# Southwark Council ANNUAL TENANT GRANT FUND

**AWARDED BY THE TENANT FUND MANAGEMENT COMMITTEE (TFMC)**

# APPLICATION FORM: A

## For Sheltered Housing Units (SHUs), Tenant Management Organisations (TMOs) and Tenants and Residents Associations (TRAs). NAME OF APPLYING ORGANISATION: FINANCIAL YEAR:

|  |  |
| --- | --- |
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**TENANT AND RESIDENTS ANNUAL GRANT APPLICATION**

**GUIDANCE**

**AIM**

Southwark Council and the Tenant Fund Management Committee (TFMC) provide financial support to existing and new Sheltered Housing Units (SHUs),Tenant Management Organisations (TMOs) and Tenants and Residents Associations (TRAs) for:

* Running costs
* Activities

**AMOUNT OF ANNUAL GRANT**

The grant is calculated according to the number of properties the SHU/TMO/TRA covers, at £5.5 per property.

For example, if the SHU/TMO/TRA covers 300 properties the grant will be £1,650.

The minimum grant paid is £1,300 (up to 240 properties). In order to receive the grant certain conditions have to be met which are detailed below.

**DECISION PROCESS**

The decisions on individual applications will be made by Southwark Council officers.

A report on the approved awards will be presented to the TFMC at the meeting following the accepted decision and the notification date.

**APPEALS PROCEDURE**

If your application for funding is unsuccessful we will therefore write to inform you of the outcome and of your right to appeal.

Appeals must be made within three months from the date of the decision to the Tenant Fund Management Committee (TFMC). After the appeal will be heard by the TFMC, its decision is final.

Please contact Maurizio D’Antona, Tenant Grants Officer, for details of the appeals procedure. ([Maurizio.D’Antona@southwark.gov.uk](mailto:sabrina.burrell@southwark.gov.uk) on 020 7525 0228).

**CRITERIA FOR EXISTING SHUS/TMOS/TRAS –**

**RECOGNITION AND FUNDING OR RECOGNITION ONLY**

Please note that the **funding** is conditional upon the SHU/TMO/TRA adopting a constitution that is based upon Southwark Council’s Model Constitution.

All applicants must meet the following criteria:

* Have a valid SHU/TMO/TRA Bank/Building Society/Credit Union account in the name of the of the SHU/TMO/TRA.
* Have an Annual General Meeting (AGM) at which financial accounts are presented and agreed.

* If the financial accounts are not presented and agreed at an Annual General Meeting (AGM) then a General Meeting (GM) must be held in order that the financial statements/ accounts be presented and agreed.
* Have held a minimum of two Meetings per year of which one must be an Annual General Meeting and the other a General Meeting.
* Have verified financial accounts which must be signed, dated and addressed by a verifier (a stamp is acceptable).
* Have at least two unrelated signatories for the Bank/Building Society/Credit Union account.
* The SHU/TMO/TRA will pay back unspent Tenant Fund money in the event of dissolution/de-recognition.
* No person who has power to decide on how monies are granted from the Tenant Fund shall personally benefit from it, i.e. a committee member of the SHU/TMO/TRA.
* SHU/TMO/TRA must invite a member from the Southwark Council Communities Team to the Annual General Meeting (AGM) either via email, [resident.involvement@southwark.gov.uk](mailto:resident.involvement@southwark.gov.uk) or in writing to London Borough of Southwark, Communities Team, 160 Tooley Street, 5th Floor, Hub 3, Area D,

PO Box 64529, London SE1P 5LQ.

**SAFEGUARDING**

All SHUs/TMOs/TRAs must ensure, in addition to the above criteria being met, that all volunteers/staff working on behalf of the SHU/TMO/TRA with specific access to children or vulnerable adults have a current DBS (Disclosure and Barring Service) check.

This applies to all SHUs/TMOs/TRAs, whether they are existing, start-up or re-launched.

**REQUIREMENTS:**

* Only SHUs/TMOs/TRAs recognised by Southwark Council may apply for funding.
* Organisations can only apply for grant funding once per financial year, commencing from the **1st of April up to the 30th of September** of the following calendar year, e.g. from 1st of April 2017 to 30tht of September 2018.
* Grants may not be used to discriminate on the basis of the nine protected characteristics from the **Equality Act 2010**: age, disability, gender, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sexual orientation.

Grants must be spent on activities that include the whole community.

* Grants may not be used to support political activity or to affiliate to any political organisation.
* A SHU/TMO/TRA holding more than **£15,000** in its bank account will not be eligible for funding unless it gives a valid reason.

The SHU/TMO/TRA must identify earmarked project amounts in its bank account and show that by removing these amounts the balance held will fall below the **£15,000** cut-off point. In this case, a SHU/TMO/TRA can still apply for ‘Recognition only’.

* A TMO making an application for funding will be required to submit an annual balance sheet to justify for Tenant Fund expenditure. If accrued sums exceed £15,000 the provisions of the preceding paragraph shall apply.
* However, because of the size, the conformation and the administrative structure of TMOs, these organisations are allowed to apply for an annual fund, provided they supply the necessary documentation.

