

COMMUNITY FINANCIAL ASSISTANCE PROGRAM

GUIDELINES



1. GUIDELINES FOR COMMUNITY FINANCIAL ASSISTANCE PROGRAM

- The Blayney Shire Council Community Financial Assistance Program assists **not-for-profit groups** that offer a significant contribution to the social, economic and/or environmental wellbeing of the community. It also assists schools, sporting groups and sportspersons with financial assistance pursuant to the relevant financial assistance categories.
- Projects must be clearly described, illustrate the community benefit that the financial assistance will provide and identify which of Council's vision statements in the Community Strategic Plan will be addressed.
- Council will announce its annual budget funding in the local paper for the February and August application periods. Council does not offer any guarantee of funding as not all projects will receive funding and funding will be allocated for projects that meet the required community based criteria.
- No appeal process is permitted as to funding allocation.

2. GENERAL CONDITIONS OF FUNDING

- All applicants are to complete a Community Financial Assistance Application form - letters of request or verbal applications will **not** be accepted as funding applications.
- Applications that **match \$ for \$ will be considered favourably** - any matching funding from the applicant or other sources are to be identified on the application.
- Assessment of applications will remain confidential.
- No funding will be allocated to meet short falls, nor will financial assistance be retrospective other than for Council fee waiver requests within the current financial year.
- **All applicants must furnish documents as requested e.g. certificates of currency for public liability insurance and / or constitution / rules of their organisation. (School prize awards and sporting related requests excepted.)**
- Council **must be acknowledged in all promotional activities** and must be provided with copies of advertising or promotional materials featuring Council for Council's approval **prior** to use in any promotional activity.
- Any funds unspent at the completion of the project shall be returned to Council.
- Council requires a tax invoice prior to payment of financial assistance. GST will be added to all financial assistance where applicable. Applicants should provide their ABN. Applicants without an ABN must submit a "Statement by a Supplier" form available from the Australian Tax Office or from Council.
- Council fees and charges incurred in the holding of an event may be deducted before the financial assistance is paid.
- For financial assistance of \$10,000 and above, a performance agreement must be completed between Council and the organisation following approval.
- The applicant accepts and acknowledges these guidelines and conditions of making an application and that if unsuccessful cannot appeal, contest or petition any councillor, staff member or community representative acting on behalf of or for council or its funding partners.

3. ELIGIBLE RECIPIENTS

To receive financial assistance under this policy an applicant must be an eligible community organisation. For the purposes of this policy, an eligible community organisation is a separately constituted legal entity:

- a) which operates on a "not-for-profit" basis (meaning that any proceeds of its activities and used for the benefit of the organisation and are not available for distribution to its members); and
- b) the members of which are predominately members of the Blayney Shire community or, if not, which organises an event or function of regional significance which is supported by Council and benefits the Blayney Shire community.

Examples include Village Progress Associations; Town Committees; Trustees of Public Halls; Schools of Arts; Showground and other Reserves; Historical Societies; Show Societies; Community Service Organisations; Educational establishments; Charity Groups; Churches and Religious establishments; Sporting Clubs; Cultural Groups and Societies; Youth Groups and Senior Citizens; CWA branches; RSL Clubs and other groups assisting Council carry out service functions (as determined by Council).

Financial assistance is provided across a broad range of activities and projects conducted by such organisations.

Individuals may only apply for sporting related financial assistance where eligible.

4. CATEGORIES

Financial assistance to community organisations is provided in two categories:

a) **Recurrent Annual Donations.**

These are donations made to community organisations on an annual basis to assist financially with specified outgoings (such as public liability insurance), the waiver of Council rates and charges, waiver of Council rental charges, a school activity, the holding of a regular community event, cultural activity, other recurring activity or programs as approved by Council resolution.

