

DATA LABEL: PUBLIC



COUNCIL EXECUTIVE

PLACE BASED INVESTMENT PROGRAMME PROCESS PROPOSAL AND UPDATE

REPORT BY HEAD OF PLANNING, ECONOMIC DEVELOPMENT & REGENERATION

A. PURPOSE OF REPORT

The purpose of this report is to seek Council Executive's approval for a proposed Place Based Investment Programme application process for the forthcoming year, 2022-23 estimated at £1,000,000, and to provide an update on the allocation of £1,302,000 from the programme for the year 2021-22.

B. RECOMMENDATION

It is recommended that Council Executive:

1. Agrees to the process proposed for 2022/23 for applications, engagement, assessment, decision-making, monitoring and reporting, as set out in the report;
2. Agrees to the 2022-23 funding to be split 50:50 between Community Wealth Building and Town Centre Capital investment;
3. Delegates authority to the Head of Planning, Economic Development and Regeneration to implement the process;
4. Agrees that a recommendation on the award of Community Wealth Building funding will be made to a subsequent meeting of Council Executive;
5. Agrees that recommendations to approve the Town Centre Capital applications will be made to Local Area Committees (LAC) for their final decision or to the Council Executive should the LAC be unable to agree on part or all of the ward allocation;
6. Notes that allocation is underway for the five successful projects for 2021-22; and that regular contact is ongoing; and
7. Notes that regular contact will be made with awardees for 2022-23 to monitor project progress.

C. SUMMARY OF IMPLICATIONS

I Council Values	Focusing on our customers' needs; being honest, open and accountable; providing equality of opportunities; developing employees; making best use of our resources; working in partnership
II Policy and Legal (including Strategic Environmental Assessment, Equality Issues, Health or Risk Assessment)	<p>Place Based Investment is a Scottish Government Initiative.</p> <p>This report does not raise any specific SEA, Equality, Health or Risk Assessments</p>

requirements. However, projects supported through the fund may require assessments.

III	Implications for Scheme of Delegations to Officers	The report details a one-off specific delegation to the Head of Planning, Economic Development and Regeneration.
IV	Impact on performance and performance Indicators	Investment in place-based projects has potential to increase positive outcomes across a range of indicators.
V	Relevance to Single Outcome Agreement	Relevant to all outcomes.
VI	Resources - (Financial, Staffing and Property)	West Lothian's allocation of the Scottish Government's Place Based Investment Programme Funding 2021-22 was £1,302,000. The Scottish Government is expected to award £1,000,000 for the year 2022-23, which will be available from 1 April 2022.
VII	Consideration at PDSP	Updates will be made to Development & Transport PDSP and the nine Local Area Committees on a regular basis.
VIII	Other consultations	None.

D. TERMS OF REPORT

D.1 Background

In late October 2021, Council Executive approved recommendations in a report by the Head of Planning, Economic Development and Regeneration to allocate £1,302,000 to five projects, in taking forward West Lothian's allocation of the Scottish Government's Place Based Investment Capital Grant (PBIP).

The main objectives of the PBIP include:

- to support place policy ambitions such as town centre revitalisation, community led regeneration, 20-minute neighbourhoods and Community wealth Building;
- to ensure that all place-based investments are shaped by the needs and aspirations of local communities; and
- to accelerate ambitions for net zero, wellbeing and inclusive economic development, tackling inequality and disadvantage, community involvement and ownership.

This report sets out proposals for the application, assessment, and allocation process for the next round of funding, detailed in Section D.2, building on the feedback received from members and applicants following the 2021-22 process. The report also provides a progress update on each of the five projects, outlined in Section D.3.

D.2 Process Proposal 2022-23

Following the allocation of funds for 2021-22, a revised application, assessment, and allocation process is presented for approval for 2022-23. It is proposed that this process will begin in April 2022, allowing projects to be selected and begin spending from June 2022. It is expected that the Scottish Government will award £1,000,000 for the year 2022-23, which is expected to be made available from 1 April 2022.

The funding for 2022-23 will be split between investments that meet the criteria under Community Wealth Building and Town Centre Capital Projects; this will be a 50:50 split.

Funding for Community Wealth Building projects will be expected to have a value of at least £100,000. The funding for the Town Centre Project's will be in line with previous allocations of Town Centre Capital Funding.

There is a 6-step process which aims to nurture and support applicants through the stages below:

- **Preparation:** Creating and updating application forms and guidance notes. This includes compiling an information page that gives information on the eligibility and criteria to be met around Community Wealth Building and Town Centre Capital Projects (See Appendix 1).
- **Communication:** the applications and guidance will be posted on the council's website and social media channels and circulated around existing networks. Previous applicants will be made aware of the fund reopening.
- **Support:** Offering applicants 4-weeks of support from officers with their application. This could be to enquire about permissions needed, how to fill out the application form, whether their project currently aligns with the principles of Community Wealth Building and meets the criteria for Town Centre Capital projects. Officers recognise the importance in supporting applicants to feel confident in their application and the application process before applications close
- **Panel Meeting: for the Community Wealth Building:** As per the previous round, an assessment panel will be convened and will meet to discuss their assessments. Recommendations will be made and any variation in award amounts will be calculated. The lead contact for each recommended application will be notified that they have been recommended for approval before Council Executive and will be advised of the Council Executive Decision.

LAC Meeting: for the Town Centre Capital Projects: as per the previous round of Town Centre Capital projects applications will be submitted and agreed by the LAC's. These will be brought to the LAC's in May/June 2022, with Special LACs called if required. As was previously the case the Head of Planning, Economic Development and Regeneration will retain the delegated authority to move funding between towns within the ward allocation should this be required. Should any ward allocation not be fully allocated by the LAC it will be brought back the Council Executive for a decision.

