

Weymouth & Portland Borough Council

DISCRETIONARY GRANTS, LOANS & SUBSIDIES POLICY

POLICY STATEMENT:

It is the policy of this council to consider awarding grants, loans and subsidies, upon application, to 'not for profit' organisations, subject to its limited budgets.

1) DEFINITIONS

- 1.1 A 'grant' is a payment made by the council to an organisation. The grant is non-repayable subject to satisfactory adherence to the terms of the grant.
- 1.2 A 'loan' is a repayable payment made by the council to an organisation. Loans may incur a repayable interest charge.
- 1.3 A 'subsidy' is allowing the use of a council service(s) or asset(s) at a discount. The discount can be up to 100%.
- 1.4 'Organisation' in this policy will normally refer to 'not for profit' or charitable organisations only.

2) GENERAL

- 2.1 The contribution made by many organisations to the well-being of the local community is recognised by the Council as important to our society. The purpose of any grant, loan or subsidy given by the council is to support initiatives in the local community which help to achieve the council's Corporate Priorities and evidence-based community priorities.
- 2.2 This policy has been written to explain the main details of the council's approach to grants, loans and subsidies. Please read it carefully before making an application.

3) EXCLUSIONS

- 3.1 Mandatory grants, loans or subsidies are not covered by this policy.
- 3.2 Monies or subsidies given to individuals (eg benefits or Disabled Facilities Grants) are not covered by this policy.
- 3.3 The administration of discretionary rate relief is not covered by this policy.
- 3.4 Property leases are not covered by this policy. However, grants to offset rent due to the council are covered by this policy.

4) CONDITIONS OF FUNDING

- 4.1 Applications must clearly demonstrate, at the time of application, a link to at least one of the council's Corporate Priorities and one of the evidence-based community priorities, which can be found at the rear of this policy.
- 4.2 Applications must clearly demonstrate, at the time of application, how the grant, loan or subsidy will be of benefit to Weymouth & Portland and its residents.
- 4.3 Applications will be considered for day-to-day running expenses (including staffing costs) and/or one-off projects.

- 4.4 Applications will not be considered from organisations intending to support or oppose any particular political party or to discriminate against any section of the local, national or international community.
- 4.5 Applications will not normally be considered from organisations operated exclusively as a business to make a profit or surplus.
- 4.6 Ongoing commitment to awarding grants, loans or subsidies in future years will not normally be made, other than those covered by a Grant Agreement as detailed in 4.7 below.
- 4.7 Grants or loans of £2,000 or more, which are to be annually recurring or for which the funds will last more than 12 months, must be covered by a formal grant agreement between the council and the recipient. No single grant agreement can last more than 4 years. Officers must exercise due diligence and report their findings when reporting to committee on grants of over £2,000.
- 4.8 Grants below £2,000 must be covered by an award conditions letter and a requirement for the applicant to report on use of the grant.
- 4.9 All applicants must have either an equality and diversity policy or statement and supply a copy of this with their application.
- 4.10 Where the grant, loan or subsidy request is made by an applicant who works with children/young people and/or vulnerable adults, the applicant must have an appropriate safeguarding policy.
- 4.11 There is no dedicated grants, loans and subsidies budget, and due to the council's tight finances, each application will be assessed on its own merits and considered along with other applications. To ensure as fair a distribution as possible, the council will take into account the amount and frequency of any previous awards given to the organisation.
- 4.12 Due account will be taken of the extent to which funding has been sought or secured from other sources or own fund-raising activities.
- 4.13 The Council may make the award of any grant, loan or subsidy subject to such additional conditions and requirements, as it considers appropriate.

