

Southwark Council
2023/24 RESIDENTS
PARTICIPATION
FUND
ANNUAL GRANT
FORM: A

For Sheltered Housing Units (SHUs),
Tenant Management Organisations
(TMOs) and Tenants and Residents
Associations (TRAs).

NAME OF APPLYING ORGANISATION:

FINANCIAL YEAR:



GUIDANCE

AIM

Southwark Council provides financial support to existing and new Sheltered Housing Units (SHUs), Tenant Management Organisations (TMOs) and Tenants and Residents Associations (TRAs) for

- Running costs
- Community Activities

FUNDING FORMULA/AMOUNT OF ANNUAL GRANT

The grant is calculated according to the number of properties that form part of the SHU/TMO/TRA, at a coefficient of £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 236 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.

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 Council officers and should be sent to:

Yasmin White

Resident Involvement Manager| Environment and Social Regeneration,
Southwark Council | 160 Tooley Street | London | SE1 2QH

After the appeal will be heard by the officers, the decision is final.

Please contact Maurizio D'Antona, Tenant Grants Officer, for details of the appeal procedure. (Maurizio.D'Antona@southwark.gov.uk, 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 on the 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.
- Call an Annual General Meeting (AGM) at which independently verified financial accounts are presented and agreed.
- If the financial accounts cannot presented and agreed at an Annual General Meeting (AGM) then a General Meeting (GM) must be held, thus the financial statements/ accounts can be presented and agreed.
- Hold a minimum of two Meetings per year, of which one must be an Annual General Meeting and the other a General Meeting.

- Provide independently verified financial accounts which must be signed, dated and contain the address of a verifier. The verifier should declare the professional qualification/status (e.g. chartered accountant, charity, etc.). A stamp with the relevant particulars is acceptable.
- Have at least two separate signatories for the SHU/TMO/TRA Bank/Building Society/Credit Union account. To avoid a conflict of interest these guarantors cannot sign the completion of the form as well.
- The SHU/TMO/TRA will pay back unspent RP Fund money in the event of dissolution/de-recognition.
- No person who has the initiative to decide on how monies from the Fund are spent shall personally benefit from it, i.e. Chair, or treasurer or 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 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

In addition to the above criteria being met, SHUs/TMOs/TRAs must ensure, that all volunteers/staff working on behalf of the SHU/TMO/TRA with specific access to children and/or vulnerable adults have a current **DBS** (Disclosure and Barring Service) check. This regulation applies to all SHUs/TMOs/TRAs, whether they are existing, start-up or re-launched.

It is strongly recommended that the claimants have their own written safeguard policy.

REQUIREMENTS:

- Only SHUs/TMOs/TRAs recognised by Southwark Council may apply for funding.
- Organisations can only apply for grant funding **every** financial year, commencing from the **1st of April up to the 30th of September** of the following calendar year, e.g. for 2023/24, from the 1st of April 2023 to the 30th of September 2024.

That is, the application window is open for 18 months.

- 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 benefit the whole community within the TRA's catchment area.
- Grants may not be used to support political activity or to affiliate the applicant to any political organisation.
- A SHU/ TMO/TRA holding more than **£15,000** as net worth in its bank account/s and as shown in its financial statements, will not be eligible for funding unless it gives a valid reason.
The SHU/ TMO//TRA must identify earmarked project's amounts or other specific amounts in its bank account and prove that by removing these figures the balance will fall below the **£15,000** cap. In this case, a SHU/TRA can still apply for funding, provided the Council's officers give their approval.

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/TRAs:

APPLICATION FORM A (Existing SHUs/TMOs/TRAs)

Q1. Name of your SHU/TMO/TRAs:

Q2. Main contact postal address:

Q3. Email address:

Q4. Main contact telephone number:

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

YES NO

If yes, please give details:

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 a change was made to your constitution, what was the General Meeting date:

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

Q10. If your SHU/TMO/TRA is an incorporated registered charity or company limited by guarantee, please provide us the registration number (please note that ALL Financial Accounts must be agreed at the AGM):

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

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 two SHU/TMO/TRA bank signatories' signatures:

Bank Signatory Print Full Name:

Signature:

(1)

Bank Signatory Print Full Name:

Signature:

(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.

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 3).

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 concern your application please mark it as 'not applicable' or 'unsure'.

If you are an existing SHU/TMO/TRA please indicate that the following documents have been included in support of your application. Please send these documents in a non- amendable format (e.g. PDF) via email (please see page 12):

- Copy of the filled/signed claim form
- Copy of your full financial statements/accounts that have been verified by an independent organisation not associated with your SHU/TMO/TRA. The financial statements/accounts must be signed and dated.
- Copy of your AGM minutes at which the financial statements/accounts were agreed

Any further information:

TO COMPLETE YOUR APPLICATION, PLEASE FILL THE FOLLOWING:

Your Committee Member's Position:
(IT MUST BE A DIFFERENT PERSON FROM THE ABOVE BANK SIGNATORY)

Print your full name:

Your Signature:

Date:

Tenant and Homeowner Involvement Officer, THIO's full name:

THIO's signature:

Date:

Completed Funding Application Form

Please ensure that you complete your 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 **in PDF format** 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, Environment and Leisure, Communities Division 160 Tooley Street, 5th floor, Hub 3, PO Box 64529, London SE1P 5LX
- Or you can hand in a copy to:
 - Maurizio D'Antona, Tenant Grants Officer, at Tooley Street office
 - Paulette Watson or Harold Markham (Training Officers) at Taplow Resource Centre.

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

- The Tenant Grants Officer, Maurizio.D'Antona@southwark.gov.uk, on 020 7525 0228.
- Your THIO (Tenant & Homeowner Involvement Officer)
- Training Officers, Paulette Watson or Harold Markham (at Taplow Resource Centre).