



Payments, monitoring and marketing: Information for funded programmes

Introduction

The purpose of this leaflet is to explain the terms and conditions of grant, how they will be monitored and put into effect, and how you can work with Youth Music to achieve maximum publicity for your programme. We want to make your responsibilities clear and help you to meet them. If you need further advice or if a problem arises at any time, please contact Youth Music and we will try to help you.

Youth Music allocates funds with support from the National Lottery. Our Trustees are accountable to Arts Council England for the way in which lottery funds are spent. Therefore organisations in receipt of Youth Music have to meet certain standards, conditions and requirements.

The offer letter and conditions of grant

You will be sent an offer letter within one month of the Assessment Panel or Trustees meeting which approved your award. The offer letter details the standard and special conditions of grant that relate to your particular programme.

The offer letter will include a payment schedule – showing the dates you can claim the instalments of your award. It will also give details of any conditions that have to be met before the payments can be made. For example, you must sign and return a copy of the offer letter agreeing to the conditions and meet the conditions for the first payment before the first payment can be made.

You have two months from the date on the letter to accept the offer. In doing so your organisation is making a contractual commitment to comply with all the conditions of grant detailed in the offer letter.

You will then be sent separately an offer pack. Every organisation that receives a lottery grant must comply with the standard conditions listed in the offer pack.

Monitoring

Once an award has been made, responsibility for dealing with the programme is transferred to the Monitoring Unit at Youth Music. This unit monitors funded programmes and handles all payment claims.

You must inform the Youth Music Monitoring Officers if at any stage your plans for the programme change in a significant way. Changes in purpose or financial circumstances could undermine the offer of funding and could oblige Youth Music to seek repayment, either in part or in full, at a later stage. Youth Music must also be consulted **before** you make any changes to the artistic or musical elements of the programme. If such changes are not discussed and approved in advance Youth Music may be obliged to withhold future payments.

Acknowledging your lottery grant

Use of the Youth Music logo is essential in increasing public awareness of how arts lottery and other funding is benefiting local communities. It is also vital in helping Youth Music to secure future support for providing music-making opportunities aimed at children and young people.

You will receive a CD Rom containing the Youth Music logo and guidelines on its use. These guidelines apply to every organisation that has been awarded a grant from Youth Music. It is a condition of grant that you comply with the requirements set out in these guidance notes. Failure by organisations to use the logo as outlined in these guidelines may affect future grants from Youth Music.

Alternatively, the Youth Music logo and guidelines can be downloaded from the Funded organisations area of our website: www.youthmusic.org.uk.

The Youth Music logo must be used on all publicity material that relates to your Youth Music programme. Please pass the logo on to your designer/printer as appropriate, as well as any partners involved in the programme that may need it.

Youth Music asks to be provided with copies of your publicity material, please refer to your payment schedule for details. Please send to: Monitoring Unit, Youth Music, One America Street, London, SE1 0NE. (NB Please see later for advice on how to gain maximum publicity for your programme through public relations and marketing.)

Who should accept the offer?

In order to accept, the chairperson or head of your organisation must countersign and date the offer letter and return it to Youth Music. It is important that a senior member of the organisation signs because the ultimate responsibility for the programme rests with them.

Do not begin spending money on the programme until you have signed the copy of the offer letter and returned it.

Authorised signatories mandate

Your chairperson should also sign and return the **authorised signatories mandate** along with the offer letter (a copy of the mandate will be included with the offer letter). This form should also be used to nominate other people as signatories – staff who will have day to day responsibility for budgetary control of the programme. The mandate gives these people authority to certify expenditure claims. It is very important that the same people who are responsible for signing claims should also be responsible for the conduct of the programme. Each authorised signatory must provide a specimen signature, as well as printing their names on the mandate.

