



About this document

This document is a generic template of a contract for a grant. It is provided for reference purposes only, to give a general idea of the terms and conditions that may be included in a Lloyd's Register Foundation grant contract.

This is not an actual contract for a specific grant. It does not confirm that a grant has been awarded, does not create any legal obligations and does not need to be signed or accepted.

The contract issued for a specific grant may contain different or additional terms. The legal wording in this template has not been simplified or changed.

Standard terms and conditions

Monitoring Reports Schedule ("Table A")

Monitoring Form	Due Date
{{#FundingAwardRequirement}}{{Name}}	{{DueDate}}{{/FundingAwardRequirement}}

Payment Schedule "Table B"

Date Payment Scheduled	Description	Value
{{#FundingDisbursement}}{{Scheduled_Date_ONLY__c}}	{{DisbursementName}}	£{{Amount}}{{/FundingDisbursement}}

The following specific Terms apply to the Grant made to you by the Foundation:

1. The Grant is made to you on the basis of your Application, and the Application forms a part of this agreement as may be varied from time to time by you and the Foundation in writing. It sets out as how the funding is to be used to carry out the Programme including:
 - (b) using the Grant for the Programme; and
 - (b) not sub-granting the Grant to any third party without prior written consent by the Foundation (unless this has been approved in the Application). Even when any sub-grant is consented by the Foundation, you shall (i) ensure the third party fully complies with the conditions of this agreement and (ii) at all times remain responsible for the proper performance of this agreement and for all the acts and omissions of the third party in connection with the Grant.

2. The amount stated above is the maximum total funding to be provided to you by the Foundation under this agreement, including any liability for tax. Payment of the Grant shall be made in instalments in accordance with Table B. In the event you have not utilised the relevant amounts paid prior to the next due date, the Foundation reserves the right to defer such payment until the following due date and Table B shall be amended accordingly.
3. Please quote your grant reference number {{#FundingAward}}{{Identifier__c}}{{/FundingAward}} in all correspondence with the Foundation.
4. Your Case officer in the Foundation for this grant is {{#CaseWorker}}{{Name}}{{/CaseWorker}} .
5. Your contact for this Grant is {{#Awardee}}{{FirstName}} {{LastName}}{{/Awardee}}.
6. If your contact for the Grant is unable to continue in that capacity, you must promptly notify the Foundation. Your contact should not pass on their log on details to the Foundation's online grants management system to any successor. The successor must register in the Foundation's online grants management system, notify the Foundation, and the Foundation will give them access to the Grant via the grants management system.
7. You and the Foundation recognise the value in publicising the existence of the Grant and the Programme. Accordingly, you hereby agree for the Foundation to publicise the same which may include reference to your name. If any acknowledgement of funding is to be made by you then this should refer to 'Lloyd's Register Foundation' and the Foundation's logo and description should be used, where appropriate, on any publicity materials produced by you in connection with this agreement letter. You must request for a copy of the Foundation's logo and comply with the Branding Policy in relation to the use of the Foundation's logo. For the avoidance of doubt if the publication contemplated herein goes further than announcement of the Programme and funding then the provisions of the Branding Policy shall apply.
8. All proposed publications (including online and offline press releases and statements) must comply with the Foundation's Branding Policy which shall be deemed to be incorporated into this agreement. Such publication must acknowledge the Foundation and the Grant unless the Foundation has specifically requested not to be mentioned.
9. If you become aware of any publicity generated externally by the Grant then you shall notify the Foundation immediately.
10. a. You must notify the Foundation immediately on becoming aware of any 'Serious Incident' which affects your organisation. For these purposes a 'Serious Incident' is an adverse event (actual or alleged) which results in or risks significant harm to people by you, (whether or not funded by the Grant), may result in loss of your money or assets or damage to your good standing or reputation.



- b. In the event you are a UK charity you shall notify the Foundation of any reporting of Serious Incidents required as set out on the UK Charity Commission website:

Any breach of this clause may result in termination of this agreement pursuant to clause 23.