- **Results:** The recommendations from the Community Wealth Building panel report will be taken to the next practicable Council Executive meeting for approval. Following the meeting, applicants will be informed if they have been successful or unsuccessful. Award letters and feedback will be issued, and unsuccessful applicants may express interest in being notified when applications go live for the following year's fund.
- **Finalising:** After award letters are sent, meetings will be scheduled to discuss conditions of the offer. Awardees will be asked to (on the basis of their full or partial award) gather up-to-date quotes, re-examine their priority of spend, outline their project timeline, and propose a payment schedule at this meeting.

D.3 Project Updates 2021-22

Following the approval of the recommendations presented to the meeting of Council Executive on 26 October 2021, formal offers of award were sent to the successful projects, and meetings were scheduled to agree a project timeline and payment schedule. It was agreed with each project that monitoring officers and project boards will meet regularly to discuss progress. Project-specific updates are as follows:

1. Craigsfarm Community Development Project

A formal letter was sent on 5 November, offering full award of £129,602. Monitoring officers held an online meeting on 9 November to discuss the project's timeline and payment schedules prior to formal acceptance of the award.

It was agreed that Craigsfarm will receive their award over three equal instalments, with the first instalment in early December 2021, and the last instalment before 31 March 2022.

The signed letter of acceptance and detailed project plan were received on 15 November. Preparatory and electrical work began in December, and work on the ceiling commenced before Christmas 2021. Work on the roof, accessible toilet, and security will take place in early 2022.

2. West Calder HUB

A formal letter was sent on 5 November, offering a full award of £140,265. Monitoring officers held an online meeting on 16 November to discuss the project's timeline and payment schedules prior to formal acceptance of the award. This meeting identified the need for a planning application, and to reconfirm and compare quotes from external and internal contractors.

Monitoring officers held another online meeting on 30 November to confirm that the planning application process is underway.

It was agreed that West Calder HUB will receive their award over three instalments; in January, February, and March 2022. A signed letter of acceptance was received on 30 November and a detailed project plan was received on 1 December. Work to upgrade the kitchen commenced in January, and replacement of the boiler & heating system, kick pitch, and environmental improvements will take place in early 2022.

3. West Lothian College

A formal letter was sent on 5 November, offering a partial award of £493,436. Monitoring officers held an online meeting on 9 November to discuss the project's timeline and payment schedules prior to formal acceptance of the award. This meeting identified the need for a planning application and relevant contact details and information on the process was shared.

A meeting between officers and project managers took place on 7 December to finalise and agree the project plan and schedule of payments. The College liaison officer has confirmed that all work will be contracted by 31 March 2022 to meet the programme deadlines. It was agreed that West Lothian College will receive their award over three instalments; in January, February, and March 2022.

4. West Lothian Foodbank

A formal letter was sent on 5 November, offering a full award of £188,697. Monitoring officers held an online meeting on 10 November to discuss the project's timeline and payment schedules prior to formal acceptance of the award. This meeting identified the need for a planning application and change to the use of land, and relevant contact details and information on the application process was shared.

It was agreed that the project will receive their award over three instalments; with the first instalment likely to be claimed in December 2021, the second in January 2022, and the last instalment before 31 March 2022.

The signed letter of acceptance was received on 17 November, and a project plan was submitted with the original application to the fund in August 2021. An updated, final timeline will be provided once there is clarity on the planning application.

5. Crofthead Community Education Association

A formal letter was sent on 5 November, offering an award of £350,000. Monitoring officers held an online meeting on 17 November to discuss the project's timeline and payment schedules prior to formal acceptance of the award. This meeting identified the need for a planning application and relevant contact details and information on the process was shared.

The signed letter of acceptance was received on 19 November. A detailed project plan and finalised schedule of payments will be provided once there is clarity on the planning application, and once updated quotes have been received from contractors.

E. CONCLUSION

This report proposes an application, assessment, and application process for the Place Based Investment Programme 2022-23, and provides a progress update on the five projects who received the awards for 2021-22. Council Executive is asked to agree the process outlined and delegate the Head of Planning, Economic Development and Regeneration to commence this process in January 2022.

F. BACKGROUND REFERENCES

Council Executive, '*Place Based Investment and Community Wealth Building Report*', Head of Planning, Economic Development & Regeneration, 26 October 2021.

Appendices/Attachments:

- Appendix 1: Place Based Town Centre Split;
- Appendix 2: Guidance CWB Funding 22/23
- Appendix 3: Application CWB Funding 22/23
- Appendix 4: Guidance Town Centre Capital Fund 22/23
- Appendix 5: Application Town Centre Capital Fund 22/23

Contact Person:

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Craig McCorriston

Head of Planning, Economic Development & Regeneration

8 February 2022

Appendix 1 – Proposed Allocation of Grant with settlements more than 1000 in West Lothian

Settlement	Population	Fixed Allocation	Population Allocation	Total Amount Awarded
		£	£	£
Livingston	54,516	10,000	83,908	93,908
Bathgate	23,559	10,000	36,260	46,260
Linlithgow	13,862	10,000	21,336	31,336
Armadales	12,021	10,000	18,500	28,500
Whitburn	11,805	10,000	18,170	28,170
Broxburn	10,970	10,000	16,884	26,884
Uphall	4,687	10,000	7,214	17,214
Blackburn	5,775	10,000	8,889	18,889
East Calder	5,733	10,000	8,824	18,824
Fauldhouse	4,804	10,000	7,394	17,394
Winchburgh	3,758	10,000	5,784	15,784
Midcalder	3,351	10,000	5,158	15,158
West Calder	3,152	10,000	4,851	14,851
Kirknewton	2,598	10,000	3,999	13,999
Polbeth	2,301	10,000	3,542	13,542
Blackridge	2,074	10,000	3,192	13,192
Addiebrownhill	1,991	10,000	3,064	13,064
Stoneyburn	1,982	10,000	3,051	13,051
Pumpherston	1,667	10,000	2,566	12,566
East Whitburn	1,344	10,000	2,069	12,069
Seafeld	1,334	10,000	2,053	12,053
Uphall Station	1,073	10,000	1,651	11,651
Greenrigg	1,066	10,000	1,641	11,641
Total	175,423	230,000	270,000	500,000

Note that the fixed amount will stay the same however the variable amount based on population maybe subject to change when actual budget is received from Scottish Government. The variable amount will ensure full allocation of the budget received.

