



## UK Shared Prosperity Fund (UKSPF)

### Supporting Local Business: Grant Recipients' Handbook

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## Eligible Expenditure

Eligible revenue costs include the following (for which further guidance can be found later in this section):

- staff costs – for lead organisation, delivery partner(s) and procured staff (including basic pay, and employer's national insurance and pension contributions, if these can be evidenced upon request)
- business travel, subsistence and accommodation
- contractors and consultants, including evaluation costs
- materials
- marketing and publicity
- grants provided to beneficiaries
- beneficiary costs
- events
- small items of equipment.

### Direct Costs

These are the costs that relate directly to initiating and implementing the agreed project activities. These are not wider organisational costs. Only revenue costs should be included; revenue expenditure refers to costs that are related to specific revenue transactions or operating periods, such as the cost of goods sold, or repairs and maintenance expenses.

## **Staff Costs**

These are paid staff roles working, either full-time or part-time, directly on the project. Staff may be employed directly or contracted by the Grant Recipient (GR) or delivery partner(s). Costs for contracted staff will be referred to as 'procured staff costs' in this section.

Eligible staff costs are the basic salary; the employer's national insurance and pension contributions; and any contractual benefits. The GR must account for any expected increases in salary for the project staff over the lifetime of the project.

Organisational maternity, paternity/parental and long-term sick pay are eligible costs and can be claimed under the staff cost (including FRICs) cost heading.

The staff role relating to the Individual on maternity, paternity/parental or long-term sick leave, can also be claimed if a replacement is allocated to that staff role, at the agreed percentage of time on the project.

The costs claimed can only be organisational policy pay and should not include any statutory pay. Statutory costs must be removed within any transaction list line before being claimed. Evidence must be retained and can be requested by Grant Managers (GM) should they require.

### **Flat rate contribution for indirect costs (FRIC)**

For indirect costs (shared organisational costs, which cannot be directly linked to project activity), a FRIC, calculated at a rate of 20% of staff costs, may be claimed. Details of eligible and ineligible project costs can be found within this section.

### **Procured staff costs**

Where a GR is including procured staff costs in their budget, the GR must ensure that these external staff costs: can be clearly identified as staffing costs in the contract and/or invoice of the subcontractor; and are separate to any other costs on the invoice and/or contract. The invoice for that month and/or quarter will be the actual cost that can be claimed.

The GLA may request evidence of the procurement exercise and invoices, plus defrayal, though this will not be a routine exercise.

The GR should ensure they include the procured staff costs in the right cost category, as follows:

- Where procured staff will be based in, and/or delivering from, premises owned or rented by the GR or delivery partner(s), the costs are claimable under the 'staff costs' category in the granular budget and will attract the 20 per cent flat rate indirect costs (FRIC).
- Where procured staff will not be based in, and/or delivering from, premises owned or rented by the GR or delivery partner(s), these costs should be claimed under other direct costs ('contractors and consultants' cost category) and the 20 per cent FRIC won't apply.

### **Recruitment agency fees**

Recruitment agency fees are eligible costs, but GRs must ensure the following:

1. The recruitment fees associated with the project must be clearly identified in the contract and/or invoice. They must be separate to any other costs within the contract and/or invoice. The GM may request evidence of the procurement exercise and invoices, plus defrayal.
2. If the agency fees are related to the recruitment of a staff member who is not allocated 100 per cent (full-time) to the project, only the fixed percentage (part-time) can be claimed. For example, a £1000 recruitment fee for a member of staff with a fixed part-time allocation of 50 per cent would allow £500 to be claimed.
3. Recruitment costs must be claimed under the 'contractors and consultants' cost category. If recruited staff are paid via a recruitment agency, they must also be claimed under the 'contractors and consultants' cost category with no FRIC.

## **Apportioning staff costs**

### Staff working full-time on the project

GRs can include 100 per cent of their annual basic pay and contractual benefits, and the employer's national insurance and pension contributions, on a quarterly claim basis.

### Staff working part-time on the project

Salary costs for staff who spend part of their time working on a project must be calculated using a fixed percentage (see example below). GRs should determine the percentage of time that the staff member will spend working on the project at the outset (this will not usually be expected to change throughout the lifetime of the project). There is an understanding that, in reality, the percentage may vary slightly from one month or quarter to another. This is acceptable providing that, overall, the percentage remains the same for the duration of the project. If the variation becomes significant and permanent, the GR will need to discuss this with the GM before making changes to the fixed percentage.

