

Council

COMMUNITY GRANT PROGRAM – REVISED PROCESS & GUIDELINES

Draft 'Community Grant Program – Guidelines'
Draft 'Community Grant Program – Application
Form'

Policy CF/DG/2 - Financial Assistance (Operating) to
Incorporated Organisations and Clubs

Policy CF/DG/3 - Financial Assistance to Endorsed
Community Service Organisations

Policy CS/CFGF/1 - Community Capital Assistance
Grants

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Shire of
Plantagenet

Mount Barker • Kendenup • Narrikup
Porongurup • Rocky Gully

Community Grant Program (CGP)

Guidelines

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1. INTRODUCTION

Thank you for enquiring about financial assistance from the Shire of Plantagenet. The Shire's Mission Statement is:

To enhance the quality of life for the people of Plantagenet and the region, through the provision of leadership, services and infrastructure.

One key method to assist in achieving this mission is through our commitment to recognising the value of all volunteers and assisting community groups, via this Community Grant Program (CGP).

Each year the Shire of Plantagenet allocates funds within the Annual Budget specifically for providing financial support to the community organisations that meet the objectives of the Community Grants Program.

Four (4) CGP categories are on offer:

- 1. CEO Donation (up to \$1,000)**
- 2. Quick Response Grant (less than \$3,000)**
- 3. Community Grant (more than \$3,000)**
- 4. Industry Support (Triennium Community Grants)**

The table on pages 4 & 5 of these guidelines demonstrates how to apply, when applications are open and eligible items for each of these four grant categories. The complexity of the application and the information required, along with the subsequent approval process, increases with each of the four categories listed above.

One key consideration of the CGP process is that it be as simple as possible, whilst balancing the responsible use of public money, to enable our community volunteers to get on with what they are most passionate about. We encourage you to make contact with the Community Development Officer at the Shire (contact details on the last page of these guidelines) and discuss your idea at the earliest possible time.

2. OBJECTIVES OF THE CGP

The CGP aims to support projects that improve community capacity, promote social participation and inclusion as well as enhance community harmony.

The Shire of Plantagenet 's CGP provides funding to assist community groups and not-for-profit organisations with their vital work and programs to:

- Enhance community capacity, foster harmony, and promote social cohesion within the community.
- Motivate individuals and organizations to take initiative in supporting their own growth and development.
- Ensure equitable distribution of activities and services across the Shire; and
- Promote resident involvement in activities that enhance living in the community.

3. TYPES OF GRANTS AVAILABLE

GRANT CATEGORY	HOW TO APPLY	OPEN DATE	ELIGIBLE APPLICANTS	NON-ELIGIBLE ITEMS	ASSESSMENT PROCESS
1. CEO Donation Up to \$1,000	Detailed requests to be sent in a letter to the CEO with supporting documents	Open anytime	<ul style="list-style-type: none"> Local community organisations (unincorporated) Incorporated community and sporting organisations for local benefit Non-profit organisations from within Plantagenet 	<ul style="list-style-type: none"> Alcohol Items directly benefiting an individual Assistance towards operating costs of the applicant (eg rent, wages, utility costs etc) Projects not based in Plantagenet Political activities 	CEO consideration
2. Quick Response Grant \$1,000 to \$3,000	Detailed requests to be sent in a letter to the CEO with supporting documents	Open anytime	<ul style="list-style-type: none"> Incorporated, not for profit organisations and charities Unincorporated not-for-profit organisations applying through the auspice of an incorporated body 	<ul style="list-style-type: none"> Alcohol Items directly benefiting an individual Assistance towards operating costs of the applicant (eg rent, wages, utility costs etc) Projects not based in Plantagenet Political activities 	Community Grants Program Working Group recommendation to CEO