Based on 2017 population figures

<u>Livingston</u>		
<u>Area</u>	<u>Population</u>	<u>Amount Awarded</u>
Livingston Eliburn	8,211	14144
Livingston Craigshill	7,057	12156
Livingston Dedridge	6,808	11727
Livingston Murieston / Bankton	5,315	9155
Livingston Carmondean	5,170	8905
Livingston Ladywell	5,024	8654
Livingston Deans	4,234	7293
Livingston Knightsridge	3,945	6796
Livingston Howden	3,489	6010
Livingston Village / Kirkton	2,958	5095
Livingston Bellsquarry / Adambrae	2,305	3973
	54,516	<u>93908</u>

Proposed Allocation of Grant by Ward in West Lothian

Ward	Settlement	Allocation £	Total Allocation £
Linlithgow	Linlithgow	31,336	31,336
Broxburn, Uphall & Winchburgh	Broxburn	26,884	
	Uphall	17,214	
	Winchburgh	15,784	59,882
Livingston North	Eliburn	14,144	
	Carmondean	8,905	
	Deans	7,293	
	Knightsridge	6,796	
	Livingston Village / Kirkton	3,312	40,450
Livingston South	Dedridge	11,727	
	Murieston/Bankton	9,155	
	Ladywell	8,654	
	Howden	6,010	
	Bellsquarry/Adamrae	3,973	
	Livingston Village / Kirkton	1,783	41,302
Livingston East & East Calder	Craigshill	12,156	
	East Calder	18,824	
	Mid Calder	15,158	
	Kirknewton	13,999	
	Uphall Station	11,651	
	Pumpherston	12,566	84,354

Fauldhouse & Breich Valley	Fauldhouse	17,394	
	West Calder	14,851	
	Polbeth	13,542	
	Addiebrownhill	13,064	
	Stoneyburn	13,051	71,902
Whitburn & Blackburn	Whitburn	28,170	
	Blackburn	18,889	
	Seafield	12,053	
	Greenrigg	11,641	
	East Whitburn	12,069	82,822
Bathgate	Bathgate	46,260	46,260
Armadale & Blackridge	Armadale	28,500	
	Blackridge	13,192	41,692
			500,000

PLACE BASED INVESTMENT PROGRAMME (PBIP) 2022-23
WEST LOTHIAN - COMMUNITY WEALTH BUILDING APPLICATIONS
GUIDANCE FOR APPLICANTS

Introduction

This guidance is intended to help applicants prepare and submit their applications for Place Based Investment Programme (PBIP) support in 2022-23.

It covers the background to PBIP and its context within West Lothian, the application process, eligible organisations and project types.

**Note that the deadline for receipt of completed application submissions is
5PM on FRIDAY 22nd APRIL 2022.**

Background

The Place Based Investment Programme (PBIP) 2022-23 was announced by the Scottish Government in May 2021. The main objectives of the PBIP include:

- to link and align place-based initiatives and establish a coherent local framework to implement the Place Principle;
- to support place policy ambitions such as town centre revitalisation, community led regeneration, 20-minute neighbourhoods and Community Wealth Building;
- to ensure that all place-based investments are shaped by the needs and aspirations of local communities;
- to accelerate ambitions for net zero, wellbeing and inclusive economic development, tackling inequality and disadvantage, community involvement and ownership.

The programme provides local government with a share of £140M over 5 years to support and advance place-based capital investment and build on the strong partnership currently existing through the Regeneration Capital Grant Fund (RCGF). This breaks down per year as £38m in 2021/22; £33m in 2022/23; £23m in 2023/24; £23m in 2024/25; and £23m in 2025/26.

West Lothian Council's allocation over the 5-year period will be over £4.5m with £500,000 available for Community Wealth Building projects in 2022/23. The grant is for capital expenditure, and it is expected that expenditure will be met, or at least work or contracts signed or commenced, by 31st March 2023.

West Lothian Council's Approach

The allocations of the PBIP funding are for local authorities to decide, working collaboratively with local communities, business and third and public sectors, to support shared local plans and aspirations.

At **the Council Executive on 8 February 2022**, it was agreed that £500,000 would be allocated for Community Wealth Building projects, and that an applications-based approach would be used. ([link to report and minutes here](#))

This approach meets the requirements of the PBIP, will allow a strategic approach to be taken over the 5-year period and will also support the council to progress this key policy agenda.

The following sections provide an overview of Community Wealth Building.

Community Wealth Building

Community Wealth Building is an approach that is gaining traction across Scotland and is currently being explored in West Lothian. It aims to tackle the challenges of rising inequality by placing a greater degree of control and wealth into the hands of local people, communities, businesses and organisations. It promotes working in partnership with communities and businesses to build a strong and resilient local economy which supports fair work, encourages local spend and uses land and property for the common good.

Community Wealth Building seeks to use the economic levers available to local authorities and other 'anchor institutions' such as the NHS, further and higher education institutions, larger private sector and third sector organisations, to support their local economies, ensuring that wealth is locally retained and benefits local people. These locally rooted anchor institutions can exert their influence to impact upon economic, social, and environmental priorities, generating community benefits and wealth.

