

British Academy of Management and Partner Grant Schemes Terms and Conditions 2023

1. General Requirements

- 1.1 Principal Investigators must observe the summary requirements for successful Principal Investigators as set out in the Scheme Guidance for Applicants 2023.
- 1.2 Grants must be used solely for the purposes set out in the application as agreed by BAM and cannot be transferred to another individual or used for a different purpose.
- 1.3 The Principal Investigator will be responsible for the conduct of the work. The host organisation administering the grant is responsible for the employment of staff working on the project, their terms and conditions, and for providing appropriate facilities for the work.
- 1.4 The Principal Investigator must ensure that all necessary ethical committee approvals, agreements about access, licences and requirements of regulatory authorities are in place before the project begins and are maintained for the full duration of the grant.
- 1.5 Projects are expected to last from 12 to 18 months (18 months maximum) and must begin no earlier than 1st October 2023.
- 1.6 No additional funding from BAM, ANZAM, IAM or SIMA will be available during the period of the project.
- 1.7 Applications should make a commitment to disseminating and sharing learning from the project throughout the wider business and management academic community.
- 1.8 The Principal Investigator's organisation (host organisation) must provide letters of support from the Head of Department and Research Office with the necessary confirmations as required in the BAM and Partner Grant Schemes 2023 Guidance for Applicants. The agreements must be included with the application. **Please note: applications without the agreement will be rejected at the administrative reject stage.**

2. Contract and dates

- 2.1 The Grant will be contracted between BAM and the Principal Investigator's Research Office. In the case of Collaborative Research Awards, BAM remains the contracting party, and administers the grants on behalf of the partner academies. The contract will contain the terms and conditions of the grant, the grant amount and the proposed dates on which the research project should start and end. The Principal Investigator's Research Office must accept the final terms and conditions by signing the provided contract and returning it to the BAM Grants Administrator, within one month of being sent the contract.
- 2.2 The host organisation will issue an invoice to BAM via the BAM Grants Administrator to claim the grant. Principal Investigators must not commit any expenditure prior to the contract being issued and the period of the grant having commenced.

- 2.3 As part of the contract process, BAM will confirm the preferred start date or agree a revised date with the Principal Investigator.
- 2.4 Principal Investigators are required to make every effort to start on the agreed date. It is recognised that this is not always possible due to unexpected difficulties in, for example, participant recruitment or data access. In circumstances where such a delay is unavoidable, a degree of flexibility will be allowed wherein grants may commence up to a maximum of three months after the agreed start date on the Grant Contract. The Principal Investigator must contact the BAM Grants Administrator if there is any instance where there is a delay in the start of the project.
- 2.5 If a project has not commenced within three months of the date stated in the issue of the grant and a later date has not been approved, the offer of the grant may be withdrawn. The grant may not then proceed without further written confirmation from the BAM Grant Awards Committee that it has been re-issued.
- 2.6 Applicants should understand that under no circumstances may the start date for a grant be earlier than the date of the issue of the grant. BAM will not accept responsibility for any expenditure undertaken prior to the agreed start date.