GRANT CATEGORY	HOW TO APPLY	OPEN DATE	ELIGIBLE APPLICANTS	NON-ELIGIBLE ITEMS	ASSESSMENT PROCESS
3. Community Grants \$3,000 +	Formal application with supporting documents	Round 1: August – September Round 2: February - March	<ul style="list-style-type: none"> • Incorporated, not for profit organisations and charities • Unincorporated not-for-profit organisations applying through the auspice of an incorporated body 	<ul style="list-style-type: none"> • Alcohol • Items directly benefiting an individual • Assistance towards operating costs of the applicant (eg rent, wages, utility costs etc) • Political activities 	Community Grants Program Working Group recommendation to Council
4. Industry Support 3yr (Triennium) Grants	Formal application with supporting documents Presentation to the Council	February - March	<ul style="list-style-type: none"> • Incorporated, not for profit organisations and charities • Unincorporated not-for-profit organisations applying through the auspice of an incorporated body 	<ul style="list-style-type: none"> • Alcohol • Items directly benefiting an individual • Political activities 	CEO / Executive recommendation to Council

4. HOW DO I FIND OUT ABOUT THE CGP?

Category 1 & 2 grants are always open and you can submit your application now.

Before and during each category 3 & 4 funding round, advertising of the CGP will be placed in:

- Local newsletter 'The Plantagenet News.'
- As a Latest News item on the Shire of Plantagenet website.
- the Shire of Plantagenet Facebook page; and
- Shire information notice boards.

More information is available on the Shire's website [here](#).

5. WHO CAN APPLY?

Please refer to the 'eligible applicants' column in the table on pages 4 & 5 of these guidelines.

6. WHO CANNOT APPLY?

Each organisation may submit only one application for funding per financial year.

Previous recipients of the CGP must have completed and submitted the required acquittal documents for any funds previously received to be eligible to apply for further rounds. Failure to meet all acquittal requirements automatically disqualifies you from applying in further funding rounds.

The following applicants are also ineligible:

- Unincorporated organisations without an auspice arrangement (Categories 2 – 4).
- Individuals.
- Commercial for-profit organisations.
- Government Agencies (including education, health, transport); or
- Organisations that have a current application open within the CGP.

6. ELIGIBLE PROJECT COSTS MAY INCLUDE

- Costs associated with public events or functions held in the Shire of Plantagenet.
- Purchase of equipment required for the ongoing operations of the club/group, e.g. shade tent, tables, chairs etc.
- Construction/purchase costs for facility upgrades;
- Printing of marketing materials (posters/flyers).
- Advertising and promotions.
- Assistance towards workshops/projects that benefit the Plantagenet community.
- Entertainment at an event.

7. ITEMS THAT WILL NOT BE FUNDED

In addition to those items listed in the table on pages 4 & 5 for each CGP category:

- Projects that do not benefit the Plantagenet community.
- Assistance towards Council rates or standard user agreements.
- Conference attendances.
- Projects that have already commenced or been finalised.
- Political activities.
- Projects that are a duplicate of an existing or similar project/service within the community.
- An item directly benefiting an individual; or
- Any item that may cause offence to others or cause the Shire's name to be in disrepute.

8. SELECTION CRITERIA

Collaborative community wide projects are encouraged.

Applications will be assessed against the following:

- Does the project meet a broader community need?
- Does the project benefit a sufficiently broad, or diverse, target group?
- Does the applicant organisation have the capacity to undertake and manage the project successfully?
- Does the application represent value for money?

The level of assistance available is limited by the Council's budget allocation and its priorities. No applicant can be guaranteed funding, nor can any applicant be guaranteed to receive the full amount requested.

9. PUBLIC LIABILITY INSURANCE & AUSPICING

Not-for-profit organisations must have Public Liability Insurance and provide a Certificate of Currency in order to be eligible for the CGP.

If your application is under auspice by another organization, you are required to provide the Public Liability Certificate of Currency of your auspice organisation.

10. ABN & GST

To comply with the requirements of the Federal Government's Goods and Services Tax (GST) you must advise on your application if your organisation is registered for GST. If you do not have an ABN or are not registered for GST, you are required to complete a Statement by a Supplier form and include it with your application.

The Shire of Plantagenet cannot release funds to successful applicants without an ABN or signed Statement by a Supplier form.

Statement by a Supplier forms are available on the ATO website [here](#).

11. SHIRE VALUES AND COMMITMENT

All applicants must demonstrate that the organisation or community group has a vision that is consistent with the Shire of Plantagenet's. Organisations or community groups who apply to the CGP that engage in negative public comments that disparage the Shire, Councillors and/or staff may have their application denied on this basis.

The Shire's values and long-term vision can be found [here](#).

