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| **Applicant Checklist**  Please complete the checklist (This is for applicants to ensure they have completed all requirements prior to submission and is not part of the assessment) | | | | |
| Does the project align with the objectives and outcomes of the SEP? | | | |  |
| Do the SMART objectives describe the aims of the project and link to the outcomes described in Section 9 of the SEP. | | | |  |
| Is it clear what the MCA is being asked to fund - Is everything clear, specific and easy to understand, e.g. acronyms explained and technical terminology avoided? | | | |  |
| Do you have an estimated cost, eg based on benchmark information? | | | |  |
| Have you included a risk allowance in Appendix A to deal with cost increase as the project develops? | | | |  |
| Have you sought initial Legal Advice on Subsidy Control? | | | |  |
| Have you included evidence of internal commitment to the project? eg Board Papers, Cabinet/committee decisions etc. | | | |  |
| Do you know what the Statutory and Planning requirements of your project are and have allowed time to completed them? | | | |  |
| Have you completed the appendix A templates? | | | |  |
| Have you appended the cost plan and Gantt chart? | | | |  |
| Have you appended relevant maps and plans or any other relevant background information for your project? | | | |  |
| Have you checked that the cost of the project is consistently reported across the business case? | | | |  |
| Have you identified the funding source(s) for your project? | | | |  |
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| ***Please Note: Guidance in blue italics is provided for information only. Overwrite with the relevant information to be provided as part of your application.*** | | | | | |
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| **1 - PROJECT DETAILS** | | | | | |
| **1.1 - PROJECT & APPLICANT’S INFORMATION** | | | | | |
| Project Name: | *[The official name of the project. Please provide (if applicable) the programme and/or work package names as well]* | | | | |
| Project Location, including Post Code and Local Authority Area: | *[Provide full details of the project location, including address, postcode and Local Authority area(s) - in addition please also append a site map/ plan]* | | | | |
| Applicant Organisation & Company Registration Number (if applicable): | *[The full (legal and official) name, and registration number (if applicable) of the applicant organisation – this is the organisation who will receive any funds]* | | | | |
| Type of organisation | |  |  | | --- | --- | | Public Sector |  | | Voluntary or Community Sector (VCS) |  | | Private Sector Company |  |  |  |  | | --- | --- | | Company Employee Numbers |  |   *For Private Sector, please provide details of Parent Company if appropriate* | | | | |
| Contact Name and Role: | *[Provide details of the project lead for this project within your organisation]* | | | | |
| Contact Address: | *[Address details for the project lead]* | | | | |
| Email: | *[E-mail address details for the project lead]* | | | | |
| Telephone: | *[Telephone number for the project lead]* | | | | |
| **Please provide the name of the Senior Responsible Owner and their position in the organisation** | | | | | |
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| Is your company a living wage employer? | | |  | | |
| Are all your subcontractors living wage employers? | | |  | | |
| **1.2 - FINANCIAL SUMMARY** | | | | | |
|  | Capital | Revenue | | | |
| A - MCA Funding Sought (£) | *[ Provide details of the type(s) and amount of MCA funding sought. If this project is seeking support from more than one MCA fund, please specify (if known)* |  | | | |
| B - Total Other Public Sector Investment (Non-MCA Funding) (£): | *[Provide details of total other public sector investment secured or anticipated]* |  | | | |
| C - Total Private Investment (£): | *[Provide details of total private investment secured or anticipated]* |  | | | |
| D - Total Cost (£):  D=A+B+C |  |  | | | |
|  | The MCA will determine the most suitable form of investment (this could be a loan, grant, an equity stake or other forms of investment or a combination thereof) and will communicate this to the lead applicant. | | | | |
| E - MCA as % of Total Project Investment  E= A/D |  |  | | | |
|  | **Please provide details of the funding stream(s) that this project is seeking support from (if known).** | | | | |
| Development Funding Sought | *[The MCA can release up to 14% of the total estimated project costs to develop the project fully.]* |  | | | |

