



«OPPORTUNITY_CONTACT_LINK_NAME»
«ACCOUNT_LEGAL_NAME»
«ACCOUNT_BILLINGSTREET»
«ACCOUNT_BILLINGCITY» «ACCOUNT_BILLINGPOSTALCODE»

25 January 2022

Dear «OPPORTUNITY_CONTACT_LINK_NAME»,

I am pleased to offer «ACCOUNT_LEGAL_NAME» a grant of £«OPPORTUNITY_AMOUNT_AWARDED» for the project set out in the attached project summary. The duration of the grant is «OPPORTUNITY_LENGTH_OF_PROJECT» months, starting on «OPPORTUNITY_PROJECT_START_DATE».

Please find enclosed a copy of the grant terms and conditions. Please note that the agreement must be electronically signed (on page 12) by either the Chair, Vice Chair or Treasurer. You can reassign the signer of the letter at the bottom of the email received. If you encounter any problems when signing the letter, please contact the Connect Fund Programme Officer, Alex Padilha (a.padilha@barrowcadbury.org.uk). When this, along with confirmation of the «ACCOUNT_LEGAL_NAME» banking details has been received, we will process the first payment.

I would like to take this opportunity to highlight some additional terms and condition of this grant, that is for «OPPORTUNITY_RECOMMENDED_TERMS_AND_CONDITIONS»

In awarding this grant, the Barrow Cadbury «OPPORTUNITY_TRUST_OR_FUND» wishes to support the work of your organisation. We will be in regular contact with you for the duration of the grant and hope that you will inform us of particular events or activities that we might be able to attend or promote for you.

We will periodically convene Connect Fund grant recipients, and ask that you commit to participate in this community to foster learning and collaboration across projects. This includes working with our research partner to enable us to provide guidance and recommendations to others in the market. We will send you progress report forms to be completed two weeks before the report deadline.

Yours sincerely,

Debbie Pippard
Director of Programmes
Encl. Grant offer pack

GRANT OFFER PACK

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1. Terms and conditions of grant

Definitions: in this letter “we”, “us” and “the «OPPORTUNITY_TRUST_OR_FUND»” refers to the Barrow Cadbury «OPPORTUNITY_TRUST_OR_FUND», “you” and “your” refers to the organisation receiving the grant to which this letter refers.

The following terms and conditions apply:

1. The «OPPORTUNITY_TRUST_OR_FUND»’s grant is to be spent in accordance with the project summary in Section 2 of this pack.
2. The grant is restricted and must be treated as such in your annual accounts. If the income of your organisation is less than £5 million, you must include the details of our grant, attributing it clearly to the «OPPORTUNITY_TRUST_OR_FUND» and its purpose, irrespective of the form of your accounts. You can do this in your Statement of Financial Activities (SOFA), the notes to the accounts or elsewhere, but for audit purposes we need to be able to trace the use of our grant in your accounts. Please ensure that whoever prepares your accounts is aware of this requirement.
3. If any part of the grant remains unused at the end of the funding period, you must inform the «OPPORTUNITY_TRUST_OR_FUND». The «OPPORTUNITY_TRUST_OR_FUND» will either require you to return the unspent portion of the grant, or agree with you how it is to be spent.
4. If you wish to accept this grant offer, you must send us, within one month of the date of this letter, one signed copy of this offer letter and of the attached project summary. The grant agreement will commence on receipt of your signed offer letter.
5. By returning the signed offer letter you are confirming that the project is ready to start on the date set out in the accompanying cover letter. If it seems likely that you cannot start the project within a month of this date, you must inform the «OPPORTUNITY_TRUST_OR_FUND» as soon as possible to discuss changes to the project plan.
6. During the period of the grant, you will comply with all relevant legislation including employment, health and safety, equality and data protection law. If you are a registered charity and/or company, you must also comply with the relevant legislation covering your legal structure. You must hold adequate employee and public liability insurance. If your project involves work with children, young people or vulnerable adults, you will take all reasonable steps to ensure their safety and have safeguarding procedures in place, including staff and volunteer supervision arrangements, background and Criminal Records Bureau checks.
7. If the grant includes funding for a new member of staff, you must inform us of the recruitment schedule and notify us when that member of staff is appointed or if

there is a delay in recruitment. Where your project proposal has stated that an individual or some person of a particular grade will be employed to deliver your project, you must ensure that that the work is carried out by a person of that grade or above. If there is any change to the personnel working on your project, you must notify us prior to the change.

