

Shared Prosperity Fund: North Wales 2025 -2026 Claim guidance

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

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INTRODUCTION

1. PURPOSE

- 1.1 To provide a consistent financial grant claiming process for grant recipients to complete and submit a grant claim form for reimbursement of UKSPF funds. This guidance explains the reporting process, change request, eligibility criteria, document retention, sample verification requests, on the spot monitoring visits and guidance to complete the necessary forms to successfully draw down UK Shared Prosperity (UKSPF) funds.

2. UNIQUE PROJECT REFERENCE NUMBER

- 2.1 Each project has been assigned a unique 3-digit project reference number. This number can be found on the grant funding agreement letter issued for your project and should be included within all correspondence relating to your claim. This should also be referenced in the file name when returning your project grant claim form and progress report.

3. CLAIM SCHEDULE

- 3.1 The claim schedule is as follows:

Claim No.	Claim period	Submission due date
1	April – June 2025	01/08/25
2	July – September 2025	10/10/2025
3	October – December 2025	09/01/2026
4	January – March 2026	07/04/2026

Grant claims will be paid quarterly in retrospect (based on incurred* expenditure).

*incurred expenditure – costs that a business incurs when it purchases goods or services, but not yet paid.

- 3.2 In exceptional circumstances, a grant recipient can request to be paid in advance. Projects will need to provide a robust justification to demonstrate that cashflow is a barrier to project delivery for approval to be granted. Further guidance on advanced payments is available upon request.
- 3.3 The grant recipient will need to submit grant claim form and progress report to a Shared Prosperity Fund North Wales Regional Team, by email on or before the specified claim deadline.

4. CLAIM DOCUMENTS

- 4.1 Grant recipients must complete and return the following two documents for UKSPF funds to be released:
- Grant claim form (customised template issued separately to project applicant)
 - AND a Progress report

A progress report is required even where there is a Zero Financial claim.
Financial claims cannot be processed without both documents completed.

- 4.2 The grant recipient will need to submit the grant claim form and progress report to the Shared Prosperity Fund North Wales Regional Team by email on or before the specified claim deadline.

GRANT CLAIM FORM

5. OVERVIEW

- 5.1 A master grant claim form template will be issued to you. This will be an excel document customised to reflect the details in Annex B of the project approved application. The grant claim form contains 9 individual tabs for single LA project and 10 tabs for multi LA projects as detailed below:
1. Guidance
 2. Annex B Summary
 3. Declaration & Transaction Claim #

4. UKSPF Financial Breakdown (Multi LA projects only)
 5. SPF Outputs
 6. SPF Outcomes
 7. Delivery Plan and Milestones
 8. Procurement Plan
 9. Risk Register
 10. Project Tracker
- 5.2 The SPFNW team may need to amend or update the claim form template from time to time to ensure sufficient information is being captured for reporting to the UK Government. Any changes to the template or prepopulated information will be done by the SPFNW Team and submitted to you in advance of any claim deadline.
- 5.3 To ensure that each claim is processed efficiently, grant recipients must not change the format of the grant claim form. Adapting the template may affect the formulas contained within it thus making the grant claim form open to errors.
- 5.4 The grant claim form will be sent to you electronically and include the Declaration & Transaction Claim 1 tab.
- 5.5 Once your 1st claim has been processed, it will be returned to you with the Declaration & Transaction Claim 1 tab locked, together with Column F and G of the SPF Outputs and SPF Outcomes tabs also locked. An additional Declaration & Transaction Claim 2 tab will be included and additional columns added to SPF Outputs and Outcomes.
- 5.6 You will not be able to submit your next claim until your previous claim has been processed and the claim template reissued to you by the SPFNW team.
- 5.7 The process stated in 5.5. will continue when submitting your Claim 2, 3 and 4.
- 5.8 State the project reference ID number and project name in the subject title of all emails.

The following section introduces the claim form and provides instructions on how to complete and submit the claim form.

