

Title: DMC Funding Bid Process Review

Information/Discussion Report – Discussion

Recommendations: The DMC is asked to note the report and the proposed revised bidding process, monitoring and overall management of DMC budget.

Report Summary: This report provides an update on the review of the process for bidding, management and monitoring of the DMC budget proposed for adoption.

1. Background

- 1.1 At the June round of DMC meetings members were informed of plans afoot in relation to DMC budget, the application process and management of said budget.
- 1.2 It was confirmed then, the administration of the DMC budget and application process would be transferred from Landlord Services to the Tenant Participation (TP) team, which, presented a good opportunity for a review.
- 1.3 The review also responds to feedback from DMCs about the bidding process and a range of challenges expediting some bids.
- 1.4 Moreover, the bidding process was last reviewed almost 5yrs ago, and changes to Housing Management and Repairs and Improvements can be built into the process.
- 1.5 Through the review officers working together with DMC chairs sought to:
 - 1.5.1 Simplify the application form and guidance
 - 1.5.2 Introduce end to end monitoring of bids from expression of interest to project completion
 - 1.5.3 Have a named officer working with TRAs with application completion and provide advice
 - 1.5.4 Introduce evaluation of bids/project for the purpose equity, transparency and value for money (vfm) with analysis oof auditable records
 - 1.5.5 Offer set for individual process point
 - 1.5.6 A service standard agreement between DMCs and all involved officers
 - 1.5.7 Interface with linked teams i.e. Repairs, Capital Works, Landlord Services
- 1.6 DMC chairs and TP officers met at the end of July to discussion and review the proposed revised process. There was not a need wholesale change, but merely some tightening of area

- 1.7 Chairs welcomed what appears to be a clearer process, more concise guidance, revised application form, financial tracking and monitoring and the introduction of project evaluation post completion.
- 1.8 To support the Council's responsibility for Equality, Diversity & Inclusion (EDI) monitoring, and satisfy regulatory requirements for participation, the process now includes questions on project impact.

2. What's New

- 2.1 In keeping with point 1.6 above, the process has been split into its three separate parts (draft forms appendix).
 - 2.1.1 Bid guidance: this has been simplified and shorted to include a process map and a timeline for each task from bid enquiry to project completion.
 - 2.1.2 Bid application: there has been some change to the form to reflect the team responsible apart from which it remains recognisable.
 - 2.1.3 Project Evaluation: to satisfy growing requirements for accountability, transparency and value, officers will work with TRA reps to complete an evaluation of their project to measure the impact of DMC funding, who benefitted, objective being met, and difference made.
 - 2.1.4 DMC Budget Tracker: to assist with analysis of spend and monitoring of project delivery/deliverables, TP officers will work closely with Finance colleagues to maintain a live end to end tracker of all bids.
- 2.2 It is recognised the timeliness of the process may be a barrier to effective management of the budget. As such DMC chairs are agreeable to a quicker decision process for bids that fall under a set threshold.
- 2.3 Bids that meet the current criteria and are under £5K, on satisfactory review will be sent to the respective DMC chairs who will consult with members for a decision outside of a formal DMC meeting.
- 2.4 Each application subject to the threshold will be assessed on its own merits. However, it is anticipated such bids are likely to be for single purchase items or a few of the same (like tables or chairs) but still required to demonstrate value for money (vfm).
- 2.5 All officer bids regardless of value will be subject to a full DMC meeting for decision.
- 2.6 The TP Officer for respective districts will be the first point of contact for all bids, who will see the process through to completion including the evaluation.
- 2.7 To support wealth retention reps/TRAs are encouraged to secure quotations from a local provider where applicable

3. What has not Changed

- 3.1 Applications must be made no less than 20 working days before the next scheduled DMC meeting to be consider at that meeting. Reps are encouraged to make bids as early as possible to allow more time for prerequisite checks.

- 3.2 Bids can be submitted at any time throughout the year. If the 20 working criteria is not met the bid will be considered at the following DMC.
- 3.3 Bids must be made for projects or spends of communal benefit. See section 2 of the bid guidelines.
- 3.4 Bids remain subject to Section 20 consultation where there is a possible recharge to leaseholder. See section 6 of the bid guidelines.