There are five principles for Community Wealth Building:

- **Plural ownership of the economy**
Developing different types of ownership approaches such as; co-operatives, locally owned or socially minded enterprises, etc.
- **Making financial power work for local places**
Increasing flows of investment within local economies. Local authority pension funds are encouraged to redirect investment from global markets to local schemes and community owned banks and credit unions are supported to grow.
- **Fair employment and just labour markets**
Working within large anchor institutions to encourage them to pay the living wage, adopt inclusive employment practices, recruit from lower income areas, build secure progression routes for workers and ensure stable employment contracts and reliable hours.
- **Progressive procurement of goods and services**
Developing a dense supply chain of local enterprises, SMEs, employee-owned businesses, social enterprises, co-operatives and other forms of socially rooted business, which can provide goods and services to the large local anchor institutions and are supported to bid in for local contracts.

- **Socially productive use of land and property**

Ensuring that equitable forms of ownership, management and development of local assets are developed, ensuring that any financial gain is harnessed by local people and communities.

The application should be for a capital project that addresses one or more of these themes. There are a number of examples of capital projects being delivered in other areas across Scotland to deliver Community Wealth Building, and these include:

- projects to tackle under-utilised and derelict land and buildings,
- using land and property assets to help develop low carbon and renewable energy schemes and networks,
- unlocking assets to develop community enterprise hubs for small businesses and social enterprises,
- developing progressive and productive use of land and property (e.g. for Food Farm – providing employment and training opportunities and food production; tree planting), and
- developing transport models.

1. APPLICATION PROCESS

1.1 Eligibility

The application process is open to local community organisations, public sector (including council services), other community planning partner organisations and private sector.

Applications must be for capital projects that contribute to the delivery of Community Wealth Building, addressing at least one or more of the 5 principles as identified above (in Section 4).

1.2 Funding Available

Projects must be of significant value and be ready to implement. They are expected to have a value of £100,000 or above. There will be no restriction placed on the number of application bids submitted. Given the minimum project value, and limited size of overall fund, applicants are requested to be realistic with their applications and combined value of grant requests.

It must be clearly demonstrated that significant expenditure will be incurred by the particular individual project to allow for PBIP funds to be drawn down in full in the 2022-23 financial year.

In order to satisfy this, it is expected that work being supported by PBIP funds would be well underway or at the very minimum have a full procurement and legally binding contract in place and signed. Priority will be given to those projects that demonstrate that the PBIP funded works will meet prescribed 31 March 2023 timelines.

Please note where a project is successful in receiving a recommendation and offer of grant award, this must take place in line with the approved profile. There is no facility to carry over grant into subsequent financial years. Failure to meet the timescales in the offer of grant may result in any offer of grant being withdrawn.

1.3 Consortium Bids

Projects submitted on behalf on a consortium or partnership must have a lead body on behalf of a consortium of partners. The Lead body as applicant must evidence that partners have agreed the application and are signed up to the delivery of it if successful, for example a letter of support.

APPLICATION FORM AND TIMESCALE

The deadline for application along with any supporting information is

5PM on FRIDAY 22nd APRIL 2022

The application form can be downloaded from the West Lothian Council website where there this accompanying guidance for applicants has been published. A separate application form should be completed for each project. There is no requirement for hand signed or hard copies.

[INSERT LINK TO APPLICATION FORM]

The application form should be completed and emailed on to:

CommunityWealthBuilding@westlothian.gov.uk

If you are unable to submit an electronic copy please contact us as soon as possible to discuss.

1.4 Process Points of Contact

Applicants will be contacted at multiple points throughout the application process to provide support and updates on the status of their application.

Between the launch and closure of applications, applicants will have 4-weeks of the Support Phase in which they may contact officers for support and further guidance with their application. Officers recognise the importance in supporting applicants to feel confident in their application and the application process before applications close.

During the Vetting & Feedback Phase, applicants will be contacted with an update on the suitability of their application, and whether it will be considered by the assessment panel. Throughout this 2-week phase, applicants may also be approached to discuss aspects of their application in more depth (e.g. meeting with Council contacts in planning, asset management, building services, procurement, etc.). Following this phase, unsuccessful applicants will be contacted with feedback.

After the Panel Meeting, the lead contact for each recommended application will be notified that they have been recommended for approval before Council Executive and will be updated in due course.

ASSESSMENT PROCESS

The project assessment process will consider all applications in terms of their overall viability. For example, this may include provision of a detailed business plan for your project. The Head of Planning, Economic Development and Regeneration has delegated authority for assessing applications, with recommendations being taken to Council Executive for decision. Successful applicants will be made aware as soon as possible afterwards.

SUCCESSFUL APPLICATIONS

If successful, please note that monies will only be released on receiving evidence that contracts are in place and any offer of grant will be provisional on the basis of this being received and that West Lothian Council is satisfied with what has been provided.

Please note that in the event of an application being successful, it may be recommended for a level of grant other than that requested, in order to ensure all eligibility criteria are met or to fully utilise the overall PBIP fund. This would of course be subject to discussion with individual applicants and organisations, particularly in relation to viability.

SUPPORT AND ADVICE ON YOUR APPLICATION

Officers recognise the importance in supporting applicants to feel confident in their application and the application process before applications close. If you have any questions with regards to this guidance, the application form and/or the process please contact the Community Wealth Building Team at:

CommunityWealthBuilding@westlothian.gov.uk

Appendix 1

Additional Guidance on Completing the Application Form:

Project Start Date: This must be after the date any funding offer is made and you sign off any conditions of grant but before the 24th June 2022. The signing of a formal contract by the 31 March 2023 will be considered appropriate even if physical work commences after that date, but would be expected to commence soon thereafter.

Project Completion Date: Project completion should be realistic and applicants will be required to provide monitoring reports throughout the funding period and delivery phase, and through to practical completion. These must demonstrate the ongoing viability of the project.

Project Costs: Individual projects are expected to have a minimum value of £100,000 or more, and you may apply for 100% of the total eligible project costs. Please note however, that leverage will be considered as part of the PBIP assessment of applications, in terms of either contribution to a wider programme or within the project itself.

