

Grants Learning Session – Wednesday 14th April 2021 – Rachel King's notes

- We will guide you through the grant application and monitoring process
- We will provide helpful hints on how best to complete your application + monitoring forms
- We will outline any changes that have been made to the process this year
- There will also be an opportunity to ask questions about anything you are unsure about

- **GRANTS PAGE ON CONTACT WEBSITE**
 - how to access the grants page and forms on website
<https://contact.org.uk/help-for-families/parent-carer-participation/grants-monitoring/>

- **FINANCIAL YEAR (DATE RANGE)**
 - only account for activities that were carried out during the time period 1st April 2020 to 31st March 2021
 - includes goods or services purchased between these dates

- **TRANSITION BETWEEN FINANCIAL YEARS**
 - how to manage the transition from one financial year to the next
 - DfE are getting stricter (from now) and there will be no flexibility on end of year
 - no more small underspend (was < 500 pounds in previous years)

- **UNDERSPEND** – 2020 was a one off, this year there will be no carry forward of any underspend – will be taken off 2nd tranche (even small underspend)

- **BE PREPARED**
 - make sure you have prepared and organized all your proofs of expenditure relevant to 2020-21 e.g. receipts, invoices, expense claim forms, remuneration forms, pay slips
 - we will only ask for proofs from 20% of forums (will include all new forums)

- **EXPENDITURE**
 - make sure you are clear about appropriate spend – what can you spend the PCP grant on and what you can't spend the PCP grant on (look in [Managing Your Parent Carer Participation Grant](#) document)
 - include information about remuneration and expenses paid to parent carers
 - include information about paid work for admin/management (staffing costs)
 - staffing costs – make sure to include hours worked, hourly rate + activities

- **PROOFS OF EXPENDITURE**

- you must have appropriate proofs of expenditure (POEs) in order to submit an expense as part of the grant spend
- we will ask 20% of forums to provide their proofs of expenditure for our team to check
- the other 80% of forums will still need to keep their poes filed (physically or digitally)
- DfE expects all financial records including spreadsheet and proofs to be kept on file for 7 years
- for those poes checked by our grants team, any missing or inadequate proofs will be deducted and counted as under-spend from the next year's grant.
- are your proofs of expenditure labelled clearly with reference number? Rachel can offer extra training and support for individual forums – email rachel.king@contact.org.uk

- **EXPENSE CLAIM FORMS**

- are your expense claim forms correctly completed?
- have you attached receipts and invoices where appropriate?
- do you have the correct approval?
- remember to explain your approval process if necessary

- **SPREADSHEET**

- assume that most people will already have completed a spreadsheet. For those who haven't yet show them the new upgraded spreadsheet.
- have you got the Contact grant spend spreadsheet for 2020-21 or your forums own accounting information to hand?
- have you cross-referenced your poes with the spreadsheet? (not all forums do this but it can really help)

- **CATEGORIES OF SPEND**

- **REFERENCING + CROSS-REFERENCING**

- Explain briefly and offer follow up sessions with me. Happy to offer extra support around using Contact spreadsheet and referencing proofs of expenditure.

- **ACTUAL SPEND**

- please fill in what you actually spent for each "area of spend" from your application.
- do not enter your planned expenditure. Section 5.

- **LIST YOUR POES**
 - where appropriate you can list which poes relate to each area (category) of spend in section 5 of the monitoring form.
 - no need to list proofs if you are attaching a fully complete spreadsheet.
 - total spend in monitoring form should match total spend on spreadsheet.

- **DISCRETIONARY GRANT**
 - remember to include a row for your discretionary grant if you had one

- **TOTAL SPENT**
 - enter your total grant spent in the final box – should match total spend on attached speradsheet

- **ATTACH SPREADSHEET**
 - ideally a full soft copy of your spreadsheet (Excel) rather than a summary sheet PDF.

- **HOW TO SEND YOUR PROOFS?**
 - we only accept soft copy proofs so these will need to be scanned and saved at your end.
 - we will provide a link where you can upload your soft copy proofs.

- **STAFFING COSTS**
 - remind forums about the 75% staffing continuing

USEFUL DOCUMENTS - Remind forums to look at all documents on grants page (website)

- **Managing your Parent Carer Participation Grant**
<https://contact.org.uk/wp-content/uploads/2021/03/Parent-Carer-Participation-Managing-your-Parent-Carer-Participation-Grant-2021-22.pdf>

 - **Changes to the PCP Grant monitoring form and grant application form**
<https://contact.org.uk/wp-content/uploads/2021/04/Parent-Carer-Participation-Grant-monitoring-form-and-grant-application-form-changes-2021-22.pdf>

 - **Fraud Guidance**
<https://contact.org.uk/help-for-families/parent-carer-participation/grants-monitoring/fraud-advice-for-parent-carer-forums/>

 - **Proofs of Expenditure Guidance**
<https://contact.org.uk/wp-content/uploads/2021/03/Parent-Carer-Participation-Proofs-Of-Expenditure-Guidance-2020-21.pdf>

 - **DfE grant spend spreadsheet**
[2021-22 Excel spreadsheet](#) to record grant spend
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- Explaining the big changes to the Conditions of Grant (Ben)

 - Directing to the DfE's code of conduct
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/771152/2019-01-15 Code of Conduct for Grant Recipients v. 1.01.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/771152/2019-01-15_Code_of_Conduct_for_Grant_Recipients_v.1.01.pdf)