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**PLACE BASED INVESTMENT PROGRAMME (PBIP) 2023-24**

**WEST LOTHIAN - COMMUNITY WEALTH BUILDING**

**PROJECT APPLICATION FORM**

Completed project application forms must be submitted to West Lothian Council before the publicised deadline of **5PM on Wednesday 2nd August.**

Please refer to the associated guidance when completing this application form. No project should start or commit expenditure before receiving any approval of grant in writing. All projects **MUST** be either delivered or legally committed by 31st March 2024.

1. **Applicant Information**

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| **Applicant/Organisation Name** |  |
| **Address** |  |
| **Website** |  |
| **Type of Organisation**  (public sector, voluntary organisation, charity, CIC, Ltd. by guarantee, SCIO, unincorporated association etc. or private sector) |  |
| **Charity number (if applicable)** |  |
| **Legal Structure** |  |
| **Confirm current number of Board Members (and is this in line with the constitution)** |  |
| **Number of Employees** |  |
| **Number of Volunteers** |  |
| **Total annual turnover of organisation (2022/23 Accounts)** |  |
| **Brief summary of the history of the organisation including a summary of key services/ activities delivered and client group. (**No more that 100 words) |  |

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| **Contacts** | **Lead Contact** | **Secondary Contact** |
| **Name** |  |  |
| **Position in Organisation** |  |  |
| **E-mail Address** |  |  |
| **Telephone Number** |  |  |
| **Address** |  |  |

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| **If voluntary organisation, charity, CIC, Ltd. by guarantee, SCIO, unincorporated association etc. please select documents attached:** | **Please select** |
| **Constitution or articles of Memorandum** |  |
| **Latest audited accounts** |  |
| **List of current Board members** |  |

1. **Costs, Timeline & Legal**

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| **Project Title** |  |
| **Start Date** |  |
| **Completion Date** |  |

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| **Project Costs:** | **2023/2024** |
| **PBIP Costs to which grant will contribute** |  |
| **Costs funded by other committed sources** |  |
| **Total** |  |

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| **Breakdown of Project Costs (source/funder)** | **2023/2024** | **Date funding confirmed or expected to be** |
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| **Total** |  |  |

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| **Legal Requirements** |
| **Does the project comply with relevant statutory legislation?**  Procurement, Subsidy Control, Environmental Impact, Equalities Impact Assessment, Planning Permission, Fairer Scotland Duty (as part of the Equality Act 2010,) Building Warrant, and any other legal requirements that are specific to individual projects. All projects will need to comply with all relevant statutory legislation relating to project implementation.    Further information may be required from organisations prior to any offer of grant award being made.  **Please detail what statutory legislation applies to your project and how you are addressing it.** |
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1. **Project Details**

**Please refer to associated PBIP 2023-24 Guidance on completing this application.**

Also note that the word count limit in each section is fixed so anything over the word count is unlikely to be considered. Please refer to the guidance notes for more information.

**Community Wealth Building Principle(s)**

Please detail how your capital project detailed below will deliver on the themes of Community Wealth Building.

Use bullet points / sub headings as appropriate. This helps with the assessment process.

**Inclusive Ownership**

Please detail below how your capital project will deliver on the pillar of inclusive ownership

Use bullet points / sub headings as appropriate. This helps with the assessment process.

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**Finance**

Please detail below how your capital project will deliver on the Finance Pillar of Community Wealth Building

Use bullet points / sub headings as appropriate. This helps with the assessment process.

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**Workforce**

Please detail below how your capital project will deliver on the Workforce Pillar of Community Wealth Building

Use bullet points / sub headings as appropriate. This helps with the assessment process.

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**Spending**

Please detail below how your capital project will deliver on the Spending Pillar of Community Wealth Building

Use bullet points / sub headings as appropriate. This helps with the assessment process.

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**Land and Property**

Please detail below how your capital project will deliver on the Land and Property Pillar of Community Wealth Building. Use bullet points / sub headings as appropriate. This helps with the assessment process.

