



## **LEADER GRANT CLAIM FORM AND PROGRESS REPORT GUIDANCE NOTES**

**These Guidance Notes are intended to assist the applicant complete the LEADER Grant Claim Form and Progress Report. Please read through the form before completing it.**

### **GENERAL**

This form should be used for claiming LEADER grants and recording project progress. The form may be used for projects attracting either CAPITAL or REVENUE payments.

A claim form **must** be completed within 4 months of the date of the Approval Document and acceptance of the grant and conditions, and every 3 months thereafter.

This is an **absolute** requirement but applicants may submit claims on a more frequent basis if they so wish, provided a claim is still submitted as above.

Where no expenditure has been incurred within any claim period, a claim form **must** still be submitted, with the performance progress reports (sections 3 and 4) fully completed.

Failure to comply with any of the grant conditions or to complete this form fully, may render the grant claim invalid. This will lead to delays in payment.

Up to 75% may be claimed while the project is being completed. **The remaining 25% may only be claimed after completion once all invoices have been paid.**

### **SECTION 1: PROJECT & CLAIMANT DETAILS**

#### **1.1 Project Details**

Please provide details of the project title as stated on your application and the project reference number allocated to your project. These details should be the same as that notified in your offer of grant.

#### **1.2 Claim Period**

- The period, for which the claim is submitted should be entered in this section, detailing the first date of the claim and the last date.
- You should ensure that the start date follows on from the previous claim finish date. If this is your first claim you should enter the start date of the project as the start date for the claim.
- Claims must be submitted at least quarterly, although applicants can submit claims more regularly if desired. The claim should normally be submitted within one month of the end of the claim period.
- If no expenditure has been incurred during the period in question, a nil claim must be submitted and any progress on targets provided.
- Please indicate in the box provided the number of the claim e.g. if this is your first claim - No 1, second claim - No 2 etc.
- Applicants should also note whether or not the claim being submitted is a final claim, interim/partial claim or non financial claim. Please note that once a final claim has been submitted and processed, no further expenditure can be claimed.

- If the claim is for Land Management you must detail the numbers of hectares.

### 1.3 Claimant Organisation

Please check the details provided in your application form are correct.

### 1.4 Bank Details

Details entered here must correspond to those shown on the project approval document or subsequent written notification. Any discrepancy will render the claim invalid. Payment will only be made to the applicant's bank account through BACS.

Changes to bank details must be submitted in writing. Such correspondence must be on the applicants' headed notepaper and **bear the original signature** of the Director of Finance or equivalent officer.

## SECTION 2: EXPENDITURE DETAILS

This section allows you to present the expenditure that has been incurred by your project during the claim period and therefore allow you to calculate the level of LEADER grant to be claimed. The items of expenditure listed in the table should correspond to those listed in your approved application and detailed in your Approval Document. The columns should be completed as follows:

### 2.1: ELIGIBLE PROJECT COSTS

To qualify as eligible, expenditure must relate to approved costs, and must have been incurred and discharged by payment on works, consistent with the project approval, before the end of the claim period. For the costs to be discharged, payment must have been transferred from the account of the claimant to the creditor involved.

Column 1 - enter the approved expenditure as set out in your application form for each category of expenditure.

Column 2 – enter the total amount approved in your LEADER Grant Application against each expenditure item.

Column 3 - enter the total expenditure claimed in previous claims for each category of expenditure. If this is your first claim, zero should be entered for each category.

Column 4 - Total cost of each item of expenditure.

Column 5 - Enter total amount claimed to date. This column should include the total for all claims made to date, including the current claim. The figures in this column should be the sum of column 3 and column 4 for each category of expenditure.

#### 2.1.1 ELIGIBLE CLAIM DETAILS

A copy of the receipted invoices or other documentary evidence of the expenditure having been incurred should back up each item of expenditure and should be submitted with your claim. Only expenditure for which documentary evidence provided will be taken as eligible and therefore included in the calculation of LEADER grant to be authorised and paid. Please group and number the invoices according to items of expenditure and split by CAPITAL or REVENUE. **You will need to supply bank statements as proof of payment.**

#### 2.2 PROJECT MATCH FUNDING

Evidence, in the form of receipts must be submitted at the final claim stage including receipts for any goods or services paid for by match funding.

## **In-Kind Contributions**

- Up to 25% of total project cost may be claimed as in-kind contributions.
- Contributions which are in-kind must be able to be assigned a monetary value (e.g. based on standard hourly labour costs) and must involve a logical audit trail. All in-kind claims must be backed by timesheets for labour costs.
- The supply of land, property, long term equipment, raw materials and unpaid work provided by volunteers as part of the direct delivery of a LEADER project may be considered as in-kind support. Applicants should provide detailed justification for in-kind contributions.
- It should be noted that the level of EC financial assistance towards in-kind costs should not exceed the level of expenditure actually incurred.
- In other words, applicants cannot receive a LEADER contribution greater than the value of the actual costs incurred.

## **2.3 INCOME GENERATION**

Projects which generate income, such as entrance fees, sales etc are acceptable for LEADER support, provided that any “profit” element raised would be held by the community and either recycled back into the community through other projects, upkeep of community assets, or used to sustain the project in its longer lifetime.

## **SECTION 3: PROJECT PROGRESS**

### **3.1 Job Creation**

If this applies to your project enter the number of jobs as approved in your application form (section 4.12) in column 1. Any jobs created during previous claim periods should be entered in column 2. If this is your second or a subsequent claim, the figures entered in this column should be the same as that entered in column 4 of your previous claim. Jobs created during the current claim period should be entered in column 3 and the total number of jobs created to date should be entered in column 4. The figure in column 4 should be the sum of columns 2 and 3.

### **3.2 and 3.3 Project Targets, Outputs and Outcomes**

This section allows you to present the progress that has been made towards meeting the targets set out in your application.

Column 1 - this column should include the targets/outputs as set out in your application. A zero should be entered if no target/output/outcome was agreed.

Column 2 - enter the targets/outputs/outcomes achieved in previous claim periods for each target. If this is your first claim, zero should be entered for each category. If this is your second or a subsequent claim, the figures entered in this column should be the same as that entered in column 4 of your previous claim.

Column 3 - enter the targets/outputs/outcomes achieved for the period of this claim for each target. If appropriate, evidence of the target/output being achieved should be submitted with the completed claim form.

Column 4 - this column should include the total for all claims made to date, including the current claim. The figures in this column should be the sum of column 2 and column 3 for each target/output/outcome.

### **3.4 Project Progress Summary**

Please outline the reason for any variance in the targets approved and those being achieved. This can include the reasons for delays in the project or in recruiting beneficiaries from the target groups. You should also report on the progress towards meeting the Key Milestones identified in section 8.1 of your application form.

## **SECTION 4: PUBLICITY**

### **Publicity Requirements**

This section should be used to demonstrate which of the publicity actions have been undertaken to date in the project implementation. By the end of the project all actions set out in your approved application should have been undertaken. Project officers should refer to the Publicity Requirements supplied with the approval pack for details of the requirements concerning publicity.

This section should detail what has been done during this claim period. An example of publicity material (e.g, copy of an advert, literature, photograph) relating to this claim period should be enclosed with the completed claim form.

Project Officers should note that failure to comply with the publicity regulation can result in action being taken to reclaim grant payments.

## **SECTION 5: CERTIFICATION**

Please ensure that the signatory for the claim is appropriately authorised to sign on behalf of the applicant organisation.