8. If the grant is for research work, you must comply with the ethical standards relevant to your area of study. Please contact your grant manager if you need guidance on this. Where particular ethical considerations arise from research proposals, you must satisfy the «OPPORTUNITY_TRUST_OR_FUND» that appropriate consents have been obtained before your research begins.
9. Written agreement should be sought from the «OPPORTUNITY_TRUST_OR_FUND» in advance for any proposed changes to activities, budget or staffing that may significantly impact on your project. If anything occurs that might affect the cost, progress or date of completion of your project, including any additional funding obtained that was not disclosed at the time of application to the «OPPORTUNITY_TRUST_OR_FUND», you must inform us.
10. Payments are subject to conditions as outlined in the grant payment schedule in Section 3 of this pack. We will ask you for an expenditure update with each progress report. If you are significantly underspent, we will contact you to discuss rescheduling your payments.
11. This grant payment is made with funding from Access – The Foundation for Social Investment. Payments to grantees by the «OPPORTUNITY_TRUST_OR_FUND» are subject to the necessary funding from Access being available when payment falls due. The grantee agrees and accepts that payments of the grant can only be made to the extent that the «OPPORTUNITY_TRUST_OR_FUND» has available funds.
12. The «OPPORTUNITY_TRUST_OR_FUND» will require regular monitoring reports from you, as set out in the grant payment schedule. You will be contacted by us in advance of your reporting deadline. In addition to your regular monitoring reports, the «OPPORTUNITY_TRUST_OR_FUND» may from time to time need to see other information relating to the running of your project, which must be provided in a timely fashion.
13. You must send us a copy of your annual report and accounts for each financial year covering the period of your grant, once they have been approved by your Trustees. Your annual report must be compliant with any guidance provided by relevant registration bodies (for example the Charity Commission in the case of registered charities).
14. The Connect Fund should be acknowledged as the source of this grant in your published literature. Use of the Connect Fund's logo and any accompanying description of our work must be agreed in advance with us.

15. The «OPPORTUNITY_TRUST_OR_FUND» maintains the right to use any written or photographic materials provided by you. These will be credited to your organisation.
16. The «OPPORTUNITY_TRUST_OR_FUND» may withhold funds if you have unreasonably failed, after due warning, to comply with the terms and conditions of the grant. In these circumstances all or part of the grant payments will be withheld until such time as the matter is rectified.
17. The «OPPORTUNITY_TRUST_OR_FUND» reserves the right to withdraw the grant offer at any time if you breach any terms and conditions of the grant. Any outstanding payments at this time will be cancelled and the «OPPORTUNITY_TRUST_OR_FUND» may take steps to recover any monies not used in accordance with this agreement.
18. You may withdraw from the grant agreement at any time by written notice and as long as you agree to repay any unused grant that has been made by the «OPPORTUNITY_TRUST_OR_FUND».
19. The «OPPORTUNITY_TRUST_OR_FUND» considers that the funding arrangement covered by this letter relates to grant funding, and cannot take responsibility for any differing interpretations made by others. In particular, should VAT be deemed to be applicable, the amount of award quoted is deemed to be inclusive of any such VAT. If any of the grant is used to pay VAT and that VAT is subsequently recovered, you must immediately inform the «OPPORTUNITY_TRUST_OR_FUND», which will either require you to refund it, or agree with you how it is to be spent.

