

CLANRYE ABBEY DEVELOPMENTS LTD

Guidance Notes for 2017/2018 Community Fund Call

A: Introduction:

Clanrye Abbey Developments Ltd., is a Newry-based Charitable Organisation formed in 1986 and is run by a voluntary Board of Directors.

Its Mission is: 'To assist in improving the local built environment to enhance the community and social fabric of the Greater Newry City Area.'

CAD COMMUNITY FUND:

CAD has a limited Community Fund available for distribution via an application process to groups, clubs and organisations across the Greater Newry City Area to assist in funding the improvement of the built environment within a 5 mile radius of Newry City Hall that will enhance the community and social fabric of the Greater Newry City Area.

The CAD Community Fund will have a maximum initial payout of £10,000 but in some cases, depending on the scale of the project and its positive impact on the local community, may pay out up to £20,000.

Groups/Clubs/Organisations can apply for funding from only one of the following funding tiers:

Tier 1 – Minimum of £500 – Maximum of £2,000

Tier 2 – Minimum of £2,000 – Maximum of £10,000

Tier 3 – Minimum of £10,000 – Maximum of £20,000

(A maximum of 3 projects will be assisted at this level in this call)

- Applications for Tier 3 must not exceed 50% of the overall costs of the project for which funding is being sought and consideration will only be given to applications which provide evidence that matched funding of 50% is in place.
- In order to qualify for consideration for funding from the CAD Community Fund 2017 Call, applicants must ensure they complete the **CAD Community Fund Call 2017-18 Application Form**.
- Any other forms submitted will not be considered and will be rejected.

- All projects must take place between **1st September, 2017 and 31st August, 2018**. Clanrye Abbey Developments will not accept retrospective applications (i.e. applications seeking funding for projects already started prior to 1st July, 2017).
- The closing date for applications is **4pm on Thursday 31st August 2017**.
- Applications must be delivered by 4pm on **Thursday 31st August 2017 to Clanrye Abbey Developments Ltd., c/o Daly Park Chartered Accountants, Trevor Hill, Newry**.
- Late applications will not be considered.

CLANRYE ABBEY DEVELOPMENTS LTD (CAD) COMMUNITY FUND:

Defined as – Contributions of up to 100% in Tier 1 and up to 50% of the costs In Tier 2 & Tier 3 towards match funding of community capital infrastructure schemes proposed by the community and voluntary sector.

Projects must deliver Capital Infrastructure Projects; see examples of eligible and ineligible items outlined below. Please note: these lists are not exhaustive.

Eligible – Capital Costs, including associated fixtures and fittings (examples).	Ineligible – Revenue Costs and non fixed items (examples).
Capital Building Works	Rent/Rates
Building Construction and Landscaping	Staff Costs
Extensions	Running Costs e.g. heat / electricity
Essential Professional Fees associated with capital building works	Maintenance Costs
Renovations	General Office Equipment e.g. Tables / Chairs / Stationary

- Application forms need to be completed as per the programme area on the covering page of the application.
- CAD will only consider one application per organization in this call.
- It is essential that applicants submit a copy of their Annual Accounts or Income and Expenditure Accounts with the application.
- For Tier 2 & Tier 3 applications CAD will pay only the agreed sum against each original invoice whenever all relevant conditions have been met and bank statements evidencing expenditure have been submitted.
- “Own labour” and hire of “own facilities” are not eligible items of expenditure.
- Insurance costs are not eligible items of expenditure.
- The Board of Directors of CAD will make the final decision on the provision of funding for all/any projects. Where an organisation has been allocated funding, payment will be subject to the organisation adhering to the conditions contained within their letter of offer.
- This is a competitive process and applicants will be awarded in line with their score and the funding available.
- CAD accepts no responsibility whatsoever for any expenditure or liabilities arising out of the applicant’s project.

B. Assessment process and criteria

CAD will consider all eligible applications. The assessment panel will make recommendations on whether applications fulfill the funding criteria and the level of funding awarded. The assessment panel recommendations are submitted to the Board of CAD for approval. Assessment will take place in two stages:

Stage 1: Basic eligibility check

All project applicants **must** meet the following basic eligibility criteria – otherwise the application **will not progress** any further in the appraisal process and **will not** therefore **be scored**.

- Application forms must be submitted by hard copy and received at CAD's registered office c/o Daly Park Chartered Accountants, 6 Trevor Hill, Newry, BT34 1DN **by 4pm Thursday, August 31st 2017**.
- The Applicant in the application should be a properly constituted community or voluntary organisation and be a not for profit organisation and the appropriate documentation must be included as evidence. As per Section 1.2.
- The organisation must include a copy of their Safeguarding policy (if applicable). As per 1.3.
- The organisation must enclose a copy of their most recent bank statement. As per Section 1.4.
- The organisation must enclose a copy of either their recent annual accounts or income and expenditure accounts. As per Section 1.4.
- The project must be within the allocated funding period for the programme or service area applied for and attach a timeframe plan and cashflow. As per Section 2.2 and 2.4.
- The project activity must be within the eligible area (Within a 5 mile radius of Newry City Centre. As per Section 2.3.