Report Ends

APPENDIX 1

District Management Committee Funding Guidelines (updated August 2024)

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1 Introduction

- 1.1 Annually each District Management Committee (DMC) is given a budget to spend in their area
- 1.2 The budget is then allocated to TRAs and sometimes other groups, via a democratic process in they (DMC reps) apply and members vote during DMC meetings to accept or reject bids. Camden Council is committed to this process as it gives communities direct control over resources, allowing resident representatives to work with staff and members to make the budget decisions that best reflect local needs.
- 1.3 This process has been developed in line with Camden's Financial Regulations and Standing Orders.
- 1.4 In August of 2024, a decision was taken to transfer the responsibility for this process and management of the budget to the Tenant Participation team from Landlord Services.

2 What can residents bid for?

2.2 Examples of the types of projects funded:

- Environmental improvements to Camden Council estates or areas
- Improvement or alterations to tenants' halls or rooms
- Relevant equipment needed to support community activities in tenants' halls
- Gardening and recycling projects
- Landscape improvements
- Security enhancements (lighting etc.)
- TRA notice boards
- Sports, outdoor gym, play equipment, cycle racks
- Initiatives or improvements the DMC deem important enough to financially support

- DMCs can on occasion consider exceptional proposals that benefit many residents or multiple estates or across neighbourhood areas.

3 Who can bid for funding?

3.1 Those who can apply for funding include:

- Tenants' and Residents' Associations (TRAs) registered with DMCs
- TMOs that are registered with DMCs
- Council Officers on behalf of areas or estates not represented by TRAs

4 How to apply?

4.1 Resident reps should contact their TP officer in the first instant to discuss their plans and initiate the application if viable. Alternatively, reps can request an electronic copy from the TP team (email: tp@camden.gov.uk), download to complete at a later date or complete an online form [here](#).

4.2 The application process map is included at section 9 of the guidance document.

5 When can bids be made?

5.1 Bids may be submitted throughout the year and will be heard at the next scheduled DMC meeting. Applications should be lodged with the TP team at least 20 working days prior to the DMC in order for bids to be collated, assessed and dispatched with the DMC agenda papers. The dates of the DMCs are available on the Camden Council website and at the end of each DMC agenda. ***(Bids can be agreed subject to further consultation if required or additional information is requested by the DMC).***

6 Procurement

6.1 Procurement of all projects undertaken using DMC funding must be conducted in line with Camden's Financial Standing Orders and procurement process.

6.2 There should be at least one competitive quote from a Council approved supplier for project delivery. Quotes can be obtained from local or other external providers that can deliver to council standard ***(repair team will verify)***.

6.3 Comparative quotes are recommended for bids between £5,000 and £45,000 (incl VAT). Competitive bids will always be required in cases where Leaseholder Section 151 consultation is required *(formally section 20 of the Housing Act 1985)*.

6.4 Quotes may be in the form of a letter, email, print out from the internet or photocopy from advertisement and should be attached to the application. Where appropriate the contractor's company registration number should be provided. TRA's are encouraged to use local suppliers and providers where possible to encourage local wealth retention.

6.5 If leaseholder consultation is required, (under the terms of the Landlord and Tenant Act 1985 - Section 20, and in the Commonhold and Leasehold Reform Act 2002 - Section 151), TP officers will seek advice from the Council's Procurement Team and Leasehold Services Teams.

- 6.6 Leaseholders and/or Recognised Tenant Associations will be included, the process will be explained and relevant notices issued.