Example of how to calculate the fixed percentage:

- A. Annual employment costs (basic salary; employer's national insurance and pension contributions; contractual benefits) = £50,000
- B. Percentage of time staff member will spend working on the project = 40 per cent
- C. Total cost = £50,000 x 40 per cent (A x B) = £20,000

There is no requirement for staff to record the hours spent working on the project on a timesheet. We expect GRs to inform the relevant members of staff, in writing, of their work on the project and the agreed fixed percentage of their role that will be funded by UKSPF. Staff can be informed via email or letter, and this correspondence can be sent by individuals, groups or entire project teams. However, it should be sent from a senior member of staff in relation to the project, or from human resources. If the percentage of the staff member's time to be spent on the project changes, they must be informed, in writing, of this change.

Fixed percentages for each staff role will be based on those agreed at grant-funding agreement (GFA) stage. If the GR wishes to change any such percentages, this must be agreed with your GM in advance of claims. The GR is expected to retain evidence of correspondence with each staff member regarding their time on the project. It is expected that the GR will keep an up-to-date organogram of the project team on file.

The GM will not request evidence of correspondence to staff regarding agreed fixed percentages, or the organogram, on a regular basis. However, the GLA reserves the right to request this evidence if required.

Please note, staff members who are expected to spend less than 5 per cent of their time working on the project are not considered to be working directly on it. Therefore, these staff costs will fall into the 'indirect costs' category (see below).

## **Bonuses**

Bonuses for staff who are working full-time on the project (100%) can be claimed. These are included within staff costs and are eligible for FRIC. The bonus scheme must be set out within contractual documentation and included within a payroll report. Staff who are part-time on the project (under 100%) are not eligible for bonuses to be claimed.

## **Other direct costs**

We expect non-staff costs to be directly attributable to the project; otherwise, they will fall into the 'indirect costs' category. However, we understand there may be instances where the project costs cannot be itemised on an invoice. For example, the GR may want to use existing contracts, such as Google ads, for marketing purposes. It may prove difficult to get the supplier to itemise the UKSPF project costs on an invoice. As a result, direct costs can be apportioned, but the methodology used must be agreed with your allocated GM in advance of expenditure being claimed.

## **Eligible other direct costs**

- Costs of business travel, subsistence and accommodation directly related to, and essential for, the effective delivery of the project
- Events costs: third-party venue hire, catering (including alcohol), guest speaker fees
- Contractors and consultants (see section related to staff costs for distinction with procured staff costs)
- Costs of materials e.g., materials purchased to support the development of a product with a small or medium-sized enterprise (SME)
- Marketing and publicity costs, which may include social media, website costs, leaflet design and printing
- Grants provided to beneficiaries – beneficiary should follow the same eligibility guidance issued to GR for eligible expenditure
- Beneficiary costs: direct spending on the beneficiaries such as allowances, travel expenses or childcare
- Small items of equipment, such as laptops
- Costs of a visa for new staff member being employed, if allocated to the project 100% of the time for the lifetime of the project

'Beneficiaries' refers to people benefiting directly from the UKSPF project. The benefit can be financial (such as a grant given to a business) or non-financial (such as one-to-one or one-to-many coaching or mentoring sessions).

## **Indirect costs**

Indirect costs are, by default, all eligible costs that do not meet the above definition of a direct cost. Indirect costs are shared organisational costs that cannot be directly linked to project activity because it is difficult, or impossible, to quantify a precise amount attributable solely to a single operation/project.

FRIC is the process on how these costs are recovered, calculated at a rate of 20% of staff costs.

Indirect costs may cover, for example:

- premises costs
- accountancy costs
- cleaning costs
- telephone
- utility charges
- staff costs for people working indirectly or spending up to 5 per cent of their time, on the project.