Please provide the total eligible spend on the specific PBIP activity to which grant will contribute, indicating amounts covered by PBIP and any other funding, grant or loan investment that will contribute to the expenditure of the project.

Grant awards must relate to spend actually incurred or legally committed. PBIP project leads will be required to show that expenditure figures are consistent with project start and completion dates, and shall provide sufficient detail within project summary regarding the nature of costs that will actually be incurred and specifically those to which PBIP will contribute.

Grant cannot be claimed for costs incurred prior to the conditions of grant being signed off.

Please provide a detailed breakdown of costs. Additional information on any other costs, e.g. wider programme activities, should only be included within the project description. Include detail on expenditure beyond the PBIP (2022-23) funding period where appropriate. Please provide additional information within the project description where the project will be incurring expenditure beyond the period that the grant has been requested for.

Match Funding: Where you are not requesting 100% funding but are match funding the project please provide detail of other sources of funding, grant or loan investment that will contribute to the expenditure of the project. This should include the source and confirmation that this is in place or the date that you expect it to be confirmed in not.

Please specify if any additional funding for the project has already been secured, or if you are in discussions with funders to discuss eligibility. You must be able to evidence that this funding is in place by 22 April 2022 or earlier.

Project Contact: Please ensure that the project proposal is submitted by an appropriate official from your organisation and that this individual is available to respond quickly to information requests. If possible, please include details of a secondary contact.

Legal Requirements: 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.

Community Wealth Building Principles: Projects must address at least one of the five principles of Community Wealth Building. Further information on these principles is provided

in Section 3 of this guidance, and applicants are encouraged to seek advice and support with their applications by contacting the Community Wealth Building Team. Please also demonstrate in the project description how the capital project will support delivery of Community Wealth Building.

Please use sub headings and bullet points as this makes it easier for the reader assessing your application to quickly understand your project.

Project Proposal Summary: Please aim to keep your proposal summary short and concise, with use of bullet points where appropriate, and provide clarity what the project will deliver. Please note that any information beyond the 500-word limit is unlikely to be considered in application determination.

Please ensure that you provide responses to each of the following (you might find it useful to use these as sub-headings in your application):

- What will the project actually deliver?
- Brief outline of why this project is being undertaken and how it has evolved.
- Timescales, objectives, target groups, geographical coverage, partnership, community involvement.
- Any other financial contributions and timescales for securing other funding.
- Demonstration of how this project will benefit disadvantaged communities, as well as economic, social and physical regeneration outcomes.
- Demonstration of how the project is of strategic value and supports delivery on at least one of the five principles of Community Wealth Building.
- Demonstration of how the project will contribute to wider net zero emissions targets.
- Any other potential wider local impact not covered elsewhere in the application.

**West Lothian Council
Economic Development & Regeneration
8 February 2022**

PLACE BASED INVESTMENT PROGRAMME (PBIP) 2022-23

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 FRIDAY 22nd APRIL 2022**.

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 2023.

1. Applicant Information

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)	

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

If voluntary organisation, charity, CIC, Ltd. by guarantee, SCIO, unincorporated association etc. please select documents attached:	Please select
Constitution or articles of Memorandum	<input type="checkbox"/>
Latest audited accounts	<input type="checkbox"/>
List of current Board members	<input type="checkbox"/>

2. Costs, Timeline & Legal

Project Title	
Start Date	
Completion Date	

Project Costs:	2022/2023
PBIP Costs to which grant will contribute	
Costs funded by other committed sources	
Total	

Breakdown of Project Costs (source/funder)	2022/2023	Date funding confirmed or expected to be
Total		

Legal Requirements
<p>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.</p> <p>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.</p>
<div style="border: 1px solid black; height: 150px;"></div>

3. Project Details

Please refer to associated PBIP 2022-23 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.

Which of the 5 Principles of Community Wealth Building does your project address? (Please select all that apply)		
1.	Plural ownership of the economy	<input type="checkbox"/>
2.	Making financial power work for local places	<input type="checkbox"/>
3.	Fair employment and just labour practices	<input type="checkbox"/>
4.	Progressive procurement of goods and services	<input type="checkbox"/>
5.	Socially productive use of land and property	<input type="checkbox"/>

Community Wealth Building Principle(s)

Based on the box(es) you ticked above please detail how your capital project detailed below will deliver on the theme of Community Wealth Building.

Maximum 500 words (use bullet points / sub headings as appropriate. This helps with the assessment process)

Capital Project

Please detail what your capital project is and how it will deliver the outcomes you detail above in reference to Community Wealth Building themes you have identified.

Maximum 500 words (use bullet points / sub headings as appropriate. This helps with the assessment process)

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.

Privacy Notice

Place Based Investment Programme (PBIP) 2022-23

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 2022-23
 - Memorandum of Association or Constitution
 - Bank Statements / Bank Details
 - Invoices
 - Payslips

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Providing accurate information

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<input type="checkbox"/>	Contact you to pass on information that may be relevant to you.
<input type="checkbox"/>	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 Community Wealth Building Team:

CommunityWealthBuilding@westlothian.gov.uk

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

CommunityWealthBuilding@westlothian.gov.uk

PLACE BASED INVESTMENT PROGRAMME (PBIP) 2022-23

WEST LoTHIAN TOWN CENTRE CAPITAL FUND

GUIDANCE FOR APPLICANTS

INTRODUCTION

This guidance sets out the criteria for the fund to help applicants prepare and submit their applications for the West Lothian Town Centre Capital Fund 2022-23, that forms one of the two strands of the Place Based Investment Programme (PBIP) in 2022-23, the other being the Community Wealth Building strand.

It covers the background to the West Lothian Town Centre Capital Fund 2022-23 and its PBIP context, the application process, eligible organisations and projects.

