



[REDACTED]  
The National Federation of Roofing Contractors Limited  
31 Worship Street  
London  
EC2A 2DY

CITB  
Bircham Newton  
King's Lynn  
Norfolk  
PE31 6RH

17 November 2017

Telephone: 0300 456 7415

Email: [funding@citb.co.uk](mailto:funding@citb.co.uk)

Dear [REDACTED]

I refer to your proposal A Roofing Skills Partnership and National Workforce Development Programme for the Roofing Industry NFRC 17 01 ('the Project') and confirm that the Construction Industry Training Board (Registered Charity Number 264289) (known as CITB) is willing to assist The National Federation of Roofing Contractors, Company number 02591364 ('you') with structured fund support of the Project subject to your acceptance of the following terms and conditions ('the Agreement').

#### Funding

CITB is willing to fund the Project to an amount not exceeding £2,892,616 subject to the satisfactory completion and compliance with the Agreement.

#### Duration

The Project activity will take place between January 2018 and finish December 2021

#### Law and Jurisdiction

Please confirm your agreement to the above as follows:

1. Sign Annex 1, for and on behalf of The National Federation of Roofing Contractors.
2. Return one hard copy of all documents to Pauline Raby, Contracts Co-ordinator, CITB, Bircham Newton, King's Lynn, Norfolk, PE31 6RH at which point you will be contacted by a Programme Co-ordinator to finalise payment arrangements.
3. Retain one copy for your records.

Unless acceptance of this offer in the form stipulated herein is received by CITB within thirty days of the date of this letter the offer terminates.

We look forward to hearing from you shortly.

Yours sincerely

[REDACTED]

**SARAH BEALE**  
Chief Executive  
CITB

**FLEXIBLE AND STRUCTURED  
FUND (EXCEPT SKILLS AND  
TRAINING OPTION) TERMS OF  
FUNDING**

Between:

(1) The Construction Industry Training Board (Registered charity number 264289 and SC044875)

whose principal place of business is at Bircham Newton, King's Lynn, Norfolk, PE31 6RH ('CITB or we'); and

(2) The recipient ('you').

(a) We have reviewed your proposal ('the Project') and grant funds\* ('the Funds') to assist in carrying out the Project.

(b) This Agreement sets out the terms and conditions on which the Funds are granted to you.

(c) The terms and conditions are intended to ensure that the Funds are used for the purpose for which they are awarded.

\*in the sum communicated to you separately in the covering letter to this Agreement.

**1. Funding and tax**

1.1 CITB grants the Funds to the Project (inclusive of VAT) subject to clause 1.6 and 1.2 and in observance of the Agreement and the criteria attached in Annex 2.

1.2 Payment will be by the number of instalments in the sums, on the dates and according to the criteria set out in Annex 2 so long as we are satisfied that such payment will or has been used for the

proper expenditure of the Project.

1.3 The amount of the Funds shall not be increased in the event of any overspend by you in the delivery of the Project.

1.4 Eligibility for payment will be measured in terms of the number of activities produced ('the Outputs') and/or the intended benefits of the activities for individuals, companies and the industry ('the Outcomes').

1.5 The Funds will be used only by you and only for the Project.

1.6 You shall promptly repay to CITB any money incorrectly paid to you either as a result of an administrative error or otherwise. This includes (without limitation) situations where either an incorrect sum of money has been paid or where Funds have been paid in error before all conditions attaching to the Funds have been complied with by you.

1.7 You acknowledge the Funds are not a taxable supply for VAT purposes by you to us. You understand our obligation does not extend to paying you any amounts in respect of VAT in addition to the Funds and that the Funds we give are inclusive of VAT.

1.8 You shall not use the Funds to:

- a) exclusively fund employees, directors or trustees;
- b) purchase buildings or land;
- c) fund any capital expenditure.

**2. Duration**

2.1 Except where otherwise specified, the terms of this Agreement shall apply from the start date of this Agreement (as stated in Annex 2) until the anniversary of expiry of the end date (as stated in Annex 2) within the criteria attached in Annex 2.