### **Ineligible costs**

- Any expenditure incurred before the agreed project start date, or after the project end date
- Loan and current account interest, or any other financial charges
- Staff time or consultancy fees related to time spent working on the application form or other application documents
- Purchase of buildings or rental fees for leased premises
- Cost of interest payments or service charge payments for finance leases
- Expenditure not related to the project
- Any statutory training that employers must provide under health and safety legislation
- Bank charges or legal fees (see below)
- Capital costs (capital expenditure relates to expenditure on the acquisition of an asset; or expenditure that adds to, and not merely maintains, the value of an existing asset, and where the asset yields benefit over a period of more than one year)
- Aid for lobbying, entertaining, petitioning or challenging decisions, which means using the UKSPF to lobby (via an external firm or in-house staff) in order to undertake activities intended to influence, or attempt to influence, Parliament, government or political activity (including the receipt of UKSPF funding); or attempting to influence legislative or regulatory action
- Payments for activities of a party-political or exclusively religious nature
- VAT reclaimable from HMRC
- Gifts, or payments for gifts or donations
- Statutory fines, criminal fines or penalties
- Payments for works or activities that the lead local authority, project deliverer, end beneficiary, or any member of their partnership has a statutory duty to undertake, or that are fully funded by other sources
- Contingencies and contingent liabilities
- Dividends
- Costs resulting from the deferral of payments to creditors
- Costs involved in winding up a company
- Legal expenses in respect of litigation
- Costs incurred by individuals in setting up and contributing towards private pension schemes
- Payments that breach or are contrary to the funding agreement or UK legislation

### **Revenue generation**

The GLA expects all UKSPF projects to provide a free service to SMEs/ beneficiaries being supported. Any revenue would be expected to be offset against the grant claims. You must discuss this with your GM in advance.

## Legal fees

Legal fees associated to the direct delivery of the project can be claimed. For example, this could include legal advice on subsidy control related to the project.

The ineligible legal referred to within the guidance include fees associated to legal challenges with a project or SMEs. We will provide advice on a case-by-case basis.

## Communications and Branding

These requirements relate to all communications materials and public facing documents relating to funded activity – including print and publications, through to digital and electronic materials. This includes any preparatory activity linked to the UKSPF.

### Logos



### Funded by UK Government

UK government publicity and branding requirements must be followed for all UK government funded projects. This includes the UKSPF. The requirements cover several areas including logo use, production of plaques, print and digital materials, and also co-branding.

[UK government branding guidelines](#)  
[Funded by UK Government: Branding Manual](#)

Projects should use the 'Funded by UK Government' logo from the UK Government branding guidelines.

If you have any questions, please contact your Grant Manager.

### Supported by Mayor of London

Projects are required to use the 'Supported by Mayor of London' logo on all external communication materials, including the project website. For guidelines for use of the 'Supported by' logo, please visit [Supported by Mayor of London guidelines](#). GR can ignore points 4 and 5 in the guidelines. GR should share external communication materials with 'Supported by Mayor of London' logo on with their allocated GM prior for sign off.

## Digital materials including websites and social media

Digital channels can provide a quick way to reach audiences and promote Fund activities. Where details of Fund activities are published on website, a clear and prominent reference to the funding from the UKSPF is to be included as follows:

*'This project is [funded/part-funded] by the Mayor of London and UK government through the UK Shared Prosperity Fund.'*

Where possible and practical, grant recipients should also include a direct link to the [UK Shared Prosperity Fund webpage](#) and [GLA UK Shared Prosperity Fund webpage](#) – and include the following text:

*'The UK Shared Prosperity Fund (UKSPF) proactively supports delivery of the UK-government's five national missions: pushing power out to communities everywhere, with a specific focus to help kickstart economic growth and promoting opportunities in all parts of the UK.'*

When describing or promoting UKSPF activities on social media such as X (formerly Twitter), the following hashtag (#) should be used #UKSPF. This will be re-tweetable by UK government and the GLA allowing others to follow Fund activities.

## Press Releases

Press releases must include a clear and prominent reference to the UKSPF, in the main body of the press release as follows

*"[This project/Name of project] has received £[INSERT AMOUNT] from the Mayor of London and UK government through the UK Shared Prosperity Fund'."*

## Events

Projects should make their Grant Manager aware of planned events ensuring a GLA representative is invited.

## Email signatures and Further information

Only the 'Funded by UK Government' logo is required on email signatures for staff involved on the UKSPF project.

Evidence of compliance with branding and publicity guidance should be retained for monitoring and audit purposes.

## Claims

GRs are required to submit quarterly claims, regardless of the amount of expenditure and/or delivery of outputs and outcomes. A claim form, which includes a progress report and updated forecasts, is expected for every claim.