**Note that the deadline for receipt of completed application submissions is
5PM on FRIDAY 22nd APRIL 2022.**

BACKGROUND

The Place Based Investment Programme (PBIP) was announced by the Scottish Government in May 2021. The main objectives of the PBIP include:

- to link and align place-based initiatives and establish a coherent local framework to implement the Place Principle;
- to support place policy ambitions such as town centre revitalisation, community led regeneration, 20-minute neighbourhoods and Community Wealth Building;
- to ensure that all place-based investments are shaped by the needs and aspirations of local communities;
- to accelerate ambitions for net zero, wellbeing and inclusive economic development, tackling inequality and disadvantage, community involvement and ownership.

The programme provides local government with a share of £140million over 5 years to support and advance place-based capital investment and build on the strong partnership currently existing through the Regeneration Capital Grant Fund (RCGF). This breaks down per year as £38m in 2021/22; £33m in 2022/23; £23m in 2023/24; £23m in 2024/25; and £23m in 2025/26.

West Lothian Council's allocation over the 5-year period will be over £4.5m. In year two of the fund 2022/23 it is expected that around £1,000,000 will be available. The grant is for capital expenditure, and it is expected that expenditure will be met, or at least work or contracts signed or commenced, by 31 March 2023.

WEST LoTHIAN COUNCIL'S APPROACH

At the Council Executive on 8 February 2022 it was agreed that an application-based approach would again be used in 2022-23 with the funding split between two funding streams:

1. West Lothian Town Centre Capital Fund 2022-23 (£500,000), and
2. Community Wealth Building (£500,000)

This approach in 2022-23 meets the requirements of the PBIP, will continue to allow a strategic approach to be taken and will also support the council to progress these key policy agendas for our local communities.

This guidance relates solely to the West Lothian Town Centre Capital Fund 2022-23, with separate application process and guidance being issued for the Community Wealth Building Place Based Investment Programme 2022-23.

The funding (subject to budget confirmation) is being made available along similar lines to the earlier West Lothian Town Centre Capital Funds in 2019-20 and 2020-21. As such the grant will be available to each community with 1,000 people or more, 50% of funding based on the number of towns (i.e. an equal split) and 50% based on the scale of population. The allocation to the 23 communities is set out in Appendix 2 below.

APPLICATION PROCESS

1.1 Eligibility

The application process is open to local community organisations, public sector (including council services), other community planning partner organisations and private sector. Applications must be for physical capital projects that contribute to the delivery of town centre and town improvements.

1.2 Funding Available

Projects must be supported by or have been identified by their local community, as well as be ready to implement. There is no minimum project value nor any restriction placed on the number of application bids submitted. However, given the limited size of the overall fund available, see appendix 2, applicants are requested to be realistic with their applications and combined value of grant requests.

It must be clearly demonstrated that significant expenditure will be incurred by the particular individual project to allow for the West Lothian Town Centre Capital Funds to be drawn down in full in the 2022-23 financial year.

In order to satisfy this, projects funded must be completed, underway or at the very minimum have a full procurement and legally binding contract in place and signed by 31 March 2023. Priority will be given to those projects that can demonstrate that they can meet these timelines.

Please note where a project is successful in receiving a recommendation and offer of grant award, this must take place in line with the approved profile. There is no facility to carry over grant into subsequent financial years. Failure to meet the timescales in the offer of grant may result in any offer of grant being withdrawn.

Where contracts are let by 31 March it is expected that work will be completed as soon as possible thereafter, certainly within six months.

1.3 Consortium Bids

Projects submitted on behalf of a consortium or partnership must have a lead body on behalf of a consortium of partners. The Lead body as applicant must evidence that partners have agreed the application and are signed up to the delivery of it if successful, for example a letter of support.

APPLICATION FORM AND TIMESCALE

The deadline for application along with any supporting information is:

5PM on FRIDAY 22nd APRIL 2022

The application form can be downloaded from the West Lothian Council website where this accompanying guidance for applicants has been published. A separate application form should be completed for each project. There is no requirement for hand signed or hard copies.

[INSERT LINK TO APPLICATION FORM]

The application form should be completed and emailed on to:

regenerationteam@westlothian.gov.uk

If you are unable to submit an electronic copy please contact us as soon as possible to discuss alternative approaches to submission.

ASSESSMENT PROCESS

The project assessment process will consider all applications in terms of their overall viability. For example, this may include provision of a detailed business plan for your project. The Head of Planning, Economic Development and Regeneration has delegated authority for assessing applications, with recommendations being taken to the relevant Local Area Committee in May/June for a decision. If there should be any unallocated funding from the Local Area Committee then this will be reported back to the Council Executive to determine how to spend this across the whole Council area. Successful applicants will be made aware as soon as possible afterwards.

SUCCESSFUL APPLICATIONS

If successful, please note that monies will only be released on receiving evidence that contracts are in place or charges are about to be incurred and any offer of grant will be provisional on the basis of this being received and that West Lothian Council is satisfied with that provided.

Please note that in the event of an application being successful, it may be recommended for a level of grant other than that requested, in order to ensure all eligibility criteria are met or to fully utilise the overall West Lothian Town Centre Capital Fund. This would of course be subject to discussion with individual applicants and organisations, particularly in relation to viability.

MAINTENANCE AND LIABILITY INSURANCE

If you are successful and delivering a project please be aware that unless otherwise agreed by West Lothian Council in advance, the expectation is that any ongoing related maintenance will be the responsibility of the applicant as well as any public liability insurance that may be required depending on the nature of your project.

SUPPORT AND ADVICE ON YOUR APPLICATION

Appendix 1 sets out Additional Guidance on Completing the Application Form that should help you complete the application form. **However, before applying you are strongly advised to contact the relevant Ward Officer from Economic Development and Regeneration (see table below) or email the team mailbox at (RegenerationTeam@westlothian.gov.uk) to discuss your project in more detail in the first instance.** This will be important both in

terms of the eligibility of your project but also to identify key contacts that may be vital to the delivery of your work. For example, to identify planning related matters, leases, land ownership, roads/signage matters etc. as well as the ongoing maintenance and insurance matters that are likely to apply.

