

The Forward Trust - Terms and Conditions for Forward's Match Funding

The Forward Trust (Forward) is providing up to £5,000 grant match-funding for projects we want to support on Crowdfunder. Eligible projects receiving support from The Forward Trust will be subject to the terms and conditions below. This grant match-funding from Forward is running in conjunction with the Forward Enterprise Fund, a repayable finance fund (loan) to support investment-ready charities and enterprises that meet our mission. The purpose of providing the grant match-funding to start-up enterprises is to support the next generation of enterprises that support our mission. The initial information we require for both the grant and loan is similar.

Projects applying for support will be subject to the application process on www.forwardenterprise.org.uk.

The Forward Trust acknowledge that the purpose of funds from The Forward Trust is to support projects that create employment opportunities for ex-offenders and / or people in recovery from addiction.

1. Allocation of match-funding

1.1. Match funding

The Forward Trust will provide **up to** £5,000 grant match-funding for each eligible project. The Forward Trust will agree with eligible projects the individual terms of their match-fund and how funds will be released. This could include Forward funds only be released once the full match has been achieved. Forward will work with the eligible projects and agree the terms of our match-fund prior to their project campaign launching.

1.2. Project selection

The Forward Trust reserves the right to withhold or suspend all or some of the match award if submitted projects do not meet the eligibility criteria listed below.

Eligibility criteria:

- The project should be based and operating within England.
- The project should be:
 - **Working with or intending to work with** ex-offenders or people in recovery from addiction, creating employment opportunities for people from these communities.

AND/OR

- **Led by** ex-offenders or people in recovery from addiction.
- Projects should be, or seeking to be enterprising (trading), creating direct employment opportunities for ex-offenders or people in recovery from addiction
- Funds will not be used for political or religious purpose.
- The project will need to have, or intend to become (as part of the request for support), one of the following legal structures:
 - Regulated organisations (e.g. charities, Community Interest Companies or Community Benefit Societies which pursue charitable objectives).
 - Alternatively an unregulated social sector organisations (such as Companies Limited by Guarantee, Companies Limited by Shares and Industrial and Provident Societies) must be able to demonstrate their social purpose. To understand what types of legal structures we can support, please see [‘How we think about Social Purpose’](#).

Forward is open to working with individuals who have a developed idea of their enterprise and are near to or pre-trading enterprises. We will expect these projects to become constituted organisations as part of our support. Note that any funds committed by Forward will require a designated bank account. We recommend that individuals who are in receipt of benefits and are intending to apply to Forward for support, should take advice on their income. Some useful information can be found below but we strongly recommend seeking individual advice in the first instance.

www.moneyadviceservice.org.uk/en/articles/thinking-of-starting-up-in-business

www.gov.uk/moving-from-benefits-to-work/starting-your-own-business

The application process for match-funding will require projects to provide:

- Plans for the organisation
- Breakdown of costs
- How the funds will meet our mission and create jobs

- Forward may also ask for more information about the individuals behind the project if it is a start-up. For more information about Disclosure, please visit: www.forwardenterprise.org.uk/disclosure/

1.3. Use of match-funding

Funds can only be used for the sole and explicit purpose of meeting Forward's mission of creating employment opportunities for ex-offenders or people in recovery. The award must only be used to support the expenditure and purpose identified in the application form.

All awards must be spent within six months from receipt of the award money. Any proposed change to the use of the award must be agreed in advance with The Forward Trust's notified contact.

The Forward Trust reserves the right to withhold all or part of the award if the project fails to meet one or more of the criteria or terms and conditions.

2. During The Project

2.1. Finances

Funds from Forward will be made available by electronic transfer from Crowdfunder's online system. We expect take up of funds within 2 months of agreement. How funds are paid will be agreed upfront with the Project.

2.2. Keep records

Keep receipts and other evidence of expenditure for all purchases and services related to the funding for the project and make them available upon request. These should be kept for five years. (Ensure that proper insurance of any equipment remains in place at all times.)

2.3. Document process

Projects should document the project process and its impacts in text, photographs, video, feedback, etc. to share with the Forward Trust. These will be agreed upfront with successful projects.

2.4. Publicity

- Work with The Forward Trust and Crowdfunder on any joint publicity opportunities in relation to the award.
- Ensure the use of the Forward logos on any publication you produce relating to or supported by this award. All materials must be approved by The Forward Trust in advance.

3. Reporting

3.1. Social Impact

The applicant must maintain records to enable the Forward Trust to measure the Social Impact of its match-funding. This will be agreed in advance with successful projects that receive match-funding from The Forward Trust. Requirements are likely to include:

- Amount spent including evidence
- Assets purchased
- Number of employment opportunities created
- Growth in turnover/income
- Annual Impact Report 12 months from receipt of award money (provided by the Forward Trust)

3.2. Changes

We understand that changes happen. Incidents or developments affecting the project or organisation should be reported to Forward and changes to the project agreed in advance, in writing. This includes significant changes to how funds are spent, agreed performance, ongoing eligibility for the fund or ownership of the organisation or project.

3.3. Protecting Forward's mission

Any developments to the project which compromise or risk the mission of Forward match-funding should be reported immediately. Forward reserves the right to recall part or all of the grant match-fund provided. Significant breaches may result in criminal proceedings.

4. Safeguarding

- 4.1. The applicant must not use the award for any unlawful activities, for the promotion of political or religious activity or for activity that is discriminatory on any grounds.
- 4.2. The applicant must have insurance for any activity which the fund will be wholly or partly funding.
- 4.3. If the project involves work with children, young people or vulnerable adults, you will take all reasonable steps to ensure their safety. You will obtain the written agreement from the legal carer or guardian before having any direct contact with vulnerable people. You will have and carry out an appropriate written policy and have a set of procedures in place at all times to safeguard vulnerable people, which will include procedures to check backgrounds and disclosures of all employees, volunteers, trustees or contractors who will supervise, care for or

otherwise have significant direct contact with vulnerable people with the Disclosure and Barring Service. You will regularly review your policy and procedures to ensure they adhere to any applicable legislation and/or regulations.

- 4.4. The applicant must ensure parental consent is obtained in relation to photography of minors for publicity material.

5. Support

Projects understand that Forward's support is subject to the availability of funds.