

Grants and Concessions Policy

1 Why does Chichester District Council give grants and concessions?

1.1 The development of the Council's Corporate Plan recognises the role that Chichester District Council plays in achieving the aspirations for the local area, shared by both the people that live and work here and the organisations that serve them. Working to achieve these aspirations is best done through co-operation or partnership. The District Council has identified the areas where it can contribute most effectively, reflecting both the statutory responsibilities we hold and the best interests of local tax payers.

1.2 Chichester District Council has a long history of awarding appropriate and timely financial support to local businesses, community groups and voluntary organisations and we want to continue this, despite increasing financial constraints.

2 What is the purpose of the Council's Grants and Concessions Policy?

- recognise that there are other organisations that are better or uniquely placed, to achieve certain outcomes.
- define what Chichester District Council seeks to achieve by giving financial support
- have a single and transparent process for how we give financial support.
- To improve outcomes and quality of life for the community
- To target funding where it will have the greatest benefit, and address inequalities

3 Who is this Policy for?

This updated Grants and Concessions Policy will continue to be the reference point for future decision making, and is therefore of relevance to:

- Council Members and Officers in determining how decisions are made
- Applicants to the Council for financial support, to understand what they may be able to receive. Applying "Organisations" are typically businesses, charities, community or voluntary groups located in and serving the needs of the local area.
- Local residents, to see how elements of the Council Tax they pay is invested back into their communities
- Other grant giving bodies, to outline our intentions and achieve mutual clarity

4 Review 2015

4.1 Since inception the Grants and Concessions Policy has been regularly reviewed. Annual reporting provides an opportunity for review and continuous improvement, but formal reviews were implemented in 2011 and most recently in Autumn 2015 (looking specifically at Grants). Grants have been

sustained since 2009 primarily through the use of the Council's Capital reserves, and (looking ahead to a time when these are exhausted) it was felt timely to look to the long term continuance of Grants.

4.2 The Review concluded that cumulatively, the total level of grant funding made available would need to reduce, but critically this was with a view to sustaining Grant giving into the longer term.

4.3 The Review also concluded that in order to make best use of the resources available, the Council needs to be much clearer about what it is looking to fund – and by omission what it will not.

4.4 The Priorities and Principles for Grants and Concessions funding have also been reviewed, and will be reviewed and published annually (and considered appended to this Policy).

5 The West Sussex Compact

5.1 In reviewing this Policy, Chichester District Council has observed The West Sussex Compact, which it signed up to in 2005. The Compact is an agreement between statutory organisations and the voluntary and community sector, which seeks to improve relationships. The document contains a set of commitments made by both sides.

6. How decisions will be made

6.1 The decisions of Chichester District Council are made by the Cabinet, who meet monthly to make decisions relating to all areas of the Council's work. To provide sufficient scope for full consideration of the requests the Council receives for financial support, the Cabinet has established the Grants and Concessions Panel.

6.2 The Cabinet and full Council have approved this Policy (and specifically the Terms of Reference of the Panel) which effectively set the parameters in which they work.

6.3 The Grants and Concessions Panel will meet regularly to consider applications. In order to make timely decisions, the Chair of Panel is a Cabinet Member and has delegated powers to approve or decline applications. To facilitate a timely response to small grant applications (below £1001) outside of the Panel meeting cycle, the Chair/Cabinet Member can use their delegated power in consultation with two other Panel members.

6.4 To facilitate informed discussion and decision making at Panel meetings, officers are tasked ahead of Panel meetings to assess individual applications and prepare reports that comment on a range of issues (without recommendation).

6.5 There are some areas of decision making (such as discretionary rate relief) where successful applicants must conform to clear criteria. In such circumstances, the administrative task of determining if an applicant meets

those criteria is delegated to officers. Applications that fall outside this criteria (such as higher value applications, or those requiring discretion) are taken to the Panel for a decision.

6.6 Annually, the Panel will receive (and subsequently present to Cabinet) an annual Monitoring Report, that will identify all financial assistance made to organisations in the past year. This report will consider allocations against various indicators, such as the priorities for funding, location in the District, type of organisation etc. Consideration of report will determine the success of Grants and Concessions, and identify any actions required.