11. You must complete written reports to the Foundation as set out at Table A above (and described in Schedule 2), through the Foundation's online grants management system. You must report on the outcomes and impact of the Grant and provide all the information requested in the format required by the Foundation.
12. You must keep accurate accounts and records of the receipts and expenditure of the Grant and, if requested, provide the Foundation with copies and fully cooperate with any financial audit carried out by the Foundation on the Grant. If an audit identifies that You have failed or is failing to perform with your obligations under this agreement and have not utilised the Grant in accordance with this agreement, you shall immediately repay such amounts to the Foundation and this may impact the following payments of the Grant.
13. Delay in submitting the reports in Table A, or not providing all the information requested in the format required by the Foundation, will result in delay in payment by the Foundation of the next instalment of the Grant.
14. The Foundation's policies [attached], shall apply to this agreement deemed to be incorporated to this agreement. You hereby agree to comply with the provisions of all such policies which include:
- (iii) Grants Monitoring Reports
 - (iii) Branding Policy
 - (iii) Generative AI Policy
15. The Foundation expects you to submit ad hoc interim reports of any significant output, outcomes or impact, and to upload formal papers relating to the governance and activity of the Grant, through the Foundation's online grants management system. The Foundation will provide specific guidance.
16. The Foundation is committed to maintaining the highest legal and ethical standards and practices in all aspects of its business and affairs. Accordingly, as a condition of your receipt of grant funding, you are required to (i) confirm your commitment also to act at all times in accordance with the highest ethical and legal standards as practised in your industry in the UK and EU, and in particular (but without limitation) to have in place and adhere to policies and practices which are fully compliant with the laws of England and Wales including Data

Protection, Safeguarding, Anti-bullying, Anti-Bribery and Corruption, Anti-Facilitation of Tax Evasion, Employment Legislation, Health and Safety, Environment and Sustainability, Whistleblowing and Modern Slavery, as well as to comply with all applicable laws (of England and Wales and local laws) and regulations with respect to this Agreement, including but not limited to sanctions and trade control related laws; and (ii) warrant that neither your application for, receipt or use of the Grant nor the Programme violate or will violate any applicable laws. Furthermore, it is your responsibility to ensure that any partners, stakeholders and subcontractors working with you act at all times in accordance with these legal and ethical standards. This remains the case regardless of the location of your principal office or whether the laws of England and Wales are directly enforceable in the territory(s) in which you conduct your business and affairs and by accepting the Foundation's funding you warrant and undertake to ensure that this is the case. Any breach of this clause shall give the Foundation the right to immediately terminate this agreement and cease all further funding and the relevant provisions of paragraph 24 shall apply.

17. You acknowledge and agree that all Foreground Intellectual Property Rights in the Output generated by the Grant, wherever in the world enforceable, shall immediately upon creation vest in and shall be and remain the sole and exclusive property of the Foundation. In the event a third party contributes to the Output you shall procure the ownership of all Intellectual Property Rights to comply with this clause 17. You hereby indemnify and hold the Foundation harmless from and against any claim, liabilities, losses, damages, suffered by the Foundation in relation to any breach of this clause and any infringement of a third party's Intellectual Property Rights.
18. You hereby grant to the Foundation a non exclusive, worldwide, royalty free, irrevocable, perpetual, transferrable and sub-licensable licence to use the Background Intellectual Property in order to use the Output.
19. It is the intention of the Foundation that all Intellectual Property Rights generated by the Grant shall be made available for the benefit of the public. Research papers shall be retained in the Foundation's repository of public reports and accessible by the public.
20. Where this agreement terminates by virtue of clause 22 or clause 25 the Foundation hereby grants you a non-exclusive, worldwide and royalty free licence to use the Foreground Intellectual Property Rights for research and non commercial purposes only.
21. You agree that you will notify the Foundation as soon as reasonably practicable of any actual or potential commercial value in the Output.
22. This agreement shall continue until **[DATE ONE MONTH AFTER THE FINAL REPORT DUE]** unless terminated earlier in accordance with the provisions contained herein.
23. The Foundation reserves the right to terminate this agreement at any time at its discretion, after giving you 30 days' written notice.

