and revenue grants, individual grant letters, conditions or grant agreements will be sent for each successful application respectively. The grant agreement to include provisions in compliance with law.

All payments must be made by BACS to an account in the name of the organisation making the grant application and will only be released following the return of a signed grant acceptance form and either signed standard conditions or a signed grant agreement.

We will pay revenue grants of up to £10,000 annually up to a five-year period. The first payment will be made upon receipt of their signed acceptance and standard conditions. Subsequent payments will be made on an annual basis, subject to a satisfactory monitoring review against the targets each year.

We will pay revenue grants of over £10,001 annually up to a five-year period in two equal stages. The first payment will be made following receipt of their signed acceptance and standard conditions or grant agreement. Subject to a satisfactory monitoring review after six months against the targets set, the rest of the balance will be paid. Subsequent payments will be made in two equal stages on an annual basis, subject to satisfactory monitoring reviews.

We pay capital grants in two stages, half when we receive a valid signed acceptance form and signed standard conditions or grant agreement. We pay the balance when the project completes, upon receipt of evidence (receipts/invoices) of expenditure.

For capital projects:

- if the costs are less than expected, we will reduce our final payment accordingly, and if necessary, request back some of the first payment
- grants that have not been claimed within six months of the project completing will be closed and the final payment not issued if we do not hear from the applicant

We reserve the right to change the grant payment schedule, as above, should a monitoring return and/or project plan not be satisfactory.

We will only pay towards costs incurred after the date of the council's decision to award the grant and the council has the discretion to delay the first payment where it is perceived due to conditions outside the organisation control that the project start date could be delayed.

Standard Conditions

All organisations must enter into either a formal grant agreement or sign up to our full standard conditions before any payment is released.

If you charge for the service/activity you provide, any grant awarded is declared and offered as Minimal Financial Assistance and offered on the basis that the organisation has not received any other Minimal Financial Assistance in the current and previous two financial years, which in total exceeds or when taken together with this grant will exceed £315,000, and so is outside the scope of the Chapter 3 UK-EU TCA obligations to apply the principles relating to subsidies and domestic subsidy laws (where relevant).

If you charge for the service/activity you provide, you must declare our grant award amount to any other sources of Minimal Financial Assistance received in the future; you must advise the council if you receive any other Minimal Financial Assistance during the life of the Revenue grant award and declare that the threshold will not be exceeded by accepting the revenue grant award or other Minimal Financial Assistance in the future.

If requested, organisations will return a proportionate amount of the grant if the project costs less than expected or they receive additional funding towards the project.

The funding is non-transferrable unless agreed by the council in writing in advance of any spending and any unspent funds will be returned to the council upon request.

Organisations will comply with all relevant statutes and regulations related to its status, objectives and delivery of its core activities.

Organisations must have suitable insurance in place for the duration of the grant.

Organisations must consult with us before making any significant changes to their service/project/activity or their general organisation structure.

Organisations must have appropriate policies in place to safeguard children, young people and vulnerable adults, and comply with equalities, GDPR and any other relevant legislation.

Organisations must consult with us before making significant changes to the project/work covered by the grant and officers will confirm if they agree to these changes.

Organisations must acknowledge the council's support in any press, publicity or promotion of the project.

Organisations must provide satisfactory monitoring information by the deadlines to continue receiving payments.

Organisations must demonstrate value for money in expenditure of the grant by for example obtaining competitive quotes where applicable or required by the council.

Organisations must acknowledge the council accepts no responsibility or liability for the project or the facilities it provides now or in the future including ongoing operations and maintenance liabilities arising from the works funded by the capital grant.

We may add extra conditions to any grant during the decision-making process if we consider it necessary.

The Interim Head of Policy and Programmes has delegated authority in consultation with the Cabinet member for Economic Development and Regeneration to remove any grant conditions or amend any targets following a written request from the organisation.

We will confirm organisations have met all relevant grant conditions before making any payments. Failure to meet all the agreed conditions may delay or reduce payment or, in extreme cases, result in us withdrawing our grant offer.

Updates

This policy may be updated from time to time in accordance with all applicable law and government guidance.



Appendix 1 – Grant Scheme Scoring Matrix

This scheme is designed to fund services, activities and projects that support and improve community well-being in line with the transformation of Berinsfield into a thriving garden village.