Economic Development and Regeneration Officer contact:

Ward 1 Linlithgow Stewart Ness, stewart.ness@westlothian.gov.uk , Tel. 07717 865225
Ward 2 Broxburn Uphall and Winchburgh Stewart Ness, stewart.ness@westlothian.gov.uk , Tel. 07717 865225 For Winchburgh, contact Douglas Grierson, douglas.grierson@westlothian.gov.uk ; Tel. 07500 816852
Ward 3 Livingston North Scott McKillop, scott.mckillop@westlothian.gov.uk ; Tel. 07500 816862
Ward 4 Livingston South Lesley Keirnan, lesley.keirnan@westlothian.gov.uk ; Tel. 07771 980037
Ward 5 East Livingston and East Calder Lesley Keirnan, lesley.keirnan@westlothian.gov.uk , Tel. 07771 980037
Ward 6 Fauldhouse and the Breich Valley Douglas Benson, douglas.benson@westlothian.gov.uk , Tel.07769 877145
Ward 7 Whitburn and Blackburn Scott McKillop, scott.mckillop@westlothian.gov.uk ; Tel. 07500 816862 For Blackburn, contact Michelle Kirkbright, michelle.kirkbright@westlothian.gov.uk , Tel. 07500816855
Ward 8 Bathgate Nairn Pearson, nairn.pearson@westlothian.gov.uk ; Tel. 07917 263587
Ward 9 Armadale and Blackridge Michelle Kirkbright, michelle.kirkbright@westlothian.gov.uk ; Tel. 07500 816855

Appendix 1

Additional Guidance on Completing the Application Form:

Project Contact: Please ensure that the project proposal and application is duly submitted by an appropriate official from your organisation and that this individual is available to respond quickly to information requests.

Project Start Date: This must be after the date any funding offer is made and you sign off any conditions of grant but before and the **31 March 2023**. The signing of a formal contract by the 31 March will be considered appropriate even if physical work commences after that date, but would be expected to commence soon thereafter and be completed as soon as possible, within six months would be the expectation.

Project End Date: Project completion (end) should be realistic and applicants will be required to provide monitoring reports on completion, or at any point throughout the funding period requested by West Lothian Council. This will include financial evidence such as receipts and invoices along with bank statements showing payment. Failure to do so when requested is likely to mean repayment of the grant will be requested.

Pre-Application Discussion: It is strongly encouraged that applicants engage in pre-application discussions with relevant Council officer as outlined in the guidance. This will be important both in terms of the eligibility of your project but also to identify key contacts that may be vital to the delivery of your work. For example, to identify planning related matters, leases where relevant, roads/signage matters etc. as well as the ongoing maintenance and insurance matters that are likely to apply.

Project Description: Describe fully the planned project for which funding is being sought, typically giving consideration to information such as:

- What will the project actually deliver.
- Brief outline of why this project is being undertaken and how it has evolved.
- Timescales, objectives, target groups, geographical coverage, partnership, community involvement; and
- Any other financial contributions and timescales for securing other funding.

Project Outcomes: Outline what your capital project will deliver in line with funding outcome. It may be helpful to use bullet points and sub headings as appropriate, as this makes it easier for the reader assessing your application to quickly understand your project and its deliverables.

- Demonstration of how this project will benefit disadvantaged communities, as well as economic, social and physical regeneration outcomes.
- Demonstration of how the project is of strategic value and supports delivery against the principles of the wider Place Based Investment programme.
- Demonstration of how the project will contribute to wider net zero emissions targets.
- Any other potential wider local impact not noted elsewhere in the application

Project Costs: Individual projects are not expected to have a minimum value, and you may apply for 100% of the total eligible project costs. Please note however, that leverage may be

considered as part of the assessment of applications, in terms of either contribution to a wider programme or within the project itself.

Please provide the total eligible spend on the specific activity to which grant will contribute, indicating amounts covered by proposed funds and any other funding, grant or loan investment that will contribute to the expenditure of the project.

Grant awards must relate to spend actually incurred or legally committed after the date of award. Project leads will be required to show that expenditure figures are consistent with project start and end/completion dates, and shall provide sufficient detail within project summary regarding the nature of costs that will actually be incurred and specifically those to which secured funds will contribute. **Grant cannot be claimed for costs incurred prior to the conditions of grant being signed off.**

Please provide a detailed breakdown of costs. Additional information on any other costs, e.g. wider activities, should only be included within the project description. Include detail on expenditure beyond the 2022-23 funding period where appropriate. Please provide additional information within the project description where the project will be incurring expenditure beyond the period in which grant has been requested.

Additional Funding: Where you are not requesting 100% funding support of the project please provide detail of other sources of funding that will contribute to the expenditure of the project. This should include the source and confirmation that this is in place or the date that you expect it to be confirmed in not.

Please specify if any additional funding for the project has already been secured, or if you are in discussions with funders to discuss eligibility. You must be able to evidence that this funding is in place by 31 March 2023 or earlier.

Project Management and Legal Requirements: 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. Description should also be provided as to how the project will be managed and delivered, and this should include a commitment to completing and returning relevant project monitoring information, as specified in guidance.

During delivery and on completion you need to be aware that, unless otherwise agreed with West Lothian Council, any ongoing related maintenance will be the responsibility of the applicant as well as any public liability insurance that may be required depending on the nature of your project.