The amount of these donations for each organisation or event or program is approved by Council in its annual budget contained in the Operational Plan or by Council resolution. The General Manager may approve other donations to an organisation or event under delegated authority, provided the donation is consistent with the guidelines, within budget and reported to Council via the next available Financial Assistance Program Committee meeting.

b) **One-off financial assistance.**

This assistance is provided for projects involving the construction, maintenance or repair of community facilities, the purchase of equipment, or for the organising and conducting of local events and functions or for youth programs that foster leadership or access to tertiary education. In

each case having demonstrated broad community benefit and support. Projects must be in accordance with the Community Strategic Plan and the four year Delivery Program.

Under this category community organisations are eligible to receive Council funding via a competitive submission process. There are two (2) funding rounds each year. Applications are called in May and November via a public notice published in the local newspaper and on Council's website.

Applications received after the close of business on the due dates will not be considered unless the Financial Assistance Program Committee in its discretion agrees otherwise. Financial assistance will be made available following determination at an ordinary meeting by Council and subsequent claim by the applicant.

The below table, Guidelines for One Off Assistance, sets out guidelines for determining the amount of such donations in each case. Applications are assessed in accordance with the criteria in Clause 7 below.

Applications received after the close of business on the due dates will not be considered, unless the Financial Assistance Committee in its discretion agrees otherwise.

c) Flagship annual community project.

Each year an amount of up to \$25,000 will be set aside from the Iberdrola Moneys to provide financial assistance for a major project(s) to be undertaken by a community group(s). Partial matching funding (in cash or kind) is desirable for major project(s). This will usually entail capital works such as ground works, building construction, building repairs, refurbishment or renovation, and/or major equipment purchases. Funding for such a project is non-recurrent and is subject to the applicant entering into a management agreement for the facility with Blayney Shire Council or the Crown with Council's support.

Council assistance may include support for applications for grants made to a government or other public funding organisation. Success in such applications may result in a reduction of Council financial assistance.

[If a suitable major community project is not identified in any year, the funding will be set aside and be available in a subsequent year, when it will be in addition to any project in that year or pooled with that year's allocation to provide additional assistance for a suitable project]

Guidelines for Annual Donations

Type of assistance	Amount
Public liability insurance	(i) reimbursement of 100% of the premium up to \$1,000 pa; and (ii) reimbursement of 50% of the premium exceeding \$1,000 up to a maximum grant of \$2,000 pa
Property rates and charges	as per Notice of Assessment
Rental	as per Council invoice
Schools and sporting related donations	(i) for school prizes, \$100 per school per annum (ii) for sporting achievements: (A) \$100 for regional selection; (B) \$300 for state selection; and (C) \$500 for national selection
Community Events/Cultural Activities	Not exceeding \$2,000 except with the approval of Council

Guidelines for One-off Financial Assistance

Type of assistance	Amount
Financial Assistance for community facilities	(a) Up to \$5,000 in funding, with matching funding (in cash or kind) being desirable at all levels, but mandatory between \$3,000 and \$5,000; or (b) up to \$10,000 in exceptional cases for special projects approved by Council
Flagship annual community project (see clause 4(c))	Up to \$25,000
Development Applications	The total amount development application costs levied on works to be undertaken on Council-owned facilities.

5. APPROVAL PROCESS

All applications for one-off financial assistance and for the annual flagship community project are decided by Council upon the recommendation of Council's Financial Assistance Program Committee, which is a section 355 committee of Council.

The Financial Assistance Program Committee is chaired by a Councillor nominated by Council and comprises 2 Councillors including the Chairman, the General Manager of Newcrest Mining or their delegate; a representative nominated by Iberdrola; and a minimum of 4 community representatives, including a member from the Flyers Creek area, appointed by Council. The executive officer is Council's Director Corporate Services.

Assessment of applications will remain confidential and no appeal is permitted as to any funding allocation decision.

6. ASSESSMENT CRITERIA

Council will use the following general criteria when considering requests for financial assistance:

- (a) activities which address gaps in service or community development;
- (b) activities which promote community development in a multicultural context and seek to address issues of access and equity;
- (c) involvement from volunteers and self-help initiatives which build upon Council's contribution;
- (d) consumer / use participation in management of services / activities
- (e) innovative and creative approaches to identified needs; and
- (f) activities which use Council funding to attract further resources.