The project must clearly identify how the proposed project will **assist in improving the local built environment and enhance the community and social fabric of the Greater Newry City Area**. As per Section 2.5.

- Applicants must be applying for a **minimum of £500 and maximum of £20,000** from CAD. As per Section 3.
- For Tier 2 & Tier 3 applications the organisation must include evidence to show that match funding (minimum of 50%) is in place or is being processed e.g. confirmation of bank loan, bank statements or letter of offer or intent showing own/other funds available. If being processed full confirmation is required within

12 weeks of Letter of Offer being issued. As per Section 3.3.

- Applicants must demonstrate that they will have secured 100% of the funding required for the project to be completed inclusive of this application. As per Section 3.3.
- The organisation must include evidence of land ownership and/or legal title to property confirmed and in place. As per Section 3.9.
- The organisation must include evidence that statutory approvals and permissions are in place. As per Section 3.9.
- The organisation must include a copy of the Business Case/Economic Appraisal completed (if applicable). As per Section 3.9.
- The organisation must include evidence of site Surveys completed and Risk Assessed. As per Section 3.9.
- The organisation must include evidence of Design Brief approved. As per Section 3.9.
- Applications forms must be appropriately signed. As per Section 5.

Stage 2: Full Project Appraisal and Scoring – Tier 2 & Tier 3 Applications:

All applications passing Stage 1 basic eligibility check, will proceed to a “Full Project Appraisal and Scoring” carried out using the following criteria, process and scoring system. The assessment panel then makes a recommendation to the Council for consideration/approval. All eligible applications will be assessed against the pre-set criteria agreed by Council. All applications will be scored out of 120. An application must score a minimum of 50% under Programme and Priority Criteria and Efficiency and Effectiveness criteria as well as under the cross cutting themes before it can be considered for funding. Projects under 50% will not be recommended for support.

However, a score equivalent to 50% or above will not necessarily guarantee funding as applications will be scored and ranked with funding available awarded to the highest ranked projects. Thereafter a project may be reconsidered and allocated funding should it become available at a later date.

For consistency and to facilitate efficient assessment the following approach has been adopted to scoring against the following criteria:

Criterion	Maximum	Weighting	Weighted Final Score
Council & Programme or Service Area.			
Fit with the CAD's overall Strategic priorities (Question 2.5)	12	x 1	12
Fit with the programme or service area being applied for (Question 2.5)	12	x 1.5	18
Impact on the local community (Question 2.6)	12	x 1.5	18
Efficiency & effectiveness			
Added value (Question 2.7)	12	x 1	12
Value for money (Question 2.6 and Section 3)	12	x 1.5	18
Need (Question 2.8)	12	x 1.5	18
Cross cutting themes			
Equality of opportunity (Question 2.9)	12	x 0.5	6
Good Relations (Question 2.10)	12	x 0.5	6
Empowerment (Question 2.11)	12	x 0.5	6
Impact on poverty, social need and health and well being (Question 2.12)	12	x 0.5	6

In addition the following scoring system will be used by the panel to ascertain the scores for the criteria above:

Link at project level	Link to Criterion	How evident	Score
The project proposal does not demonstrate that it has the capacity to deliver basic project outcomes that would be expected in order to be awarded funding.	The application does not meet the basic standard under this criterion	Not evident	0
The project proposal demonstrates some ability to deliver key outcomes in some areas but overall it is below the standard expected in order to be awarded funding.	The application met some of the basic requirements of this criterion.	Less evident	1 – 3
The project proposal demonstrates an ability to deliver project outcomes to an acceptable standard and it may be considered suitable for funding.	The application met the requirements of this criterion.	Evident	4 – 6
The project proposal is strong in the manner in which it has been described with a range of activities that will result in good outputs and the achievement of outcomes.	The application fully met the requirements of this criterion.	Very Evident	7 – 9
The project proposal is strong as the activities described will result in good outputs and the achievement of outcomes.	The application was an excellent fit with the requirement of this criterion.	Highly evident	10 – 12

CLANRYE ABBEY DEVELOPMENTS FUNDING CALL 2017-2018

Application Form

**The closing date for receipt of completed application forms is:
4pm on Thursday 31st August 2017.**

No applications will be accepted after the closing date.

It is your responsibility to obtain a proof of receipt.

Only one application per organisation will be considered.