24. The Foundation further reserves the right immediately on written notice to terminate the whole or any part of this agreement and recover all or any part of the funds already paid to you in the event of (i) any breach or non-observance by you of any relevant law; (ii) breach of any of the terms of this agreement ; (iii) the occurrence of a Serious Incident caused by your default; or (iv) breach of paragraph 8 (Due Diligence) of the Branding Policy.
- 24.1 Failure to comply with the Generative AI Policy may be treated as a breach of this agreement. The Foundation reserves the right to suspend or terminate funding, require repayment of grant funds, or take other action it considers appropriate where you have breached the Generative AI Policy.
25. Either you or the Foundation may terminate the agreement, without further liability to the other immediately upon giving the other notice in writing if a “force majeure event” occurs which prevents either party from fulfilling their obligations under the agreement for one month or longer. A “force majeure event” means any circumstance not within a party’s reasonable control, including (a) acts of God, flood, drought, earthquake or other natural disaster, (b) epidemic or pandemic, (c) terrorist attack, civil war, civil commotion or riots, war, threat or preparation for war, armed conflict, imposition of sanctions, embargo, or breaking off of diplomatic relations, (d) nuclear, chemical or biological contamination or sonic boom, (e) any law or any action taken by a government or public authority, including (but not limited to) imposing an export or import restriction, quota or prohibition, or failing to grant a necessary licence or consent, (f) collapse of buildings, fire, explosion or accident, and (g) any labour or trade dispute, strikes, industrial action or lockouts.
26. In the event of termination (howsoever) any surplus Grant payments shall be repaid to the Foundation within 14 days from the date of termination.
27. Notwithstanding termination (howsoever) you shall complete the latest report due in accordance with Table A and at the request of the Foundation transfer any or all documentation, materials, notes, findings in relation to the Programme.
28. There is no obligation on the Foundation to provide any further funding after expiration of this agreement or Programme. A new application would be required and may be considered through the Foundation’s usual process.
29. The liability of each party to the other for any breach of this agreement, any negligence or arising in any other way out of the subject matter of this agreement, will not extend to any indirect damages or losses, or to any loss of profits, loss of revenue, loss of data, loss of contracts or opportunity, whether direct or indirect, even if the party bringing the claim has advised the other of the possibility of those losses, or if they were within the other party's contemplation.

30. Notwithstanding anything or provision to the contrary (other than save for subject to clause 33), your aggregate liability to the Foundation for all and any breaches of this Agreement, any negligence or arising in any other way out of the subject matter of this Agreement will not exceed in total the total value of the Grant.

31. Notwithstanding anything or provision to the contrary (other than save for subject to clause 33), the Foundation's aggregate liability to you under this agreement will be limited to payment of the Grant in accordance with this agreement.

32. Nothing in this agreement limits or excludes either party's liability for death or personal injury resulting from negligence; any fraud or for any sort of liability that, by law, cannot be limited or excluded; or any loss or damage caused by a deliberate breach of this agreement.

33. The parties hereby agree to comply with the provisions of the Data Protection Legislation. For any personal data, which you disclose to the Foundation in the Application or will disclose to the Foundation during the term of this agreement, you further confirm and agree that:

(i) Regarding your own personal data, you expressly consent herein that:

(b) the Foundation can use your personal data for the purpose of its performance of this agreement, management of the grants and its normal operation of the foundation; and

(b) the Foundation can transfer your personal data to its suppliers and allow such suppliers to use your personal data to the extent that such transfer and use is needed for the purpose of its performance of this agreement, management of the grants and its normal operation of the foundation.

(ii) Regarding those personal data collected by you from data subjects, before you disclose it to the Foundation, you should ensure you have obtained all necessary appropriate consents from the data subjects to enable lawful transfer of such personal data to the Foundation (and its suppliers) and lawful process of such personal data by the Foundation (and its suppliers) for the purpose of its performance of this agreement, management of the grants and normal operation of the foundation.