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| **2 - PROJECT SUMMARY** |
| **2.1 – Tell us about the project**  *Please provide a summary description of your project and what you intend to achieve. Why are you looking to embark on this project? What do you want to achieve? What is the problem you want to address or what is the opportunity? What is the project about?* |
| *Brief description of the project – Approx. 200 words* |
| *What do you hope to achieve by delivering the project? (SMART objectives)*  *The project aims to deliver the following OUTPUTS;*   * *Number of homes ‘unlocked’ and started on site by XX (before March 2025)* * *Number of homes ‘unlocked’ and started on site by XX (after March 2025)* * *Hectares of land remediated by XX.*   *The project aims to deliver the following OUTCOMES:*   * *e.g Regeneration, place-making, supply of affordable homes, jobs, apprenticeships, green space, health and wellbeing outcomes* |

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| **3 – STRATEGIC ALIGNMENT** | | | |
| **3.1 – Using the table below, please set out which of the MCA’s Core Strategic Outcomes (Stronger, Fairer and Greener), as set out in the Strategic Economic Plan your project will contribute to.**  **Useful links:**  For details of the Strategic Economic Plan (SEP)  [**https://southyorkshire-ca.gov.uk/explore\_strategic-economic-plan**](https://southyorkshire-ca.gov.uk/explore_strategic-economic-plan) | | | |
| **Theme** | **Indicator** | **Outcome** | **Contribution from this Programme/Project**  e.g. increase in [outcome] of x [number/%] by y [year]. Please be specific as you possibly can be at this stage of the project. |
| **Stronger** – Achieve sustained, inclusive growth, underpinned by productivity gains that matches the UK average | **Productivity per hour worked** | A higher productivity workforce |  |
| **High growth business** | A larger proportion of high growth businesses |  |
| **Business density** | More businesses in the area, relative to population |  |
| **Higher-level occupations** | Higher proportion of employees in managerial, technical & professional occupations (SOC 1 – 3) |  |
| **Greener** – Drive forward environmental sustainability to achieve our net-zero carbon target by 2040 | **Flooding** | Flood risk demonstrably reduced compared to 2020 baseline |  |
| **Carbon emissions** | Reduced carbon emissions |  |
| **Car Usage** | Car usage and motor traffic falls, indicating mode shift and lower pollution due to transport. |  |
| **Fairer** – Unlock prosperity by eliminating the wage gap and other inequalities (particularly health) with South Yorkshire and between South Yorkshire and the national average and by improving standards of living for disadvantaged communities | **Economic inactivity** | Fewer people are economically inactive |  |
| **Wage levels** | A lower proportion of employees on low earnings |  |
| **Qualifications & skills** | A higher proportion of working-age population possess higher qualifications, indicating progression in education and employment. |  |
| **Personal Wellbeing** | Estimated levels of worthwhile, life satisfaction, happiness and anxiety are indicators of personal well-being. |  |

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| **4 – SYMCA SUPPORT REQUIRED** |
| **4.1 How can the South Yorkshire MCA support the delivery of the project?** |
| *If you know what support you need from the MCA, please state this here (include the funding programme if known). This includes any financial or in-kind support and when you will need this. For financial support, a range estimate will suffice at this stage.*  ***Please note that the MCA wishes to use its limited funding in a way that that creates a self-sustaining fund and will therefore usually seek a return for our investment.  Applicants are required to discuss and agree the broad outline of any financial investment you may be seeking with the relevant MCA Executive Officer, prior to submitting this form. [Grant would be the funding option of last resort*** |
| **5.2 Please provide details of any funding secured and/or details of other funders you are approaching.** |
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| **5.3 What additionality will MCA investment bring?** |
| *What would happen with MCA intervention that wouldn’t happen without it?*  *What would happen without MCA intervention?* |