2.2 Any obligations under this Agreement that remain unfulfilled following the expiry or termination of the Agreement shall survive such expiry or termination and continue in full force and effect until they have been fulfilled.

**3. Outputs/Outcomes**

3.1 You undertake to deliver the Outputs and Outcomes as detailed in Annex 2. You will comply with all requests we make with regards to monitoring and evaluation including regular evaluation of the performance of the Project against the profile outlined in the approved application form with the Outputs and the Outcomes as defined within Annex 2.

3.2 Evidence will be submitted to CITB in accordance with the Evidence detailed within Annex 2 of this Agreement in order

to trigger staged payments throughout the duration of the Project. In relation to submitting the evidence time shall be of the essence.

**4. Intellectual Property Rights, marketing and promotion**

4.1 For the purpose of this

Agreement, the following definitions apply:

'Intellectual Property Rights' ('IPR') means any confidential information, patents, registered and unregistered trademarks, registered designs and unregistered design rights, copyright, know-how, trade secrets and all other creative content in the world. For the avoidance of doubt, data shall fall outside this category and shall be handled as set out in the data protection clause.

'Background IPR' shall mean IPR owned by you or a third party not created under this Agreement but needed for the performance of the Agreement or for use and exploitation of Foreground IPR.

'Foreground IPR' means IPR created by you or a subcontractor for the Project.

4.2 Any advertising, presentation or media coverage by you and training materials or products connected to the Project shall acknowledge CITB's funding in accordance with the advice that shall be communicated to you separately.

4.3 Except as expressly set out in this Agreement you are not authorized to use any of CITB's logo and/or trademarks without our prior written approval.

4.4 Nothing in this Agreement entitles you to state, either expressly or impliedly, that you are endorsed by, approved by, affiliated with or have any

corporate association with CITB.

4.5 We may publicise funding the Project and we may use your logo/trademark to do so.

4.6 Nothing in this Agreement shall affect your ownership of the Background IPR. The Foreground IPR shall belong to CITB.

4.7 You grant us (and will ensure third parties do the same) a perpetual, royalty-free, non-exclusive worldwide licence to use the Background IPR so we can use the Foreground IPR.

4.8 We grant you a perpetual, royalty-free, non-exclusive worldwide licence to use the Foreground IPR.

4.9 You will have agreements with third parties equivalent to these IPR provisions and will provide us copies upon request.

4.10 We own all the new creative content in the Outputs/ Outcomes and may share this across the industry.

## **5. Payment**

5.1 Payment of the Funds will be made subject to:

- a) the submission of satisfactory evidence that the Project is proceeding according to the schedule outlined in Annex 2;
- b) you meeting the stipulated Outputs and Outcomes; and
- c) receipt by us of a properly rendered invoice quoting the relevant purchase order number.

5.2 Subject to clause 5.1 we shall make payment within a reasonable period

of receipt of the invoice.

5.3 For CITB, the project manager shall be the programme manager, or such other person appointed in their place, they shall provide guidance and assistance on policy matters. The CITB project manager's decision in relation to the submission of evidence and the meeting of Outputs and Outcomes in respect of clause 5.1 shall be final.

5.4 There are considerable pressures on the funds available. Failure to discuss problems/issues concerned with evidence-based staged payments, Outputs and Outcomes with us may result in allocated monies being redistributed back into the fund. CITB reserves the right not to make the relevant staged payment to you in such circumstances.

## **6. Indemnity**

6.1 You hereby indemnify and hold harmless CITB, its employees, agents, officers and subcontractors against all claims, demands, actions, costs, expenses, losses, damages and all other liabilities arising from the Project or incurred by reason of the actions and/or omissions (including without limitation infringement of IPR rights) of you in relation to the Project, non-fulfilment of obligations of you under

this Agreement or your obligations to third parties.

### **7. Insurance**

7.1 You will effect and maintain adequate insurance, as detailed in the Application Declaration Form and, if requested, you shall supply us with the relevant insurance documentation and evidence that the relevant premiums have been paid.