Programme Area	Programme Area applied for (please tick appropriate)
Community Capital Scheme Tier 1 – Minimum of £500 – Maximum of £2,000	
Community Capital Scheme Tier 2 – Minimum of £2,000 – Maximum of £10,000	
Community Capital Scheme Tier 3 – Minimum of £10,000 – Maximum of £20,000	

Important information when completing your application.

1. You are advised to complete the Application Form in conjunction with CAD's guidance notes and scoring criteria.
2. The project will be assessed solely on the information provided within the application. Therefore ensure your application is completed in a comprehensive, detailed and legible manner.
3. Applications should be completed in black ink or computer format.
4. Additional information should only be attached where requested. Any additional material provided which has not been requested will not be considered.
5. Applicants must ensure the application form is signed and dated.

For further clarification in relation to the completion of the application you can contact :

Michael Savage
Chair
Clanrye Abbey Developments
c/o Daly Park Chartered Accountants
6 Trevor Hill
Newry
BT34 1DN
Email: info@clanryeabbeydevelopments.co.uk

Section 1 Your Organisation

LEAD PARTNER					
1.1 Contact Details: (The information provided must be accurate and CADI must be notified of any changes).					
Title (Mr, Mrs, Miss, Msetc)		First Name		Surname	

Position in organisation:		Contact Number:	
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Organisation Name:			
Address:			
Postcode:		Telephone:	
E-mail:		Website:	

Contact details for this project (if different from above)			
Address:			
Postcode:		Telephone:	
E-mail:		Website:	

1.2 What is the legal status of your organisation? Enclose a copy of the relevant documentation as evidence.			
Voluntary/Community body		Other (Please specify)	
Co-operative			
Registered Charity: Charity Number: _____			

Limited Company (including company limited by guarantee) Company registration number:			
Place of Incorporation:			

**1.3 Will the project involve children and vulnerable adults? If yes, please enclose a copy of your Safeguarding policy.
If your project does not require a safeguarding policy you must state the reason why.**

Yes ☐ Please enclose a copy

No ☐ Reason _____

1.4 What is the annual accounting position of your organisation?

Audited accounts ☐ (Please enclose most recent copy)

Income & Expenditure ☐ (Please enclose most recent copy)

Each application must include a copy of their most recent bank statement, and a copy of either their recent annual audited accounts or income and expenditure accounts. If this is not enclosed your application will not be processed.

1.5 Please describe your organisation and provide examples of previous initiatives or projects.

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1.6 Organisational Information.

Date of formation:

Chairperson:

Secretary:

Treasurer:

Section 2 About Your Project

2.1 Project Title:	
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2.2 Start and end date of your project			
Start date		End date	

2.3 Please also indicate the project's primary geographical area of benefit within the Greater Newry Area – CAD will only fund activities for beneficiaries within a 5 mile radius of Newry City Hall or activities based within that radius.

2.4 Give a brief description of your project outlining specific aims and objectives and cashflow and timeframe for delivery and how the project will be sustained after the funding period.
Applicants <u>must</u> attach a copy of the cashflow and timeframe plan.

**2.5 Clearly identify how the proposed project will meet the funding ethos of CAD and will assist in improving the local built environment and enhance the community and social fabric of the Greater Newry City Area.
(weighted final score 30, refer to scoring matrix)**

2.6 Outline the outcomes and benefits of your project for the local community. Provide targets e.g. number participating, number of events etc. (weighted final score 18)

2.7 How is the proposal/idea new or how does it build on a current or previous project to address continued needs? (weighted final score 12)

2.8 What need is being met by this project? How did you establish this need? (weighted final score 18)

2.9 How will the initiative improve equality of opportunity? Please detail what actions will be undertaken which will contribute to improving equality of opportunity. (weighted final score 6)

2.10 How will the initiative promote good relations? Please detail what actions will be undertaken which will contribute to improving good relations. (weighted final score 6)

2.11 How will the project empower the local community building capacity for future self help? (weighted final score 6)

2.12 Please detail what actions you will be undertaking to address social needs, health and wellbeing and impact on poverty. (weighted final score 6)

Section 3 Project Budget

3.1 Total Cost of Project:	£
3.2 Amount Requested from CAD Must be between (£500-£20,000)	£
Is the Applicant Organisation/Lead Partner registered for VAT? Please note that if registered for VAT you should normally exclude VAT from the project costs. If you are not registered for VAT please include VAT along with the costs detailed in your project budget)	Yes / No Please provide details:

3.3 Applicants will require a minimum of 50% match funding. Please list any other organisations that you have secured the match funding from. Give any relevant reference numbers. The organisation <u>must include evidence</u> to show that match funding (minimum of 50%) is in place and that including this application 100% of the funding has been secured to complete the project e.g. confirmation of bank loan, bank statements or letter of offer or intent showing own/other funds available.			
Organisation	Funding Programme (Include reference number)	Amount received	Period of Funding (start-end dates)
		£	
		£	
		£	
		£	
		£	

3.4 Will this project generate revenue? If yes, provide details below		Yes / No
Year	Source	Amount
		£
		£
		£

3.5 Please provide a fully costed budget with a breakdown of all costs. Please detail which elements of your project you wish CAD to fund. Note CAD will only pay grant monies against headings and figures detailed below.