Council will give low priority to following types of requests for financial assistance:

- (a) activities/services which do not attempt to become self-supporting where the potential exists through fees or other feasible income-producing activities;
- (b) activities of a purely social nature, which do not address the needs of disadvantaged groups;
- (c) activities which are eligible for support from state-wide or regional parent bodies; and
- (d) organisations, which have not observed accountability requirements for past Council assistance.

7. WHAT IS NOT FUNDED?

One-off financial assistance is not available for:

- (a) projects or organisations wholly outside the shire of Blayney;
- (b) operating or administrative overheads, such as rent, wages, office equipment or utility costs or travel, accommodation and conference costs;
- (c) projects by individuals or that benefit personal business interests;
- (d) projects that duplicate an existing project or service; or
- (e) completed projects.

8. GENERAL CONDITIONS/PAYMENT

8.1 School and Sporting Related Donations

Assistance is provided for annual school awards as outlined in the above table.

Sporting financial assistance is provided for sportspersons that gain regional, state or national selection in their sporting field. Regional selection is based on selection as a regional representative to a state carnival e.g. as a representative of western region. State selection is based on selection as a state representative at a national carnival e.g. as representative of NSW. National selection selection is based on selection as a national representative at an international carnival e.g. as a representative of Australia.

8.2 Recurrent Annual Donations

- (a) Where Council is providing a contribution for Rates and Sewer charges, this funding will be processed after the Rates Instalment notice has been issued in July.
- (b) For grants for sporting achievement:
 - (i) only the highest level of achievement will be recognised;
 - (ii) participation must be based on merit (not self-selection); and
 - (iii) evidence of participation and a letter of support from the relevant sporting association should be provided.
- (c) For those categorised as Public Liability Insurance, Council requires a tax invoice prior to payment of financial assistance to be accompanied by the relevant Insurance Policy and Premium notice or proof of payment. GST will be added to all financial assistance where applicable. Applicants should provide their ABN. Applicants without an ABN must submit a "Statement by a Supplier" form available from the Australian Tax Office or from Council.

8.3 One-off Financial Assistance and Flagship Annual Community Projects

- (d) Projects must be clearly described, illustrate the community benefit that the financial assistance will provide and identify which of Council's vision statements in the Community Strategic Plan will be addressed.
- (e) Council does not offer any guarantee of funding as funding is subject to funds being available and not previously allocated. Also, as not all projects will receive funding, available funds will be allocated for projects that best meet the required community based criteria.
- (f) Applications that match \$ for \$ will be considered favourably. Any matching funding from the applicant or other sources are to be identified on the application.
- (g) Applicants must ensure that necessary approvals such as development applications or licences are considered prior to application lodgement. Evidence to this end in the form of a pre-development application consultation letter or correspondence from the relevant licence authority should accompany the application.

- (h) For projects involving construction / installation of new assets or renewal of existing assets on any Council controlled land, park, oval or recreational facility, consultation with the responsible Council department will be required prior to application lodgement.
- (i) Council reserves the right to manage any project approved on Council controlled land, park, oval or recreational facility as it deems required in consultation with the community organisation.
- (j) All applicants must provide certificates of currency for public liability insurance and the constitution or rules of their organisation where requested.
- (k) Council must be acknowledged in all promotional activities and must be provided with copies of advertising or promotional materials featuring Council for Council's approval prior to use in any promotional activity.
- (l) Any funds unspent at the completion of the project must be returned to Council.
- (m) Council requires a tax invoice prior to payment of financial assistance. GST will be added to all financial assistance where applicable. Applicants should provide their ABN. Applicants without an ABN must submit a "Statement by a Supplier" form available from the Australian Tax Office or from Council.
- (n) Applicants who are not registered for GST should consider the applicability of Council's Community Infrastructure Projects Policy (No. 3h) which is intended to assist such groups with projects on Council land by enabling them to recover the GST paid on taxable supplies associated with of the project.
- (o) Council fees and charges incurred in the holding of an event may be deducted before the financial assistance is paid.
- (p) For financial assistance of \$10,000 and above, a performance agreement must be completed between Council and the organisation following approval.