Reports

It is a standard condition of grant that you fulfil Youth Music's monitoring requirements. You will be asked to complete a self-monitoring and evaluation report (Final Report) at the end of the programme and, depending on the length of your programme, you may also be asked for interim reports. All programmes with more than three months duration will have to fill in a periodic self-monitoring and evaluation form.

These reports are needed in a standard format and should be filled out on-line from the funded programmes area of our website: www.youthmusic.org.uk. The reports will help us track the effects of your programme and will show us whether we are meeting both our objectives and those you set yourself. Receipt of completed self-monitoring and evaluation reports may be linked to payments of grant, and the final payment will only be made when you have completed the Final Report, sent us accounts for the programme, and met any other special conditions relating to your final payment.

Independent monitors

Independent monitors may be appointed to visit your programme and provide us with reports. You will be told in advance of the name of the monitor. They are experienced people who will come to see your work in a spirit of interest and support. Additionally, we must reserve the right to make visits at short notice to randomly selected funded organisations. You will be under an obligation to allow Youth Music staff and monitors access to the programme and to all the records related to it.

Payment schedules and cashflow forecasts

Grants from Youth Music are never paid out in one lump sum. Scheduled payments will be tied to the provision of reports and invoices and the fulfilment of the conditions, which have been described earlier in this leaflet.

The payment schedule is designed to fit with your expenditure plan. It can be changed in discussion with the Monitoring Unit at Youth Music. A sum (usually 10%) will always be held back until you have fully completed your programme and provided us with the necessary documentation.

If you are VAT-registered you will need to make provision for this on all your taxable expenditure and remember to take account of the rebate dates when you are looking at your cashflow.

Payment claims

Not all costs associated with a programme may be eligible for funding from Youth Music. Your offer letter will set out clearly any exclusions. You will be provided with a **Certified Invoice Summary form** which you must use to make claims for payment. This form is also available to download from the funded programmes section of our website: www.youthmusic.org.uk. Each Certified Invoice Summary form must be signed by an appropriate person – as an assurance that the amounts identified are correct valuations of the work done or purchases made. It also assures us that you will use Youth Music's grant to pay the invoices. You should attach photocopies of all invoices to the Certified Invoice Summary form. The VAT content of each invoice must also be shown separately, together with gross and net amounts.

Payments are normally based on a percentage ratio of Youth Music funds to partnership funds already received. This means that, in most cases, you will not receive a payment which covers the total amount of each invoice submitted. We will only pay a proportion and the balance will be taken as your partnership contribution. Where partnership funding is "in kind", documentation or an invoice for that amount should be included.

Frequency of payment will depend on the length of your programme, but will usually be between 3 and 6 months.

How to claim

The first payment from Youth Music will usually be made in advance of your programme starting work, upon receipt of the information requested in your special conditions schedule. It is recognised that in order to get a programme off the ground, some money may be needed in advance for which invoices can be sent later. All later payments will be made against invoices and the further information requested in your special conditions schedule.

If pre-payment is necessary to enable goods or services to be ordered, we can make payments against a pro forma invoice, provided the supplier can indicate the estimated delivery date for each item. A copy of the supplier's letter confirming this will be needed. You will also need to provide evidence of delivery at a later date together with the covering VAT invoice. This is to enable us to verify the payment against the amount advanced, and it will need to be provided before any further claims can be made.

However, it is vital that programmes should not accumulate costs in excess of their immediate requirement.

Partnership funding

All programmes are awarded grants on the basis that you can raise a certain proportion of partnership funding towards your programme. Youth Music will only make payments if you have raised the appropriate proportion of partnership funding for the whole programme.

You will have had to provide assurance that you have your partnership funding in place before Trustees considered your application and evidence of that partnership funding must be confirmed as part of the conditions of your first payment. If a proportion of your partnership funding is to come from income from a performance at the end of the programme, for example, you will have to show this in your final claim, but also give us assurance about how you will raise this amount if the earned income level is not reached.