### **8. Discrimination**

8.1 You shall not unlawfully discriminate within the meaning and scope of any law, enactment, order or regulation relating to discrimination (whether in race, gender, religion, disability, sexual orientation, age or otherwise) against anyone.

8.2 You shall take reasonable steps to secure observance of this clause by all servants, employees or agents engaged by you and all suppliers and sub-contractors engaged on the Project.

### **9. Safeguarding**

9.1 If the Project involves work with children, young people or vulnerable adults (vulnerable people), you will take all reasonable steps to ensure their safety.

9.2 You will obtain written agreement from the legal carer or guardian before any direct contact with vulnerable people and have policies and procedures to safeguard them, obtaining appropriate disclosure

checks for anyone in contact with them.

### **10. Data Protection**

10.1 You shall:

a) Follow only our instructions in relation to data including personal data as defined by the Data Protection Act 1998 as amended and/or replaced;

b) Use sufficient, appropriate technical/organisational measures to stop unauthorised or unlawful processing, accidental loss, destruction or damage;

c) Comply with the obligations imposed on you under the Data Protection Act 1998 including notification to the Information Commissioner, if applicable; and

d) Provide us with details of the measures you take to comply with this clause.

10.2 We shall process any data you provide only for lawful and fair purposes including sharing for evidence and monitoring.

### **11. Freedom of Information**

11.1 You acknowledge that CITB is subject to the requirements of the Freedom of Information Act 2001(FOIA).

11.2 You undertake to:

(a) provide all necessary assistance and co-operation as reasonably requested by CITB and enable CITB to comply with its obligations under FOIA;

(b) transfer to CITB all requests for information relating to this Agreement that you receive as soon as practicable and in any

event within two (2) working days of receipt;

(c) provide CITB with a copy of all information belonging to CITB requested in the request for information which is in your possession or control in the form that CITB requires within five (5) working days (or such other period as CITB may reasonably specify) of CITB's request for such information; and

(d) not respond directly to a request for information unless authorized in writing to do so by CITB.

11.3 You acknowledge that CITB may be required under the FOIA to disclose information without consulting or obtaining consent from you. CITB shall take reasonable steps to notify you of a request for information to the extent that is permissible and reasonably practical for it to do so but (notwithstanding any other provision in this Agreement) CITB shall be responsible for determining in its absolute discretion whether any information is exempt from disclosure in accordance with the FOIA.

### **12. Withholding, Suspending and Repayment of Funding**

12.1 You shall use the Funds for this Project and no other purpose. We may ask you to show how the Funds were used by completing forms and such other documents as we require. You shall return these documents within ten (10) working

days of any such request.

12.2 CITB's intention is that the Funds will be paid to you in full. However, without prejudice to CITB's other rights and remedies, we may at our discretion withhold or suspend payment of the Funds and/or require repayment of all or part of the Funds if:

- a) The Funds have not been used for the purpose of the Project or for which they were awarded; or
- b) You do not tell us of changes to the Project we deem substantial; or
- c) The future of the Project is in jeopardy; or
- d) Your bid contained or you provided inaccurate, false or misleading information or acted dishonestly or disreputably; or
- e) Progress towards completion of the Project is unsatisfactory; or
- f) You are, in the reasonable opinion of CITB, delivering the Project in a negligent manner; or
- g) There is a serious delay or delivery fails in some other way; or
- h) We discover that the Project has been funded or part funded by another third party.

12.3 If we make an overpayment, you will repay that to us, on demand.

### **13. Accounts and records**

13.1 The Funds shall be shown in your accounts as restricted funds and shall not be included under general funds.

13.2 You shall keep

separate, accurate and up-to-date accounts and records of the receipt and expenditure of the Funds, which we may see upon reasonable request.

13.3 You shall keep all invoices, receipts, and accounts and any other relevant documents relating to the expenditure of the Funds for at least seven years following receipt of any of the Funds to which they relate. We shall have the right to review, at our reasonable request, your accounts and records that relate to the expenditure of the Funds and shall have the right to take copies of such accounts and records.