6. GUIDANCE TAB

- 6.1 It is important to note that all white coloured cells will need to be completed. All other cells will be locked and cannot be changed. Peach coloured cells are prepopulated with the values from your approved Annex B. Grey colour cells are pre-defined values or formulas that are locked for editing. Yellow cells contain instructions or guidance. Green cells indicate that the data has passed the validation check. Red cells indicate a failed validation check, you should review and correct the values entered.

7. ANNEX B – SUMMARY

- 7.1 This section will include the most up to date summary of your Annex B. It will include the SPF Sub-Theme breakdown, cost headings and output and outcome targets. This section will be pre-populated with information from your approved Annex B.
- 7.2 You will be required to review all pre-populated approved figures for correctness. Any anomalies found should be reported to the SPFNW Team at the earliest opportunity.

8. DECLARATION & TRANSACTIONS CLAIM

- 8.1 The sheet is large, ensure you scroll across and down to view all the data.
- 8.2 This section needs to be completed with details of the project's incurred expenditure within the claim period. E.g April - June
- 8.3 The sections below provide further guidance. Data can be copied into the White cells. If you require additional rows, go to the last cell and press the tab button on your keyboard.

A - Document reference ID number	Enter a document number for the transaction. This number can be a sequential number for the claim period or your own internal reference number. The SPFNW regional team will use this reference number to inform you which samples are being selected for verification. Please ensure that this reference number is also typed/written on the document and quoted in the file name when submitting to the SPFNW team for review.
B Cost Heading	Select from the drop down. Only approved Cost headings from your approved Annex B for your project will be listed.
C. Cost Description	Provide a brief description of the expenditure being claimed
D Name of Supplier, creditor/payee	Name of supplier, creditor/payee or employee.
E. Invoice number / Payee reference	Invoice/receipt or any reference number that will identify it as an individual payment.
F. Invoice date / Transaction Date	Invoice date or transaction date. If the date pre-dates the claim being submitted, provide an explanation in the Supporting Comments column.



G Transaction amount excl. VAT (Net Amount)	The total amount of invoice (excluding VAT).
H. VAT	The amount of VAT on the invoice/receipt. Enter £0.00 if no VAT is charged.
I . Total transaction amount (Gross)	This is the total amount from column G and H. Should be the whole total of the transaction amount regardless whether 100% cost is SPF.
J. Irrecoverable VAT amount	The amount of VAT you are unable to recover the from HMRC,
K. Total project claim amount	This is the total amount from column I and J and the project costs claimed from UKSPF.
L. UKSPF Grant amount	The amount of SPF grant
M. SPF Capital or Revenue Expenditure	State whether the expenditure is Capital or Revenue
N. Match Funding amount	The Match Funded amount will automatically calculate. You will need to state the source of the matchfunding in the Match Funding Profile section below on this tab.
O . Supporting comments of details of any assumptions relating to costs	Supporting comments relating to the expenditure and amounts claimed. E.g. Expenditure outside claiming period / Percentage of irrecoverable VAT / Only an element of the transaction value relates to SPF.
P. Sub theme numbers S01, S02 etc	List all UKSPF amount applicable to each agreed sub-theme of your approved Annex B. The total sum allocated against the sub theme must equal the total UKSPF grant amount in Column L. Check column AC/Check states TRUE, if it states FALSE, you will need to review your figures.



Do not include any Match Funding.

ADVANCE PAYMENTS

- 8.4 If you have received any advance payments, you will need to list it here.
- 8.5 The amount of grant paid for your submitted claim, may be less than the actual claimed amount, if you have any remaining advance payment funds.
- 8.6 The amount paid for the submitted claim will be stated under the Office use only section, together with any comments required.

MATCHFUNDING

- 8.7 Any matchfunding stipulated within your Approved Annex B will be pre-populated.
- 8.8 Input any matchfunding figures used for this claim period. Ensure the total match figures are highlighted in green, if in red, you will need to review the figures.

DECLARATION

- 8.9 Ensure that the declaration is signed by a duly authorised officer, listed on the authorised signatures document submitted with your signed GFA.

