



SHEPTON MALLET TOWN COUNCIL

COMMUNITY DONATIONS SCHEME

POLICY

Donations: Under £2,000 and on a one-off basis

Policy Reference Number: 1929/1

AUTHOR: Town Clerk

RESPONSIBILITY: Policy and Resources Committee

GRADE: Three – Low

DATE ADOPTED: 21st January 2020

REVIEW DATE: Every 3 years – January 2023

AMENDMENTS:

23rd June 2020 – temporary alteration to scheme dates 11.5

1.0 Introduction

This policy sets out how Shepton Mallet Town Council will manage applications from organisations who are seeking financial support from the Town Council for a project, event or activity.

2.0 Review Statement

2.1 This policy has been prepared considering prevailing legislation and recognised good practice. New legislation requirements or changes in current legislation may necessitate the review of this policy document. The council will continue to review and amend all/part of this policy on a regular basis. It is the applicant's responsibility to ensure that the copy of the policy being referred to is the most up-to-date version.

3.0 Equality

3.1 In putting this policy into practice, no aspect of the policy will discriminate on the grounds of race, sex, sexual orientation, gender reassignment, age, religion, politics, marital status, disability, politics, caste or any other grounds likely to place any particular member of the community at a disadvantage.

4.0 Definitions

4.1 Donations:

A donation is a free and unrestricted financial contribution. For the purpose of this policy they are under £2,000 and are given on a one-off basis only. There will be some basic conditions, such as giving credit to the Town Council in publicity and giving a report on how the money was spent.

4.2 Grants:

A grant is for a specific purpose with specific terms and conditions. They might be for more than £2,000 and might be requested over more than one financial year. The money might be given in stages, subject to satisfactory completion of the first stage of the project. A grant will also invite collaborative working between the Town Council and the recipient organisation.

4.3 When you apply please determine whether you are applying for a grant or a donation as they are processed in different ways and on different occasions during the year. If you are unsure, please contact the office (details at the end of the policy) to speak to a member of staff about the process before submitting your application. If you would like help completing the application form, please contact the Town Council and someone will be happy to assist you. A meeting can be arranged in advance of you progressing your application, to assist with the application. The office holds information on other organisations that you can apply to for funding.

5.0 Aims of the Donations Policy

5.1 To provide financial support to organisations who work to improve the quality of life for residents by supporting the Town Council's objectives:

5.1.1 To provide facilities and activities which promote and support health and wellbeing as well as meeting social and leisure needs

5.1.2 To support community involvement in local arts and cultural activities which benefit the residents of Shepton Mallet

5.1.3 To support community participation in local sports and leisure activities to enable clubs to develop and thrive

5.1.4 To facilitate access and sustainable transport schemes by community and voluntary activity

5.1.5 To maintain and enhance opportunities to create a green, clean and safe environment, including biodiversity and sustainability

6.0 **Principles**

6.1 Shepton Mallet has adopted an Environmental Policy that has the following principles and it asks you to adhere to these principles when delivering activities that rely on funding from Shepton Mallet Town Council:

6.1.1 To do all it can, in and around Shepton Mallet, within its powers and resources to protect and enhance the well-being of local people and all that comprises the natural and built world (our environment)

6.1.2 To be committed to the principle of sustainability. This means avoiding unnecessary energy use or waste and restricting its use of resources to avoid contributing to climate change or other ongoing damage to ourselves or our environment. Accordingly, it will at all times seek maximum sustainability in all its dealings affecting the environment.

7.0 **Scheme Governance**

7.1 The Community Donations Scheme is managed by the Town Clerk, with the day to day administrative process delegated to the Responsible Financial Officer.

7.2 Shepton Mallet Town Council has assigned responsibility to the Policy and Resources Committee to consider applications and, working against a pre-determined criterion, to make an award. The Town Council works within a GDPR framework and will respect the confidentiality of individual, personal data and sensitive personal data. The financial contribution that can be awarded is taken from the annual budget that has been agreed and runs from April to March.

7.3 On receipt of an application it will be scrutinised by the Responsible Financial Officer, using the criteria as laid down in the policy. Applications which meet the criteria are submitted to the committee meeting, where councillors reach their decision and make the awards. Applicants are invited to attend the meeting at which the application will be considered. Decisions in the form of the minutes of the meetings are made available the following week and all applications, whether successful or not, will receive notification within 2 weeks of the meeting. Occasionally conditions might be applied, which the application need to address as prior to approval and the award being made.

8.0 **Monitoring**

8.1 In order to ensure value for money and good use of funding, successful applicants will be subject to some monitoring. This may involve a request for an annual report, or project completion form, detailing expenditure outcome and other qualitative results.

9.0 **Recognition**

9.1 The Town Council requests that recognition is given to Shepton Mallet Town Council in publicity and publication.

10.0 **Criteria**

10.1 The Community Donations Policy is aimed at supporting applications that can meet the following criteria. This checklist is used on receipt of application. If evidence is missing, or the criteria is not achieved, the applicant will be contacted

and asked to resubmit the form with further evidence. Equally, the application might be dismissed at this stage for either failing to meet the overall aims of the scheme or providing insufficient information.

