

Information and Responsibilities Salaries and New Posts

The Tudor Trust aims to be a helpful and flexible funder and respond imaginatively to organisations' real concerns and priorities. We recognise that organisations are best placed to know what the problems are and what to do about them and are happy to support work which is untried and with uncertain outcomes. We trust the groups that we fund to do the work that is needed. However in order to ensure that the funding relationship is a productive one, both sides need to fulfil their responsibilities.

1. Management committee responsibility

Your organisation's management committee* is responsible for ensuring that the grant is used for the charitable purpose for which it was agreed and for ensuring that Tudor is consulted about any changes to that purpose. An officer# of your management committee needs to acknowledge the grant commitment by signing and returning the attached grant acceptance form.

2. Claiming the first instalment

The first instalment of your grant must be requested **in writing**, by emailing our Grants Team. We make grant payments by direct transfer to your bank account. When you write to request the first payment please provide us with your organisation's bank details by emailing a scanned copy or photo of a recent bank statement - one that is less than three months old.

If we haven't funded the salary in full you will need to confirm that you have enough funding to pay the worker for at least a year (and preferably for the whole period our grant covers) and provide a breakdown of that funding. In addition, for **existing posts** please confirm that the post is filled and the worker is expected to remain in post. For **new posts** we need to know that a suitable person has been appointed and is about to start work. Please tell us how you recruited to the post, the name of the successful candidate, their start date and brief details of their skills and experience.

3. Change of postholder

If the post holder changes you must let us know when the previous worker left, when the new worker joined and tell us their name and their previous experience. If a post is unfilled for more than a month, we generally delay our next grant payment for a time equivalent to that for which the post is vacant. You must let us know if the post holder is off sick for any length of time or goes on maternity leave - see the *Information for grantholders* section of our website.

4. Informing us of serious incidents or significant changes

Please let us know immediately if you think a serious incident may have taken place within your organisation - this could be related to loss of charity money or assets; damage to property; harm to its beneficiaries, staff or volunteers (including safeguarding incidents); or harm to its work or reputation. A member of our Grants Team will be happy to discuss any of this with you, so please feel free to get in touch if you are unsure or just want to talk it through.

Please also keep us informed about any significant changes that will have an impact on your organisation - for example the departure of a key member of staff, a major change of direction or policy, a proposed merger or a severe funding crisis.

5. Claiming subsequent instalments

You should normally claim subsequent instalments of salary grants 12 months after the previous payment. We will send you a reminder, but it is your responsibility to send us the information outlined below.

- A detailed report about the work carried out since the last payment. It should be specific about the services/activities provided, the numbers of people you have worked with and the ways they have been supported, although it doesn't need to be lengthy. It can be written by the postholder or the person closest to the work we're funding, but should be accompanied by a covering letter from their manager or a member of the management committee* endorsing the report and confirming that the post has remained filled over the previous year and is expected to remain so. See section 3 if there has been a change of post holder.
- The report should include an assessment of your work and how you think you have made a difference. We are interested to hear about 'what works' - and about what doesn't! Please explain your plans for developing the work over the coming year in the light of this assessment of the previous year's work.

Financial information including:

- a) a copy of the latest annual accounts and annual report
- b) an estimated income and expenditure budget for the current financial year for the **whole organisation** (indicating which income is secured). If you are near the end of your financial year please send your draft budget for the next financial year as well
- c) if we are not funding a salary in full, details of how you are covering the balance for the 12 months ahead
- d) written confirmation that your bank details remain unchanged. If you have changed your bank account please send a photocopy or scan of a recent bank statement to confirm the new details.

If we need any additional information in your reports, or want you to report back more frequently, we will ask you to do this in the commitment letter sent with this sheet.

6. Payment of grant

Once we have received all the information we need we will write to let you know that the payment is being made. We aim to ensure that the payment reaches your bank account within 12 working days of our receiving satisfactory information.

7. End of grant report

Please send us an end of grant report 12 months after the final payment. We will send you a reminder giving you guidance on what to include, but if you'd like more detail now please see the *Information for grantholders* section of our website.

8. Timescales

Tudor is sometimes one of the first funders to make a grant commitment towards new work. We can hold grants for up to two years as we know that it can take some time to raise the rest of the funds required or to recruit the right person for a new post. However,

if the grant has not been taken up within a year of the date it was agreed, please send us an update on progress together with your latest annual accounts.

9. Publicity

We have no requirements as to publicity, but are happy for you to mention our grant to other funders, in your annual report and accounts or in press coverage. If you would like to use our logo, or have any questions about publicity, please get in touch. We will include details of your grant in our annual grants review.

10. Contact details

We keep contact details for the named individuals representing your organisation on our database so that we can administer your grant and keep in touch as necessary. We will not use these details for any other purpose.

*Management committee is the term we use to describe the group of people governing your organisation. You may use another term such as board of trustees, board of directors or executive committee.

By officer we mean the Chair, Vice Chair, Treasurer or Secretary of your committee. This must not be a paid member of staff.