

Partnership Grants Policy

2024/25-2028/29



INTRODUCTION

The council provide grants to voluntary and community organisations to help build and support healthy communities and to improve the quality of life for the residents of the Vale of White Horse District. We recognise the need for revenue grants that extend more than one year, so that organisations can plan ahead with confidence.

We value locally based assured, supported advice services for residents, particularly those who are most in need due to inequalities from the cost of living crisis or other national issues. We will favour organisations who are actively exploring partnership or collaborative working with other voluntary organisations to avoid duplication of services provided and improve efficiency, along with other methods to help them to become more sustainable and have a greater impact in the communities they serve.

BASIC RULES OF THE SCHEME

The service we fund must support the delivery of at least one of the council's Corporate Plan priorities for 2020 – 2024:

- Building Healthy Communities
- Working in Partnership

We also encourage applications for services that make a positive contribution towards the council's equality objectives, in particular to 'Support communities to deliver better outcomes for disadvantaged groups and encourage community cohesion', as well as towards the council's climate goals by supporting residents who are most vulnerable to the effects of climate change by ensuring they are properly supported.

Information about the councils Corporate Plan priorities, Climate Action Plan and equality objectives can be found at www.whitehorsedc.gov.uk

Organisations must:

- Be based and provide services across the whole of the Vale of White Horse District, for the benefit of the Vale residents.
- Provide information and advice services across the Vale in the areas of debt, employment, finance, housing, energy, family, law and courts, immigration and health. Either directly, or through signposting to other organisations.
- Have a minimum of £175,000 annual operating costs and maximum of £450,000. Pro rata for district wide organisations.

- Have a flexible partnership approach to service provision, to respond to local and national issues as they arise, meeting the needs of the council and its residents.
- Provide access to the information and advice services 24/7 through offering multiple channels including telephone, email, website, Teams/Zoom (or similar) and face to face during office hours as essential.

WHAT TYPE OF COSTS WILL THE SCHEME FUND?

We will fund information and advice services that benefit residents of the Vale (if a service covers a wider area the costs will need to be pro-rata).

Core revenue funding/costs such as:

- salary costs relating to the services being supported
- fundraising/income generation activities, that may include exploring new income streams to boost the sustainability of the applicant organisation (see appendix 2 for suggestions)
- rent and rates etc for the location of the service (in the Vale district)
- training staff in new skills to deliver services in our district (or a proportion if it is a county-wide service)
- marketing and publicity for new/extended services, which those organisations provide, or a proportion for general publicity that includes a new service
- professional fees directly linked to collaborative working with others or starting or extending a service
- transport costs (such as mileage expenses) where they are clearly required as part of the objectives of the organisation.

We will not fund:

- services that don't meet the basic requirements of the scheme above
- topping up savings and reserves, or setting up an endowment fund
- repayment of debts or loans
- staff bonuses
- redundancy costs
- purchase of large items of equipment
- purchase of vehicles
- new heating systems
- the purchase of a new lease
- the purchase of a building

- statutory services that are the responsibility of the council or another public sector's responsibility for delivering

WHO CAN APPLY TO THE SCHEME?

Any constituted locally based voluntary sector organisation that meets the basic requirements of the scheme above.

This scheme is **not** open to:

- town/parish councils
- other statutory bodies, or organisations providing a service on behalf of a statutory body
- unincorporated groups and associations
- education providers (schools, free schools, academies, colleges, PTAs and similar)
- profit-based businesses (private businesses)
- political and lobbying groups
- Nationwide organisations (except where they have a local constitution and/or local bank account. We may also make exceptions if the activities clearly relate to a local hub/branch of the organisation.)

WHAT ARE THE MINIMUM AND MAXIMUM AWARDS?

We will accept applications for a **minimum** grant of £25,000 and a **maximum** grant of £100,000 per annum over the five-year period, towards the provision of the information and advice services listed in the basic rules of the scheme

We will limit awards to a **maximum of one-third (33.33 per cent)** of an organisation's total annual **running costs** in **2022/2023** financial year.