13.4 You shall have your accounts externally audited and shall provide us with a copy of the audited annual accounts within six months (or lesser period as CITB may reasonably require) of the end of the relevant financial year in respect of the year in which the Funds were paid.

13.5 You shall comply and facilitate CITB's compliance with all applicable statutory requirements as regards accounts, audit or examination of accounts, annual reports and annual returns.

### **14. Limitation of Liability**

14.1 CITB accepts no liability for any consequences, whether direct or indirect, that may come about from you running the Project, the

use of the Funds or from withdrawal of the Funds.

14.2 Subject to clause 14.1 CITB's liability under this Agreement is limited to the payment of the Funds.

### **15. Warranties**

15.1 You warrant, undertake and agree that:

(a) you have all necessary resources and expertise to deliver the Project (assuming due receipt of the Funds);

(b) you shall at all times comply with all relevant legislation and all applicable codes of practice and other similar codes or recommendations, and shall notify CITB immediately of any significant departure from such legislation, codes or recommendations;

(c) you shall comply with the requirements of Health and Safety at Work etc. Act 1974 and any other acts, order, regulations and codes of practice relating to health and safety, which may apply to employees and other persons working on the Project;

(d) you have and shall keep in place adequate procedures for dealing with any conflicts of interest;

(e) you have and shall keep in place systems to deal with the prevention of fraud and/or administrative malfunction;

(f) all financial and other information concerning you which has been disclosed to CITB is to the best of your knowledge

and belief true and accurate;

(g) you are not aware of anything in your own affairs, which has not been disclosed to CITB, which might reasonably have influenced the decision of CITB to grant the Funds on the terms contained in this Agreement; and

(h) since the date of your last accounts there has been no material change in your financial position or prospects and for the avoidance or doubt CITB retains the right to carry out a credit check during the term of this Agreement.

#### **16. Assignments/sub-contracting**

16.1 You may not assign or sub-contract the Project or Funds without our prior written approval.

16.2 Any assignment or sub-contract shall be on terms no worse than these and shall

(a) require payment by you no more than 30 days from receipt of a valid invoice and

(b) your prompt approval of each subcontractor invoice. A sub-contractor must include in a sub-contract equivalent terms.

16.3 No assignment or sub-contract removes an obligation or liability. You are liable for acts and omissions of assignees or sub-contractors and their employees as if your own.

#### **17. Termination**

17.1 CITB may in writing terminate this Agreement immediately without compensation:

a) If you, being an

individual, or where a firm, any partner in that firm, shall become bankrupt or equivalent;

b) If you, being a company, pass a resolution of winding up, or equivalent;

c) If you, being a charity/public body, have an analogous event to those in (a) or (b);

d) If you seriously breach this Agreement and do not remedy it or, following a notice, do not within thirty (30) calendar days remedy it to CITB's satisfaction; or

e) If your acts or omissions bring us into disrepute or attract adverse publicity.

17.2 We may terminate this Agreement without reason on 30 calendar days' written notice.

#### **18. Dispute resolution**

18.1 In the event of any complaint or dispute (which does not relate to CITB's right to withhold Funds or terminate) arising between the parties to this

Agreement in relation to this Agreement the parties shall meet promptly to resolve matters.

18.2 If we cannot resolve the dispute within ten (10) working days of a meeting, the parties may, by mutual consent, refer the matter to the Centre for Effective Dispute Resolution to nominate a mediator.

#### **19. Notices**

19.1 All notices and other communications in relation to this Agreement shall be in writing and shall be deemed to have been duly

given if personally delivered or mailed (first class postage prepaid) to the address of the relevant party. If personally delivered all such communications shall be deemed to have been given when received (except if it is received on a non-working day or after 4 pm on any working day they shall be deemed received on the next working day) and if mailed such communications shall be deemed to have been given and received on the second working day following such mailing.

#### **20. Third party rights**

20.1 The parties do not intend the Agreement to be enforceable, under the Contracts (Rights of Third Parties) Act 1999, by any person not a party to it.

