
Assessment of requests for ‘Major funding’

Background:

1. The system employed when assessing smaller grants (<£2,000) within the established Community Grants Scheme is that the Grants Panel evaluates applications in four ‘rounds’ each year, with members individually awarding scores on perceived merits in five categories; then collectively analyzing aggregate results, and reaching consensus having assessed comparative ‘ranking’ of applications and other factors. Recommendations for awards are made in a report to Council.
2. Requests arise from time to time for financial support in larger sums – “Major funding” - usually related to projects within the community that appear to the applicant body to have some resonance with the aims of a parish council, and these may be brought direct to Council or to a Committee or Working Party according to context.
3. Such requests are usually received individually, and a system of comparative ranking as used by the Grants Panel is not appropriate. Council has agreed a system (*Resolution FC2020/07.2 refers*), devised by the Audit & Governance Panel, giving a simple, structured, assessment that can be understood by both applicant and assessors. This follows the same principle of five equally-weighted elements and similar criteria. These are:
 - i) Closeness of match to the council’s objectives and underlying values*
 - ii) Overall “robustness” of the proposal – *ie* general likelihood of success/sustainability
 - iii) Financial planning exhibited – *ie* adequacy/prudence/appropriateness *etc.*
 - iv) Scope and sustainability of the proposal – *ie* beneficiaries; scale; thoroughness
 - v) A personal (subjective) assessment; based on any special insight or considerations.

Also considered are factors such as the balance or proportion of Council funding being sought, compared with other sources and the applicant’s own funds, and other detail elements of a proposal.

*These are inherent in the establishment of a parish Council and enhanced by published policies in specific areas of activity or aspiration.

Assessment:

4. When a relevant application is received, to be considered at any meeting of Council; Committee or Working party, a report on the agenda or a submission by the applicant will be accompanied by this briefing note and a blank scoresheet for Councillors to complete individually. An example is attached to this note.
5. Councillors should individually record a score for each of the five elements (maximum score 20 for each = total max 100) according to their own judgement. A median average of the scores recorded by those present will be entered on behalf of any absent Member. The resulting total score will be represented as a percentage of the maximum possible. This process is a first-stage to moderate any inherent ‘high’ or ‘low’ scoring tendencies among individuals. The final decision is reached following a discussion – informed by the ‘scoring’ of the application in terms of total score and proportion of the theoretical maximum.
6. Council should set a minimum threshold score required before a request might be eligible for further consideration (65% is recommended in most circumstances). Failure to reach the threshold will result in immediate rejection. If there is sufficient support, represented by a score at or above the threshold, the matter is then concluded following discussion.
7. Following discussion, any award should be agreed by a vote in the normal manner.

FUNDING APPLICATION ASSESSMENT SHEET

Larger sums or requests falling outside the Financial Grants Scheme (Resolution FC2020/07.2 refers)



**LEWES
TOWN
COUNCIL**

Ref: *report FCnnnn/20nn*

APPLICANT *name* Requested **£n,nnn**

Councillor _____

Date: **meeting date**

| | AREA | COMMENTS | SCORE (Max 20) |
|------------------------|---|-----------------|-----------------------|
| 1 | Closeness of match to the Council's objectives and underlying values | | |
| 2 | "Robustness" of proposal – general likelihood of success/sustainability | | |
| 3 | Financial planning – adequacy/prudence/appropriateness | | |
| 4 | Scope & Sustainability – beneficiaries; scale; thoroughness | | |
| 5 | Personal (subjective) assessment – any special insight or consideration | | |
| TOTAL (max 100) | | | |

Signature _____