Criteria	Evidenced?
a) There is evidence that the community or volunteers will benefit from the event, project or activities, rather than an individual or small number of individuals. The project encourages community involvement	
b) The event, project or activity must make a difference to the quality of residents in Shepton Mallet	
c) The organisation has made a well justified statement in support of the application	
d) The event, project or activity contributes to the objectives of the Town Council and gives free access and accessibility to all sections of the community	
e) The event, project or activity represents value for money (include photos, plans, project costs)	
f) The organisation is not-profit making	
g) The organisation has demonstrated financial need (through providing either bank statements for an established organisation, or business plan and comprehensive budget (with quotes) for an new organisation)	
h) There is evidence, with supporting documentation, that the organisation has sought to generate income from other sources	
i) The organisation has a bank account in its own name with at least 2 cheque signatories, or has agreement for monies to be held in trust by another recognised organisation	
j) The organisation has a constitution or similar (terms of reference) and a committee structure	
k) Where this is a start-up, notes of meetings are provided to demonstrate that this idea has been considered by others, other than just the applicant	
l) The organisation has provided the name of one other person in the organisation who are part of the decision making process	
m) The organisation is able to give recognition to Shepton Mallet Town Council through its publicity and publications	
n) The organisation is prepared to provide feedback to the Town Council on how the donation was used, through its monitoring and feedback form	
o) The organisation has provided a copy of the organisation's equal opportunity statement and environmental impact assessment	

11.0 **Application Process**

11.1 **Who can apply for a donation?**

The Community Donations Scheme exists to support organisations which require financial assistance up the value of £2,000. It accepts applications from the following:

- Charitable Organisations which are furthering specific charitable objectives

- Community Interest Groups
- Sports Clubs and Arts Groups
- The scheme also assists with start-up donations for new organisations who will become one of the above in due course

The organisation must be based in Shepton Mallet or the surrounding area and must be able to demonstrate that it benefits a significant number of people living in Shepton Mallet.

11.2 What can the donation be used for?

Donations will be used to assist with capital projects (assets that have long lasting benefits) or for the running cost of the community event or project. The money is not to be used for wages or routine administrative costs, repairs or routine maintenance to buildings, or equipment, hospitality and donations are not available for individuals or sponsorship.

11.3 How much money is available?

Only one application from any group or organisation will be considered by the Town Council in any financial year. The Town Council maintains a register of successful applications to prevent multiple awards being made to the same organisation or to different organisation but for a similar event or activity. The total amount available in the donations budget will change from time to time but has been agreed at £10,000 for the financial year 2020/21.

There is an upper limit of £2,000 per application. All applications are considered against the budget of £10,000 and therefore you have to compete against other applicants. Your application might not get the full amount that was requested.

11.4 What will not be considered for a donation?

- General appeals (eg national or international disaster funds)
- National organisations without a locally based group
- Individuals
- Branches of a larger organisation that could be funded by their main organisation
- Commercial enterprises which aim to generate a profit
- Projects with party political links
- Projects that discriminate on the grounds of age, colour, impairment, marital status, lifestyle and culture, nationality, race, gender or sexuality, or on the grounds of economic or social status.

11.5 When do we apply for a donation?

The Policy and Resources Committee will consider applications for donations at 2 meetings a year: In September and January of each year, (or as close to those months as possible). The dates of meetings will be on the Council's website and are available from the office. Applications must be received three weeks before the meeting date. Late applications will either be deferred to the next meeting or will be returned, depending on the nature of the request.

11.6 What if my project is urgent or falls between the meeting dates of the Policy and Resources Committee?

To assist with small scale events, or to meet an urgent need, the Town Council has delegated responsibility the Town Clerk and the Responsible Financial Officer, to take decisions outside of the meetings. They have authority to make awards of up to a total of £1,000 per year, dependent on the nature and urgency of the request. This is to be reported to the next Policy and Resources Committee meeting. The amount that is awarded is taken from the overall donation budget of £10,000.

11.7 How does one apply?

The Town Council's application form must be used.

Applications must not be submitted, or endorsed, by members of staff or councillors of Shepton Mallet Town Council. Applications must include the necessary evidence to support the application, as listed in the criteria.

Applications must be made in advance of the event/project commencement date.

If the organisation is relying on the donation from the Town Council, it should not commence the activity until the award of a donation has been confirmed in writing.

Retrospective applications will not be considered. If a project has already started, or a key date to which the application relates to has passed, it cannot be funded from this scheme.

If the group is unable to use the donation for the stated purpose and within the stated timescale, the Town Council must be informed and the monies must be returned.

The donation must only be used for the purpose for which the application was made. The Town Council will ask for feedback at the appropriate time.

Awards for funding which are not for projects within the current financial year will be considered on a case by case basis. Where a donation for a project is relying on match funding from other organisations, the funds will not be released until confirmation is received that the target has been reached (to be set by the committee).

All applicants completing an application form will be deemed to have read and agreed to the requirements outlined in this policy. All sections of the application form must be completed and returned with the necessary documentation, not later than 3 weeks prior to the meeting. Applicants will be invited to the meeting to give a brief overview of the application and to answer any questions of the committee.

11.8 Receipt of donation

Donations will not be paid to an individual. If an organisation does not have a bank account, the organisation can arrange for another community organisation to receive and hold those funds. On occasion the donation might be paid in instalments.

12.0 Application Check List

12.1 The following check list has been prepared to assist with the completion of the donation application form. Applicants are advised to read the check list before submitting.

- Are you aware of the dates of the meeting, and have submitted the application more than three weeks in advance of the meeting at which you would like your application to be considered?

- Have you answered all sections of the form?
- Have you been clear on the amount of donation required?
- Does the application set out how the organisation meets the criteria?
- Have you enclosed your organisation's constitution, or set of rules?
- Have you included a project outline, business plan, photos, quotes as required?
- Have you, and one other within your organisation, signed the statement on the last page to certify that all the details are correct?

13.0 **Contact Details**

Shepton Mallet Town Council, 1 Park Road, Shepton Mallet, Somerset, BA4 5BS

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