The GR can only include spend that has been defrayed (either by itself or by one of its delivery partners, if there are any) during or – if it is not previously been claimed – before the claim period.

The grant-claim periods are quarterly, ending on 31 March, 30 June, 30 September and 31 December. Many GRs have retrospective start dates, so any retrospective expenditure since the project start date can be claimed within this period (or captured in later quarterly claims).

Grant claims are due for submission on the 15<sup>th</sup> of the month following the quarter end, or – if this falls on a bank holiday or a weekend – the working day before, as outlined below. All projects will end 31 March 2026, grant claims are due for submission no later than 15 April 2026.

<b>Grant Claim Period</b>	<b>Claim Due Date</b>
1 April 2025 – 30 June 2025	15 July 2025
1 July 2025 – 30 September 2025	15 October 2025
1 October 2025 – 31 December 2025	15 January 2026
1 January 2026 – 31 March 2026	15 April 2026

Extensions to these due date deadlines will not routinely be granted. The GM can grant an extension if the GR provides a reasonable explanation – such as key staff being on leave, or technical or IT issues that have prevented the GR from submitting the claim form on time. This must be agreed in writing in advance by the GM. Repeated requests for extension must not become the norm.

Please note that delayed claim submission will have an impact on the GLA's ability to report accurate performance data to the Ministry of Housing, Communities and Local Government (MHCLG), which manages the UKSPF on behalf of the UK government.

For a submission to be complete, a GR must submit the full and completed claim form.

Full guidance on how to complete the UKSPF claim form correctly can be found on Tab 1, 'Guidance' of the Excel sheet, which will be provided to you directly by your GM. Please ensure the guidance carefully and you are aware of what is expected and required. Failure to complete the claim form correctly will result in delays in processing claims.

The claim form must be emailed directly to the GM.

In the case of a submission with no expenditure, it is expected that only the transaction list will remain blank. All other claim documentation is still required to be completed.

Failure to provide the complete documentation, without a valid reason, will result in the claim submission being rejected. If no documentation has been provided, the claim submission will be cancelled. The GM reserves the right to inform the GR that they will need to wait for the next quarterly claim submission to resubmit.

Repeated claim rejections may trigger clause 27 of the GFA.

The GR must ensure that an authorised signatory has signed the claim form. Agreed authorised signatories can be found in the GFA. If a non-authorised person has signed the claim form, the GM will send back the form and ask for resubmission.



The GM will check that the information is consistent throughout the claim form. If incorrect or insufficiently detailed information has been included, the GM will send the form back to the GR for amendments.

## **Expenditure**

Full details of eligible and ineligible expenditure can be found in this handbook. Please ensure the transaction list meets the following requirements:

- all columns have been completed.
- the agreed categories have been used
- only eligible costs have been included.
- the FRIC cost option has been applied against staff costs only (automated check within claim form)
- no indirect costs have been included in the direct costs listing.
- evaluation costs – 2 per cent of total project costs either procured or using in-house staff – should be clearly identified and described within the transaction list
- defrayal dates fall within (or before) the claim period.
- there are no costs defrayed prior to the project start date.
- invoice dates should usually fall before the defrayal dates; there can be exceptions that the GR should explain in the progress report.
- staff costs calculation: the project has used the fixed percentages of time included in their granular budget, and any variations must be discussed with the GM beforehand; the GR must include details of the calculation in the 'apportionment details' columns.
- apportioned costs are as agreed at the inception meeting
- staff costs: the project must include an invoice date, which can be the payslip date or the defrayal date.
- If a payment has been made for an expenditure item via a credit card, the purchase date on the credit card statement should be used as the defrayment date.

The GM has the right to query amounts or lines within the transaction list. It is left to the GM's discretion to request expenditure evidence at claim stage to check the eligibility of an item; or if, for example, values look too high. Expenditure-evidence checks at the claim stage should not and will not become the norm. Continue to read this document for further detail on evidence checks.

The GR must ensure that, within the claim form, they have included realistic quarterly forecasts, correct contractual profiles and actuals in the table. Any variances must be explained in the progress report. As the UKSPF programme ends on 31 March 2026, the GR must ensure that profiled expenditure can be achieved by this date, at the latest. There is no option of an extension after March 2026.