APPENDIX 2

Allocation of Grant with settlements more than 1000 in West Lothian

Settlement	Population	Fixed Allocation	Population Allocation	Total Amount Awarded
		£	£	£
Livingston	54,516	10,000	83908	93,908
Bathgate	23,559	10,000	36260	46,260
Linlithgow	13,862	10,000	21336	31,336
Armadales	12,021	10,000	18500	28,500
Whitburn	11,805	10,000	18170	28,170
Broxburn	10,970	10,000	16884	26,884
Uphall	4,687	10,000	7214	17,214
Blackburn	5,775	10,000	8889	18,889
East Calder	5,733	10,000	8824	18,824
Fauldhouse	4,804	10,000	7394	17,394
Winchburgh	3,758	10,000	5784	15,784
Midcalder	3,351	10,000	5158	15,158
West Calder	3,152	10,000	4851	14,851
Kirknewton	2,598	10,000	3999	13,999
Polbeth	2,301	10,000	3542	13,542
Blackridge	2,074	10,000	3192	13,192
Addiebrowhill	1,991	10,000	3064	13,064
Stoneyburn	1,982	10,000	3051	13,051
Pumphreston	1,667	10,000	2566	12,566
East Whitburn	1,344	10,000	2069	12,069
Seafeld	1,334	10,000	2053	12,053
Uphall Station	1,073	10,000	1651	11,651
Greenrigg	1,066	10,000	1641	11,641
Total	175,423	230,000	270,000	500,000

Note that the fixed amount will stay the same however the variable amount based on population maybe subject to change when actual budget is received from Scottish Government.

Livingston

<u>Area</u>	<u>Population</u>	<u>Amount Awarded</u>
Livingston Elburn	8,211	14144
Livingston Craigshill	7,057	12156
Livingston Dedridge	6,808	11727
Livingston Murieston / Bankton	5,315	9155
Livingston Carmondean	5,170	8905

Livingston Ladywell	5,024	8654
Livingston Deans	4,234	7293
Livingston Knightsridge	3,945	6796
Livingston Howden	3,489	6010
Livingston Village / Kirkton	2,958	5095
Livingston Bellsquarry / Adamrae	2,305	3973
	54,516	<u>93908</u>

Based on 2017 Population figures

**West Lothian Council
Economic Development & Regeneration
8 February 2022**

PLACE BASED INVESTMENT PROGRAMME (PBIP) 2022-23

WEST LOTHIAN – TOWN CENTRE CAPITAL FUND

APPLICATION FORM

Completed project application forms must be submitted to West Lothian Council before the publicised deadline of **5 PM on FRIDAY 22nd APRIL 2022**.

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 31 March 2023. It is strongly advised that applicants discuss their proposals with Council officers prior to making any application submission.

1. Applicant Organisation

Organisation Name	
Contact Person and Position	
Address	
Telephone Number	
Email Address	
Type of organisation (public sector, private sector, voluntary organisation, charity, SCIO, etc) If charity then please include charity number:	
What are the main activities of your organisation? (please answer in no more than 100 words)	

Do you have an equal opportunities policy or statement? If yes please provide a copy	Yes / No
Does your organisation take account of equality issues around age, disability, gender, race, religion or belief?	Yes / No

2. Project Details

Council Ward	
Project Title	
Project Location	
Project Start Date	
Project End Date	

<p>Pre-Application Discussion</p> <p>Have you made any pre-application enquiries or discussed your proposal with Council officers? We strongly encourage you to liaise with relevant officer(s) as outlined in the accompanying guidance. What was the basis and outcome of any discussion?</p>

<p>Project Description</p> <p>Describe fully the project for which grant is being sought (background and context of the project, description of works). Is this project work linked to an existing project? If this application is from a WLC service area, is the project supported by the community.</p>

Evidence of Need

What evidence is there that your project is needed? It is important to show that you have identified the need for your project, e.g. letters of support, or local survey, see guidance for examples of how you can evidence this.

Project Outcomes

Describe what your capital project will deliver in line with funding outcomes (use bullet points and sub headings as appropriate, to help with assessment process).

Partners involved

(other local organisations you are working with)

3. Project Costs

Total Project Cost	
Amount of Funding being requested from West Lothian Town Centre Capital Fund 2022-23	

Expenditure Item	Total Cost	WLTCCF Cost

If the total project cost is greater than the funding applied for please then detail where the source of this additional funding is generated from (i.e. WLC, Lottery etc.)

Please confirm whether this funding is approved and in place or the date that you expect this to be confirmed.

Funding Source (i.e. WLC, Lottery)	Approved and in place	Date to be confirmed

Project Management and 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

Project Management

Describe how your project will be managed and administered, including for example design and plans, procurements and implementation, public liability etc.

Maintenance and Insurance

Have you considered and understand the ongoing maintenance and public liability matters?

Monitoring and Finance

Please note that part of any grant award there is a requirement to provide monitoring and evidence of financial spend (in general copies of invoices and bank statements showing spend etc) on request failure to do so may mean the grant being repaid).

Supporting Documentation Check List	Please Indicate (x)
Constitution or Articles and Memorandum	<input type="checkbox"/>
Committee Members or Directors List	<input type="checkbox"/>
Bank Statements - Dated within the last 3 months	<input type="checkbox"/>
Annual Accounts	<input type="checkbox"/>

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- Copies of organisation documents;
 - List of committee members/directors list
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<https://intranet.westlothian.gov.uk/article/36236/General-Data-Protection-Regulation-GDPR>

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<p>I consent to West Lothian Council processing my personal data for the purposes of:</p>	
<input type="checkbox"/>	Application to the West Lothian Town Centre Capital Fund 2022/23 and the monitoring of the grant if awarded.
<input type="checkbox"/>	To provide you with updates on the progress of your application.
<input type="checkbox"/>	Contact you to pass on information that may be relevant to you.
<input type="checkbox"/>	Contact you for feedback on quality of services provided to you.
Name	
Position	
Organisation	
Date	

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RegenerationTeam@westlothian.gov.uk