There are three key goals and objectives that will be assessed, and all valid applications will be marked against the criteria shown for each of these objectives. Each criterion is scored from 0 – 3 and, to achieve the highest score, clear evidence should be provided in line with the scoring guidance provided.

Capital Grants

Awards for valid applications will be ranked in order of points scored as shown in the table below (no prioritisation will be applied for capital grants) and the available grant funding will be distributed down the ranking until exhausted i.e. the application with the most points will be awarded up to 100 per cent of funding at the council's discretion, applications with a lower number of points may not receive any funding. In the event of a tie between any applications, the balance remaining will be split in proportion to the value of each application. Where for any reason a capital project may be part funded under this grant scheme, prior to any grant monies being awarded satisfactory evidence will be required to demonstrate how additional funding will be secured to enable the project to be completed within the time stipulated in the Policy.

Revenue Grants

Awards for valid applications will be scored and also prioritised as shown in the tables below and all awards will be capped in accordance with the Policy provisions.

Tables – Prioritisation and Scoring

Score	Priority Level	Awards
		All awards are subject to sufficient budget. Revenue awards will be capped at 50% of the organisations total annual running costs in any financial year. Capital awards are not capped, but all awards are subject to the Policy provisions.
25 – 32 points	High priority	Award full amount requested. For the high priority level – we would expect applications to perform strongly across all of the scoring criteria, as detailed below.
11 – 24 points	Medium priority	Will only receive funding if there is budget left after all the high priority projects/services/activities are awarded. The amount of funding awarded may be reduced dependent on remaining funds.
0 – 10 points	Low priority	Will not receive funding.

All goals and objectives will be scored against the criteria shown below. It is recommended that you refer to the scoring guidance when completing this.

Goals and objectives	Scoring Criteria
1. Community Benefit (outcomes for the community) How will the project/service address these priorities?	Will it support combatting people experiencing loneliness and isolation?
	Will it encourage participation in social activities?
	Does it have a direct impact on the health and well-being of the community?

<p>Please select all that apply.</p> <p>Each criterion is scored individually (0-3 points) and you can achieve up to 24 points in this section if your projects meets all of them.</p>	Will it deliver training programmes to increase skill sets for all demographics?
	Does it serve a critical population such as children, youth and the elderly?
	Will it support extra-curricular activities such as improving literacy, numeracy and IT skills?
	Will it provide facilities for community activities to take place?
	Will it increase support for individuals with disabilities and impairments?
<p>2. Sustainability</p> <p>You can achieve up to 3 points in this section.</p>	<p>How will this funding make your organisation stronger and resilient in the future?</p> <p>Please tell us how this project/services/activity will help your organisation continue to grow, develop, and service the Berinsfield community in the future.</p>
<p>3. Partnership Working</p> <p>You can achieve up to 5 points in this section.</p>	<p>How are you actively working with other organisations to provide these services, activities, or project?</p> <p>Please share in greater detail the specifics of who and how.</p> <p>Two additional points will be added for evidence of collaboration with the community and/or partners in co-production of the project/service/activities.</p>

Scoring Guidance

The evidence and details provided in support of proposed delivery goals and objectives listed above shall be assessed and scored in line with the following table.

0 points	Unsatisfactory	Response addresses some of the requirements but does not provide sufficient evidence that the service/project will be delivered to an acceptable standard that delivers stated goals and objectives.
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		The information is lacking relevant detail and/or suggests that the service/project could be better delivered by another organisation.
1 point	Satisfactory	<p>Response addresses all or most of the requirements and provides sufficient evidence that the service/project will be delivered to a satisfactory standard that delivers stated goals and objectives.</p> <p>Demonstrates how all or most of the relevant requirements of the criteria will be met but may lack some detail to fully assess how the organisation will achieve in this area.</p>
2 points	Good	<p>Clear and relevant response that addresses all the requirements for the specific criteria and provides sufficient evidence that the service/project will be delivered to a good standard that delivers stated goals and objectives.</p> <p>Demonstrates how all or most of the relevant requirements of the criteria will be met, with clear well thought through answers and examples of previous achievement in this area.</p>
3 points	Excellent	<p>Clear and relevant response that addresses all the requirements for the specific criteria and provides sufficient evidence that the service/project will be delivered to an excellent standard that delivers stated goals and objectives.</p> <p>Demonstrates how all the relevant requirements of the criteria will be met, with clear well thought through answers, going beyond expectation and detailed examples of previous achievement in this area.</p>