## **Outputs/outcomes**

The latest Output and Outcome guidance can be found [here](#).

The GR must check that:

- the output or outcome claimed is eligible for this project.
- supported SMEs are either located or operating/delivering in London – there should be no common trend for non-London SMEs being supported.

The GLA will not be providing templates for any outputs or outcomes. It is up to the GR to develop their own templates that fit the evidence requirements, as set out in the latest version of the output and outcome guidance published on the GLA UKSPF website.

The GR must ensure that they have included realistic quarterly forecasts, correct contractual profiles and actuals in the table. Any variances must be explained in the progress report.

The GR should ensure that they report on performance against contractual equality targets. Any variances must be explained in the progress report. As the UKSPF programme ends on 31 March 2026, the GR must ensure that profiled outputs and outcomes can be achieved by this date, at the latest. There is no option of an extension after March 2026.

The GM is not expected to carry out output or outcome evidence checks at claim stage.

The GR is required to report on equality data for specific outputs and outcomes within the claim form, specifically on the outputs and outcomes data tab.

It is not a requirement for electronic or wet signatures to be on registration forms or related evidence if the system provides a timestamp and unique ID confirming that the data has entered by the beneficiary. An email confirmation that the information they have provided is accurate is also acceptable.

The GR should be mindful that projects must record equality, diversity and inclusion (EDI) data on businesses, households, organisations and individuals receiving support through the UKSPF. If the beneficiary is a business or organisation, the GR will record where 51 per cent or more of the ownership or senior management team comprises individuals from minority ethnic communities; women; or disabled people. Ethnic minorities refer to all ethnic groups except the white British group. Ethnic minorities include white minorities, such as Gypsy, Roma and Irish Traveller groups.

### **Programme 7 projects**

Projects that have been funded under Programme 7 must ensure they support beneficiaries that fit into the following criteria:

- been trading for 18 months or more
- an aspiration to grow
- a turnover of at least £50,000
- a minimum of two employees

Projects must comply with the prospectus criteria and thus support beneficiaries that meet this set criteria in full.

### **Progress report**

The progress report must be completed for every quarter. It provides narrative alongside the claim form data, including:

- an update on the project activities delivered
- progress against expenditure and outputs and outcomes

- staff changes
- procurement
- publicity
- the EDI and environmental sustainability impacts.

If any slippage is present, the GR should provide a valid and detailed explanation. The GR must also provide information on how they plan to mitigate any variances to profiles; and planned activities and milestones for the next six months. GMs have the right to challenge the information provided in the report and 'pause' the claim review until satisfactory information has been provided.

### **Assets and procurement**

The GR must keep a register of all assets acquired or improved at a cost exceeding £1,500, wholly or partly using UKSPF funding. This is captured within the 'Assets' tab of the claim form. Further information about assets in relation to the project can be found within the GFA.

Where the GR is a contracting authority, they will ensure compliance with the procurement regulations when procuring any goods and services in relation to delivery of the project. Procurement information should be captured in full within the 'Procurement' tab on the SLB claim form. While evidence regarding procurement will not be requested on a regular basis, we reserve the right to request this evidence if required. Further information about procurement can be found within the GFA.

### **UKSPF calculation**

GMs could reduce the amount of UKSPF to be paid if certain costs, related to past or present claims, are deemed ineligible. This would be discussed with the GR in advance. The GR should be aware that the funds are not lost via this process; providing that the eligibility of the costs can be confirmed, the funds can be claimed at a later date.

### **Subsidy control**

The GR should provide subsidy control information and data on a quarterly basis. This is captured within the 'Progress Report' tab of the claim form.

It is the GR's responsibility to ensure that they are monitoring and capturing subsidy control data from beneficiaries (where relevant); and to keep subsidy records for at least six years following closure of the project.

The guidance to key requirements for Subsidy Control can be found in the following links:

- [The subsidy control regime](#)
- [UK subsidy control statutory guidance](#)
- [Streamlined routes](#)
- [Subsidy control rules: quick guide to key requirements for public authorities](#)

### **Claim approval, authorisation and payment**

Following submission of the claim by the GR, the GM will review the claim form and any associated documentation. Once satisfied with the information provided, the GM will seek

authorisation of the claim from another GLA colleague at the appropriate financial delegation level.

