

Revenue Grants Policy 2025/26 - 2026/27 (Revised July 2024)



Listening Learning Leading

Introduction

The council provide grants to voluntary and community organisations to help build and support thriving communities and improve the quality of life for the residents of South Oxfordshire. We recognise the value of local community organisations delivering key services to our residents and their need for grants that extend for more than a one-year, so that organisations can plan ahead with confidence.

We will favour organisations who are actively exploring partnership/joint working with other voluntary organisations, businesses or the public sector and/or other methods to help them to become more financially sustainable and have a greater impact in the communities they serve.

What type of service will the scheme fund?

The services and activities must be able to demonstrate direct benefits to meet a clearly identified need for South Oxfordshire residents. They must contribute towards at least one of the council's externally focussed emerging Corporate Plan priorities.

- Action on climate change and nature recovery
- Inclusion, accessibility and accountability
- Thriving and healthy communities
- Homes and infrastructure that meet local need

We encourage applications for services and activities that make a positive contribution towards equality, diversity and inclusion. Applicants must also consider the climate and ecological implications of their service. This may include climate-friendly options to reduce energy use.

We will fund core revenue funding/costs from 1 April 2025 such as;

- Salary costs relating to the services/activities being supported.
- Fundraising/income generation services/activities, that may include exploring establishing a social enterprise in the district or other new income streams to boost the financial stability of the applicant's organisation (see appendix 2 for suggestions).
- Rent and rates, utilities etc for the location of the service/activities (ideally in South Oxfordshire).
- Training staff in new skills to deliver services/activities in our district (or a proportion if it is a county-wide service).

- Marketing and publicity for new/extended services/activities, which those organisations provide, or a proportion for general publicity that includes a new service/activities.
- Professional fees directly linked to collaborative working with others, or starting or extending a service/activities.
- Transport costs (such as mileage expenses) where they are clearly required as part of the objectives of the organisation.

If a service covers a wider area (i.e. Oxfordshire) the costs will need to be pro-rata to South Oxfordshire.

We will not fund:

- services that offer minimal benefit to residents of South Oxfordshire
- topping up savings and reserves, or setting up an endowment fund
- repayment of debts or loans
- staff bonuses
- redundancy costs
- purchase of large items of equipment
- purchase of vehicles
- new heating systems
- the purchase of a new lease
- the purchase of a building
- extensions to premises
- statutory services that are the responsibility of the council or another public sector's responsibility for delivering.

Who can apply to the scheme?

Any constituted voluntary sector organisation delivering services that will benefit residents of South Oxfordshire can apply online through the council's website.

This scheme is **not** open to:

- town/parish councils
- other statutory bodies, or organisations providing a service on behalf of a statutory body
- unincorporated groups and associations
- education providers (schools, free schools, academies, colleges, PTAs and similar)
- profit-based businesses (private businesses)
- political and lobbying groups

- Nationwide organisations (except where they have a local constitution and/or local bank account. We may also make exceptions if the services/activities clearly relate to a local hub/branch of the organisation.)

What are the minimum and maximum awards?

We will accept applications for a **minimum** grant of £10,000 and a **maximum** grant of £125,000 per annum over the two-year period.

We will limit awards to a **maximum of one-third (33.33 per cent)** of an organisation's total operating costs in the most recent financial year (2023/24). If your service covers a wider area (i.e. Oxfordshire) or the organisation is not locally-based, the costs will need to be pro-rata to South Oxfordshire¹.

This will be a highly competitive grant scheme and the council receives applications from many excellent and worthy organisations. Therefore, it is not always possible to fund every eligible application or award the full grant that is requested. We would advise applicants to have a thorough fundraising plan with contingencies in place.

Budget

We have a provisional budget of £667,992 over the two-year period; this is subject to annual approval by the council when setting budgets, throughout the period of the grant.