COMPLETION CHECK

- 8.7 Ensure that **Completed** is listed for every tab listed. If stated as **Incomplete** review the information within the relevant tab.

9. OUTPUTS AND OUTCOMES

- 9.1 All Output and Outcomes Indicator's have been listed for the 2025-2026 programme. The outputs and outcomes that have been approved for your project will have a target number listed in Column C.
- 9.2 When reporting on the number achieved to date, you must state the evidence you have in place to support the figure. Otherwise, this will highlight **Incomplete** on your Declaration & Transaction Claim tab.
- 9.3 If you achieve additional outputs/outcomes not approved, you may input a figure in the *Number achieved in Claim period*. Remember to include information on the evidence you have to support the figure.
- 9.4 As with the Declaration & Transaction Claim 1 tab, column's will be locked for the claim submitted and reissued to you when your claim has been processed, but will have with additional columns for the next claim period.
- 9.5 Applicants should record an output or outcome achieved once and not double count the same achievement under multiple indicators.
- It is not considered double counting if the unit of measure is different.
- 9.6 Definitions and expected evidence to support the achievement of the outputs and outcomes can be found [Outputs/Outcomes 25-26 Evidence requirements](#)
- 9.7 Within the document, for SPFNW purposes, the evidence listed within column F of the above document, will be required during the verification sampling of your claims. The evidence listed in Column G – Evidence collected and kept by the Grant Recipient for Audit purposes, need to be kept for a minimum of 10 years and may be requested by either SPFNW Officers, Local Authority Auditors and/or UK Government Officers.

10 DELIVERY PLAN AND MILESTONES

- 10.1 All tasks listed have been pre-populated from your approved Annex B.
- 10.2 You are required to update column F – Completed in this claim period – Yes/No. Provide comments in column G - Comment on progress made. If the update for this claim is not relevant, please state n/a otherwise it will show as incomplete on the validation of the Declaration & Transaction Claim tab.
You may add tasks if required.

11 PROCUREMENT

- 11.1 List all procurement activities carried out to-date. This should cover all items of expenditure that you are claiming.
- 11.2 Ensure that all columns are completed

Description of works, supplies or services	Description of the works, supplies or services of procurement carried out and which expenditure is being included within this claim. If no expenditure is being claimed at this time, do not include the procurement detail.
Anticipated value of works (£)	The total value of the contract in £
Has the Contract already been procured	Yes/No
If Yes, when was the contract awarded?	State date the contract was awarded.
Name the Organisation commissioned to deliver the works, Supplies or services	State the Organisation /Company that have been appointed to provide the works, Supplies or Services for this UKSPF project.
IF no, when will the contract be awarded?	

Which procurement procedure will be/was used?	<p>Please state the procurment route followed.</p> <p>Please state if you are a Contracting Authority.</p>
Comment on Progress made	<p>Provide comments for each line of procured activity.</p>

11.3 Submitting a tender evaluation report with your claim will reduce the verification sampling requirement.

12 RISK REGISTER

12.1 The risk register will already have been pre-populated with the data provided within your approved Annex B.

12.2 As part of your submission you must review all existing risks and update the scores (if applicable) and provide an update on how the risk is managed.

12.3 Please add any new risks within the claim period if applicable.

13 TRACKER

13.1 The tracker provides a summary of your approved Annex B, Expenditure against Sub-themes and cost headings, Outputs and Outcomes achieved.

13.2 Please review this document before you submit your claim to the SPFNW Regional team.

PROJECT EXPENDITURE

14 ELIGIBLE COSTS

- 14.1 Only expenditure identified in Annex B of the project approved application form is eligible to be claimed. The expenditure is only eligible if it has been incurred within the claim period.
- 14.2 You are not required to send supporting documents to evidence expenditure with your grant claim, but one of the SPFNW Team will contact you, requesting a full audit trail on a sample of the transactions within the claim.
- 14.3 To evidence expenditure incurred you will need to submit a copy of the purchase order, invoice, any workings out on how the sum being claimed has been reached if not 100%. We do expect invoices to have been paid by the time we request a verification sample of the claim and will expect to see a copy of the bank statement showing the payment made. If the payment is part of a larger payment run, you will need to provide details on how the sum on the bank statement has been reached.