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**Capital Project**

Please detail what your capital project is and make clear who/what will be supported through the completion of this project in reference to Community Wealth Building themes you have identified above. It is possible that parts of the application will be supported and others not.

Use bullet points / sub headings as appropriate. This helps with the assessment process.

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**If you wish to include a plans/maps to illustrate the subject area you can do so. Please submit as a separate document. Please do not embed files within this document.**

**What are the planned Outcomes from this project?**

Outcomes are the changes / differences made to individuals or groups through the proposed capital project and the principles of Community Wealth Building

Use bullet points / sub headings as appropriate. This helps with the assessment process.

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1. **Additional information about your organisation**

The following questions relate to you organisation and are not directly part of the assessment of the project but are important to our understanding of that governance arrangements and the general health of the organisation. If successful with your application you will be allocated a project Link Officer and this information will be useful to their role.

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| **Additional Governance/Health Check information** | | |
| **FINANCIAL** | | |
| Are there documented financial procedures for all aspects of the organisations’ financial activities? When were they last reviewed? |  | |
| How frequently is the financial position reported to the senior management and the board? |  | |
| Does the organisation meet all statutory financial requirements including VAT, PAYE and HMRC? |  | |
| What level of reserves does the organisation hold? Is this compliant with the constitution? |  | |
| Did the organisation operate with a surplus (profit) last year? |  | |
| Does the organisation have a funding strategy? |  | |
| **Governance and Management** | | |
| Have the constitution/governance documents been reviewed in the last 12 months? |  | |
| Have board members received training regarding their responsibilities as trustees/directors in the last 2 years? |  | |
| Have all board meetings been quorate and have all board members attended the majority of board meetings in the last year? |  | |
| Is there a business plan for the organisation which clearly states the objectives and strategy for the organisation? Has this been reviewed in the last 12 months? |  | |
| Has the organisation reviewed the current services offered within the last year to ensure they continue to be relevant to future needs and requirements of stakeholders? |  | |
| **Networks and Partnerships** | | |
| Is the organisation a member of any formal networks or strategic partnerships (local and or national)? |  | |
| Is information on the services and outcomes delivered by the organisation shared with all key partners, stakeholders and potential beneficiaries? |  | |
| Does the organisation have a clear understanding of where it fits within local and national priorities? |  | |
| **Staff and Volunteers** | | |
| Are you a national living wage employer? |  | |
| Is there an appraisal system in place for all staff and volunteers? |  | |
| Are appropriate PVG/Disclosure arrangements in place as appropriate. |  | |
| Is there a documented staff induction and training policy? |  | |
| Do all staff and volunteers have a documented job description which defines their roles and responsibilities? |  | |
| How are staff and volunteers kept up to date with the vison and objectives of the organisation? |  | |
| **Policies and Procedures:**  **Do you have a documented:** | **Yes/No** | **Date put in place and last updated (if not in place please say why)** |
| Data Protection Policy? |  |  |
| Data Processing Agreement or Information Sharing Protocol? |  |  |
| Recruitment policy? |  |  |
| HR policy? |  |  |
| Health and Safety policy? |  |  |
| Equal Opportunities policy? |  |  |
| Policy for the protection of vulnerable groups? |  |  |
| Environmental policy? |  |  |
| **Insurance and Indemnity (as appropriate)** | **Yes/No** | **Dates of cover** |
| Public Liability Insurance |  |  |
| Professional Indemnity Insurance |  |  |
| Employers Liability Insurance |  |  |
| Building and contents insurance |  |  |
| Motor vehicle insurance |  |  |
| Other |  |  |

**Privacy Notice**

**Place Based Investment Programme (PBIP) 2023-24**

**Information held about you**

As part of the arrangements for this funding programme evidence of eligibility and information must be collected. We also need to keep information on your progress throughout the funding application process.

West Lothian Council will collect personal information about you, with some or all of the following information will be held by West Lothian Council.

* Name of the organisation
* Contact details of contact person; name, position in the organisation, address, telephone and e-mail address.
* Copies of organisation documents;
  + List of committee members/directors list
  + Annual Accounts
  + Cash flow forecast 2023-24
  + Memorandum of Association or Constitution
  + Bank Statements / Bank Details
  + Invoices
  + Payslips

**Who is processing my data?**

All personal information is held and processed by West Lothian Council in accordance with data protection law.