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| **5 - CONSULTATION** | |
| **5.1 – Who have you consulted with about the project idea?** | |
| **Please insert South Yorkshire MCA** | ***Please insert name*** |
| **Local Authority** | ***Please insert name*** |
| **Other consultees, for example:** | |
| **Local community** |  |
| **Housing Association** |  |
| **Relevant businesses** |  |
| **Environment Agency** |  |
| **Planning Authority** |  |
| **Highway Authority** |  |
| ***Please insert others as appropriate*** |  |

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| **6 – TIMESCALES FOR DELIVERY** | |
| **6.1 – What is the preferred date that the project can commence delivery? If this is currently unknown, please set out your proposed next steps below.** | |
| *[Please advise the date and any dependencies]* | |
| **6.2 – If currently known, please outline the key milestones required to deliver the project and provide forecast dates for achievement.**  **[*e.g. complete outline design, secure all funding, procurement complete, statutory processes complete]*** | |
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| **7 – DEPENDENCIES** |
| **7.1 – Is the project linked to or dependent on any other project or activity, especially one the MCA may be involved in?** |
| *[Please advise if the delivery or success of the project is dependent on any other project or activity taking place]* |
| **7.2 – Are there any statutory processes required for you to deliver the project?** |
| *[Please advise if the project will require planning permission or other statutory approvals prior to commencement. If so, please provide more detail on progress and the forecast timescales for achievement?]* |

**Please attach any document(s) or provide links to reference material that support any of the information presented above.**

**Please return to**

[**BHF@southyorkshire-ca.gov.uk**](mailto:BHF@southyorkshire-ca.gov.uk)

**Document Sign Off**

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| **8 – DECLARATION AND SIGN OFF** | |
| *On signing the Project Mandate Form the project sponsoring organisation agrees to the following:*   1. *The South Yorkshire (SY) Mayoral Combined Authority (MCA) is a public body and is therefore subject to information/transparency laws and the Local Government Transparency Code 2015. This Project Mandate Form will be shared with the appropriate SYMCA Boards including the MCA. In line with legislation, papers to the MCA are published in advance and made publicly available. These papers will detail the applicant and summarise the Mandate Form in sufficient detail to allow the members to take an informed decision. At this point, under Local Government access to information provisions, the Mandate Form may have to be made available for inspection to any member of the public who requests it.*   *Once a project is admitted onto our programme pipeline, in line with MCA’s Assurance and Accountability Framework and Freedom of Information Act (FOI) Publication Project, the Mandate Form must be published on the applicant’s and the SYMCA website.*  *For this purpose, you may wish to also send a redacted copy stating any exemption or exception applied under FOI or Environmental Information Regulations. We will consider any requested redaction. Any comments received after publication are required to be reflected in SOBC, the OBC and FBC if the project progresses further. MCA will require evidence of this through the assurance process.*     1. *MCA support is not allocated to a project at this stage. The Project Mandate Form is the means by which the MCA can accept project ideas into the Programme Pipeline. Further project development and submission of SOBC, OBC and FBC or BJC in line with the Assurance Framework will be required.* 2. *To the best of your knowledge all the information provided in this Project Mandate Form is true and correct. You acknowledge that the information provided will inform any future contract should a decision be made to support the project.* 3. *You will comply with due diligence requirements appropriate to this project. This will be conducted by the SYMCA Executive Team and further details will be provided if the project progresses further.* | |
| **Person responsible for the application (Chief Executive or relevant Executive Director in your organisation)** | |
| Name: | Please |
| Role: |  |
| Date: |  |
| **Counter signatory – Director of Finance** | |
| Name: |  |
| Role: |  |
| Date: |  |

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| **Signature of the appropriate thematic Director in the SYMCA** | |
| Name: |  |
| Role: |  |
| Date: |  |

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| **For MCA Use Only** | |
| Programme/Project Reference Number: |  |
| Date Received/ Accepted: |  |
| Version Number: |  |
| Summary of Amendments:  (if applicable) |  |
| Resource implications for the MCA | *Key staff resources or functional team involvement required to deliver the project. These could be expert consultants (external) or internal functions (e.g. procurement team, HR, Tram Concession Manager, Active Travel team etc).* |