#### **21. Joint and Several Liability**

21.1 Where you are not a company or incorporated entity with a distinct legal personality, the individuals who enter into and sign this Agreement shall be jointly and severally liable for your obligations and liabilities arising under this Agreement.

#### **22. Set off**

22.1 We may set off any liability of you to us against any liability of us to you without prejudicing our other rights or remedies.

#### **23. Entire Agreement**

23.1 Neither party is induced into this Agreement by a statement or promise, unless fraudulent. This Agreement may be varied

only in writing, by both Parties.

**24. No partnership or joint venture**

24.1 Nothing in this Agreement shall create a partnership or joint venture between us, nor any relationship of principal and agent, nor authorize any party to make or enter into any

commitments for or on behalf of the other party.

**25. Variation**

25.1 The terms of this Agreement may only be varied by agreement between both parties.

**26. Contracts (Rights of Third Parties) Act 1999**

26.1 This Agreement does not and is not intended to confer any contractual

benefit on any person pursuant to the terms of the Contracts (Rights of Third Parties) Act 1999.

**27. Law and jurisdiction**

27.1 The law of England and Wales, and the exclusive jurisdiction of the English and Welsh courts shall apply.

**Annex 1: AGREEMENT OR VARIATION**

The terms of this Agreement may only be varied by agreement in writing between both parties.

Authorised to sign for and on behalf of the Recipient.

Signature:	[REDACTED]		
Position in Organisation:	CHIEF EXECUTIVE		
Address:	The National Federation of Roofing Contractors Limited 31 Worship Street London		
Post Code:	EC2A 2DY	Date:	19 <del>th</del> DECEMBER 2017

Authorised to sign for and on behalf of CITB

Signature:	[REDACTED]	Name in Capitals:	SARAH BEALE
Position in Organisation:	Chief Executive		
Address:	CITB Bircham Newton Kings Lynn Norfolk		
Post Code:	PE31 6RH	Date:	
<b>Project Code NFRC 17 01</b>			
<b>Brief Project Description</b>			
<p>The NFRC will form the Roofing Skills Partnership and show that the industry backs the call for a national strategy to have one qualification that enables roofers to multi-skill across all areas of roofing.</p> <p>To enable this, three activity groups will be formed, 4 research projects will be carried out, and 200 work based recorders, 60 instructors and 10 skills auditors will be trained to enable 5000 workers to achieved the Approved Roofer status.</p>			



Project Code	NFRC 17 01
Start	1 Jan 2018
End	31 Dec 2021
CTB Award	2,892,616

<b>Key outputs</b>	<b>Success Criteria</b>
4 research reports and action plans resulting from research	One research project commissioned from each Activity Group, to investigate various aspects of Roofing Industry including provision, qualifications, professionalisation and recommendations taken forward within Activity Groups and Roofing Skills Partnership
Approved Roofer programme System to track and monitor candidate progress	A fit for industry programme, designed and developed by industry A fit for purpose system for monitoring and tracking
5000 Approved Roofers qualified 200 Work Based Recorders 10 Skills Auditors 60 Instructors	5000 existing workforce trained and achieving Approved Roofer qualification, with key findings of what worked, what didn't and what mitigations were used to improve achievement rate.

Reference	Output	Output to be completed by	Claim Date	Financial value	CTB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P1.1	Set up of RSP	31 March 2018	30 April 2018	£20,456	£15,750	£4,706	Minutes of the first RSP meeting, attendance list of first meeting	Set up of Roofing Skills Partnership group, including Terms of Reference, list of members, roles within the Partnership.	
P1.2	Direction and Partnership Management			£17,085	£13,163	£3,922	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Copy of project plan detailing completed Direction and Partnership Management work.  Set up of first Activity group, including Terms of Reference, list of members, roles within the Group	
P1.3	Accreditation development started			£26,856	£19,375	£7,481	Copy of the requirements of the accreditation development Copy of the procurement/tender process and selection criteria Copy of timesheet for 12 weeks Project Management work	Copy of the accreditation development contract Copy of project plan detailing completed Project Management work. Copy of the project plan covering all aspects of the next quarter of the project  Set up of second Activity group, including Terms of Reference, list of members, roles within the Group	
P1.4	Project set-up			£16,015	£13,438	£2,577	Administration: Timesheets of 12 weeks work on project Copy of invoice or timesheets	Copy of project plan detailing completed Administration work. Set up of third Activity group, including Terms of Reference, list of members, roles within the Group Agreement of press protocols with CTB from supplied contact details. Copy of specification for External Evaluation [or confirmation from Rachel Iredale on involvement with the process], and 3 quotes to show value for money. List of 'roofing industry' that backing will be sought from, including Federations, Trade Associations, and other key players. Evidence of agreement with CTB of what 'Buy-in' looks like, with wording and quantitative measure/s in consultation with Mark Noonan	Benchmark data tiles that will be used throughout the project to ascertain progress [from the original research, as agreed with Mark Noonan]  Agreement of evaluation criteria from above with RI
Period 1 Activity to 31 March 2018 total				£80,412	£61,726	£18,686			