This will be a competitive grant scheme and the council may receive applications from many excellent and worthy organisations. Therefore, it is not always possible to fund every eligible application or award the full grant that is requested. We would advise applicants to have a thorough fundraising plan with contingencies in place.

BUDGET

The council has an annual budget of £154,920 and has committed to providing five years of sustainable funding, subject to annual review and approval by Council when setting its budget. This is to help ensure thriving advice services are able to flex their services to meet their needs, the needs of the council and ultimately our most vulnerable residents.

SCHEME ELIGIBILITY CRITERIA

In addition to meeting the basic scheme requirements above, applicants must:

- Submit all required documentation at the point of application submission to be eligible.
- Provide a signed constitution, articles of association or equivalent.
- Supporting statement to evidence the service covers the whole of the White Horse district.
- Provide evidence that there is a need for the service, that it benefits residents of the Vale of White Horse District with clear outcomes, including local strategies, official reports and similar.
- Provide full accounts for the last three years 2020/21 – 2022/23 (or a detailed working budget and financial plan for new organisations) and reserves policy.
- Provide details of the estimated costs/budget to provide the service each year (over the five-year period). Your five year financial forecast should include all income and expenditure for the organisation, and a breakdown of your fundraising costs and income streams.
- Provide evidence that staff and volunteers are sufficiently trained, and the advice given is quality assured.
- Provide evidence that staff and volunteers are given the pastoral mental health support they need to provide the service.
- Provide project delivery and development plans showing plans for more collaborative work with others to become more sustainable in the longer term.
- Demonstrate how service users and other stakeholders, where appropriate, are consulted and involved in service planning and delivery.
- Be able to demonstrate an active response to the climate emergency. This could be through working in partnership with other organisations to provide information to residents relevant to the climate emergency, such as help to improve the energy efficiency of their homes, or it could be through providing details of how their organisation has made changes to their own building or operations to adapt to the climate emergency.
- Confirmation you have relevant insurances and safeguarding, H&S, equalities, data protection and other relevant policies.
- Submit outcomes and targets we can use to help measure the success of the service/work/activity each year of the grant period. These will be subject to agreement with the council each year and should focus on the achievable outcomes for residents.
- Two references from other funders (for organisations the council has not worked with before).
- Must confirm that they haven't received any Minimal Financial Assistance (MFA) in this financial year and/or the previous two financial years, in excess

of £315,000. This may also have been called De Minimus State aid if received it prior to 1 January 2021.

OPENING AND CLOSING DATES

We will aim to open for applications in July 2023 and will close for applications in September 2023. We will publish the opening and closing dates on our website.

DECISION-MAKING

Community Enablement Team

The community enablement team will review the eligibility of every application before using the scoring matrix in appendix one to suggest scores to the Partnerships Grant Panel. They will also flag any concerns or issues for additional consideration, in order to support the panel's decision making.

Head of Service

In accordance with the council's constitution, the relevant Head of Service (using delegated powers) will decide:

- if we will accept requests for over 33.33 per cent of the total annual running costs in any financial year
- whether to amend award percentages beyond what was originally agreed, as requested by applicants. Increases will stay within the 33.33 per cent maximum limit for the scheme if we will accept applications that don't meet all the eligibility criteria

Partnership Grant Panel (known at the PGP)

The PGP will consist of the relevant Head of Service, the relevant Cabinet member, Cabinet member for Finance and Chair of Scrutiny Committee. The panel will consider officers suggested scores for each application and make recommendations to the relevant Cabinet member to consider and decide which grants to award based on the scoring matrix, at appendix one. Any awards over £25,000 will be Key decisions and subject to the council's call-in procedure.

Competition for the fund means that not all worthy and eligible organisations will receive funding.

Even if an application scores enough points, the panel can recommend **not funding** it if they:

- believe the service and/or organisation doesn't meet the criteria
- 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 themselves.
- have serious concerns about the appropriateness of the service 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.