The Foundation's Privacy Notice (<https://www.lrfoundation.org.uk/en/privacy-notice/>) will be applied for the personal data disclosed by you to the Foundation.

35. You shall not, without the prior written consent of the Foundation, assign, transfer, mortgage, charge, subcontract, declare a trust over or deal in any other manner with any of your rights and obligations under this agreement.

36. The provisions of clauses 7, 8, 9, 12, 17, 20, 21, 27, 28, 31. 32, 33,34, 35,37 and 38 shall survive the expiry or termination of this Agreement.

37. This agreement shall be governed and construed in accordance with the laws of England and Wales.

38. The following definitions shall apply to this agreement:

Application: as set out in paragraph 1 of this agreement.

Background Intellectual Property: any Intellectual Property Rights, other than Foreground Intellectual Property Rights or any Intellectual Property Rights in connection with the respective names or brands.

Branding Policy: the branding policy of the Foundation in relation to use of its logo, mark and written communications attached to Schedule 4 of this agreement.

Data Protection Legislation: all applicable data protection and privacy legislation in force from time to time in the UK including the UK GDPR; the Data Protection Act 2018 (DPA 2018) (and regulations made thereunder); the Privacy and Electronic Communications Regulations 2003 (SI 2003/2426) as amended.

Foreground Intellectual Property: any Intellectual Property Rights that arises or is obtained or developed by, or by a contractor on behalf of, either party generated from the Grant.

Generative AI Policy: the Generative AI Policy of the Foundation attached to Schedule 5 of this agreement.

Grant: as set out in paragraph 1 of this agreement.

Intellectual Property Rights: patents, rights to inventions, copyright and related rights, trade marks, business names and domain names, rights in get-up, goodwill and the right to sue for passing off, rights in designs, database rights, rights to use, and protect the confidentiality of, confidential information (including know-how), and all other intellectual property rights, in each case whether registered or unregistered and including all applications and rights to apply for and be granted, renewals or extensions of, and rights to claim priority from, such rights and all similar or equivalent rights or forms of protection which subsist or will subsist now or in the future in any part of the world.

Monitoring Policy: as attached to Schedule 3 of this agreement.

Output: means any output including findings, research, information, articles, publications, analyses, tool kits, seminars, events, networks, activities generated from or in connection with the Programme using the Grant.

Programme: as set out in paragraph 1 of this agreement.

Table A: as set out in paragraph 3 of this agreement.

Table B: as set out in paragraph 1 of this agreement.

Terms: the terms set out at clause 1-37 of this agreement.

Schedule 2 – Reports

The following reports are required and the templates can be accessed on the Foundation's grant management system.

- Short report, a report which details delivery and budget spend for the last period.
- Annual report, a report which details delivery and budget spend for the whole year.
- Final report, a report which details delivery and budget spend for the whole of the grant.

- Impact report
- Ad hoc report (as described in clause 16 of the Terms). This is generated by the grantholder in the portal.

Schedule 3 – Monitoring Policy

GMS03-01-01 Grants Monitoring Policy – Grant Holders

1. Policy

Periodic and final monitoring reports are required for grants awarded by the Foundation as detailed within the grant agreement. We require grant monitoring reports to ensure that funding has been used solely for the purpose it was given and to collect evidence on outputs, outcomes, and impact.

This policy sets out the principles for overdue monitoring reports from grant recipients, including escalation and applies to all approved grant recipients.

Our policy is to ensure that:

- Grant holders submit periodic monitoring reports as per their contract.
- A Case Officer reviews, and signs off as approved, the submitted reports.
- There is a process in place to manage overdue or incomplete monitoring reports.