12. HOW TO APPLY

Please refer to the table on pages 4 & 5 for details on each CGP category:

Category 1 & 2 - Detailed requests to be sent in a letter to the CEO with sufficient supporting documents (e.g. quotes, photos, plans, etc). Applications are always open.

Category 3 - Formal application using the application form with supporting documents. Round 1 is open August – September each year, Round 2 is open February – March. The application must address the selection criteria

provided within the application guidelines and include all required attachments such as budgets, receipts, quotes and letters of support.

Category 4 - Formal application using the application form with supporting documents, along with a presentation to the Council. Industry support is set for a three (3) year period and applications are open February – March each year.

Organisations that have not provided an acquittal from previous CGP applications are ineligible to apply until the required documentation has been completed and submitted.

Tips for your application:

- Projects that can demonstrate benefits to the wider community are preferred.
- Projects that can demonstrate contributions from the community or community groups will be preferred.
- Applications that have multiple funding sources/financial contributors will be preferred.
- Applications for major and minor grants received from individuals will not be accepted.
- Projects requesting funding for salary costs, administration support and recurring expenditure are ineligible for support (Category 1 – 3 only).

Late applications will not be considered.

All applicants will be advised of the outcome of their application in writing.

13. APPLICATION PROCESS

Step 1

Contact the Community Development Officer at the Shire of Plantagenet to discuss your project idea and confirm that it falls within these guidelines & familiarise yourself with the guidelines.

Step 2

Write a letter of request containing sufficient information (category 1 & 2) or download and complete the application form (category 3 & 4).

Step 3

Collate all supporting documents and attachments listed on the Application Checklist or in these guidelines and submit the application before the closing date. Late applications will not be accepted (category 3 & 4).

Applicants will receive a confirmation email from the Community Development Officer within 5 working days of receiving applications. If no confirmation is received after this time, please call the Shire on 9892 1111 as soon as possible.

Step 4

Recommendations from applications received (Category 3 & 4) are considered at the October or April Ordinary Council Meeting. Council Meeting commences at 5pm and is held in the Council Chambers at the Shire of Plantagenet Administration Centre.

Step 5

Applicants are notified of outcome via written correspondence.

Step 6

Grant Agreement between the Shire of Plantagenet and successful applicant to be signed.

Step 7

Project is completed.

Step 8

Successful applicant completes evaluation and acquittal report within 30 days of completion/delivery of project. Submit report and receipts to the Shire of Plantagenet Community Development Officer. (Please ensure all supporting documentation and receipts are included – refer to the acquittal form for details).

Step 9

Invoice to be raised and sent to Shire of Plantagenet. Upon receipt and processing of invoice, payment of acquitted funds will be made to the recipient organization.

14. ASSESSMENT COMMITTEE

The Community Grants Program Working Group that assesses category 2 and 3 applications shall consist of:

- Executive Manager – Corporate & Community Services
- Manager Community & Recreation Services; and
- Community Development Officer

15. CONFLICT OF INTEREST

Councillors and Shire employees involved in assessing applications for funding must declare any financial interest, proximity interest or impartiality interest before the relevant application is considered and follow the necessary procedure regarding such declaration.

16. SHIRE ACKNOWLEDGEMENT

Approved recipients are required to publicly acknowledge the Shire of Plantagenet's contribution to their project or equipment. This will entail incorporating the Shire of Plantagenet logo into all promotional and marketing materials. Recipients must provide supporting evidence of this.

All items purchased with grant funds must clearly display a "Proudly sponsored by the Shire of Plantagenet" inscription or an acknowledgment sticker, which will be supplied by the Shire. Notifications of successful applications will be shared on the Shire of Plantagenet's Facebook page, as also should be shared on recipient's social media platforms.

Recipients must liaise with the Shire's Community Development Officer to acquire the Shire's logo for project promotion purposes. Additionally, it is mandatory for recipients to submit any promotional materials featuring the logo to the Community Development Officer for approval **BEFORE** any public release. This procedure guarantees the proper use of the Shire's logo and ensures the Shire is accurately represented in all communications.

The Shire may request highlights of the project's success and positive impact for promotional purposes. We require your cooperation to showcase these achievements, aiming to inspire and motivate other community groups to participate in the Community Grants Program (CGP).