APPLICATION FORM: A

**TO BE COMPLETED BY EXISTING SHUS/TMOS/TRAS ONLY**

**Please tick the box which you are applying for:**

**Recognition Only**

**Recognition & Funding**

**FINANCIAL YEAR you are applying for:**

**Name of your SHU/TMO/TRA:**

**APPLICATION FORM A (Existing SHUs/TMOs/TRAs)**

**Q1**. Name of your SHU/TMO/TRA:­­­­­­­­­­­­­­­­­­­­­­

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**Q2**. Main contact postal address:

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**Q3. Email address:**

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**Q4. Main contact telephone number:**

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**Q5. Has your SHU/TMO/TRA been known by any other name?**

**YES**  **NO**

**If yes, please give details:**

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**Q6. Committee Members’ Information:**

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| --- | --- | --- | --- | --- | --- |
| **POSITION** | **NAME** | **ADDRESS** | **TEL** | **MOBILE** | **EMAIL** |
| **CHAIR** |  |  |  |  |  |
| **VICE CHAIR** |  |  |  |  |  |
| **SECRETARY** |  |  |  |  |  |
| **TREASURER** |  |  |  |  |  |

**Q7. Date of your Annual General Meeting (AGM):**

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**Q8**. If a change was made to your constitution, what was the General Meeting date:

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**Q9**. Please give the date of the Annual General Meeting (AGM) or General Meeting (GM) during which your financial statements / accounts were agreed:

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**Q10**. If your SHU/TMO/TA is an incorporated registered charity or company, please provide us the registration number (please note that ALL Financial Accounts must be agreed at the AGM if you are a registered company):

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**Q11.** Please provide your Resident Services Officer (Housing Officer) name:

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**Q12.** Please provide your Bank/Building Society/Credit Union account and sort code details:

**Name of Account:**

**Account Number:**

**Sort Code:**

**Building Society Roll/Reference Number (If applicable):**

**Q13.** Please provide the SHU/TMO/TRA bank signatories:

**Bank Signatory: Print name:**

**(1)**

**Bank Signatory Print name:**

**(2)**

***Please note that if your Bank /Building Society/Credit Union account has changed since your last application, proof of your new Bank/Building Society/Credit Union account is required.***

***The most recent Bank /Building Society/Credit Union account must clearly show the SHU/TMO/TRA new account* *name and new account details (account number and sort code). Bank /Building Society/Credit Union letters and statements should have this evidence.***

***All Bank /Building Society/Credit Union details will remain confidential.***

**DOCUMENTATION REQUIRED:**

**If all the obligatory information is not enclosed in the form, the application will be refused. There is a right to appeal. (Please refer to the Appeals procedure on page 4).**

**Documentation Checklist**

**Before returning your grant application form, please ensure that you have:**

* **Read and understood all the grant criteria.**
* **Completed each question on the form. If the question does not apply to your application please mark it as ‘not applicable’ or ‘unsure’.**

**Please indicate that the following documents have been included in support of your application if you are an existing SHU/TMO/TRA:**

* **Copy of your full financial statement/accounts that have been verified by an independent organisation not associated with your SHU/TMO/TRA. The financial statement/accounts must be signed, addressed and dated.**

**If your form was NOT completed through your THIO (Tenant and Homeowner Involvement Officer) at your Annual General Meeting (AGM) at which the financial statement/accounts were agreed, please provide:**

* **Copy of your full financial statement/accounts that have been verified by an independent organisation not associated with your SHU/TMO/TRA. The financial statement/accounts must be signed, addressed and dated.**

**However, if the SHU/TMO/TRA financial statement/accounts were not agreed at your AGM, please provide:**

* **Copy of your General Meeting minutes, showing that the financial statement/accounts were agreed.**

**Any further information:**

**TO COMPLETE YOUR APPLICATION, PLEASE FILL THE FOLLOWING:**

**Your Committee Member’s Position:** **Print your full name:­­­­­­­­­­­­­­­­­­­­­­**

**Your Signature:** **Date:**

**THIO name: THIO signature:**

**Date:**

**Completed Funding Application Form**

**Please ensure that you complete your Tenant Fund Application Form with your Tenant and Homeowner Involvement Officer (THIO) following your AGM on the same evening.**

If you are unable to do this, please contact your THIO as soon as possible after your AGM because the application will need his/her signature. Once the application has been signed by a THIO, email a copy to Maurizio.D’Antona@southwark.gov.uk

* If you do not have access to email you can post a copy to:

Maurizio D’Antona, Tenant Grants officer, Southwark Council, Communities, Commissioning and Voluntary Sector, 160 Tooley Street, 5th floor, Hub 3, PO Box 64529, London SE1P 5LX

* Or you can hand a copy to:

Maurizio D’Antona, Tenant Grants Officer

Paulette Watson or Harold Markham (Training Officers) at Taplow or Albrighton Resource Centres.

If you have any queries about completing your funding form please contact:

* Your THIO (Tenant & Homeowner Involvement Officer)
* Maurizio.D’Antona@southwark.gov.uk, on 020 7525 0228.