Payment turnaround time

We can usually make a payment within 15 working days of receiving your claim on a properly signed Certified Invoice Summary form. This will depend on you having met the grant conditions appropriate to the particular stage of the programme, raised the right amount of partnership funding and submitted acceptable proof of the eligible expenditure. If the documentation is not complete your payment may be delayed.

Payments will be made directly to your bank account via BACS and e-mail confirmation of the amount of each payment will be sent to you. Your bank details will be requested with your offer letter. With the exception of bank details, all correspondence from us will be addressed to the person managing your programme.

Sale of assets purchased with lottery funds

The Trustees have stated that they will only purchase equipment in exceptional circumstances if a convincing case is made, and if your 'What Next?' plan includes a proposal for how the equipment will be used once the programme has been completed. If you are awarded a grant towards equipment it cannot be sold within the period specified in your offer letter without the prior consent of Youth Music. You should contact the Monitoring Unit if, during or after completion of your programme, a sale or change of ownership is proposed. Youth Music will not unreasonably withhold consent to such sales or transfers of assets, but you would normally be expected to repay a proportion of the original grant in relation to any profit made as a result.

Fraudulent applications

All the information contained in your application and the supporting papers should, to the best of your knowledge, be correct and accurately represent your plans for your programme. Please remember that, if you are awarded a grant and it subsequently transpires that the information contained in your application was false or misleading, you will be required to repay the grant and you may be liable to legal proceedings.

Please contact a member of the Youth Music Monitoring Unit for any further information about conditions of grant, monitoring and evaluation guidelines, and payment schedules for your funded programme.

Public Relations and Marketing Guidelines

The following guidelines are designed to assist you in your PR and marketing strategy. They outline what action we expect Youth Music award holders to take and what action Youth Music's Marketing Department will take.

Why is PR and marketing important?

- It will help your programme to establish itself in the local area and achieve capacity participation at workshops and performances.
- It will raise the profile of both your programme and Youth Music.
- It will assist the long term sustainability of Youth Music as a provider of music-making opportunities for under 18s.
- It will assist your programme in securing future partnership funding.

Youth Music's Marketing Department works in partnership with Youth Music award holders to raise the profile of our funding programmes on a national and regional level. This involves highlighting the achievements, success stories, and benefits to children and young people participating in musical activities. You will be asked when you submit your self-monitoring and evaluation reports to provide anecdotal evidence of the social impact of your programme and the impact that the programme has had on individuals.

One of the first things you must do is return your press and media form (enclosed) within 2 weeks of receipt of offer.

What you can do

Youth Music knows a certain amount about your programme but you are in the best position to provide accurate and up to date information about your programme to the press and media. We expect that you will want to generate as much positive publicity as possible. Youth Music is aware that some organisations have dedicated PR and marketing staff, whereas as others have small teams where one person fulfils many roles. The following points may help to guide you through some elements of a PR and marketing campaign.

Please make every effort to follow these guidelines below:

Press releases

Although Youth Music will send out an initial press release on receipt of your press and media form relevant to the particular funding programme, it is important to write regular press releases to your local and regional press about the progress of your programme. Youth Music's release concentrates on the funding programme whereas your press release will be more detailed about the actual content of your programme. We may also set up interviews and write press releases for special events or achievements.

The Marketing Department is happy to check and advise on the content of press releases. Copies of all press releases issued should be sent to Youth Music, please refer to your payment schedule for details. Please send to: Monitoring Unit, Youth Music, One America Street, London, SE1 0NE.

As well as information about the programme itself you should include the following in your press release:

- Youth Music must be credited as the funder in your press release, preferably in the first paragraph. **Please noted that we should always be referred to as 'Youth Music' rather than the 'National Foundation for Youth Music', 'NFYM' or any other abbreviation.**
- The Youth Music logo should be used as outlined on the CD Rom.
- Under "notes to editors" we suggest you include the following paragraph:

Youth Music funds and facilitates music-making for young people up to the age of 18, particularly those living in areas of social and economic need. It is a national charity set up in 1999 with National Lottery money provided through Arts Council England. By the end of 2006, Youth Music aims to have reached more than 3 million young people and their wider communities in a nationwide strategy to support youth music-making. For further information visit www.youthmusic.org.uk

- It is always worthwhile including a photograph with the release, but please note these must be of a high quality and show interesting content. (NB see information on photography for further details).
- Include details of when and how people can get involved and a contact number for further information.