In support of this policy, the Foundation Grants Team will:

1. Ensure the requirement to submit monitoring reports is included in all our grant contracts, including their frequency and deadlines. We will include this policy for information as an appendix to all grant contracts.
2. Remind grant holders when reports are due and overdue through the lead contact supplied via the online system (Salesforce).
3. Before the reporting deadline stated in the contract, allow grant holders to request an extension, with good reason. This request and the reason for it will be carefully considered, and if agreed to, we will confirm the new deadline in writing and any change to payment dates.
4. Request report resubmission for incomplete reports - If a report is submitted incomplete i.e., lacking information, we need to assess the use of the funds and the impact of the grant. We will return it specifying what further information is needed and giving a deadline for resubmission.

5. Ensure the Grants Team monitors overdue reports - If a grant holder has not submitted a report by the agreed deadline and has not requested an extension, or that extension has not been agreed, we will consider the report to be overdue from the date of the original deadline.
6. Initiate payment sanctions, where suitable - During the course of the grant, if a monitoring report is submitted late or incomplete, we have the right to withhold the next grant payment until, in our view, the report is complete and acceptable.
7. Assess need for future grant application exclusions - During the course of the grant, if monitoring reports are repeatedly submitted late or incomplete, without good reason, we have the right to not consider future applications from the grant holder, i.e., the legal entity with whom we are contracted, including for any projects or calls by organisations wishing to partner with the grant holder.
8. Allow grant holders to appeal against (item 7) and that appeal must be made within 30 days of the restriction being imposed.

2. Process

Initial Submission Reminders

Monitoring reports are due as per the schedule in the contract. The month leading up to the due date, two (2) reminder emails are to be sent to grant holders (i.e. report due 31st of Jan, reminders sent between 1st and 31st of Jan).

Submissions Within Timescale

Reports received within timescale are reviewed by the appointed Case Officer. If there is any information still required, the report is classified as 'Rejected'. The grant holder is then informed of recommended changes and offered a new submission date.

Once the report has addressed recommended changes and is classified as 'Accepted', a scheduled payment is made.

Pre-Arranged Extensions

Where grant holders have contacted the Foundation Grants Team prior to their due date to inform of any delays, the Grants Team will discuss options for an extension.

3. Overdue Monitoring Reports

Communication of Delays

Lloyd's Register Foundation will make every effort to work with grant holders in addressing delays, as it is understandable that situations may change. Grant holders and their respective organisations have a responsibility to communicate with the Grants Team should they experience difficulties with submitting monitoring reports.

In instances whereby the grant holder has not fulfilled requirements for resubmission or extension, as noted above (section 2 Process), their report will be considered overdue, and the overdue process below will be initiated.

Stage 1 – One Month Overdue

1. During the subsequent month after a report was due, grant holders to receive a Stage 1 reminder email.
2. If the report is then submitted, the Grants Team may need to discuss an amended grant payment date, if applicable.
3. If the report is still not submitted following the Stage 1 emails, Stage 2 to be initiated.

Stage 2 – Two Months Overdue

1. If the report is 2 months overdue, a Stage 2 email to be sent to the grant holder reminding them of their contracted responsibilities.
2. If the report is then submitted, the Grants Team may need to discuss an amended grant payment date, if applicable.
3. If the report is still not submitted following the Stage 2 email, Stage 3 to be initiated.

Stage 3 – Three Months Overdue

1. The Grants Team to notify the appointed Case Officer of the overdue monitoring report.
2. A formal letter to be sent to a senior member of the grant holder's organisation. If no response or inadequate remedial action is taken, Stage 4 to be initiated.

Stage 4 – Four Months Overdue

1. Lloyd's Register Foundation to decide next steps due to non-compliance with submitting monitoring reports.
2. A Lloyd's Register Foundation Director to write to the head of the grant holder's organisation to inform of the following:
 - Details regarding breach of contract
 - Organisational ban on future grant applications
 - Any right to appeal



Schedule 4 – Branding Policy

Branding Policy

(Grant holder contracts)

1. Branding

On materials that acknowledge or refer to Lloyd's Register Foundation's ("the Foundation") funding or grant agreement, including digital assets and marketing collateral, the Foundation's logo must be used with the provisions of this Branding Policy adhered to correctly. The Foundation will supply its logo and usage criteria upon request.