Scheme eligibility criteria

In addition to meeting the requirements above, applicants must:

- Submit all required documentation at the point of application submission to be eligible. If mandatory information is requested and not provided by a specified deadline, the application is at risk of being rejected.
- Have a specific and relevant activity or service they provide to South Oxfordshire residents and that contributes to at least one of our emerging Corporate Plan priorities.
- Provide evidence that there is a need for such an activity or service, that it benefits residents of South Oxfordshire with clear outcomes, including local strategies, official reports and similar.
- Provide a signed constitution, articles of association or equivalent.
- Provide full accounts for the last three years 2021/22 – 2023/24 (or a detailed working budget and financial plan for new organisations) and reserves policy.

¹ Organisation will need to provide evidence in their application to show their activities/services will directly benefit residents in South Oxfordshire

- Provide details of the estimated costs/budget to provide the service/activity each year (over the two-year period) and how you will fund the rest of these costs.
- Provide a two-year financial forecast to include all income and expenditure for the organisation, and a breakdown of your income streams, specifying how much funding you have in reserves/savings.
- Outline your plans for more collaborative work with others to become more financially sustainable in the longer term.
- Demonstrate how your service users and other stakeholders, where appropriate, are consulted and involved in service planning and delivery.
- Provide a copy of your equality policy/statement and demonstrate how this is implemented to ensure the service or activity meets the needs of all users, including priority groups.
- Confirm you have relevant insurance cover, safeguarding, health and safety, equalities, data protection, and other relevant policies in place.
- Submit outcomes and targets we can use to help measure the success of the service/work/activity each year over the grant period – these will be subject to agreement with the council each year and should focus on the achievable outcomes for residents.
- Two references from other funders (for organisations the council has not worked with before).
- Confirm your organisation has not received any Minimal Financial Assistance, which in total exceeds or when taken together with this grant will exceed £315,000 in the elapsed part of the current Financial Year and in the two Financial Years immediately preceding the current Financial Year. 'Financial Year' means a period of twelve (12) months ending with 31 March.

Opening and closing dates

We will open the scheme for applications in September 2024 and will close in November 2024. We will publish the opening and closing dates on our website.

A decision in principle will be made by the Community Grants Panel within 16 weeks of the closing date and then a formal decision will be made.

Decision making

Community Enablement Team

The community enablement team will review the eligibility of every application before using the scoring matrix in Appendix 1 to suggest scores to the Community Grants Panel. They will also flag any concerns or issues for additional consideration, in order to support the panel's decision making.

Head of Service

In accordance with the council's constitution, the council's Head of Service for Community Enablement (using delegated powers) will decide:

- if we will accept requests for over 33.33 per cent of the total annual running cost in any financial year
- if we will accept applications that don't meet all the eligibility criteria

Community Grants Panel

The Community Grants Panel considers officers suggested scores for each application and makes recommendations to the relevant cabinet member for awards based on the scoring matrix, Appendix 1.

The relevant cabinet member, in consultation with relevant Head of Service, will consider the grant panel's recommendations when determining the revenue grant awards. Any awards over £25,000 will be subject to the council's call-in procedure.

Competition for the fund means that not all worthy and eligible organisations will receive a grant and/or the full grant requested.

Even if an application scores enough points, the panel can recommend not funding it if they:

- Have serious concerns around the management of the organisation now or in the future.
- Believe the applicant has sufficient unrestricted reserves to fund the service themselves.
- Have serious concerns about the appropriateness of the service or its financial viability, such as if the organisation has not demonstrated having a sound fundraising plan with contingencies should any of their grant applications (to the council and others) be unsuccessful or award less than requested.
- Believe the service and/or organisation doesn't meet the criteria or help contribute towards the council's emerging Corporate Plan priorities.

Standard terms and conditions for all grant awards

- All organisations must agree to enter into standard conditions for grants awarded up to £25,000 per year, and a formal legal agreement for grants above £25,001 per year, before any grant payment is released.
- If the grant is given as a subsidy, as set out in the Offer Letter, then any grant awarded is declared, confirmed and offered as Minimal Financial Assistance and offered on the basis that the organisation has not received any other Minimal Financial Assistance in the elapsed part of the current Financial Year and in the two Financial Years immediately preceding the current Financial Year, which in total exceeds or when taken together with this grant will exceed

£315,000. This condition must be satisfied for each financial year of the grant period.

