# Southwark Council ANNUAL TENANT GRANT FUNDING Application Form B

## For Newly set–up and Relaunched Sheltered Housing Units (SHUs),Tenant Management Organisations (TMOs) and Tenants and Residents Associations (TRAs).

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NAME OF APPLYING ORGANISATION:

FINANCIAL YEAR:

Awarded by the Tenant Fund Management Committee (TFMC)

**TENANTS AND RESIDENTS STARTER 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

**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 on 020 7525 0228).

**CRITERIA FOR NEWLY SET -UP/ RELAUNCHED SHU/TMO/TRA**

* **Definition of a newly set - up SHUs/TMOs/TRAs**

1. A pre-existing organisation that sets up a new status to become a SHU/TMO/TRA.

2. A SHU/TMO/TRA that has folded, passing a resolution under the old constitution, result of which the organisation is no longer functioning.

Consequently, a new organisation will be founded.

* In both instances a start-up SHU/TMO/TRA will qualify for the basic preliminary funding in **two instalments of £650**.
* ***Given all the necessary documentation has been provided and the funding criteria are met, the start-up*** SHU/TMO/TRA ***will be paid their grants as follows:***

***the first payment will be processed upon completion of this form, the second payment will be processed six months after, as long as the*** SHU/TMO/TRA ***has complied with the funding criteria contained in its constitution.***

* Have at least two unrelated signatories for the SHU/TMO/TRA 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.
* You must have invite a member from the Communities Team to your **Annual General Meeting (AGM)** via 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.

**RE-LAUNCHED SHU/TMO/TRA**

1. A SHU/TMO/TRA that has held a **final** Annual General Meeting would under normal circumstances be considered to be **de-functional** and would not be recognised anymore. However, this organisation may be willing to restart its activities and provided it can comply with the below criteria for recognition if done within the three months period of grace, it will qualify for the full grant:

* Have elected Board of Committee Members including Chair, Vice Chair, Treasurer and Secretary.
* Have a valid SHU/TMO/TRA Bank/building Society/Credit Union account in the name of the of their SHU/TMO/TRA.

**ADDITIONAL INFORMATION - APPLIES TO ALL EXISTING, NEWLY SET-UP AND RE-LAUNCHED SHU/TMO/TRA**

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

**REQUIREMENTS:**

* Only recognised SHU/TMO/TRA 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 30th 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 may not be used on activities that are not inclusive of the whole community, within the area of benefit.
* Grants may not be used to support political activity or to affiliate to any political organisations.
* A SHU/TMO/TRA holding more than £15,000 in its bank account will not be eligible for funding unless it can demonstrate that the reason it has more than the **£15,000 limit** is due to earmarked/project money (specific or community based). The SHU/TMO/TRA must identify in the financial statement/accounts the earmarked/project amounts and show that by removing the amounts the balance held will fall below the **£15,000 cut-off point**. You must still apply for ‘Recognition only’
* A SHU/TMO/TRA making an application for funding will be required to submit an annual balance sheet to account 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.

**COMPLETED FUNDING APPLICATION FORM**

**Please ensure that you complete your Tenant Fund application with your Tenants and Homeowner Involvement Officer (THIO) following your Annual General Meeting (AGM) on the same evening.**

If you are unable to do this please return your completed funding form and documentation as soon as you can after your Annual General Meeting, by: (other than online completion)

* To your Tenants & Homeowner Involvement Officer (THIO).
* Email a copy to Maurizio.D’Antona@southwark.gov.uk.
* Post a copy to: Maurizio D’Antona, Tenant Grants Officer, London Borough of Southwark, Communities, Commissioning and Voluntary Sector**,** 160 Tooley Street, 5th Floor, Hub 3, Area D, PO Box 64529, London SE1P 5LQ.
* Hand a copy to Maurizio D’Antona or Training Officers (Paulette Watson or Harold Markham) at Taplow or Albrighton Resource Centres.

In case this link does not work, please send the application as per above explanation

If you have any queries with regards to completing your funding form please contact:

* Maurizio D’Antona, Tenants Grants Officer on 020 7525 0228 or your Tenants and Homeowner Involvement Officer (THIO).

**DOCUMENTATION REQUIRED:**

If all the required information is not enclosed in this form, the application will be refused. There is a right to appeal. (Refer to appeals procedure on page 4).

**Documentation Checklist:**

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

* **Read and understood the grant criteria.**
* **Complete 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 (verified by an independent person not associated with your association, it must be signed, addressed and dated)** [ ]

**If your application form was NOT completed through your THIO (Tenant Homeowner and Involvement Officer) at your Annual General Meeting (AGM) please provide:**

* **Copy of your full financial statement/accounts verified by an independent person not associated to your organisation. It must be signed, addressed and dated.** [ ]
* **A Copy of your General Meeting minutes, showing that the SHU/TMO/TRA financial statement/accounts were agreed (if they were not agreed at your Annual General Meeting)** [ ]

**Any further information:**

**APPLICATION FORM B**

**To be completed by newly set–up and relaunched SHUs/TMOs/TRAs**

**FINANCIAL YEAR you are applying for:**

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

**APPLICATION Form B (Newly set-up/Relaunched SHUs/TMOs/TRAs)**

**Q1. Name of your Organisation:­­­­­­­­­­­­­­­­­­­­­­**

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**Q2. Organisation main contact postal address:**

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**Q3. Organisation email address:**

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**Q4. Organisation main contact telephone number:**

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**Q5. Has your Organisation been known by any other name?**

**YES [ ]  NO [ ]**

**If yes, please give details:**

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**Q6. Committee Members’ Information:**

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

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

**Q8. If your Organisation is an incorporated registered charity or company, please provide us the registration number (please note that ALL financial statement/accounts must be agreed at the AGM if you are a Registered Company):**

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**Q9. Please provide your Southwark Council Housing Officer’s name:**

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**Q10. Please give the name and address of your SHU/TMO/TRA Bank/Building Society/Credit Union account:**

**Q11. 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):**

**Q12. Please provide the Association’s bank signatories:**

 **Bank Signatory** **Please print name:**

**1:**

 **Print name**

 **Bank Signatory:** **Please print name:**

**2:**

**DOCUMENTATION REQUIRED:**

***Please note that if you are a Newly set-up or Re-launched’ SHU/TMO/TRA we require proof of your Bank /Building Society/Credit Union account. This clearly must show the SHU/TMO/TRA name and Bank /Building Society/Credit Union account details (bank letter, bank statement, etc). All bank details will remain confidential.***

**Any other information:**

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

 **Your signature:** **Date:**

 **THIO name: THIO Signature:**

 **Date:**