Should the application not receive enough points to be awarded any funding, the panel also have the discretion to **recommend an annual grant award of up to £10,000** if:

- an award can be justified as an important service for the community
- there are concerns that failure to fund the service could result in a net disbenefit to the wider community.

CONDITIONS OF AWARD

All organisations must enter into the council's formal Grant Agreement before any payment is released.

We may add extra conditions to any grant during the decision-making process if we consider it necessary. The Head of Service can also decide to remove any grant conditions or amend any targets following a written request from the organisation.

If a grant is considered a subsidy, then 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. This condition must be satisfied for each financial year of the grant period.

If a grant is considered a subsidy, then 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 grant award and declare that the threshold will not be exceeded by accepting the grant award or other Minimal Financial Assistance in the future.

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 obtain agreement of the council prior to 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, take action to tackle the climate emergency and any other relevant legislation.

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

PAYMENT OF GRANTS

We will pay annual grants in two equal stages, the first half at the start of the year (April/May) following approval of performance targets, and the balance approximately six months later, after a **satisfactory** mid-year monitoring review against targets set. Subsequently, twice yearly following **satisfactory** monitoring meetings.

We reserve the right to change the grant payment schedule, as above, to staged payments, closely linked to performance, should a monitoring return not be submitted after year one and/or subsequently; should year one and/or subsequent target actuals be unsatisfactory or as we deem appropriate.

We reserve the right to withdraw or withhold the grant which is subject to availability of approved budgets at the time of payment. In accordance with constitution of the council.

Appendix 1

Partnership Grant scheme 2024-2029 Scoring Matrix

Priority level	Awards: All awards are subject to sufficient budget. Medium priorities will only receive funding if there is budget left after all the high priority projects are awarded. In exceptional cases, high priority projects may not receive 100 per cent of their request if it will have a detrimental impact on medium projects.
High priority	Award up to the full amount requested (capped at 33.33 per cent of total organisational running cost). We would expect applications to perform strongly across all of the scoring categories, as detailed below.
Medium priority	Will only receive funding if there is budget left after all the high priority projects are awarded. The percentage of funding awarded will be dependent on remaining funds.
Low priority	Will NOT receive funding

Financial Review

Do they have?	0 - 1 points	2 - 3 points	4 - 5 points
<p>A balanced five-year financial forecast plan covering 2024/2025 to 2028/29, with evidence of a diverse income base.</p>	<p>(0) No plan has been submitted.</p> <p>(1) A limited plan which doesn't cover the required five-year period.</p>	<p>(2) A realistic five-year plan that includes evidence of a diverse income base. Whilst some over reliance on certain income streams and small gaps in funding, this is unlikely to impact service delivery.</p> <p>(3) As above <u>however</u></p> <p>Clear movement towards a more sustainable and balanced funding base, with a realistic plan to reduce budget deficits.</p>	<p>(4) A detailed five-year plan demonstrating a diverse range of secured income streams and balanced budget each year.</p> <p>(5) As above <u>and</u></p> <p>There is a healthy balance of both restricted and unrestricted funds.</p>
<p>Has the organisation achieved a balanced budget over the last three financial years AND a level of reserves that is sufficient to meet the needs of the organisation?</p> <p>(2020/2021, 2021/2022, and 2022/2023)</p>	<p>(0) Each financial year appears to show significant gaps in balancing the budget with no explanation and / or no reserves policy has been submitted.</p> <p>(1) Each financial year budget negatively affected by COVID 19 or other factors, with evidence of <u>significant reduction</u> in services/activities. Officers</p>	<p>(2) Each financial year budget negatively affected by COVID 19 or other factors, leading to an overall reduction in services. The reserves policy has some depletion over the last three years with little explanation, but officers can see it is still within reserves parameters</p> <p>(3) As above <u>however</u></p> <p>Officers note only a marginal reduction in services/activities</p>	<p>(4) Some, but not all financial year's budgets are affected by COVID 19 or other factors with evidence to explain and overall <u>increase</u> in services/activities. Has a reserves policy, no depletion of reserves over the last 3 years.</p> <p>(5) All financial years have balanced budgets showing both an increase in services/activities and income and officers note some growth in reserves.</p>

Do they have?	0 - 1 points	2 - 3 points	4 - 5 points
	note a concerning depletion of reserves over the three years that isn't within the reserves policy.	with a clear explanation for depletion of reserves.	