It is expected that claims will be approved and authorised on the GLA's OPS system within 30 days following successful submission of the claim. This 30-day period is likely to be reduced in relation to the final claim submitted.

### **Invoice and payment process**

Following a claim being approved and authorised, the GM will request an invoice from the GR for the expenditure that has been authorised.

Invoices should be submitted directly to the allocated GM via email. The GR should check the invoice matches the approved claim expenditure for that quarter before submitting.

A purchase order (PO) number will be created for each financial year for which the project runs. The PO number will be sent to the GR by the GM shortly after the GFA has been signed. It is important that the current PO number is on any submitted invoice.

Please note VAT must not be claimed on the invoice.

## **Expenditure and output/outcomes**

Expenditure and outputs/outcomes evidence checks by the GM are expected to take place at least once a year. GMs will check an expenditure item from each cost category, and evidence from each contractual output and outcome. GMs may conduct checks on a more regular basis if they believe it is required. Evidence can be reviewed in person, digitally or via email.

GMs will give the GR notice of the checks requested to ensure that you have time to gather evidence.

If issues are found during the checks, this will be discussed with the GR. If ineligible costs and/or output/outcomes are identified, these should be addressed in the next quarterly claim via the adjustment facility with the claim form.

## **Project performance and change requests**

### **Managing project performance and triggers for action**

Through regular management and monitoring of the UKSPF programme, projects are identified that are likely to be unable to deliver on contractual commitments and allow for appropriate action to be taken.

All GRs are expected to have in place arrangements to deliver on the contractual requirements set out in the funding agreement. This includes have the capacity and capability to deliver all contracted expenditure, outputs, and outcomes.

Where projects fail to deliver contractual requirements, or where the GM consider that it is unlikely the project can recover to meet the terms of the funding agreement there are several options available to be taken. These includes, but is not limited to, UKSPF grant reduced and re-allocated, early closure of the project, closer monitoring arrangements or required submission of a material change request.

## Process and Guidance for Performance Review

As part of the UKSPF performance dashboard, a RAG rating system has been implemented. Following the submission of the July – September 2025 claims, projects will be reviewed with an automated RAG rating given for expenditure, output, and outcome performance to date. This will result in an overall automated suggested RAG rating for the project, based on a 60/40 weighting towards expenditure compared to outputs and outcomes.

While RAG ratings are automated based on the methodology set out above, GM will have the ability to provide their own RAG rating. They can either agree with the automated RAG rating or disagree. If the GM enters a different RAG rating, they must give reasoning why they are differing from the methodology. This change can be adjusted by the UKSPF lead.

RAG Rating	Action to be taken
Green	Project to be continued to be monitored as normal, no further action necessary currently
Yellow	An informal meeting to be set up with the project within a month of RAG confirmation. Standard monitoring meeting but focus on key areas of delivery, including expenditure, outputs and/or outcomes. RAG rating can be reviewed and updated following meeting if justified.
Red	<p>A formal meeting to be set up with the project within a month of RAG confirmation. The outcome of this meeting should be an agreed credible plan. Plan will be completed by GM, agreed by GR, and approved by the UKSPF lead. Template has sections to set out notes from the meeting and agreed actions with associated deadlines. It also contains a review section, providing the outcome of each action, conclusion of the credible plan and proposed actions to take following the conclusion. Types of actions that can be set include, but not inclusive of:</p> <ul style="list-style-type: none"> <li>• Interim claim submissions</li> <li>• Agreed review of evidence</li> <li>• Set updates on key performance metrics</li> <li>• Change request submission</li> <li>• Reduction of outputs and/or outcomes</li> <li>• Reduction of contracted expenditure</li> <li>• Early closure of project</li> </ul> <p>Deadlines set for actions must keep in mind the current programme closure date of March 2026. Deadlines should be achievable but tight, to ensure progress is made in a timely manner to ensure progress is seen in the required timeframes.</p> <p>Failure to complete action(s) set out within the plan by the deadlines given will trigger the next step of the process. The UKSPF lead and GM will meet to discuss and agree the response to the failure to deliver. This can include</p>

	early closure of project and/or reduction in grant in line with grand funding agreement clauses.
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GRs can request changes to their project as and when required, although they will not be automatically approved. Change requests should only be actioned and submitted following discussion and agreement from your GM. Due to the short delivery timescale, with all projects ending 31 March 2026, it is not expected that GRs will require significant change requests

There are two types of change, which will be managed differently:

### *Administrative changes*

Administrative changes are non-material changes that do not affect the project's strategic fit; ownership or overall funding; and/or output/outcome totals by more than 20 per cent. The GM can approve such changes via email.

