AGENDA 12, Enc x) Summary of Grant Funding Recommendations

Introduction

A Task and Finish Group made up of Cllrs Caroline Ball, Marjorie Chambers, Kerry Davison, Karl Green, and Lynne Grimshaw, met with Executive Officer Sarah Eden and Events and Engagement Officer Sharon Parmley. This was to undertake a thorough review of the Council's Annual and Small Grants Scheme. The group considered:

- The existing annual and small grant guidance and application process

- Feedback received from applicants and Members during the 2024–25 financial year

- A review of historical grants awarded

- The clarity, consistency, and accessibility of the previous application forms

The purpose of this review was to ensure the Annual and Small Grants Scheme continues to be fair, transparent, proportionate, and accessible to local voluntary and community organisations — while also ensuring good governance and value for public money.

As a result of the group's work, a number of improvements and changes are recommended. These are summarised in the following section.

In addition to this summary, the Council is provided with:

- Updated **Annual and Small Grants Guidance** for 2025–26

- Revised **Application Forms**, aligned with new guidance

- A supporting **Eligibility and Prioritisation Checklist** (Appendix A) for Small Grants, for officer use

- Monitoring Forms for use with Annual Grants

Summary of Recommendations in respect of Annual Grants

1. *Removed presentation requirement* - Now states clearly that all applications will be reviewed based on submitted forms and documentation only.

2. *Added £5,000 maximum award limit* - Clearly stated in the funding section.

3. *Match funding preference* - Added explanation that when applications exceed available funds, projects with match funding may be favoured, with reasoning about maximising public fund impact.

4. *Ashington-only requirement* - Clear statement that applicants must be based in Ashington and applications from outside groups will no longer be considered.

5. *Fundraising efforts section* - New dedicated section explaining that applications demonstrating fundraising efforts will be favoured, with specific requirements for what to include.

6. *30% reserves policy* - Clear policy stating groups with more than 30% of annual running costs in unrestricted reserves won't be funded, with explanation requirements.

7. *Evaluation requirements* - Added mandatory evaluation form completion with consequences for non-compliance.

8. *Retrospective funding prohibition* - Clear statement that retrospective projects won't be funded and projects must be achievable within 12 months.

9. *Comprehensive publicity requirements* – Includes detailed publicity section including logo usage, social media credit, and photo opportunity assistance.

10. *Public documents notice* - Added warning about sensitive information in reports since council papers are public.

Summary of Recommendations in respect of Small Grants

1. *Defined Three Grant Rounds Per Year* - Set deadlines in **July, October, and February to i**mprove planning and fairness for applicants and Officers.

2. *Continue a Maximum Grant of £500* - to ensure wider distribution of funds across the year.

3. *Continue to Restrict Applications to One Per Organisation Per Year* – to prevent multiple small grant applications from the same organisation as well as excluding organisations who received a large grant in the same financial year.

4. *Apply Consistent Eligibility Criteria, delegated to Officer* - Provide Officers with a formal eligibility checklist and prioritisation scoring tool (Appendix A), and delegate decision making to officer level. This ensures consistent decisions based on information provided.

5. *Match the large grant scheme* on location, organisation type, policies, and financial evidence, including reserves, and ensure small grants meet the same quality and governance expectations.

6. *Implement a Simple Prioritisation System for Oversubscription* - Use application content only (e.g. benefit to Ashington, collaboration, need, effort to raise other funds) to score applications when more are received than funding allows.

7. *Strengthen Publicity Expectations* - Make Council credit and promotion a condition of award. Require use of logo, acknowledgment on social media, and willingness to share updates or photos.

8. *Support Groups Without Policies* – Continue to encourage groups who don't yet meet policy requirements to seek help. Offer signposting so they can apply in future rounds.

9. *Improve Transparency* - Build changes into guidance and publish a scoring/eligibility matrix (Appendix A) to make cake clear how and why decisions are made.