The Service(s) / Activities

	0 - 1 points	2 - 3 points	4 - 5 points
Community need, responsiveness consultation and inclusion	<p>(0) There does not appear to be community need, most likely due to insufficient evidence/information submitted</p> <p>(1) Officers get a limited sense of community need and/or responsiveness to changing community need, likely due to limited evidence/information supplied and / or limited consultation has taken place with existing users.</p>	<p>(2) Some indication of community need and/or responsiveness to changing community need with consultation limited to existing service users only.</p> <p>(3) as above <u>however</u></p> <p>Officers can see evidence of regular consultation with service users.</p>	<p>(4) Strong and clear indication of community need, and/or responsiveness to changing community need. Consultation is regularly carried out with the community/other stakeholders. Evidence of customer satisfaction data implemented, with service users e.g., including priority group/ vulnerable people, at the heart of the improving service design and delivery.</p> <p>(5) as above <u>and</u></p> <p>Substantial consultation is regularly carried out with the community/other stakeholders, including priority groups if the service/activities impact them.</p>

	0 - 1 points	2 - 3 points	4 - 5 points
			Evidence that the service is designed to meets the needs of all users and delivering better outcomes for vulnerable/priority groups and/ or improving areas of deprivation and/or encouraging community cohesion.
<p>Direct community benefit and inclusion</p> <p><u>This is not an exhaustive or definitive list yet</u> within the scope of this scoring matrix ‘vulnerable’ / priority groups can include, the elderly, isolated young families, homeless, economically disadvantaged, educationally disadvantaged, migrant groups, individuals with disabilities, and those with impairments.</p>	<p>(0) The service/ activities appear to offer little or no direct benefit to the community.</p> <p>w</p> <p>(1) Up to 50 residents, which does not appear to include vulnerable/ priority groups.</p>	<p>(2) More than 51 and up to 500 residents and it is clear this includes some vulnerable/ priority groups.</p> <p>(3) As above <u>and</u> Providing services that compliment council services or indirectly will reduce the likelihood of needing support from the council.</p> <p>or (3) points if a service/activity is directly supporting up to 50 vulnerable residents and / or priority groups</p>	<p>(4) More than 501 residents and includes a large proportion of ‘vulnerable’ residents.</p> <p>(5) As above <u>and</u> Providing services that compliment council services or indirectly will reduce the likelihood of needing support from the council.</p>
<p>Diversity of services offered</p>	<p>(0) No advice services provided to residents that meet the criteria</p>	<p>(2) Advice services covering three subject areas</p>	<p>(4) Advice service covering four to five subject areas, and signposts to other support available.</p>

	0 - 1 points	2 - 3 points	4 - 5 points
Advice services for residents in the whole of Vale in areas of debt, employment, finance, energy, housing, family, law and courts, immigration and health.	(1) Limited advice services provided (up to two) and doesn't signpost to support available.	(3) As above, <u>and</u> Signposts residents to relevant organisations	(5) Advice services covering all 10 subject areas and can signpost to any additional support available.
Service channels provided Telephone, email, face to face, letter, website, web chat, Teams/Zoom, outreach (home visits, outreach events)	(0) no detail on service channel provision submitted (1) Limited channels offered (e.g., email, website)	(2) Three service channels provided (3) Four or more service channels provided, not including face to face.	(4) Provide access to the advice services 24/7 through multiple channels: Telephone, email, letter, website, web chat, Teams/Zoom and face to face during office hours (9am – 5pm) (5) As above and Home visits for vulnerable residents and/or outreach events to promote services and/or outreach hubs providing face to face services in the district
Partnership working/collaboration/responsiveness	(0) No information regarding a flexible responsive approach, partnership working or	(2) Some information provided regarding a flexible responsive approach, with two or three examples of	(4) Information provided demonstrates a flexible responsive approach. Four or five examples of partnership working or collaboration that demonstrates