- If a grant is considered a subsidy, then you must declare our grant award amount to any other sources of Minimal Financial Assistance received in the future; you must advise the council if you receive any other Minimal Financial Assistance during the life of the grant award and declare that the threshold will not be exceeded by accepting the grant award or other Minimal Financial Assistance in the future.
- Awards are subject to annual approval of the council's budget for each financial year of the grant period.
- Organisations must provide satisfactory monitoring information by the deadlines to continue receiving payments.
- The funding is non-transferrable unless agreed by the council in writing in advance of any spending and any unspent funds will be returned to the council upon request.
- Organisations must consult with us before making any significant changes to the service/activity, their general organisation structure or threat of closure.
- Organisations must ensure they comply with all statutory legislation, for example health and safety, safeguarding, equalities and human rights.
- Organisations should actively consider how their organisation, activities and services can contribute positively towards addressing the climate emergency
- Organisations will have suitable insurance in place for the duration of the grant.
- Organisations must acknowledge our support in any publicity about the service we are funding.

We may add extra conditions to any grant during the decision-making process if we consider it necessary.

The relevant Head of Service has delegated authority to remove any grant conditions or amend any targets following a written request from the organisation.

We will confirm organisations have met all relevant grant conditions before making any payments.

Failure to meet all the agreed conditions may delay or reduce payment or, in extreme cases, result in us withdrawing our grant offer.

Payment of grants

We will pay annual grants of up to £20,000 in one payment, the first in April/May 2025² once targets have been agreed, and subsequently on an annual basis (May/June) after a **satisfactory** monitoring review against targets.

We will pay annual grants of over £20,001 in two equal stages, the first half in April/May 2025 once targets have been agreed and the balance approximately six months later, after a **satisfactory** mid-year monitoring review against targets set. Subsequently, twice yearly (May/June) and (October/November) following **satisfactory** monitoring meetings.

We reserve the right to change the grant payment schedule, as above, to staged payments, closely linked to performance, should a monitoring return not be submitted after year one and/or subsequently; should year one and/or subsequent target actuals be unsatisfactory or as we deem appropriate.

² Please note, successful organisations who currently (24/25) receive funding through this scheme; the first payment will be in May/June 25 following the monitoring meeting.

Appendix 1 – Revenue grant scheme 2025 - 2027 – scoring matrix

PRIORITY LEVEL	Awards: All awards are subject to sufficient budget. Medium priority projects will only receive funding if there is budget left after all the high priority projects are awarded. In exceptional cases, high priority projects may not receive 100 per cent of their request if it will have a detrimental impact on medium projects.
High priority	Award full amount requested - (capped at 33.33 per cent of the organisations total operating costs) For the high priority level - we would expect applications to perform strongly across all five of the scoring categories, as detailed below.
Medium priority	Will only receive funding if there is budget left after all the high priority projects are awarded. The percentage of funding awarded will be dependent on remaining funds.
Low priority	Will NOT receive funding

Financial Review

Do they have?	0 - 1 points	2 - 3 points	4 - 5 points
A balanced two-year financial forecast plan (income and expenditure) covering 2025/2026 to 2026/2027, with evidence of income from a variety of income streams?	(0) No plan has been submitted. (1) Has a funding plan but it is limited and doesn't cover the required two year period.	(2) Has a funding plan covering the required two year period. However, there is some reliance on certain income streams and/or small gaps in funding. (3) As above <u>however</u>	(4) A detailed and realistic two year plan relative to the organisation's size, demonstrating a balanced budget each year. (5) As above <u>and</u> There is a diverse range of income streams.