15 VAT

- 15.1 VAT should not be included unless you can demonstrate that you are unable to recover from the tax authorities (HMRC). If only a % of the VAT is unrecoverable, you will need to provide details/calculations on how you have reached the sum claimed.

16 STAFF

- 16.1 Project Delivery Staff & Project Management: Only posts that have been identified within Annex B of the project approved application form can be claimed.

17 REDUNDANCY COSTS

- 17.1 Redundancy costs are only eligible to claim if identified as a cost within the approved Annex B of your application form.
- 17.2 Staff must have at least 2 years continuous service on the project. The redundancy decision must be taken whilst the staff member is still working on the SPF project.
- 17.3 Only the associated SPF proportion of any redundancy payment will be eligible.
- 17.4 All redundancy costs need to be proportionate in relation to the time spent and must be pro-rata if working part time on the project.

18 OVERHEADS

- 18.1 When claiming for % overheads (if stated within Annex B of the project approved application form) you will need to provide details/calculations on how you have reached the sum claimed.

19 TRAVEL & TRANSPORT

- 19.1 Travel and subsistence (Actual) Costs need to relate to project staff members and must be incurred specifically in relation to the SPF NW funded project activity.
- 19.2 You must retain all appropriate documentation to support any T & S claim (hotel bills, parking receipts, boarding cards, tickets etc) and the mileage rates used must be HMRC rate of £0.45ppm.

20 GRANTS/SUPPORT TO 3RD PARTIES

- 20.1 When submitting a claim for 3rd party grant payments you have made, you must retain a full trail on the process of approving the grants, through to the payment of the grant.
- 20.2 This includes grant application, approval, grant offer, grant payment and in line with subsidy control requirements. (This list is not exhaustive)
- 20.3 The SPF NW Team will request sight of all this information during their site visit/verification sample if chosen as part of the sample check of a claim.

21 PARTICIPANT COSTS

- 21.1 When submitting claims for participant travel costs, event attendance, accommodation, childcare etc. (if stated within Annex B of the project approved application form) details of the participants should be retained on file to support the amount being claimed.

22 CAPITAL COSTS

- 22.1 Only capital costs expenditure that have been identified within Annex B of project approved application form can be claimed.
- 22.2 Capital costs are defined as the following:
- Acquisition of land and/or building
 - Building and Construction
 - Professional fees associated with building and Construction
 - Plant and machinery
 - Any larger value item of Equipment, assessed in accordance with the project deliverer's capitalisation policy.

Items that do not meet this definition should be classed as revenue expenditure.

23 MARKETING AND PUBLICITY

23.1 Expenditure relating to marketing and publicity must be incurred specifically in relation to the SPF NW funded project and include all appropriate logos and copies kept on file.

PROGRESS REPORT

This is a narrative report that must be completed and returned to update on progress even if you are not submitting a financial grant claim.

We cannot process your financial claims unless we have received an up-to-date progress report.

24 PROJECT ACTIVITY

24.1 Please provide a narrative update, summarising progress, and achievements during the claim period. This should include but not limited to, progress against milestones, expenditure, recruitment, outputs and outcomes.

25 PUBLICITY

25.1 Use this section to provide details of any publicity activity undertaken within the claim period. This could include, social media posts, staff advertisements, articles, posters, plaques, web content. Where possible include links, attach documents.

25.2 Also provide any details of upcoming events so we can inform UK Gov and LA Leaders of possible Ministerial visits.

25.3 Ensure that the UKSPF logo and/or appropriate UKSPF wording is used. Section 6 of the attached link. [Branding-and-Publicity](#)

26 SPECIAL CONDITIONS

26.1 Use this section to provide a progress update against any special conditions applied to your grant Funding agreement.