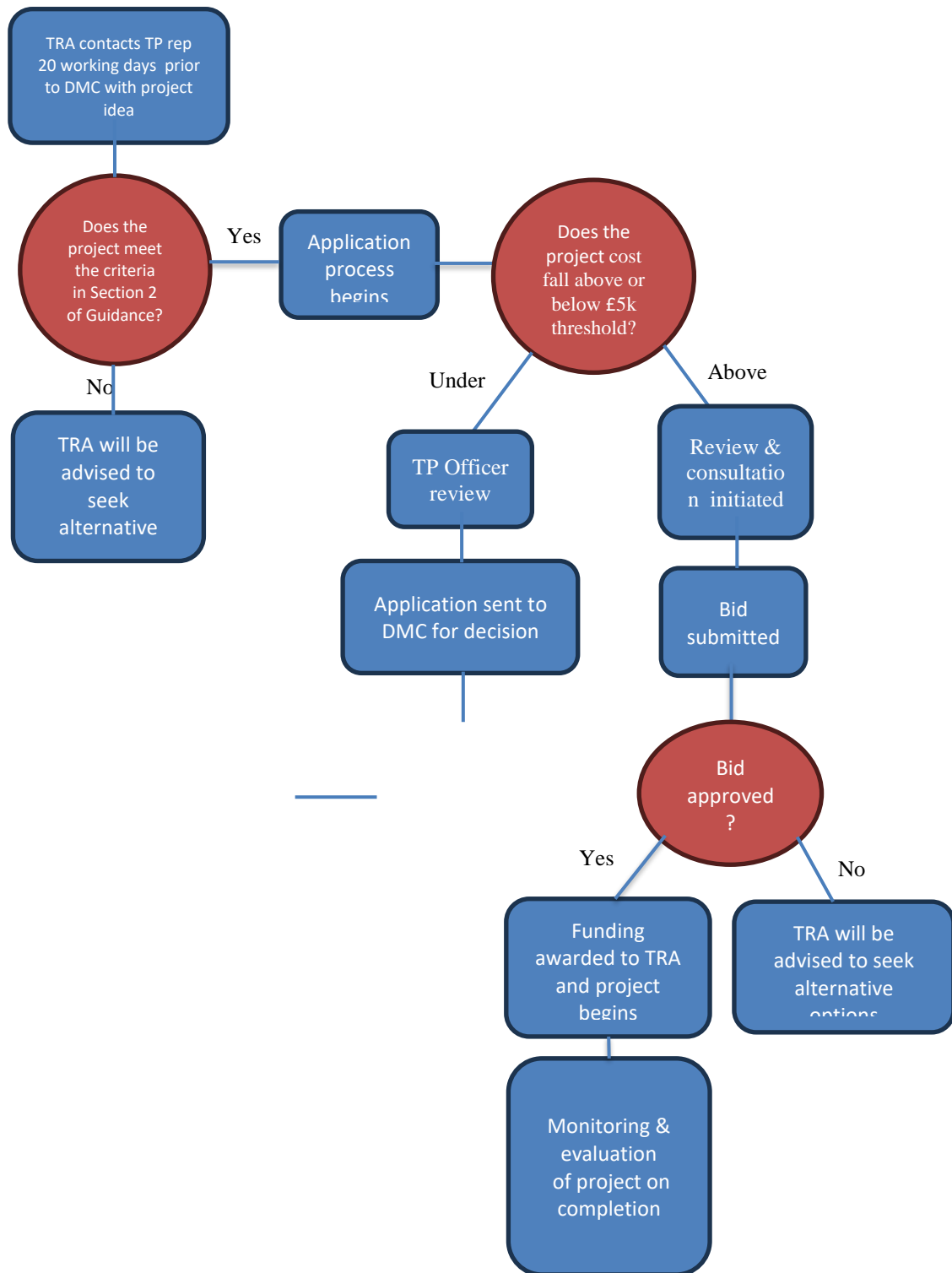
**7 The role of the Tenant Participation Team
Your TP Officer will;**

- 7.1 Work closely with the resident representatives to advise on the suitability of the proposed project, ensure that the majority of residents who have responded agree with the improvements / project and assess the possible maintenance implications of the proposal.
- 7.2 Prior to the application being made (if required) meet on site with resident representatives and a surveyor or repairs manager (if required) to discuss the feasibility, agree details about any improvement scheme and initiate request for quotes.
- 7.4 Advise the group on potential sources of alternative funding.
- 7.5 Be able to advise the group and if required support the consultation process and inform the group if Section 20 consultation or planning permission might be required at a later stage.
- 7.6 On project approval work with residents and relevant staff and contractors to facilitate successful delivery of the project.
- 7.7 Meet the TRA representatives and Surveyor (if required) on site on completion of the work to quality check.