Reference	Output	Output to be completed by	Claim Date	Financial value	CITB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P2.1	Industry Buy-In	30 June 2018	31 July 2018	£20,456	£15,750	£4,706		Copy of industry buy in from evidence in P1.4, indicating support of this RSP approach and agreement on general content of Approved Roofer accreditation. Agreement from Mark Noonan that Buy-in has been achieved, further to a meeting between NFRC and CITB before 30 June 2018. If not reached, this project will not progress beyond this quarter.	Review point - proceeding past this point needs to be agreed with Mark Noonan in association with CITB Executive
P2.2	Direction and Partnership Management			£17,085	£13,163	£3,922	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management	Copy of deliverables assigned to Director and Partnership Manager for next 6 months	
P2.3	Development of software and platform for tracking candidates started			£20,625	£15,000	£5,625	Copy of the requirements of the software development Copy of the procurement/tender process and selection criteria	Copy of the contract	
P2.4	33 Work Based Recorders trained			£65,681	£39,075	£26,606	Copy of invoice or timesheets showing work on training 33 Work Based Recorders	Copy of the Profile/Job Description for Skills Auditors - If not received we cannot fund skills auditors.  Record for 33 Work Based Recorders: Record of registration Record of achievement Employer name CITB Levy Registration number (Payment to be made if candidate works for Levy Registered employers only)	Individual data - age, gender, ethnicity, occupation, subsector
P2.5	10 Instructors trained.			£10,830	£5,000	£5,830	Copy of invoice or timesheets showing work training 10 instructors	Record for 10 Instructors: Record of registration Record of achievement Employer name	Individual data - age, gender, ethnicity, occupation, subsector
P2.6	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period. Copy of specification for Research Project A, and proof of value for money (include 3 quotes).	Benchmark data as agreed in P1.4
Period 2 Activity to 30 June 2018 total				£150,692	£101,426	£49,266			

Reference	Output	Output to be completed by	Claim Date	Financial value	CTB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P3.1	Direction and Partnership Management	30 September 2018	31 October 2018	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.	
P3.2	Approved Roofer programme developed			£40,625	£35,000	£5,625	Copy of invoice from supplier showing programme development	Copy of the programme, to include finished modules evidenced in the procurement and selection process documentation. Programme to include all aspects of Roofing, including Flat Roofing, Pitch Roofing, Lead Roofing, Single Ply and Ancillaries.	
P3.3	33 Work Based Recorders trained			£65,681	£39,075	£26,606	Copy of invoice or timesheets showing work on training 33 Work Based Recorders	Record for 33 Work Based Recorders: Record of registration Record of achievement Employer name CTB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P3.4	5 Skills Auditors			£15,000	£7,500	£7,500	Copy of invoice or timesheets showing work training 5 Skills Auditors	Record for 5 Skills Auditors Record of achievement Employer name CTB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P3.5	10 Instructors trained.			£10,830	£5,000	£5,830	Copy of invoice or timesheets showing work training 10 Instructors	Record for 10 Instructors: Record of registration Record of achievement Employer name	Individual data - age, gender, ethnicity, occupation, subsector
P3.6	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period.	Aggregate of data collected in Period Progress against Benchmark data
P3.7	Research Report A			£25,000	£20,000	£5,000	Copy of invoice or timesheets showing work on Research Project A	Research Report A	
Period 3 Activity to 30 September 2018 total				£210,692	£148,926	£61,766			