In submitting an application, the applicant accepts and acknowledges the general conditions set out in this Policy and in the Guidelines and in particular acknowledges that if unsuccessful it cannot appeal, contest or petition any councillor, staff member or community representative acting on behalf of or for council or its funding partners.

9. APPLICATION FORM

An application on the approved Council form must be submitted for those applicants seeking Council support under this Policy.

An application form and Guidelines for applicants is available on Council's website and from Council's offices. These guidelines describe the information that must be included in the application and set out the acquittal and reporting requirements which must be complied with.

PROJECT DESCRIPTION AND INFORMATION

The following information is to be included in the application:

- a) The project name
- b) A clear description of the project and its aims.
- c) How the project provides a broad community benefit.
- d) Clearly identified and demonstrated needs for the project from the community's viewpoint.
- e) How the project/programs will address identified needs.
- f) Outcomes to be achieved and the specific tasks to be undertaken.
- g) Evidence of consultation with, and involvement in the project of, key stakeholders and others who will benefit from the project.
- h) A project timetable.
- i) Letters of support including supporting documentation from the applicant's sponsoring or governing body.
- j) Copies of any applications made for funding from grants.

BUDGET (Schedule 1 or 2 of the application form)

- **IMPORTANT - Every** applicant should carefully consider this section and complete in full.
- Include a detailed budget that shows income and expenditure for the project and details of any other funding that is anticipated.
- Include an estimate of the in-kind contribution to be provided by your organisation as **\$ for \$** matching applications will be favourably considered. Refer notes on funding reduction.
- Applicants may attach a budget to the application in preference to completing the section.

ACQUITTAL AND REPORTING REQUIREMENTS

- An acquittal form is provided with the application form for applicant's information only.
- A copy will be sent to all applicants at the conclusion of the funding process. Applicants need to ensure that they have listed the end date of the project in Part B. Organisations receiving a financial assistance of less than \$500 are required to submit a letter outlining the achievements and benefits of the project with the exception of funding recipients for the purposes of junior sporting representation and school prize giving.
- All organisations receiving financial assistance of between \$500 and \$2,000 are required to submit the acquittal form and provide a written report that indicates how monies were spent and whether the outcomes identified in the application were achieved.
- Organisations receiving financial assistance of more than \$2,000 are required to submit an acquittal form, a financial statement and a written report that indicates how monies were spent and whether the outcomes identified in the application were achieved.
- Organisations receiving financial assistance of \$10,000 and over will be required to report quarterly (or as agreed) in the performance agreement that will be created for each Category 1 application.

FUNDING AGREEMENT

- ONLY applicants seeking financial assistance of \$10,000 or more are required to complete a funding agreement but this is not required until funding is approved.
- Successful applicants will be sent a completed copy for signature following the negotiation of terms between the organisation and Council.

ATTACHMENTS TO ASSIST IN THE CONSIDERATION OF YOUR REQUEST

The following suggested inclusions may assist in the success of the request:

- The organisation's constitution.
- Details of promotional and marketing activities for the project.
- Evidence of ongoing communication with stakeholders regarding the project.
- Numbers of active members, including volunteers, in the organisation - names are not required.
- Copies of quotations to help substantiate funding level sought.

Any changes to the purpose for which funding has been allocated must be submitted in writing to the General Manager.

CHECKLIST (This checklist will assist you with the application)

To ensure the application is complete, please check that all the attachments are included as follows:

For all applications

- A completed application form
- Part A – Applicants details
- Part B or Part C – Select one category only.
- Part B – Project details
- Schedule 1 (if part B of application is completed or Schedule 2 (if part C of the application is completed) – Budget
- The organisation's constitution showing its not-for-profit status.

For Capital Assistance Projects

- 2 quotations** must be included.

LODGEMENT OF APPLICATIONS

Applications should be lodged by either email to council@blayney.nsw.gov.au or via post to PO Box 62, Blayney NSW 2799.

To reduce the chance of your application being lost or missed, please ensure you send your application to the above addressing.

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