2. Referencing

In all materials that acknowledge or refer to our funding or grant agreement, we should be referred to as 'Lloyd's Register Foundation' in full, following correct backlinking procedure (please see paragraph 7). The Foundation's full description should be used (see below):

About Lloyd's Register Foundation

Lloyd's Register Foundation is an independent global charity that supports research, innovation, and education to make the world a safer place. It uses the best available evidence and insight to help the global community focus on tackling the world's most pressing safety challenges. For more information, please visit www.lrfoundation.org.uk

For subsequent mentions, Lloyd's Register Foundation can be shortened to 'The Foundation.'

3. Approval of Publications

All publications must be sent as an electronic version to the Foundation (at the email address below) for review and approval prior to publication.

The Foundation will provide its consent to use its name and logo or otherwise within two weeks of receipt of the proposed publication, and if no response has been received by you within two weeks, then you may publish with reference given to the Foundation and the grant.

All publications must be compliant with these Branding Guidelines.

Notices shall be sent to:

comms@lrfoundation.org.uk

4. Press releases

All press releases that you might wish to undertake, connected with the grant, including online and offline press releases and statements, shall be submitted to the Foundation email address as set out at paragraph 3 above for review and approval prior to publication (not to be unreasonably withheld or delayed).

The Foundation will provide approval within one week of receipt of the proposed press release. If no response has been received, then you may publish with reference given to the Foundation and the Grant.

Press releases must be compliant with these Branding Guidelines. Mention of the Foundation and its correct relation to the grant (funder, partner etc) must be included in the main body of the press release and not only in the boiler plate.

5. Written Communications

We require Lloyd's Register Foundation grant holders to follow our SAFE guidance when producing written communications:

S	Scientifically evidence and research based.
A	Accessible and clear to all stakeholder groups, regardless of knowledge level or subject matter expertise
F	Factual and transparent, and reinforces trust in our organisation?
E	Engaging and/or educational and makes our work easier to understand?

For the avoidance of doubt publications and communications shall not:

- (a) be political including not contain any political messages
- (b) critical of any governments, governmental agencies or public authorities around the world
- (d) contain any content which may cause reputational damage to the Foundation or the Lloyd's Register Group of companies.

6. Social media

You may post items on social media (e.g. X and LinkedIn) in relation to the Grant without prior approval from the Foundation in accordance with paragraph 5, however you must comply swiftly with any reasonable request by the Foundation to modify or delete any such post.

The Foundation's X and LinkedIn accounts should be tagged.

7. Backlinking

On all digital materials that acknowledge or refer to the Foundation's funding or grant agreement, you must link to the Foundation's homepage (www.lrfoundation.org.uk).

Full guidance on correct backlinking procedure can be found [here](#)

8. Due diligence

You must disclose in full any negative publicity regarding your organisation which has appeared in the public domain, whether current or historical, that may affect the Foundation's brand and/or reputation. If, during the lifecycle of the grant, negative publicity about your organisation appears or may appear in the media, or you are approached by a journalist in relation to this grant with queries that could impact on the reputation of the Foundation, you must inform Lloyd's Register Foundation at the earliest opportunity and no later than two weeks from publication or journalist enquiry.



Schedule 5 - Generative AI Policy

This [Generative AI Policy](#) (Policy) sets out when AI use must be declared to Lloyd's Register Foundation (us or we or our) in relation to grant applications and funded work, what is expected from applicants and grant holders, and how to ensure outputs are accurate, transparent and secure.

Responsible use of generative AI in grant applications and funded work

We recognise that generative artificial intelligence, often called generative AI, can support research, innovation and the delivery of grant-funded work.

We allow the responsible use of generative AI in grant applications and funded activities. We do not want to stop applicants or grant holders from using useful tools. However, we expect generative AI to be used in an accurate, transparent, ethical and lawful way.

This Policy explains what we mean by generative AI, when you need to tell us about its use and what we expect from applicants and grant holders.

What we mean by generative AI

Generative AI means systems that can create new content. This may include text, images, audio, video, code or other material.