26.2 If no special conditions have been applied, please state N/A.

27 PROJECT EVALUATION

27.1 Provide information on how you intend to evaluate your project, either by appointing an external evaluator or carried out internally.

28 ASSET REGISTER

28.1 List all assets purchased since the project start date, funded by the SPF Grant and that have an aggregated value of £5,000 or more. E.g. during the life of the project you purchase 10 laptops at £500 each, the aggregated value is £5,000, therefore should be listed. If you only bought 8, then the aggregated value is less than £5,000 and therefore does not need to be listed.

29 WELSH LANGUAGE

29.1 Please summarise any Welsh Language activities relevant to the project. This could include but not limited to:

- No of Welsh speakers delivering the project / recruited,
- Welsh signage,
- Delivery that has been conducted in Welsh,
Bilingual or Welsh promotional materials etc. Leaflets, application forms, beneficiary forms

30 EQUALITIES

30.1 Please summarise any project related activity that supports equalities. This could include but not limited to:

- Targeted support to individuals from any of the protected characteristic groups
- Participants engaging with the project from any of the protected characteristic groups
- Accessible works, ramps, lift etc.

31 NET ZERO

31.1 Please summarise any activities that support the UK Government and Welsh Government Net Zero policies.

32 SUBSIDY CONTROL

32.1 Provide details of any third party subsidies issued during the claim period.

32.2 State how the project has complied with the Subsidy Control regulations.

32.3 Confirm if relevant, that all subsidies provided above £100k has been uploaded to the subsidy control database.

32.4 If subsidy is not relevant to your project, state N/a

33 ISSUES ARISING

33.1 Please state any issues arising that may have an impact on your project, e.g. timescales, expenditure, outputs/outcomes. If not relevant to your project, please state N/A.

34 CHANGE REQUEST

34.1 Use this section to record any changes that have the potential to impact your project.

34.2 Confirm whether you consider this a material change and if this has been discussed with the relevant local authority/Multi LA Lead.

34.3 **Only** Administrative changes can be listed on the progress report and approved via email.

34.4 Material changes will require the completion of a Change Request Form and will need to be discussed with your Local SPF Team or Multi LA Lead before submitting to the SPFNW Team.

34.5 Examples of material changes include (this list is not exhaustive):

- Changes in the project ownership
- Changes in the partnership that affects the strategic fit of the project
- More than 20% reduction in outputs/or outcomes line totals
- Reduction in UKSPF grant by more than 20%
- Additional UKSPF Funding (any percentage changes)
- Increase/reduction of Match Funding (any percentage changes)
- Virement of more than 20% within expenditure headings and Sub-theme (S number)
- Virement of UKSPF funding between capital and revenue
- Additional UKSPF funding (any percentage increase)
- Removal/addition of a UKSPF Sub-theme (S number)
- Removal of outputs/outcomes

35 FORWARD PLAN

35.1 Please use this section to provide a brief summary of the activity planned for the next 3 months.

Ensure that the progress report has been signed by a duly authorised officer who is listed on the authorised signatories returned with your signed GFA.

Claim Submission

The following provides details of the process on receipt of your submitted claim.

36 REIMBURSEMENT OF GRANT

- 36.1 Completeness checks will be carried out upon receipt of your Grant Claim form and Progress report. The Project Officer will contact you if any errors are found during the checks. Grant Claims are processed on a first come, first served basis.
- 36.2 Once processed we aim to release payments of a completed grant claim form **within 10-15** working days. An email notification will be sent to confirm the amount and expected payment date, together with your following claim template, which will have previous claim tabs locked.
- 36.3 Payment of the **final claim** will not be released until the SPFNW Team have carried out the sample verification checks and the Team have received all the relevant documentation they require for your project. (It is imperative that you are aware of this)

37 VERIFICATIONS AND REVIEWS

- 37.1 It will be necessary to verify the project expenditure, activity, and achievements reported. Verifications checks will be undertaken after each quarterly claim submission. These checks will not delay payment of your submitted claim. Incorrect or missing information may, however, delay future claims being paid.
- 37.2 All queries or requests for additional evidence in relation to the review will be sent by email and will require a satisfactory response within 5 working days to ensure that future grant claims can be processed. Any delays here may result in future claims being held back until the next period claim.
- 37.3 You may also be subject to an onsite verification visit to physically inspect your records.