Do they have?	0 - 1 points	2 - 3 points	4 - 5 points
		Clear movement towards more sustainable and balanced income streams, with evidence to reduce budget deficits.	
<p>Has the organisation achieved a balanced budget over the last three financial years AND has level of reserves that is sufficient to meet the needs of the organisation? (2021/22, 2022/23, and 2023/24)</p>	<p>(0) Each financial year appears to show a budget deficit with no explanation and/or no reserves policy has been submitted.</p> <p>(1) As above <u>however</u> They have submitted a reserves policy and provided an explanation of how the budget has been negatively affected by Covid 19, Cost of Living or other factors with evidence of significant reduction in services/ activities. Officers note a concerning depletion of reserves over the three years that isn't within the reserves policy.</p>	<p>(2) Every financial year's budget negatively affected by Covid 19, Cost of Living or other factors with a clear explanation. Some reduction in services/ activities. The reserves policy has some depletion over the last three years, but officers can see it is still within reserves parameters.</p> <p>(3) Some but not all financial years budgets affected by Covid 19, Cost of Living or other factors with evidence to explain and overall increase in services/ activities. Has a reserves policy with no depletion of reserves over the last three years.</p>	<p>(4) All financial years have balanced budgets showing both an increase in services/activities and income and officers note some growth in reserves.</p>

Do they have?	0 - 1 points	2 - 3 points	4 - 5 points
Deductions	Officers can remove one point if the organisation's finances/reserves suggest there is not a need for the grant requested.		

The Service(s) / Activities

	0 - 1 points	2 - 3 points	4 - 5 points
Responding to community need, consultation and inclusion	<p>(0) There does not appear to be community need, most likely due to insufficient evidence/information submitted.</p> <p>(1) Officers get a limited sense of community need and it is difficult to establish if a flexible approach to addressing community need is taken, likely due to limited evidence/information supplied and/or limited consultation has taken place with existing users.</p>	<p>(2) Evidence demonstrates some indication of community need and flexible approach to addressing community need, with some consultation limited to existing service users only.</p> <p>(3) As above <u>however</u> Officers can see evidence of regular consultation with existing service users only, including priority groups.</p>	<p>(4) Evidence demonstrates strong and clear indication of community need, and flexible approach to addressing community need. Evidence indicates consultation is regularly carried out with the existing and potential service users and other stakeholders.</p> <p>Evidence of customer satisfaction data implemented, with service users e.g., including priority groups/vulnerable people are at the heart of the improving service design and delivery.</p> <p>(5) As above <u>and</u> Evidence demonstrates substantial consultation is regularly carried out with the community/other stakeholders, including priority groups if the service/activities impact them.</p>

	0 - 1 points	2 - 3 points	4 - 5 points
			Evidence that the service is designed to meet the needs of all users and delivering better outcomes for vulnerable/priority groups and/or improving areas of deprivation and/or encouraging community cohesion.
<p>Direct community benefit and inclusion</p> <p><u>This is not an exhaustive or definitive list yet</u> within the scope of this scoring matrix 'vulnerable' / priority groups can include, the elderly, isolated young families, homeless, economically disadvantaged, educationally disadvantaged, migrant groups, individuals with disabilities, and those with impairments.</p>	<p>(0) The service/ activities appears to offer little or no direct benefit to the community.</p> <p>(1) Up to 50 residents, which does not appear to include vulnerable/ priority groups.</p>	<p>(2) More than 51 and up to 500 residents and it is clear this includes some vulnerable/ priority groups.</p> <p>(3) As above <u>and</u> Providing services that complement council services or indirectly will reduce the likelihood of needing support from the council.</p> <p>or (3) points if a service/activity is directly supporting up to 50 vulnerable residents and/or priority groups</p>	<p>(4) More than 501 residents and includes a large proportion of 'vulnerable' residents.</p> <p>(5) As above <u>and</u> Providing services that complement council services or indirectly will reduce the likelihood of needing support from the council.</p>
Add	Add an additional one point if a local organisation is delivering the same service/activities as a national organisation or an organisation based outside of the district.		

Corporate Plan Priorities

The application will be **marked against one emerging externally focussed Corporate Plan priority**. The applicant must choose which theme best matches their service/activity.

- Action on climate change and nature recovery
- Inclusion, accessibility and accountability
- Thriving and healthy communities
- Homes and infrastructure that meet local need

Further additional points may be awarded if the applicant can demonstrate evidence of working with local people and organisations to deliver their service/activities.