Follow up the press release with a phone-call or e-mail to a key local press contact. Give them a reason why they should print a story on your organisation's programme i.e. it's the first time that 3 year olds have had access to percussion workshops in the town.

Marketing

- Free editorial coverage is the most efficient way of reaching a targeted audience. Many more people read a newspaper feature than an advert.
- Paid for advertising can be effective if you have the budget. Work out what you want to say, (what is it? - date, time, place, cost) and how much space (column inches) you need to say it. Write clearly and concisely – think about why the reader should act and give a clear indication of how

they can get involved. When selecting the publication check whether their readership is your target audience i.e. teenagers or parents.

- Distribute your posters, flyers and brochures around the area where the workshops/performances are taking place. Send them to local shops, youth clubs and schools. If you have a mailing list, send your contacts a letter with a flyer telling them more about the programme and give them a reason to get involved.

How can Youth Music help?

Youth Music supports and encourages programmes to gain as much positive press and media coverage as possible in the following ways:

- By sending out a press release as detailed above.
- By registering your project and upcoming events on the Youth Music website (www.youthmusic.org.uk - See Funded organisations section)
- By providing T-Shirts or posters and leaflets for high profile events. (All T-Shirt requests will be dealt with individually and at the discretion of the Marketing Department.)
- By featuring news, events, photographs in our quarterly newsletter and on the website. Please tell the Marketing Department your news as you go along.

Events

Entering your events on the Youth Music website is a condition of funding for the following reasons:

- It enables Youth Music staff to be kept informed about the progress of programmes.
- It enables Youth Music staff, advisors and Trustees to attend as many events as possible.
- It provides each programme with additional opportunities for publicity.
- It provides opportunities for Youth Music funded programmes to network with other programmes in their area, fostering partnership and collaboration opportunities.
- It raises the profile of Youth Music's work in the public domain.

To start entering events, visit the Funded organisations section of the Youth Music website – www.youthmusic.org.uk

Photography

Youth Music uses and needs a regular supply of high quality photographs of children and young people making music for our newsletter, website, presentations and launch events as well as for press purposes. In addition to

organising our own photographers, we also rely on the goodwill of programmes to send these through when possible. Please note the following when sending photographs:

- Photographs can be e-mailed or sent as hard copy. For the newsletter we require hard copy or electronic images scanned in at 300 dpi (dots per inch).
- Please obtain copyright permission from the photographer for the photographs to be published.
- If the photographer wishes to be identified please either attach the photograph to a piece of paper with the details or write the information on a label and stick onto the reverse of the photograph. Please also write down the location, name of participants and organisation name.
- Please do not write directly on the back of a photograph or attach paper clips to photographs as this can severely damage the print.
- Have you obtained permission from the children/adults in the photograph? Although it is not illegal to publish photographs of people without their consent, Youth Music would like your organisation to take reasonable steps to ensure that reproduction of a child's photograph (or a photograph of a group of children) does not upset any child or put any child at risk. If a child is at risk, due to family circumstances for example, then the person legally responsible for the child should ensure that the child's picture is not taken. We have found that the best way to deal with this is to make it clear to the children and to the parents and carers of young children that a photographer is present and ask them to let you know if they do not want to be photographed. **We will assume that any photographs you send to Youth Music are safe for publication.**

Please contact a member of the Youth Music Marketing Department for any further information about PR and marketing for your funded programme.

Contacts:

Monitoring Unit/Marketing and Communications Department
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