

## The Walcot Foundation's (WF) general requirements of all grantee organisations

(Version 17.12.2010)

- 2.1** All of the terms of this grant agreement will be agreed and signed by an authorised representative (usually the Director or the Chair) of the grantee organisation before the first payment is released.
- 2.2** The payment of any further instalments (year 2, year 3 etc.) will be dependent upon the performance of the grantee and the information obtained through monitoring reports and visits. Please note that WF monitoring and evaluation procedures may change from time to time and all grantees will be expected to conform to these changes. We will endeavour to give as much advance notice of any changes as possible.
- 2.3** For multi-year grants, all future instalments are conditional upon the availability of WF funds.
- 2.4** Grantees should complete the **Grant Report Form** (downloadable from the downloads page of our website) at the end of each year of funding. Grantees will also need to complete this form when the WF grant has finished. Grantees should familiarise themselves with the Grant Report Form before starting the project so that they know what is expected from the outset. **If a grant is for more than one year, please submit the Grant Report Form at or around the 10-month mark rather than waiting for the 12-month mark.** That way if there are any questions about continued funding both parties will know in reasonable time.
- 2.5** We expect all our grantees to endeavour to make referrals to WF's grant programme for individuals and to maintain awareness – via our website - of the current guidelines and criteria. Grantee organisations should also be aware that WF has a dedicated advice worker at Centre 70 advice centre based in West Norwood who can offer support with filling in our grant application forms for individuals as well as advise grantees' service users/clients on matters related to budgeting and debt. Whenever a grantee organisation would like to make use of this service, please contact us.
- 2.6** WF makes grants to organisations as a means of delivering on our objectives for individuals. We ask that grantee organisations track the following for each beneficiary of our grant: **Lambeth home postcode; how it was verified that the individual came from a low income household; baseline assessment; targets; progress as compared to baseline.**

- 2.7** We may request permission to contact service users/clients as part of our ongoing monitoring and evaluation and may ask to see their records. All beneficiaries of programmes we support should be made aware of this as soon as they engage with the project. Operating within the requirements of data protection legislation at all times, the grantee organisation will be expected to supply WF with the relevant contact details of clients/service users if asked.
- 2.8** WF is a major benefactor of the London Mutual Credit Union (LMCU) *formerly Southwark Credit Union*, believing that it offers an opportunity for financial inclusion for those Lambeth residents who have been financially excluded. Grantee organisations are expected to familiarise themselves with LMCU ([www.creditunion.co.uk](http://www.creditunion.co.uk)) – and the opportunities it provides for savings and low cost loans - and signpost clients/service users as appropriate.
- 2.9** Grant recipients should acknowledge WF's support in any publication (printed or electronic), poster or presentation and, if possible, in any related newspaper article or broadcast media. Acknowledgements should use our name - The Walcot Foundation - and where appropriate our logo (this can be supplied in various electronic formats). If grant recipients wish to issue press statements that mention us, we should be given a draft copy for comment in advance.