6.7 Transparent decision making requires reference and adherence to a significant amount of detail. The detail of application and decision processes is contained within a publicly available framework of guidance documents (summarised at Appendix 1). Changes to these guidance notes will be considered and directed by the Grants and Concession Panel, avoiding the requirement for regular Policy amendments by Cabinet.

7 How decisions will be notified

7.1 Applicants will be notified of the Panel's decision, including any caveats to awards, in writing. For all requests, the amount of the application, the name of the recipient and its specific purpose will be publically available information. For all successful applicants, the amount of the award will also be recorded. For grants, recipients will be required to specifically identify the award in their accounts.

7.2 Where a Grant award is agreed, the successful applicant will be offered a "Funding Agreement" which will detail standard conditions and any specific conditions of grant agreed by the Panel. This will need to be formally accepted by the applicant before any payment is made.

7.3 Information contained within application forms, including all financial information, will remain confidential at all times both before and after the decision on an application. Accordingly, Panel meetings are not open to the public. In the exceptional circumstance that matters were referred on to Cabinet, the item would be heard in Part II.

8 Types of financial support

This section identifies the different types of financial support available to organisations, and those who can apply. Reference should be made to the relevant guidance documents where appropriate.

9 Grants

9.1 Two types of Grants can be applied for:

- Grants for up to £1,000 can be submitted at any time and will be considered outside of Panel meetings.

-Grants over £1,000 will be considered at the regular Panel meetings, and closing dates will precede these by approximately one month. Dates will be advertised on the Council's website.

9.2 Separate guidance notes set out:

- The Priorities and Principles for Grants, reviewed annually, which identifies the types of applications the Council is keen to attract.
- The specifics of completing application forms and supporting documentation.
- The advice and guidance provided by Funding Advisers in response to enquiries
- How applications will be assessed by Funding Advisers after submission, the reporting format to Panel and the scoring and peer review/moderation used to ensure consistency across the organisation.

10 Funding Agreements

10.1 Chichester District Council maintains a number of ongoing financial arrangements with Voluntary Organisations, which are conditional upon performance against a Funding Agreement which sets out the duration and purpose of the funding and the expected outcomes. Monitoring and renewal of these Funding Agreement is undertaken by officers, but will be referred to the Grants and Concessions Panel where, for instance, performance issues require consideration of the continuance of funding. Details of all Funding Agreements will be provided in the Annual Monitoring Report.

11 Concessionary Rents

11.1 Where the Council has ownership of land or property, the income it derives provides the means to deliver services to local residents. However, financial assistance can be given to occupiers by letting at a subsidised or concessionary rent.

11.2 Small start up businesses can secure accommodation at St James Industrial Estate at a concessionary rent for the first two years of occupation: year one at 50% of market rent and year two 75% of market rent (full rent from year three onwards). Applications for occupation and rent reviews that meet these criteria are delegated to officers, and requests for further discretion are referred to the Grants and Concessions Panel.

11.3 The remainder of the Council's property portfolio is as diverse as the organisations that occupy them (from Chichester festival Theatre to Scout huts), but typically these are historic arrangements. Consequently there are no processes for applying for concessionary accommodation. Officers are tasked to manage the tenancies of occupied properties including the reduction in the size of concession provided, and therefore the renewal of leases that meet those **criteria** are delegated to officers. Details of all concessionary rents will be provided in the Annual Monitoring Report.

12 Discretionary Rate Relief

12.1 Non-Domestic Rates ("Business Rates") are payable on any property that is not residential or domestic. There are a number of mandatory

discounts that are nationally applicable and not a matter for Council Policy. However there are further discounts that have been agreed by Chichester District Council. Some have clear **criteria** and can be administered under delegation to officers, and some require consideration of the circumstances of the applicant and require the discretion of the Grants and Concessions Panel.

12.2 **Charities** and Community Amateur Sports Clubs (**CASCs**) are entitled to 80% mandatory relief. The Grants and Concessions Panel will receive applications for relief on the remaining 20%, for which specific guidance has been written.

12.3 Other **not for profit organisations** can apply for discretionary relief of up to 75%. Where this relief meets the **criteria** set (and the cost to the Council is no more than £500) then the application for relief can be agreed by officers. Applications where the cost to the Council will be greater than £500 will be presented to the Grants and Concessions Panel for consideration.