Reference	Output	Output to be completed by	Claim Date	Financial value	CITB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P4.1	Direction and Partnership Management	31 December 2018	31 January 2019	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	<b>Copy of deliverables assigned to Director and Partnership Manager for next 6 months</b> <b>Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.</b> <b>Agreement with Mark Noonan that NFRC have delivered sufficiently on Key Deliverables.</b>	<b>Review point - proceeding past this point needs to be agreed with Mark Noonan in association with CITB Executive</b>
P4.2	Development of software and platform for tracking candidates			£40,625	£35,000	£5,625	Copy of the invoice from supplier showing work on software development	Copy of the minutes of the meeting to show CITB the software and platform Proof of engagement throughout with CITB (Braden and/or Trung) and sign off from CITB that the software meets requirements. Printout of all candidates currently registered on tracking platform.	
P4.3	33 Work Based Recorders trained			£65,681	£39,075	£26,606	Copy of invoice or timesheets showing work on training 33 Work Based Recorders	Record for 33 Work Based Recorders: Record of registration Record of achievement Employer name CITB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P4.4	5 Skills Auditors			£15,000	£7,500	£7,500	Copy of invoice or timesheets showing work training 5 Skills Auditors	Record for 5 Skills Auditors Record of achievement Employer name CITB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P4.5	10 Instructors trained.			£10,830	£5,000	£5,830	Copy of invoice or timesheets showing work training 10 Instructors	Record for 10 Instructors: Record of registration Record of achievement Employer name	Individual data - age, gender, ethnicity, occupation, subsector
P4.6	End of year report			£21,015	£18,438	£2,577	Copy of invoice or timesheets	End of year progress report towards outputs and against information to be included in final report, any problems encountered in this year.	Aggregate of data collected in Period Progress against Benchmark data
Period 4 Activity to 31 December 2018 total				£190,692	£133,926	£56,766			

Reference	Output	Output to be completed by	Claim Date	Financial value	CITB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
PS.1	Direction and Partnership Management	31 March 2019	30 April 2019	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.	
PS.2	500 new workers accredited			£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CITB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
PS.3	33 Work Based Recorders trained			£54,450	£29,700	£24,750	Copy of invoice or timesheets showing work on training 33 Work Based Recorders	Record for 33 Work Based Recorders: Record of registration Record of achievement Employer name CITB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
PS.4	10 Instructors trained.			£10,830	£5,000	£5,830	Copy of invoice or timesheets showing work training 10 instructors	Record for 10 Instructors: Record of registration Record of achievement Employer name	Individual data - age, gender, ethnicity, occupation, subsector
PS.5	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period.	Aggregate of data collected in Period Progress against Benchmark data
Period 5 Activity to 31 March 2019 total				£416,067	£249,426	£166,641			

Reference	Output	Output to be completed by	Claim Date	Financial value	CITB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P6.1	Direction and Partnership Management	30 June 2019	31 July 2019	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Copy of deliverables assigned to Director and Partnership Manager for next 6 months Report of Key Deliverables achieved by Director and Partnership Manager in this quarter. Agreement with Mark Noonan that NFRC have delivered sufficiently on Key Deliverables.	Review point - proceeding past this point needs to be agreed with Mark Noonan in association with CITB Executive
P6.2	500 new workers accredited			£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CITB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P6.3	33 Work Based Recorders trained			£54,450	£29,700	£24,750	Copy of invoice or timesheets showing work on training 33 Work Based Recorders	Record for 33 Work Based Recorders: Record of registration Record of achievement Employer name CITB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P6.4	10 Instructors trained.			£10,830	£5,000	£5,830	Copy of invoice or timesheets showing work training 10 Instructors	Record for 10 Instructors: Record of registration Record of achievement Employer name	Individual data - age, gender, ethnicity, occupation, subsector
P6.5	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period. Copy of specification for Research Project B, and proof of value for money (include 3 quotes).	Aggregate of data collected in Period Progress against Benchmark data
Period 6 Activity to 30 June 2019 total				£416,067	£249,426	£166,641			