Conditions relating to the publication of reports and other documents

1. Where publications arise from funding provided by the «OPPORTUNITY_TRUST_OR_FUND», the following additional terms and conditions apply. You must:
 - a. where we wish it, give full acknowledgement to the «OPPORTUNITY_TRUST_OR_FUND», using our logo and wording to be agreed in advance with us.
 - b. provide us with a final draft report, with at least five working days' reading time, for comment. The «OPPORTUNITY_TRUST_OR_FUND» reserves the right to make suggestions about the content of any publication arising from our grant, to require changes if the publication does not meet the brief set out in this grant agreement and to refuse permission for acknowledgement of the «OPPORTUNITY_TRUST_OR_FUND»'s support and logo if the publication's content does not meet a standard judged to be acceptable by the «OPPORTUNITY_TRUST_OR_FUND».
 - c. send us at least 12 copies of any printed publication arising from work funded by the «OPPORTUNITY_TRUST_OR_FUND».

2. By signing this letter, you grant us the right and royalty-free licence to publish, reproduce, communicate and make available to the public, and to distribute and adapt any outputs of work funded by us in printed, electronic or any other medium in all languages throughout the world for the full legal term of copyright, and further to authorise third parties to do the same. Our rights under this clause include those activities concerned with editing, translating into languages other than English, converting to electronic formats, abridging and otherwise amending for the purposes of dissemination to as large an audience as possible.
3. Provided this agreement has not been terminated because of breach of obligation by you, your organisation has the right to publish the results of your project, provided the «OPPORTUNITY_TRUST_OR_FUND» is acknowledged as set out in paragraph 1 above. The «OPPORTUNITY_TRUST_OR_FUND» agrees that the following copyright notice shall appear on all copies of the published editions of the Project Report: ©«ACCOUNT_LEGAL_NAME».
4. Your organisation warrants to the «OPPORTUNITY_TRUST_OR_FUND» that:
 - a. where materials are created as part of the project, they are the original works of their author(s) and contain nothing defamatory or libellous;
 - b. where copyright and/or other intellectual property rights in the materials are not owned by you, you have all necessary consents and licences to use and to authorise the «OPPORTUNITY_TRUST_OR_FUND» to use the materials for the purposes contemplated by this agreement;
 - c. use of the materials by the «OPPORTUNITY_TRUST_OR_FUND» or by any third party with the consent of the «OPPORTUNITY_TRUST_OR_FUND» will not infringe the copyright or other intellectual property rights of any third party; and
 - d. you will ensure that no person asserts a moral right in relation to any material.

Additional terms and conditions (if any)

«OPPORTUNITY_RECOMMENDED_TERMS_AND_CONDIT»

2. Project summary

«ACCOUNT_LEGAL_NAME»: «OPPORTUNITY_PROJECT_TITLE»

Purpose of grant: «OPPORTUNITY_PURPOSE_OF_GRANT»

Project description: «OPPORTUNITY_DESCRIPTION»

{{OPPORTUNITY_PROJECT_DETAILS}}

Project evaluation: {{OPPORTUNITY_FRAMEWORK_FOR_EVALUATION}}

What our grant will pay for: «OPPORTUNITY_WHAT_OUR_GRANT_WILL_PAY_FOR»

3. Reporting and payment schedule

Payment Amount	Report Due Date	Progress Report Type	Scheduled Payment Date
{{TableStart:ReportData}}{{Payment_Amount \# Currency0}}	{{Progress_Report_Due_Date}}	{{Progress_report_type}} {{Bespoke_requirement}}	{{Payment_Schedule_Date}} {{TableEnd:ReportData}}

Please note that payments are conditional on meeting the terms and conditions outlined in this grant pack. We will send you a reminder and reporting template about two weeks before each report is due to be submitted. Please return your report by the deadline to allow prompt payment.

The text of our standard report forms can be found at:
<https://www.connectfund.org.uk/resources-for-granholders/>

4. Communications

This section is aimed at your communications manager (or project lead if you do not have a communications manager) and provides you with additional information about the way Barrow Cadbury works, and how its work is part of a broader, ambitious vision for social change. It outlines what our communications expectations are around publication drafts and dissemination, events, blogs, media coverage, launches and social media. We hope the information will be useful to you.

Finding out more about Barrow Cadbury's way of working

If you haven't already seen it, please take a look at our animation:

https://youtu.be/l2vW_2oLYyk. This will give you a very good idea of the way we work, what we are looking to achieve by supporting you, the sort of grant-maker we are, and how the work you are doing fits into the overall 'jigsaw' of structural change. We recommend you watch it before you start the work we are supporting you with. Although you may already be familiar with Barrow Cadbury and our work we hope you will still enjoy watching it (and you may find out something new).

