

Grant Terms and Conditions

This document provides the terms and conditions that The Charity needs to agree to if it wishes to accept the grant. Please read through carefully so The Charity is fully aware of its responsibilities. This document should be retained for future reference and the contents shared with the staff responsible for the management of funding, finance and the management of activity supported by the grant. A representative of The Charity needs to detach, sign and return the Acceptance Form before we will release the initial grant payment.

1. The grant is provided on a restricted basis and must be used exclusively for the purpose specified in the grant offer letter. We consider the submission of the application form as acceptance of this requirement and the wider terms and conditions contained within this document. If The Charity does not feel able to meet the required terms and conditions please notify the Foundation that it does not wish to accept the grant.
2. The grant is provided on the basis that the Foundation has committed funds to meet agreed future grant payments. In the event of the Foundation being unable to meet this commitment it reserves the right to withdraw the offer of funding and cancel future grant payments.
3. Continuation Funding. In some cases the grant offer letter will indicate that the Foundation is prepared to consider funding for a further period beyond the life of the confirmed grant. Any offer of continuation funding is subject to future consideration and approval and does not represent any commitment or guarantee by the Foundation. The Foundation will contact The Charity during the final year of the grant offered to invite it to apply for continuation funding. The Invest programme, including the initial grant and any continuation grant will offer a maximum of six years funding.
4. The grant is provided on the basis that the costs it is meeting have not and will not be secured from other sources.
5. If The Charity is unable to use the grant for the purpose and within the timescales specified in the offer letter, the Foundation must be informed in writing immediately. If The Charity wants any changes to be considered and approved please write to:

Head of Service Delivery
Lloyds Bank Foundation for England and Wales
Pentagon House
52-54 Southwark Street

London SE1 1UN

The agreement or rejection of any changes to the grant will be confirmed in writing by the Foundation. Any changes should not be implemented until this has been received.

6. We reserve the right to cancel a grant or require repayment if we find that any material information provided on the application form or during the assessment process was misleading, inaccurate or fraudulent.
7. If the grant, or any part of it, is not used for the purpose specified, or is unspent, the Foundation may ask for it to be returned or reduce subsequent grant payments.
8. If The Charity becomes insolvent, goes into administration, receivership or liquidation it should contact the Foundation at the earliest opportunity. If the grant or any part of it has not already been spent on the purpose specified, it must be returned to the Foundation.
9. If within the lifetime of the grant The Charity undergoes a merger, consideration will be given, on receipt of a written request, to the grant being transferred, subject to the merged charity being eligible to receive funding.
10. We reserve the right to visit The Charity to see and discuss the work supported by our funding and see evidence of approved expenditure. Most grant holders will receive a visit during the life of the grant.
11. We require The Charity to report to us on the use of the grant against the budget and outputs and outcomes included in the funding application and to claim subsequent payments by completing and returning a Grant Report at the end of each 12 month period. Reporting dates are included in the offer letter and form part of the grant terms and conditions. Failure to complete and submit a grant report can result in remaining grant payments being cancelled and any new funding requests being rejected. The Charity is also required to submit a final grant report within 3 months of the end of the grant period. The grant will be considered completed only when the report has been received and approved by the Foundation. We will email The Charity a weblink to the Grant Report one month before the report is due.
12. Subsequent payments must be claimed within three months of the due date – unclaimed grants will expire after this period. Any other arrangements must be agreed in writing with the Foundation.

13. Any additional or special conditions contained within the offer letter or subsequently notified to The Charity in writing also form a part of the grant terms and conditions under which this grant is paid.
14. We may use information provided by The Charity to monitor or publicise the project and/or evaluate our grant programmes.
15. Information regarding The Charity and the grant received will be published by the Foundation on its website and the Foundation reserves the right to use the information in any other printed or on-line information it produces.
16. The Charity is required to acknowledge the Foundation's grant in its financial accounts as 'restricted funding' and the source of the grant as the Lloyds Bank Foundation for England and Wales. The grant should also be specifically acknowledged in The Charity's annual accounts for each year in which it was received. References to this grant in The Charity's Annual Report or Accounts should use one of the following forms of wording:
 - Supported by the Lloyds Bank Foundation for England and Wales
 - Funded with the support of the Lloyds Bank Foundation for England and Wales
 - Lloyds Bank Foundation for England and Wales
17. We require The Charity to acknowledge the Foundation in the publication of all core materials that it produces, in print and online, that refer to the post or project for which it has received funding. For further information please see our website. If The Charity wishes to use our logo it is available online at <https://www.lloydsbankfoundation.org.uk/wedevlop/logos> with accompanying guidelines on appropriate citing and use. We require The Charity to keep the Foundation informed of any media coverage relating to the funding. Please contact our Communications Team at media@lloydsbankfoundation.org.uk or on 020 7378 4611/13 with any queries or for guidance in promoting the grant and the work of The Charity.
18. We hold the contact details of The Charity and the contacts named on the application on our database for the purposes of the administration of the grant. We reserve the right to share this information with appropriate parties, such as The Charity Commission and other funders, for the purposes of managing the grant. Please notify the Foundation if there are changes to the contact information for The Charity or the person who is managing the grant. By contacting the Foundation, the contacts named in The Charity's application may request that their details are expunged from our database. Where contact details are removed, we require The Charity to supply the Foundation with details of alternative contacts.

Please contact the Head of Service Delivery, Lloyds Bank Foundation for England & Wales at enquiries@lloydsbankfoundation.org.uk or on 0870 411 1223 with any queries about The Charity's grant (including details on how to request a copy of The Charity's contact information) or to make a complaint about our use of the Charity's data.

Enhance Terms and Conditions

If The Charity is awarded a grant by the Foundation we will also offer additional support through our Enhance Programme. This provides a range of charity support and development opportunities that draws on pro-bono services as well as specific packages of sector support such as PQASSO, Outcomes Star and courses provided by the School of Social Entrepreneurs. Most charities we fund take up some kind of Enhance support and the Grant Manager will discuss this with The Charity in the coming weeks.

The following Terms & Conditions will ONLY apply if The Charity accepts additional support under the Enhance Programme. If no Enhance support is accepted these will not apply.

The Charity is under no obligation to accept an offer of Enhance support and refusal will not affect this grant or any future grant awards.

- Provision of the Enhance support is free to The Charity. However in some cases there may be travel / accommodation costs which will need to be met by The Charity
- We will share contact details of the person managing the grant with external providers to enable them to deliver support agreed as part of the Enhance Programme.
- Once an external package of support has been commissioned on behalf of The Charity and dates agreed with external providers for support (training/consultancy etc) The Charity will be liable for any subsequent cancellation fees in line with the providers' cancellation policies.
- Acceptance of Enhance support will signify The Charity is prepared to commit the necessary time to working with the Foundation or third part providers.
- If The Charity does not commit the necessary time/resource to the support being offered, the Enhance support may be withdrawn.
- Enhance support is intended to support your charity's development and is not used to monitor your grant or assess your performance. However, if the Foundation is made aware of significant issues and/or malpractice at your charity they will be followed up appropriately and in line with the Foundation's obligations. Where possible, we will work with you to address such issues.
- The Charity will be required to be appropriately insured and to safeguard visitors to their premises.
- The Charity will be required to fill in simple forms and/or surveys regarding the support provided so that the Foundation can quality assure the providers used, further develop the support available and determine the impact of any support.

- From time to time the Foundation will carry out an independent evaluation of the Enhance Programme. The Charity will be required to participate in any such evaluation.