Generative AI tools work by using patterns learned from large amounts of data. Examples include ChatGPT, Microsoft Copilot and Google NotebookLM.

This Policy does not apply to standard tools that use fixed rules or simple models and do not create new original content. Examples include spell checkers, translation tools, transcription tools, speech recognition tools and similar systems.

When you need to tell us about AI use

You must tell us if you use generative AI to create or support any original content for:

- o A grant application
- o A grant-funded activity
- o A report to the Foundation
- o Images, video, code, text or other materials produced as part of Foundation-funded work

You do not need to tell us about standard tools as set out above.

How we will ask you to confirm this

Grant applicants will be asked to confirm that they have read, understood and agree to follow this Policy as part of the application process.

This Policy is also applicable to current grant holders. We may include questions about AI use in grant monitoring and reporting.

Failure to comply with this Policy may be treated as a breach of the grant agreement. The Foundation reserves the right to suspend or terminate funding, require repayment of grant funds, or take other action it considers appropriate where a grant holder has failed to use generative AI responsibly or has not declared its use as required.

Our expectations

You are responsible for how you use generative AI. We accept no liability for any loss, claim or damage arising from the use of generative AI in connection with a grant application or funded activity.

You may use generative AI to support your work, but your application, report or funded activity must remain accurate, honest and based on work that you and your partners can deliver.

You must use generative AI in a responsible way including the following:

- o Review and verify all content created with generative AI before you submit or use it
- o Make sure the content is accurate, relevant and complete
- o Remove or correct any content that is false, misleading, unclear or unsupported
- o Understand the content you submit to us
- o Make sure your application or report reflects your own plans, evidence, expertise and capacity
- o Avoid using AI to make your organisation, team or project appear more developed or capable than it is
- o Protect confidential information, personal data and unpublished intellectual property
- o Follow your own organisation's data protection, confidentiality and information security policies
- o Follow all relevant laws and regulations
- o Ensure that the use of generative AI does not infringe any third-party intellectual property rights or create any liability for us
- o Consider whether the AI tool may store, reuse or share the information you enter into it
- o Consider whether AI outputs may contain bias and take reasonable steps to identify and reduce this risk

AI tools can make mistakes. They may produce information that sounds correct but is false, incomplete or out of date. They may also reflect bias from their training data, model design, language coverage, cultural context, feedback loops or human labelling choices. You must check AI outputs carefully and should not rely on them without human review.

Where AI-generated content forms part of a funded output, the grant holder must ensure that our rights to use, publish, adapt and share that output are not restricted or compromised by the terms of any AI tool or platform used.

Grant holders must not use generative AI tools whose terms of service would grant the AI provider any ownership, licence or other rights over Foundation-funded outputs or the data used to produce them.

Declaring AI use

We will ask applicants and grant holders to declare how generative AI has been used. We may document these responses as part of our application, due diligence, monitoring or reporting records.

This may include asking:



- o Which AI tools were used
- o What the tools were used for
- o What content or activity the tools supported
- o How the outputs were reviewed or checked
- o Whether any personal data, confidential information or unpublished intellectual property was used
- o Whether AI generated content forms part of any output

We may request access to records of AI use at any time during the grant period and for a period of six years after the grant ends. Grant holders must retain sufficient records to demonstrate compliance with this Policy.

Keeping this Policy up to date

We may update this Policy from time to time at our sole discretion.

It is the responsibility of applicants and grant holders to review the guidance periodically and ensure they are familiar with the most recent version. The version published on the Foundation's website shall be the authoritative version at any given time.

Where a material change is made to this guidance, the Foundation will use reasonable efforts to notify current grant holders through its usual communication channels. However, failure to provide such notice shall not affect the validity or applicability of the updated guidance.

By submitting a grant application or continuing to receive Foundation funding, applicants and grant holders agree to be bound by the most recent version of this guidance as published on the Foundation's website.

The obligations in this Policy by their nature are intended to continue after the grant agreement ends and shall survive the expiry or termination of the grant agreement.