5) PROCEDURE FOR APPLICANTS

- 5.1 Generally, applications can be made at any time of the year. However, the service receiving the request may have its own timescales which will need adhering to. It is the applicant's responsibility to check if deadlines are in place. No guarantee can be made regarding speed of payment if approved.
- 5.2 For grants or loans over £2,000, the recipient must submit copies of their accounts prior to the award and provide proof of expenditure in line with grant conditions to the council.
- 5.3 Any organisation receiving a grant, loan or subsidy will be expected to acknowledge the council's contribution on all publicity (including online) and printed material.
- 5.4 In the event, for whatever reason, of the grant, loan or subsidy not being used, in part or in full, a full explanation shall be submitted to the Council within one year of the award being made. The remaining balance of the grant or loan must be repaid to the council immediately.
- 5.5 The Council reserves the right to reclaim any award in the event of it not being used for the purpose specified on the application form.

Guidance Notes for applicants and Decision-makers

General

Who makes decisions about applications for grants, loans and subsidies?

Grants, loans and subsidies below £2,000 will be decided by the relevant briefholder/s of the council and the relevant delegated council officer. Grants above £2,000 will be decided by Management Committee of the council.

How difficult will it be for me to apply?

The council will use standard application forms and documents for any grants, loans and subsidies. These will be adapted on a case by case basis according to the recipient, whether the application relates to a grant, loan or subsidy and the size of the benefit. Help will be on hand if you have any questions or difficulties in completing your application.

Paragraph 1.1 of The Policy

Small grants, loans and subsidies below £2,000 will be applied using a standard grant letter detailing the terms of the grant. Grants, loans and subsidies over £2,000 will require a formal agreement between the council and the recipient with specific terms and conditions. In each instance, failure to adhere to terms and conditions could result in a requirement to repay the grant, loan or subsidy. Requests for any variation of terms or conditions including the purpose of the grant, loan or subsidy must be received in writing by the council prior to any changes being implemented.

Paragraphs 2.1, 4.1 and 4.2 of The Policy

Applications must support either the council's corporate priorities or community priorities and clearly demonstrate how the grant, loan or subsidy is of benefit to Weymouth and Portland and its residents.

Paragraph 4.5 of The Policy

Where an applicant is an organisation that makes a profit or surplus, the council will consider the status of the organisation before considering an application. Where profits or surpluses are purely used for the good of the community applications may be considered.

Paragraph 4.8 of The Policy

An equality policy or statement must be submitted with applications. Applicants may require help in developing an equality or diversity policy or statement. This can be provided on request or via Dorsetfor you at:

<https://www.dorsetforyou.gov.uk/article/414892/The-basics-to-setting-up-and-running-a-group>

Paragraph 4.9 of The Policy

A safeguarding policy must be submitted with applications. Applicants may require help in developing a safeguarding policy. This can be provided on request or via Dorsetfor you at:

<https://www.dorsetforyou.gov.uk/article/414892/The-basics-to-setting-up-and-running-a-group>

Paragraph 5.2 of The Policy

A copy of the applicant's accounts must be submitted with all applications prior to council consideration of the request for a grant, loan or subsidy. A post award monitoring report and proof of expenditure must be submitted where this is required. Non receipt of the latter may result in a request from the council for return of the award.

Weymouth and Portland Borough Council Corporate Priorities:

Building a Stronger Local Economy

- Helping to stimulate economic growth so that the borough offers better jobs and prospects for local people
- Increasing the number of new homes built within the borough

Empowering Thriving and Inclusive Communities

- Building strong, inclusive and sustainable communities that empower local people to influence and provide the services that matter most to them
- Supporting vulnerable people so that they can live healthy and independent lives

Improving Quality of Life

- Enhancing the quality of life of people living and working in the borough
- Safeguarding and providing opportunities to enjoy the natural and built environment now and in the future

Developing Successful Partnerships

- Creating a leaner and more focused organisation to protect the delivery of local services
- Services that are shaped and focused on the needs of our customers
- Partnerships that give the county a stronger voice to influence and shape Dorset's prosperity

Weymouth and Portland Draft Community Priorities

Subject to consideration by 11 July 2017 Management Committee:

1. Supporting our Young People
2. Supporting our Older People
3. Supporting our Vulnerable People
4. Supporting Health and Wellbeing
5. Supporting Safer Communities
6. Supporting our Natural Environment