

Appendix one

Draft North Yorkshire Council Locality Budgets scheme 2023/24

1. Each Councillor can recommend the allocation of funding to support specific projects or activities that directly promote the social, economic or environmental wellbeing of the communities within their Division. Projects and activities must be lawful and not undermine the Council's or a partner's priorities or service delivery.
2. Councillors are encouraged to consider how their recommendations can best be used to lever in additional funding, volunteers and community engagement - multiplying the overall impact.
3. Funding will not be awarded for 100% of the cost of a project or activity undertaken or managed by an external organisation. The external organisation must meet a proportion of the cost of the project or activity from its own funds or from a funder other than North Yorkshire Council.
4. Projects and activities can include services provided by North Yorkshire Council provided that these are additional to normal service levels and do not create an ongoing expenditure commitment for the Council. Councillors must discuss and agree these with the relevant service manager before submitting a recommendation form.
5. Funding cannot be awarded in respect of:
 - projects or activities that will only benefit an individual or an individual family or a private business;
 - political parties or trade unions or employers' associations or groups affiliated with any of these;
 - lobbying or lobbying organisations;
 - projects or activities that seek to promote a faith or belief as their main purpose;
 - projects or activities that are contrary to the Council's equality, diversity and inclusion policy; or
 - organisations which actively or vocally oppose fundamental British values.
6. Each Councillor has a budget allocation of £10,000 a financial year. Budget allocations cannot be moved between financial years. The minimum funding which can be recommended for a project or activity is £300 and the maximum is £5,000. Two or more Councillors can recommend funding for a single project or activity, but the maximum total funding from the overall Locality Budget scheme for any project or activity in a financial year is £5,000.
7. Exceptionally in 2023/24 the restriction of £5,000 per project or activity is removed to allow Councillors to provide additional support to projects that

are directly addressing the cost-of-living crisis (eg food provision, benefits and debt advice) or directly supporting organisations or groups supporting refugees (including people here temporarily from Ukraine).

8. Recommendations must be made by Councillors using the Flexi-Grant online form.
9. Councillors must declare on the recommendation form all relevant pecuniary and personal interests including membership or other connections with the organisations that will benefit from or manage the funding.
10. If the Monitoring Officer has concerns about any recommendation, this will be raised with the relevant Councillor.
11. All recommendations will be considered by the Executive Member for Corporate Services (or in their temporary absence, the Leader), who will make a decision taking into account the information received and the recommendation of the relevant Councillor.
12. If the Executive Member for Corporate Services has made a recommendation or has a relevant pecuniary or personal interest in a recommendation, they will not make a decision, but will refer the matter for determination by the Leader.
13. The Locality Budgets business support officer will notify the Councillor of the decision taken by the Executive Member.
14. Information about the scheme and all awards will be published on the Council's website. Documents associated with the scheme (eg recommendations and monitoring forms) are not exempt from disclosure under FOI legislation.
15. All recommendations made by a Councillor and all decisions by the Executive Member will be made in accordance with the principles of decision making set out in the Council's Constitution.
16. Councillors can make recommendations from Monday 3 April 2023. No recommendations from Councillors will be accepted after midnight Wednesday 31 January 2024. No recommendations or decisions will be made if any part of the relevant Division is covered by a pre-election period linked to elections or by-elections to the Council, parish or town council or parliament (ie the period between the day the notice of election is published and the final election results; normally six weeks).
17. Funding will not be awarded for projects or activities that have already been completed or for expenditure that has already been incurred.
18. If funding is awarded for a project or activity to be undertaken or managed by an external organisation, the funding must be managed by a parish or

town council or a voluntary or community organisation. The Council will only offer a grant to the external organisation if it has an organisational bank account and agrees to:

- provide the Council with a statement of how the funding has been spent and how it has benefited the local community;
 - allow the Council reasonable access to all records relating to the funding for at least four years after the funding has been awarded;
 - meet all relevant legislative requirements;
 - spend the funding within 12 months of it having been awarded;
 - repay to the Council all unspent funding within 13 months of it being awarded; and
 - acknowledge receipt of a grant from the Council in all publicity relating to the project or activity and in their annual accounts and report.
19. If an external organisation does not accept the offer of a grant within three calendar months of the offer being made, the offer will lapse and cannot be renewed without a new recommendation being made by a Councillor.
20. All projects and activities awarded funding will be sent a monitoring form which must be completed and returned with appropriate supporting evidence (eg copies of quotes and receipts for expenditure, photographs and project reports) to the Locality Budgets business support officer at County Hall within twelve months of the funding being awarded. A copy of completed monitoring forms will be provided to the relevant Councillor by the Locality Budgets business support officer.
21. If a satisfactorily completed monitoring form and appropriate supporting evidence are not submitted within 12 months of the funding being issued, a request will be made for all the funding to be repaid within one month.
22. Organisations that have not returned satisfactorily completed monitoring forms and appropriate supporting evidence will not be eligible for future funding.
23. All concerns will be dealt with in accordance with standard Council procedures relating to suspected fraud or financial irregularity.