Shire President and Councillors should be extended an invitation to any events, launches, or initial uses of the funded equipment or project outcomes.

17. ACQUITTAL PROCESS & OUTCOMES

Completion of the acquittal process is a crucial part of the CGP process. Grant recipients are required to submit both receipts and a completed acquittal report form to the Shire of Plantagenet within 30 days following the completion of their project. The necessary acquittal form will be provided to applicants upon the approval of their funding applications.

The disbursement of CGP funds to successful community organisations will occur following the receipt of the completed acquittal report form along with the necessary supporting evidence.

Advance payments may be requested in writing and are subject to the CEO's approval. Requests for deadline extensions must also be submitted in writing and can only be approved by the Shire's CEO.

Failure to complete and submit all acquittal requirements within 6 months following the application's approval, will result in the allocated funds being forfeited, regardless of whether they have been expended or committed by the organisation. Incomplete acquittals will also disqualify the organisation from all future CGP funding rounds until acquittals have been satisfactorily completed.

Additionally, the activities and outcomes of the Community Grants Program will be detailed in the Shire's Annual Report.

18. APPLICATION ASSISTANCE AND SUBMISSION

For further information or assistance with your application contact:

Isabelle Draffehn
Community Development Officer
9892 1105 or info@sop.wa.gov.au

Completed applications are to be submitted via one of the below options and addressed to:

SHIRE OF PLANTAGENET COMMUNITY GRANTS PROGRAM
ATTN: Community Development Officer
Email: info@sop.wa.gov.au
Post: PO Box 48 MOUNT BARKER WA 6324
In person: 22-24 Lowood Road, MOUNT BARKER

**FINANCIAL ASSISTANCE (OPERATING) TO INCORPORATED
ORGANISATIONS AND CLUBS**

DIVISION	BUSINESS UNIT	RESPONSIBILITY AREA
Corporate Services	Community Funding	Donations and Grants

OBJECTIVE:

To assist incorporated clubs and organisations in meeting their objectives for the benefit of the residents of Plantagenet.

POLICY:

1. The Council's annual Community Assistance (operating) Grants are advertised in March of each year and assessed in May with funding available to successful applicants commencing in July. Two funding streams are available; one for operating grants and one for capital grants.
 2. This stream is for annual community (operating) grants and is capped at 0.5% of annual rates. Community groups leasing Shire buildings are not excluded from making an application for an operating grant under this policy, however Endorsed Community Service Organisations are excluded as they are to apply under guidelines established in Council Policy CF-DG-3.
 3. Applications will be prioritised based on what the Council believes will provide the greatest overall benefit to the quality of life of the residents of the Shire of Plantagenet.
 4. The Council may decide to reimburse all or part of an organisation's annual Property and Waste Rates in lieu of a donation, unless restricted by Council Policy A/PA/14 – Sporting and Community Organisations using Council and Vested Land – Rateability.
 5. Applications from incorporated organisations or clubs must meet the following criteria to be considered:
 - a) The group is to be based in the Shire of Plantagenet, or benefit residents within the Shire.
 - b) Applications should clearly identify the Shire of Plantagenet group(s) who will benefit from the funding.
 - c) The group should be actively operating and meeting on a regular basis. Applications should advise the number of active members or participants.
 - d) Applications should include a copy of the audited financial statements of the organisation for the last financial year. If these are not available, the minimum requirement is the organisation's most recent profit and loss statement and balance sheet. Applicants should advise the funds held by the Group which could
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be accessed for the project (that is, the financial need for a Community Grant).

- e) Applications must be made in full with supporting documentation and must be received by the due date. Incomplete applications or applications not received by the advertised deadline, will not be considered.
 - f) Applications must state the reason for funding and amount required. Applicants should also provide details of the group's own contribution to the project, where applicable.
 - g) Applications from groups that operate a facility with sale of alcohol are likely to receive increased scrutiny over other applications.
 - h) Applicants are where possible requested to show that they are actively seeking assistance from other funding bodies. Applicants must also disclose if they are seeking grant funding from other donors for this application.
 - i) Where funding relates to a recurrent event, applicants should advise number of attendees at the previous event.
6. The following category limits be set to guide the community in its expectations and the administration in making a recommendation.