12.4 Chichester District Council recognises that some **Rural Businesses** are vital to the sustainability of our communities and require specific support to ensure their survival. Subject to specific **criteria**, businesses such as village shops and Post Offices can claim relief of up to 100%, using delegated powers to officers. However, all awards are subject to review every two years and are included in the annual report to the Grants and Concessions Panel.

12.5 Government also appreciates that ratepayers may go through genuine **Hardship** that would affect their ability to pay for a time. Therefore Chichester District Council has the power to reduce or remit the amount payable where it is satisfied that there is genuine hardship, and with consideration to the interests of local residents. More detailed **criteria** is available, but each application would be considered on its merits by the Grants and Concessions Panel at the time. It is considered that should such instances occur, these would have an impact on more than one ratepayer (for instance, an environmental disaster). It would therefore be appropriate for the Panel to consider the general impact as well as the individual case.

12.6 Effective from 1 April 2012, the Council will also consider applications for discretionary rate relief from other ratepayers for which specific guidance has been written.

13 Terms of Reference for the Grants and Concessions Panel

13.1 The Grants and Concessions Panel is formed of 8 District Councillors, appointed by Cabinet and Chaired by the Cabinet Member for Community Services.

13.2 The Grants and Concessions Panel is directed by Cabinet to:

- Identify the most appropriate means to financially support external organisations in the voluntary, community and business sectors in achieving the Councils priorities, within the means available.

- Make decisions in accordance with the direction set by Cabinet, and the Grants and Concessions Policy.
- Meet regularly to consider grant applications based on Council priorities and principles, set by Cabinet.
- Determine the number and frequency of Panel meetings each year, adequate to balance the available funds with providing timely decisions to applicants.
- Correspond electronically to facilitate the timely determination of grant applications of up to £1,000.
- Consider applications for relief for all or part of the amount of non-domestic rates payable
- Consider new applications for Concessionary Rents and recommend such applications to the Executive Board
- Consider the performance of Service Level Agreements as appropriate
- Receive reports from officers on grants, rent concessions and rate concessions decided by delegated powers
- Receive the annual report and identify any alterations to Criteria, and document any findings for the continuous improvement of decision making.
- Recommend to Cabinet any changes to Priorities and Principles annually, and any changes to Policy as appropriate.

14 Delegation summary

Cabinet will annually approve the budgets available to the Grants and Concessions Panel, the Priorities and Principles to be used to encourage applications, and any adjustments to delegations to achieve efficiency and transparency.

The Cabinet Member for Community Services, as Chairman of the Grants and Concessions Panel, is delegated to approve, subject to the terms of the Grants and Concessions Policy and associated criteria:

- Grants greater than £1,000, in consultation with the Grants and Concessions Panel at their regular meetings.
- Grants of up to £1,000, in consultation with two other members of the Grants and Concessions Panel by electronic or other documented means on an ongoing basis.
- Concessions against rent payable on Chichester District Council owned premises or land
- Concessions against Business Rates collected by Chichester District Council

The Cabinet Member for Finance is delegated to act for the Cabinet Member for Community Services where that member has a prejudicial interest or is otherwise unavailable.

Officers are directed to, under delegation and subject to the criteria:

- Return Grant applications on receipt where there has been no prior contact with a Funding Adviser.
- Approve Concessionary Rents at St James Industrial Estate for up to two years

- Approve the renewal of leases at Council owned premises where concession reductions have been achieved
- Approve Rate Relief for not for profit organisations, up to 75% and where the cost to the Council is not greater than £500.
- Approve Rate Relief for Rural businesses

Appendix 1 - Criteria Documents

Grants

- 1 What are Chichester District Council's Priorities and Principles for Funding?
- 2 What and who is eligible for Grants?
- 4 Funding Agreement Guidance
- 5 How to complete the Grant Application Form:
 - i) Small Applications – up to £1,000
 - ii) Applications over £1,000
- 6 How Funding Advisers assess applications
- 7 How the Grants and Concessions Panel consider applications

Rent Concessions

- 8 Criteria for Start Up Businesses at St James Industrial Estate
Rent Concessions for Council owned premises

Discretionary Rate Relief

- 9 Who is eligible for Discretionary Rate Relief, and how applications are considered

General

- 10 Guidance for Member involvement