**How will we use information we hold about you?**

Your data will be used to:

* Assess and progress your application
* Contact you regarding the Place Based Investment Programme 2023-24
* To contact you regarding information that may be relevant to you.
* To contact you for feedback regarding the quality of services provided to you.

**Who will we share your information with?**

* We will share your information with internal West Lothian Council colleagues in services such as; Central Admin, Financial Management Unit, as required to carry out your request.
* We may discuss your application with West Lothian Council colleagues in services relevant to your application.

**How long do we keep your records?**

We will aim to keep your information accurate and up-to-date, and to update or remove the data upon request by you. The council will only keep your information for a maximum of seven years from the end of the project. After this time personal information will be securely destroyed.

**Your Rights**

You have a number of rights under data protection law, including the right to request your information and to request that the information be amended or, in some circumstances, erased.

To request your records, you will need to put your request in writing and provide proof of identification to Clare Stewart, Community Wealth Building Manager West Lothian Council, West Lothian Civic Centre, Howden South Road, Livingston, West Lothian, EH54 6FF. Email: [clare.stewart@westlothian.gov.uk](mailto:clare.stewart@westlothian.gov.uk)

**Providing accurate information**

It is important that we hold accurate and up to date information about you in order to provide evidence of eligibility for the particular funding you are applying for. We also need to keep information on your progress throughout the application process. If any of your details have changed, or change in the future, please ensure that you tell us as soon as possible so that we can update your records.

**Further Information**

If you have any questions or concerns about how your information is used, please contact Clare Stewart, Community Wealth Building Manager West Lothian Council, West Lothian Civic Centre, Howden South Road, Livingston, West Lothian, EH54 6FF. Email: [clare.stewart@westlothian.gov.uk](mailto:clare.stewart@westlothian.gov.uk)

You can also contact the Data Protection Officer, West Lothian Council, West Lothian Civic Centre, Howden South Road, Livingston, West Lothian, EH54 6FF, Email: [dpo@westlothian.gov.uk](mailto:dpo@westlothian.gov.uk)

More information about data protection and how it applies to you, including how to complain about how your information is being used, is available from the [Information Commissioner's Office.](https://ico.org.uk/)

**Who is responsible for my information?**

All personal information is held and processed by West Lothian Council in accordance with the Data Protection Act 2018. For information on the role of Data Controller, Data Protection Officer and Contact Details for the council, please refer to the ‘Data Protection and Privacy’ page of the council’s website:

<https://intranet.westlothian.gov.uk/article/36236/General-Data-Protection-Regulation-GDPR>

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| **Declaration** | | |
| We wish to apply to the Place Based Investment Programme 2023/24. The above is an accurate outline of the proposed project. We have read and understood the guidance notes for applicants and agree to the conditions therein. We understand that the grant may be modified or withdrawn, if all the conditions are not adhered to. We are willing to co-operate in the monitoring of the grant scheme and to meet with their representatives if required to do so. We will acknowledge the support of the Fund in any related PR activities.  I consent to West Lothian Council processing my personal data for the purposes of: | | |
|  | Application to the Place Based Investment Programme 2023-24 & the monitoring of the grant if awarded. | |
|  | To provide you with updates on the progress of your application. | |
|  | Contact you to pass on information that may be relevant to you. | |
|  | Contact you for feedback on quality of services provided to you. | |
| **Name** | |  |
| **Position** | |  |
| **Organisation** | |  |
| **Date** | |  |

**Please send your completed application forms and any supporting documentation to the Regeneration Team:**

[**RegenerationTeam@westlothian.gov.uk**](mailto:RegenerationTeam@westlothian.gov.uk)

**For any admin related queries or queries relating to Community Wealth Building or the guidance, please contact the Regeneration Team:**

[**RegenerationTeam@westlothian.gov.uk**](mailto:RegenerationTeam@westlothian.gov.uk)