37.4 Submitting a tender evaluation report/procurement report and/or marketing links with your claim submission, will reduce the number of verification samples requested.

38 SAMPLE VERIFICATION CHECK

38.1 Each grant claim submitted will be subject to a sample verification check. You will usually receive the sample request at the same time as you receive the notification of the UKSPF grant payment being released.

38.2 Verification samples will be selected from some or all of the following:

- Expenditure
- Outputs achieved to date
- Outcomes achieved to date
- Procurement Activity
- Marketing Activities
- Subsidy control

38.3 All sample requests will be proportionate to the level of risk identified from any previous reviews and will therefore vary from claim to claim and project to project.

38.4 You will be required to submit a full audit trail for the sample by email within 10 working days. This is required to provide assurance that the UKSPF funds are being used correctly. Section 31-43 below provides details the evidence.

38.5 One PDF should be submitted to support each sample selected. Please do not submit multiple documents to support a sample.

38.6 During the sample check, if errors are found, these will need to be corrected on your next claim. This may also increase the number of sample transactions you will be requested to submit on future claims.

39 ON THE SPOT REVIEW

39.1 During the life of the project the SPFNW reserves the right to inspect both project records and assets on site. The SPFNW will give as much prior notice as possible, with the minimum notification period being 12 working days. You will need to ensure that your processes are robust enough to facilitate any such review.

39.2 If after investigation the SPFNW is not satisfied with their findings, they may request repayment of some or all of the grant funding.

SUPPORTING EVIDENCE AND DOCUMENTATION

40 EXPENDITURE EVIDENCE

40.1 To verify expenditure claimed you will be required to submit a copy of the relevant purchase order, invoice/receipt, Bacs listing, Bank-statements.

41 OUTPUTS AND OUTCOMES EVIDENCE

41.1 Evidence to support the outputs and outcomes will vary from project to project. In some cases the evidence noted in Annex B of the approved project application is not sufficient to meet the [UKSPF published definitions](#).

41.2 Should this be the case a member of the SPF team will be in touch to work with you and agree any additional evidence you may need to collate, use the above link as a guide to the types of evidence that would meet the definition.

42 PROCUREMENT EVIDENCE

42.1 Procurement verification samples will be light touch. You will only need to provide a procurement report. Depending on the value/process undertaken this could include a report detailing the 3-quotations received and brief narrative for the selected supplier or an evaluation report for higher value bids.

42.2 You must still retain all evidence to support the entire process as this will be tested should you be subject to an onsite visit.

42.3 Documents to retain on file include: (this list is not exhaustive)

- Preselection and selection procedures used
- Tender evaluation criteria used
- Tender evaluation report
- Copy of official Journal of OJEU used to advertise
- Procedure of Opening and recording Tenders (Tender Opening Report)
 - Evaluation Panel
- Confidentiality Statements / Anti Collusion
- Evaluation / Analysis / Scoring Matrix of tenders
- Tender Report or Meeting minutes based on decision
- Copy of signed and dated agreement / Contract of successful supplier
- Copy of unsuccessful supplier notifications
- Construction Meeting (Capital build/grant schemes only)
- Programme of Works (capital build/grant schemes only)

43 DOCUMENT RETENTION

43.1 Ensure that you keep all documents relating to the SPF NW grant for a minimum period of 10 years from the final grant payment.

43.2 The SPF NW team will request to see these documents during their site visits within the SPF NW period up to March 2026.

43.3 Following March 2026, Auditors may contact you and request to see these documents. This includes all documents e.g., financial, procurement, marketing and publicity, evidence of targets reported (this list is not exhaustive). The documents must be immediately accessible.