Disseminating your work

- Whilst your grant manager will be in touch with you on a regular basis providing support and requesting reports and updates, it would also be useful if you could keep our Communications Manager, Diana Ruthven (d.ruthven@barrowcadbury.org.uk), informed of any communications or dissemination activities connected with your grant.
- For any kind of launch (soft or hard) please let Diana have the following so that we can disseminate your work in our e-newsletter and on other platforms:
 - Proposed launch date (as far in advance as possible)
 - Any communications/dissemination plans, including a Twitter hashtag if there is one.
 - A copy of your press release.
 - Links to any blogs posted on your website or content for a blog you would like us to post on the Connect Fund website.
 - It is always useful for us to know about your launch plans, so we can avoid date clashes, maybe attend your launch, cross-post blogs and retweet, as well as put news items on our website and think about other ways to disseminate your work.

Reports

- It is a legal requirement that you add your charity number (if applicable) to any material printed by your organisation. Please add the Trust's charity number (1115476) or Fund's company number (00503137) under our logo.
- Ensure that your report has a date on it – either on the front or inside cover e.g. December 2020.
- You may find our [guide to report writing](#) useful.
- If you are only producing your report electronically, the final version can be sent by email as a PDF document to your grant manager and our Communications Manager.

- If you are getting copies of your report printed, you should send us 12 copies as set out in the terms and conditions of the grant.

Logos

- You need to make sure that, where appropriate, the Connect Fund logo is on any published work or publicity. You can access our branding guidelines here: <https://www.connectfund.org.uk/resources-for-granholders/>
- We can provide you with the appropriate logo format and the design requirements for the logo. The logo should be printed in full colour unless there is an exceptional reason why it should be printed any other way.
- We can also provide you with a form of words about the Connect Fund to use with the logo if needed.

Blogs

- We may ask you to write a blog (though you are very welcome to approach us first).
- Have a look at the current [Connect Fund blogs](#) to see if you can add to the ‘conversation’, debate and knowledge sharing.
- We are always happy to reproduce or adapt blogs which have been written for other audiences.
- [Our guide to blogging](#) in the ‘Resources for Grantholders’ section of our website will give you some helpful tips on how to write a blog.

Twitter

- When we make our grant offer we try to make sure we follow you on Twitter so we can retweet about your project where possible.
- It is not a condition of the grant but we would like it if, in turn, you could follow us.
- If tweeting about the work we are supporting, if there is space, please use the @connectfund profile and any relevant hashtag. If you are using a hashtag please let us know what it is so we can use it too.

Communications support

- Although we only have limited communications resources we may be able to signpost you to pro bono communications support. Get in touch with Diana Ruthven (d.ruthven@barrowcadbury.org.uk) if you are interested.

Connect Fund e-newsletter

- Once your grant has been processed, please make sure you [sign up to our e-news](#) which goes out on an ad hoc basis. It will keep you in touch with other work we are supporting as well as providing you with networking information. You will also be able to see if it could be useful for disseminating your work.
- If you have anything you would like us to cover in the e-news, please contact your Grants Manager or the Communications Manager.

Media coverage

- If you receive media coverage of your Connect Fund-supported work, or you know in advance that you will be getting coverage somewhere, please let us have details.

I hope you find this information useful and that it will enable us to work together to deliver social justice.

Finally, if you are involved with any work which Connect Fund is not funding but you think we might be interested in because it is aligned with our programme areas do let us know so we can tweet or cover it in our e-news if there is space.

5. Acceptance of Your Grant

I have read and understood all the conditions relating to this grant, and confirm that:

- The project summary (Section 2) is an accurate reflection of the work planned.
- I have ensured that our accounts department is aware of the requirement to treat and record the grant as a restricted fund in our annual accounts (Section 1).

Signed on behalf of «ACCOUNT_LEGAL_NAME»:

Signature

Print name

Position

Date