	0 - 1 points	2 - 3 points	4 - 5 points
	<p>collaboration with other similar organisations to deliver the service, avoid duplication or cut costs</p> <p>(1) Limited information regarding a flexible responsive approach, partnership working or collaboration with similar organisations to deliver the service that result in minor efficiency savings and avoids duplication</p>	<p>partnership working or collaboration to deliver the service, that results in minor efficiency savings and avoids duplication</p> <p>(3) As above <u>and</u> Partnership working or collaboration results in major efficiency savings</p>	<p>avoiding duplication of services and results in a mix of minor and major efficiency savings and /or improvements for the service user</p> <p>(5) As above <u>and</u> Partnership working or collaboration results in major efficiency savings and improvements for the service user</p>

Appendix 2

Diversifying Income Streams

COVID has brought a new hybrid way of fundraising; mixing digital methods with more traditional routes and giving more confidence to try new things to help your organisation weather future storms.

MAKE IT EASY FOR PEOPLE TO CHOOSE YOUR CHARITY TO SUPPORT

- Invest in digital resources. Update your IT hardware and software to support online fundraising and income streams like Crowdfunding.
- Develop your website to make it simple for people to make a donation via your homepage or to set up a direct debit.
- Explain the story of your organisation and explain why you are the best at what you do. Create a short film or create a virtual tour of your premises. These visual assets are vital to help reach out to new supporters.
- Purchase a good Customer Relationship Management (CRM) system. It is important to build and manage lasting relationships with your supporters/donors. They aren't as expensive as you might think, especially if you are a small organisation with a small supporter base.

THINK BEYOND ONE-OFF DONATIONS TOWARDS REGULAR FINANCIAL SUPPORT

- Memberships and subscriptions bring in new streams of regular, dependable income and supporters to help you become more sustainable.
- Create long term relationships with donors using digital platforms to communicate online with regular posts, blog, tweets and emails updates about your day-to-day work. Why not ask your supporters what they want to hear about to make sure they feel connected to your cause?
- Remember, trusts and foundations also want to build strong relationships with local organisations. A good understanding of their priorities will help you target your applications and hopefully lead to multi-year funding.

MAXIMISING THE POTENTIAL WITHIN YOUR STAFF/ TRUSTEES/ VOLUNTEERS

- Invest in training existing staff, trustees and volunteers in fundraising, financial management, business planning, IT skills and marketing.

- A skilled workforce will efficiently manage new income generating activities. Contact the [Directory of Social Change](#), [OCVA](#), and [NCVO](#) for training opportunities and guidance.
- Deliver training courses to external organisations/ businesses. This harnesses the skills and expertise in your own organisation.

TAKE A STEP BACK AND LOOK AT THINGS DIFFERENTLY

- What products and/or services can your organisation offer at a cost to others? e.g, training programme.
- Could you establish a business/ social enterprise that supports your charity, e.g, café or shop?
- Do you have any capital assets e.g, buildings, office space or equipment that can be rented out?
- Create a Business Plan which could help you create a fully costed plan to see if your ideas support themselves and create a profit.

DON'T FORGET YOUR SUPPORTERS WANT TO HAVE FUN

- Think about booking charity places in races like Oxford Half Marathon, or devising a challenge like '[Brave the Shave](#)' and '[Movember](#)' where supporters can do something different, involve others and raise money!
- Events like raffles, auctions and quiz nights may be an easy way to get new supporters involved – they bring people together to support your cause and help raise your profile.
- The council has set up the [White Horse Community Lottery](#) for local organisations to get involved and raise regular funds. It is free to join, proceeds are paid directly to your organisation's bank account and players can win prizes up to the £25,000 jackpot.
- Have a plan to develop those new contacts and make sure they have a reason to keep supporting you for years to come.