Capital Costs	Items of Expenditure	Cost £		Council Contribution sought £ (Max 50% of cost)
TOTAL BUDGET				

BANK ACCOUNT DETAILS:

3.6 Name of Bank: _____

3.7 Address: _____

3.8 Current Account/Savings Account Number: (Please specify type of account)

3.9 All capital contributions applicants (where applicable per application) must provide evidence of the following:

	APPLIED FOR		CONFIRMED	
(a) Land Ownership and/or Legal Title to the Property	Yes	No	Yes	No
(b) Planning Permission	Yes	No	Yes	No
(c) Building Control Approval	Yes	No	Yes	No
(d) Business case or Economic Appraisal completed	Yes	No	Yes	No
(e) Site Surveys and Risk Assessments	Yes	No	Yes	No
(f) Design Brief	Yes	No	Yes	No
(g) Other relevant statutory permissions (please name below)	Yes	No	Yes	No

Section 4 – Checking it's all there

Ensure you have fully adhered to the basic eligibility checklist, and have answered all questions and have completed all sections in the application form. All relevant documentation as outlined below must be attached.

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|---|--------------------------|
| I enclose a copy of organisation's constitution or other appropriate documentation, (as per 1.2). | <input type="checkbox"/> |
| I enclose a copy of organisation's Safeguarding policy (applicable if project involves children and vulnerable adults) (as per 1.3). | <input type="checkbox"/> |
| I enclose a copy of my organisation's most recent annual audited accounts or income and expenditure accounts, (as per 1.4). | <input type="checkbox"/> |
| I enclose a copy of my organisation's most recent bank statement, (as per 1.4). | <input type="checkbox"/> |
| I enclose evidence of match funding. (Min 50 %) (as per 3.3). | <input type="checkbox"/> |
| I enclose confirmation of VAT status (if applicable), (as per 3.2). | <input type="checkbox"/> |
| I enclose written evidence of agreement of partners to participate in project (if applicable). | <input type="checkbox"/> |
| I enclose the minutes of my organisation's meeting authorising the submission of the grant application. | <input type="checkbox"/> |
| I enclose copy of economic appraisal or business case (if applicable, as per 3.9). | <input type="checkbox"/> |
| I enclose evidence of legal title to property (if applicable, as per 3.9). | <input type="checkbox"/> |
| I enclose evidence of planning permission (if applicable, as per 3.9). | <input type="checkbox"/> |
| I enclose evidence of building control approval (if applicable, as per 3.9). | <input type="checkbox"/> |
| I enclose a copy of the design brief (as per 3.9). | <input type="checkbox"/> |
| I enclose a copy of site surveys and risk assessments (as per 3.9). | <input type="checkbox"/> |
| I enclose evidence of statutory approvals and permissions (as per 3.9). | <input type="checkbox"/> |
| I confirm that the organisation operates on a not-for-profit basis unless the organisation has charitable status or all profits are reinvested in the organisation, in furtherance of its objectives and are not distributed by way of profit, dividend or otherwise to the organisation's shareholders, members, owners, stakeholders or anybody else connected with the organisation. | <input type="checkbox"/> |
| I confirm that sufficient insurance cover has been sought for the project and that CAD is not responsible for providing insurance for, or claims which arise from, grant-aided programmes. | <input type="checkbox"/> |

Section 5 Declaration

I confirm that the information I have given on this application form is accurate and complete. I acknowledge that if I give misleading or inaccurate statements on behalf of the group or organisation, we may not receive any financial assistance or it may be withdrawn and have to be refunded to Newry, Mourne and Down District Council.

Title (Mr, Mrs, Ms, Miss etc)		First name (Please print)		Surname (Please print)	
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Signature:		Date:	
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Your position within the organisation:	
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Must be completed by 2 Office Holders.

I confirm that the person named at Section 1 is authorised to act as the contact for the organisation in all matters relating to this application.

1.

Title (Mr, Mrs, Ms, Miss etc)		First name (Please print)		Surname (Please print)	
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Signature:		Date:	
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Your position within the organisation:	
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2.

Title (Mr, Mrs, Ms, Miss etc)		First name (Please print)		Surname (Please print)	
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Signature:		Date:	
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Your position within the organisation:	
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Note: The information provided on this form may be made available to other departments/ agencies for the purposes of preventing or detecting fraud.
Data Protection Act 1998