3. Project and Financial Monitoring

- 3.1 Within the limits of the total budget, the spending under different headings should conform broadly to the original estimates in the application approved by the BAM Grant Awards Committee. If the Principal Investigator wishes to make any substantial variation of expenditure between headings of the budget set out in the application, they must seek permission from BAM via the BAM Grants Administrator, **before** doing so.
- 3.2 The grant will be paid in full in advance upon submission of an invoice to the BAM Grants Administrator following receipt of a fully executed contract.
- 3.3 The Principal Investigator is required to submit an 'Interim Project and Financial Report' at 6-monthly intervals to the BAM Grants Administrator using a template provided by BAM to ensure that the project is proceeding as planned. Failure to produce this report may result in the Principal Investigator being deemed ineligible to apply for any future funding from BAM, ANZAM, IAM or SIMA.
- 3.4 The Principal Investigator is required to submit an 'End of Grant Project and Financial Report' to the BAM Grants Administrator within two months of the agreed project end date. Failure to produce this report may result in the Principal Investigator being deemed ineligible to apply for any future funding from BAM, ANZAM, IAM or SIMA.
- 3.5 All bookings and receipts should be collected as the research project progresses and sent to the BAM Grants Administrator when submitting the 'End of Grant Project and Financial Report.'
- 3.6 BAM reserves the right to suspend or terminate a grant if the Principal Investigator, or any staff working on the project:
 - breach any of the conditions of the grant;
 - become unfit or unable to pursue the work funded by the grant;
 - do not complete the project;
 - or if the project has not commenced within three months of the date stated in the grant contract and a later date has not been approved.The grant may not then proceed without further written confirmation from BAM that it has been re-issued.
- 3.7 BAM will, where possible, seek to ensure that in the event of changes or termination, reasonable notice is given to the host organisation and Principal Investigator via the BAM Grants Administrator. The minimum notice will be three months.

4. Changes in the Project

- 4.1 BAM should be informed immediately in writing to the BAM Grants Administrator if the Principal Investigator intend(s) to move to another organisation during the course of the grant. The Principal Investigator is required to inform the BAM Grants Administrator of the contact details for the administrative authority at the new host organisation and arrange for the original host organisation to send a closing financial statement to the BAM Grants Administrator and return the remaining funds to BAM. BAM will contact the new host organisation to confirm its agreement to the conditions of award and to administering the remaining grant, and make arrangement for the remaining funds to be issued to the new host organisation.
- 4.2 The permission of the BAM Grant Awards Committee must be sought in advance via the BAM Grants Administrator, where significant changes are necessary to the work that will be carried out, whether or not these are judged advantageous. BAM reserves the right to judge whether any project would be compromised by the proposed changes. If the BAM Grant Scheme Awards Committee judges this to be the case, then the request for significant changes will be rejected. If the project cannot continue as a result of rejection of a request, the grant will be terminated.

5. Publicity

- 5.1 Principal Investigators are required to attend and present the research outcomes via a full paper at the BAM Annual Conference, or ANZAM/IAM/SIMA conference for collaborative research awards, on at least one occasion. **This is mandatory, and failure to present the research outcomes at the conference as a full paper will result in the requirement to return the grant funding.**
- 5.2 BAM and ANZAM, IAM or SIMA (for collaborative research awards) must be acknowledged, as appropriate to the particular grant scheme, in any publication (written or electronic) that arises as a direct result of the project.
- 5.3 BAM must be updated on any research or materials produced from the project via submission of interim and final project reports. Progress of projects will be publicised on the BAM website. Principal Investigators must respond to requests from BAM for updates on publications and other project related outcomes and impact after the end of the grant. Projects will be allocated an individual project summary page which will include general information about the project, an abstract, and any publicly available findings specifically from the project including copies of, or links to, openly accessible versions of any publication arising from the research.
- 5.4 If the Principal Investigator or their employers wish to issue press statements that mention BAM and the respective Grants Scheme, BAM must be given an opportunity to comment on the draft by contacting the BAM Grants Administrator. BAM will provide appropriate text to acknowledge that the work has been funded for a particular purpose but that the views expressed are those of the Principal Investigator and not necessarily those of BAM.

6. Ethics

- 6.1 Principal Investigators are responsible for ensuring that ethical issues relating to the Project are identified and brought to the attention of the relevant approval or regulatory body. Ethical approval must be obtained from the Principal Investigator's institution or relevant authority before commencing the study and to comply with relevant ethical guidelines (e.g. [CABS/BAM Ethics guide \(2015\)](#)). Ethics approvals must also address how the project complies with [General Data Protection Regulation](#) (GDPR).

Note: The British Academy of Management does not intend any of these terms and conditions to be enforceable by any third party.