**8. Role of the TRA and Financial Compliance
The TRA will;**

- 8.1 Ensure that there are no undeclared financial conflicts of interest with their bid: For example the employment or proposed commission of a company or business employing a family member or close associate of a TRA or DMC member in that District must be declared for transparency purposes.
- 8.2 Work with officers to complete and submit to DMC monitoring and evaluation report to include total cost, delivery, benefit and learning outcomes.

9. Application Process Map



10. Application Process Task Timeline

- 10.1 The table below list the key process tasks and the suggested target TP officers will work to keeping TRA reps updated of progress.
- 10.2 Every effort would be made to achieve these targets, however doing so would be subject to the complexity of the work required.
- 10.3 The targets below will apply to bids that are voted on at full DMC. Bids assess under the threshold limit should have a quicker decision.

Task	Action	Target
Application submitted	Officer acknowledges	Within 5 days of receipt
Review application	Officer assesses application	Within 10 days of receipt
Survey and/or quote	Officer makes request	Within 10 days of receipt
TRA updated	Officer gives TRA update	Within 15 days of receipt
DMC made aware of bid	Officer provides summary	Subject to call-over
Bid added to agenda	Officer submits bid to clerks	By reports submission deadline
Purchase Order/Payment	Officer raises PO/payment	Within 3 days of bid approval at DMC
Evaluation	Officer completes forms with TRA	Within 20 days of project completions
Budget monitoring & tracking	Officer to update budget tracker	Ongoing

APPENDIX 2

**London Borough of Camden
District Management Committee**

Funding Application Form

Name of Tenants and Residents Association or group																
DMC area																
Contact for application (email/phone)																
Name of Project																
Project Category (building works, communal improvement, H&S/Security, grounds mtn/garden,																
Description of project																
Why is the project needed and desired outcome?																
Equality Diversity & Inclusion (EDI)																
Will the project have a positive or negative impact on any of the protected characteristic groups below?																
sex	P	N	gender reassignment			P	N	disability	P	N	sexual orientation	P	N	Being pregnant	P	N
race	P	N	marital status	P	N	religion	P	N	age	P	N					
Funds held in TRA account																

Method of consultation			
Number of residents consulted			
Number of responses			
Summary of responses (those in favour and against)			
Council Officer Comments			
Estimated cost of project	Quote 1	Quote 2	Quote 3
Source of quote(s)			
Signed and dated			
Date submitted to DMC			

APPENDIX 3

**London Borough of Camden
District Management Committee**

Funding Project Evaluation Form
(to be completed by TP Team with the TRA)

Name of Tenants and Residents Association or group															
Name of Project															
Total of DMC funds awarded															
Application Reference Number and Purchase Order															
What was the project objective – was it achieved, if not what was the reason/s?															
What difference has the project made? (please evidenced – before and after pictures, residents feedback)															
Equality Diversity & Inclusion (EDI)															
Has the project had a positive or negative impact on any of the protected characteristic groups below?															
sex	P	N	gender reassignment		P	N	disability	P	N	sexual orientation	P	N	Being pregnant	P	N
race	P	N	marital status	P	N	religion	P	N	age	P	N				
Value for Money (vfm)															
Was the project completed as scheduled, if not what was the reason?															
What was the total cost (include any match or in-kind funds)															

<p>How would you describe the quality of the works or project delivery <i>(on a scale of 1-5, 1 being poor, 5 excellent)</i></p>	
<p>Why have you given that rating? <i>(please explain)</i></p>	
<p>Looking back at the process and outcome, is there anything that could have been done different or learning to consider?</p>	
<p>TRA Committee Comments</p>	
<p>Signed and dated</p>	
<p>Council Officer Comments</p>	
<p>Date and sign off</p>	