Points	Criteria to score
0 -1	<p>(0) Response is not relevant to the priority theme and/or does not provide the officer with confidence that the service/activity will result in better outcomes for the community under the specific theme.</p> <p>(1) Response is relevant, demonstrating that the theme has been considered in a minor way, but the information provided lacks detail.</p>
2 -3	<p>(2) Clear and relevant response, that addresses how the service/activity will provide better outcomes to the community to a satisfactory standard under the specific theme.</p> <p>(3) Clear and relevant response that addresses how the service/activity will provide better outcomes to the community at a good standard under the specific theme.</p>
4-5	<p>(4) Clear and relevant response that addresses how the service/activity will provide better outcomes to the community at a excellent standard under the specific theme.</p>

Points	Criteria to score
	(5) Clear, relevant, and well detailed responses that addresses how the service/activity goes above expectations and fully integrates the theme into the service delivery.
Additional discretionary points	<p>Additional one/two discretionary points may be awarded, in addition to the above score banding, for recognition that partnership working, collaboration and co-production of the service/activities is a fundamental part of the organisation’s culture and approach:</p> <p>One point if the applicant provides strong evidence of relevant partnership working with local people and organisations to deliver their relevant service/activities to a good standard.</p> <p>Two points if the applicant provides strong evidence of relevant partnership working with local people and organisations to deliver their relevant service/activities to an excellent standard.</p>

Appendix 2

Diversifying Income Streams

COVID has brought a new hybrid way of fundraising; mixing digital methods with more traditional routes and giving more confidence to try new things to help your organisation weather future storms.

Make it easy for people to choose your charity to support

- Invest in digital resources. Update your IT hardware and software to support online fundraising and income streams like Crowdfunding.
- Develop your website to make it simple for people to make a donation via your homepage or to set up a direct debit.
- Explain the story of your organisation and explain why you are the best at what you do. Create a short film or create a virtual tour of your premises. These visual assets are vital to help reach out to new supporters.
- Purchase a good Customer Relationship Management (CRM) system. It is important to build and manage lasting relationships with your supporters/donors. They aren't as expensive as you might think, especially if you are a small organisation with a small supporter base.

Think beyond one-off donations towards regular financial support

- Memberships and subscriptions bring in new streams of regular, dependable income and supporters to help you become more sustainable.
- Create long term relationships with donors using digital platforms to communicate online with regular posts, blog, tweets and emails updates about your day-to-day work. Why not ask your supporters what they want to hear about to make sure they feel connected to your cause?
- Remember, trusts and foundations also want to build strong relationships with local organisations. A good understanding of their priorities will help you target your applications and hopefully lead to multi-year funding.

Maximising the potential within your staff/trustees/volunteers

- Invest in training existing staff, trustees and volunteers in fundraising, financial management, business planning, IT skills and marketing.

- A skilled workforce will efficiently manage new income generating activities. Contact the [Directory of Social Change](#), [OCVA](#), and [NCVO](#) for training opportunities and guidance.
- Deliver training courses to external organisations/ businesses. This harnesses the skills and expertise in your own organisation.

Take a step back and look at things differently

- What products and/or services can your organisation offer at a cost to others? e.g, training programme.
- Could you establish a business/ social enterprise that supports your charity, e.g, café or shop?
- Do you have any capital assets e.g, buildings, office space or equipment that can be rented out?
- Create a Business Plan which could help you create a fully costed plan to see if your ideas support themselves and create a profit.

Don't forget your supporters want to have fun

- Think about booking charity places in races like Oxford Half Marathon, or devising a challenge like '[Brave the Shave](#)' and '[Movember](#)' where supporters can do something different, involve others and raise money!
- Events like raffles, auctions and quiz nights may be an easy way to get new supporters involved – they bring people together to support your cause and help raise your profile.
- The council has set up the [SO Charitable Lottery](#) for local organisations to get involved and raise regular funds. It is free to join, proceeds are paid directly to your organisation's bank account and players can win prizes up to the £25,000 jackpot.
- Have a plan to develop those new contacts and make sure they have a reason to keep supporting you for years to come.