Examples of administrative changes include:

- reduction or increase of up to 20 per cent in output and/or outcome totals
- changes in the partnership that do not affect the strategic fit of the project
- updates to staff fixed percentage of time
- addition/removal of a cost category
- funding moves between cost categories
- updates to non-contractual milestones
- change in project name
- updates to the project activities that are unlikely to destabilise the project
- updates in contractual expenditure forecasted, as long as total UKSPF grant remain the same
- changes in delivery partners (additional or removal)
- changes in the name of the project

The GR should check with their GM if other minor changes can be classed as administrative.

It is important to note that, individually, these changes may be non-material, but cumulatively they could be significant and constitute a material change (see below). Please discuss with your GM before the GR submits any change request.

### *Material changes*

These changes will require a more formal process with a form to complete. GRs can access the latest form [here](#).

Examples of material changes include:

- changes in the project ownership
- changes in the partnership that affects the strategic fit of the project
- more than 20 per cent reduction or increase in output and/or outcome totals
- any reduction in UKSPF grant
- additional UKSPF funding (any percentage increase)
- changes to strategic fit, or activities that are likely to destabilise the project

- addition/removal of outputs/outcomes.

The GR should check with their GM if other minor changes can be classed as material.

A funding agreement variation may be required following a change request. The GM will inform the GR if this applies.

## Meetings

The delivery of UKSPF funding projects will be monitored by your GM throughout the lifetime of the project. It is at the GM's discretion to set the frequency of these meetings, depending on performance of the projects and monitoring requirements.

These monitoring meetings are an opportunity to review delivery progress, address concerns, and continue to gain a better understanding of the project. Urgent issues will be discussed as they arise, rather than waiting for the monitoring meeting.

Meetings can take place digitally via Microsoft Teams, at a delivery venue of the GR or in-person at a GLA venue. To ensure the meetings are efficient, ideally only key project staff should attend; we recommend a maximum of two people from the GR attend. Meetings should take no longer than two hours.

Following the meeting, key discussion points and actions will be shared with the GR via email.

Previous monitoring meeting actions can be reviewed ahead of each scheduled meeting and discussed further if required.

Some areas that may be discussed at this meeting include:

- any issues arising from the most recent claim submission
- financial, output and outcome performance against the profiles in the funding agreement
- any challenges, opportunities (past, current, or future)
- any procurement issues
- any significant changes upcoming on the project, and/or areas that could require a change request
- publicity and upcoming project events
- progress with implementing the EDI and sustainability action plans
- subsidy control.

## Further information

### Delivery partners

The GR is not required to have a service-level agreement with any delivery partners signed, or in place, in advance of a claim being submitted. This relationship is for the GR to manage. The GFA is between the GLA and the GR only and does not involve any delivery partners.

## Match funding

Match funding is reported in quarterly claim form. Match funding is not a requirement of UKSPF projects. Match funding can be described as directly linking to UKSPF activity, so it makes that activity bigger and better (i.e. adds value).

## Audit

The GLA and/or the UK government may conduct an audit, which could occur at any time during the project lifetime and up to six years after the end of the funding period. Further information on audits and the responsibilities of the GR can be found in the GFA.

## Extension of 2022-25 Projects

Projects that have been extended until 31 March 2026, it is important to note the following guidance.

Beneficiaries (people, businesses, buildings or areas of land) supported in 2022-25 can be supported again or continued to be supported in 2025-26. They should not be reported again using the same output or outcome unless the support they receive is materially different to the support provided in 2022-25.

Eligible expenditure must be defrayed between 1 April 2025 and 31 March 2026. No expenditure from prior 1 April 2025 can be claimed.

## Closure

The closure process will include a check to ensure that the GR has submitted satisfactory evidence for the GLA to confirm project completion to government. The GR should be aware of their compliance with document retention post-closure. No further closure documentation will be issued.

## Documents

Latest versions documents can be found on the [UKSPF GLA website](#).