Expenditure Category	Cap (\$)
Regional event (event aimed at and capable of attracting people from outside the Shire boundary)	\$5,000
Local event	\$1,500
Community group – Project This can include maintenance and upgrades to equipment or programs that benefit residents.	Up to one third of the project cost with a maximum limit of \$5,000
Community group – Operating costs or other support such as minor equipment and skills development and / or governance training for volunteers	\$2,000

7. Approved grants will not be disbursed until the organisation's GST status has been determined and proof of expenditure/purchase of approved grant has been provided, where applicable.
8. The Council will determine its total financial commitment to community funding for the upcoming financial year, as part of its budget preparation, and may exclude projects on the basis that it cannot be accommodated in the budget.
9. Organisations and clubs will be notified of the result of their application immediately following the adoption of the Council's annual budget.

ADOPTED: NOVEMBER 2009

LAST REVIEWED: 21 FEBRUARY 2023

**FINANCIAL ASSISTANCE TO ENDORSED COMMUNITY SERVICE
ORGANISATIONS**

DIVISION	BUSINESS UNIT	RESPONSIBILITY AREA
Development Services	Community Services	Community Funding and Grant Funding

OBJECTIVE:

To guide the Council on:

1. The process for a community group becoming an Endorsed Community Service Organisation.
2. The process and conditions for an Endorsed Community Service Organisation to access annual financial assistance.

POLICY:

1. Process to become an Endorsed Community Service Organisation
 - 1.1 The Council will consider applications in conjunction with its annual community grants process in March – May annually.
 - 1.2 For organisations to qualify as an Endorsed Community Service Organisation they must meet the following conditions.
 - a) Be a not-for-profit organisation that leases a Shire building and provides a community service benefit regardless of membership and have demonstrated their capacity to provide the service for a minimum two-year period.
 - b) The organisation will be assessed on the basis of:
 - i) Provision of community service benefit with a demonstrated need, that the Shire may otherwise decide that it should undertake or fund in the absence if the group was not active.
 - ii) The likelihood that the service may fail or be significantly diminished without ongoing Shire financial support, and this would result in the significant loss of community benefit.
 - iii) The availability of alternate funding streams (other than Local Government) for the organisation to seek funding for the services they provide.
 - iv) Alignment with the Shire of Plantagenet Strategic Community Plan objectives.
 - 1.3 Organisations wishing to become an Endorsed Community Service Organisation are to make written application by the due date of the annual community grants process and must outline how the organisation and its services meet the requirements of this policy and provided the necessary data as evidence.
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2. Annual requirement for Endorsed Community Service Organisations
- a) Endorsed Community Service Organisations (including applicants for ESCO status) are to make an annual application for a community grant. A specific application form will be available, with the closing date to be the date of the process for community assistance (operating) grants to incorporated organisations and clubs.
 - b) Endorsed Community Service Organisations are to apply under guidelines established in this policy and are excluded from applying for a general grant under Council Policy CF/DG/2 - Financial Assistance to Incorporated Organisations and Clubs.
 - c) Applicants will be required to include full disclosure of the current cash position, projected forthcoming financial year's operating income and expenditure, which would clearly identify what costs the subsidy would fund. Such detail to include a split up of costs on property maintenance and operating costs, including:
 - i) Repairs and maintenance to the building and equipment.
 - ii) Pest control, electrical tagging and fire safety.
 - iii) Utilities; and
 - iv) Insurance.
 - d) Applications should advise what efforts they have made to apply for alternate funding for the services they provide.
 - e) Applications should include a copy of the audited financial statements of the organisation for the last financial year. If these are not available, the minimum requirement is the organisation's most recent profit and loss statement and balance sheet.
 - f) Organisations seeking a grant for a capital upgrade to a Shire asset are to make application in line with the following Council policies:
 - i) I/B/1 – Capital Works – New and Existing Community Buildings, and
 - ii) GS/CFGF/1 – Capital Assistance Grants.
 - g) Organisations should, over time demonstrate how they are becoming more sustainable through fee for service, service delivery, sponsorship, retail operations etc rather than requesting increased operating grants from local government.
 - h) The annual funding stream for Endorsed Community Service Organisations is capped at 1.0% of annual rates.

ADOPTED: 21 FEBRUARY 2023

LAST REVIEWED:
