

Following careful consideration, the Garfield Weston Foundation is pleased to award a grant to your organisation. By accepting a grant from the Garfield Weston Foundation you agree to the following general terms and conditions. Any deviations to these will be set out in your grant confirmation email.

Grants

1 The grant may be used only for the purposes outlined by your organisation in the grant application which was approved by the Trustees. If there are any specific restrictions these will be contained in your grant confirmation email. If you are unable to use the grant for the specific purpose for which it was intended please contact the Foundation before spending any portion of the grant.

2 We understand that projects sometimes change as they develop. If any significant changes are likely to be made to the project's scope or scale, before or during implementation, or if the project's timetable is delayed, it is important to inform us immediately and to obtain approval for any variations. Where changes are made without our agreement, we may consider reclaiming any funds that have not been used for the intended purpose.

3 Grant reports are vital in helping our Trustees understand how their grant to you has been spent. Please refer to our **Top Tips for Reporting guide** for information on what to include in your grant report. We require the following for different types of grants:

Revenue/Unrestricted Core Cost Grant

We require an end of grant report to be submitted at the end of your grant period. Typically this will be 12 months from the date we inform you of your grant. We may ask for more frequent grant reports in some circumstances and this will be covered in your grant confirmation email.

Project/Capital Grant

If your grant is for a specific activity or capital project, the end of your grant period coincides with the project end date you supplied within your application. We ask that your end of grant report is submitted shortly after your project end date.

Multi-Year Grant

We require an update report every 12 months from the date we inform you of your grant until the end of your grant period. Please see the Multi-Year Grant section below for details on what should be included in your update report. After your grant period has concluded we will require an end of grant report.

4 On completion of a project, any unspent portion of the grant must be returned to us. If, once you have received the money, you envisage the timescales of your project changing, you must contact us straight away to explain the situation and request approval for any extension to the terms of the grant.

5 The Foundation may require repayment of a grant if you become insolvent or go into administration, receivership or liquidation.

6 Your organisation is not eligible to make a further application until your grant period has concluded and your end of grant report has been received by the Foundation. In some cases, the Foundation may extend this timeframe, in which case this will be contained in your grant confirmation email.

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- 7 In accepting this grant you are confirming that your charity has the appropriate safeguarding policies in place and that your organisation will:
- comply with such laws and practice for the duration of the grant period or project being funded
 - exercise appropriate oversight of any downstream personnel or organisations
 - report to the Foundation any safeguarding incidents which occur in connection with a project funded by the Foundation which lead to the charity making a Serious Incident Report to the Charity Commission or to taking
 - equivalent action in the case of a charity which is not required to be registered with the Charity Commission
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- 8 You will inform us of any serious incident report your organisation makes to the Charity Commission (or equivalent in Scotland or Northern Ireland) during the lifetime of our grant, or any serious incidents that meet this threshold if you are not regulated by the Charity Commission. Similarly you will notify us if the Charity Commission opens an investigation into any of your practices.
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- 9 If your organisation does not meet the requirements set out in this document, the Foundation reserves the right to reclaim some, or all, of the grant at any time.
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Multi-year Grants

Keeping in touch with us is particularly important if you are in receipt of a multi-year grant. We are very aware that a lot can happen within a year, let alone two or three! Please note that releasing future grant payments is contingent on your organisation achieving its aims as outlined in your initial application. If changes are not agreed in advance, our Trustees may not be able to release your next grant payment – a situation that all of us wish to avoid. To release subsequent instalments of your grant you will need to send us a report every 12 months of your grant period. If you applied online you can do this via your online account, if you did not apply online then please email us the report and supporting documents to admin@garfieldweston.org.

It is important therefore that your update report includes the following:

- details of how the last portion of your grant was spent
- outline your progress in achieving the aims set out in your original application including the number of beneficiaries, outcomes and any notable successes or difficulties you have encountered in the last year
- tell us if there are changes to the plans in your original proposal including to budgets or timescales
- key priorities for the coming year
- anything else you feel that our Trustees should know about your organisation and your work

Please keep your update report to within 4 sides of A4.

Along with your update report, please send us the following documents to request your next grant payment:

- a copy of your most recent set of annual audited accounts
- updated banking information supplied either via your online account or via our bank details request form

If we have any questions about your report, we will be in touch as soon as possible to arrange a conversation.



Pledges

In some instances the Foundation may offer a grant to be paid when specific conditions have been met (for example when your organisation has raised a certain level of funds). In this instance you will receive a pledge confirmation email which will outline what the conditions are and a pledge release form. We would encourage you to use our pledge to help strengthen your case with other funders you may apply to. Although you may use the pledge in discussions with potential donors to encourage further support, please do not make the pledge public until the conditions have been met and we have been able to release the funds.

At the point you believe the conditions have been met, grants should be claimed by filling in the pledge release form which enables you to give us the information we require in a simple format. If you applied online, please upload this form through your online account. If you submitted a postal application please send the form by post to our usual address. Payment will only be made if the Foundation is satisfied that your organisation is in a position to spend the money and the conditions have been met satisfactorily.

Acknowledgement

The Foundation requests that the grant is acknowledged in an appropriate and timely way, though we appreciate that how this is done will depend on the nature of the organisation and the project. For grants towards core costs please include our name in your organisation's accounts and in any newsletters or updates you may produce, including on your website. Please only acknowledge the Foundation's support when your grant is live and remove our name and/or logo once your grant period has ended. For capital grants please include the Foundation name and/or logo on your donor board. Our logo can be downloaded from the Grant Holders section of our website www.garfieldweston.org If you require our logo in another format, please contact us.

For grants of £100,000 or greater we will discuss options with you – this may involve the naming of a specific space or room within a building, or of a particular project or scholarship.

Publicity

Occasionally the Foundation may ask its grantees to help increase the profile of its grantmaking within a particular region or area of work in order to encourage eligible organisations to apply for funding. If so, this will be specified within your grant confirmation email and we will ask you to contact our Grants Team.

Social Media

If you would like to announce your grant on Twitter you may wish to tag the Foundation using @WestonFdn. Unfortunately due to the large number of grants we make each year we are unable to commit to tweeting about grants. We do however encourage you to tag us when you share updates in your project so we can keep up to date and 'like' your tweet where possible.

Invitations

If you have a significant event you would like to invite us to, which is related to the specific work or project we are supporting, please send the invitation to the Foundation's office for the attention of the Director and we will respond to RSVP invitations. We regret that it is not possible for us to attend all events we are invited to, but we send our best wishes for your continued success.