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Reference	Output	Output to be completed by	Claim Date	Financial value	CTB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P7.1	Direction and Partnership Management	30 September 2019	31 October 2019	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.	
P7.2	500 new workers accredited			£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CTB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P7.3	35 Work Based Recorders trained			£57,750	£31,500	£26,250	Copy of invoice or timesheets showing work on training 35 Work Based Recorders	Record for 35 Work Based Recorders: Record of registration Record of achievement Employer name CTB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P7.4	10 Instructors trained.			£10,830	£5,000	£5,830	Copy of invoice or timesheets showing work training 10 instructors	Record for 10 Instructors: Record of registration Record of achievement Employer name	Individual data - age, gender, ethnicity, occupation, subsector
P7.5	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period.	Aggregate of data collected in Period Progress against Benchmark data
P7.6	Research Report B			£25,000	£20,000	£5,000	Copy of invoice or timesheets showing work on Research Project B	Research Report B	
Period 7 Activity to 30 September 2019 total				£444,367	£271,226	£178,141			

Reference	Output	Output to be completed by	Claim Date	Financial value	CITB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P8.1	Direction and Partnership Management	31 December 2019	31 January 2020	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	<b>Copy of deliverables assigned to Director and Partnership Manager for next 6 months</b> <b>Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.</b> <b>Agreement with Mark Noonan that NFRC have delivered sufficiently on Key Deliverables.</b>	<b>Review point - proceeding past this point needs to be agreed with Mark Noonan in association with CITB Executive</b>
P8.2	500 new workers accredited			£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CITB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P8.3	End of year report			£21,015	£18,438	£2,577	Copy of invoice or timesheets	End of year progress report towards outputs and against information to be included in final report, any problems encountered in this year.	Aggregate of data collected in Period 8/Year 2
Period 8 Activity to 31 December 2019 total				£355,787	£219,726	£136,061			
P9.1	Direction and Partnership Management	31 March 2020	30 April 2020	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.	
P9.2	500 new workers accredited			£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CITB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P9.3	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period. Copy of specification for Research Project C, and proof of value for money [include 3 quotes].	Aggregate of data collected in Period 9
Period 9 Activity to 31 March 2020 total				£350,787	£214,726	£136,061			



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Reference	Output	Output to be completed by	Claim Date	Financial value	CITB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P10.1	Direction and Partnership Management	30 June 2020	31 July 2020	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	<b>Copy of deliverables assigned to Director and Partnership Manager for next 6 months</b> <b>Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.</b> <b>Agreement with Mark Noonan that NFRC have delivered sufficiently on Key Deliverables.</b>	<b>Review point - proceeding past this point needs to be agreed with Mark Noonan in association with CITB Executive</b>
P10.2	500 new workers accredited			£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CITB Levy Registration number (Payment to be made if candidate works for Levy Registered employers only)	Individual data - age, gender, ethnicity, occupation, subsector
P10.3	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period.	Aggregate of data collected in Period Progress against Benchmark data
P10.4	Research Report C			£25,000	£20,000	£5,000	Copy of invoice or timesheets showing work on Research Project C	Research Report C	
<b>Period 10 Activity to 30 June 2020 total</b>				<b>£375,787</b>	<b>£234,726</b>	<b>£141,061</b>			
P11.1	Direction and Partnership Management	30 September 2020	31 October 2020	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.	
P11.2	500 new workers accredited			£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CITB Levy Registration number (Payment to be made if candidate works for Levy Registered employers only)	Individual data - age, gender, ethnicity, occupation, subsector
P11.3	Quarterly Report			£21,015	£18,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period.	Aggregate of data collected in Period Progress against Benchmark data
<b>Period 11 Activity to 30 September 2020 total</b>				<b>£355,787</b>	<b>£219,726</b>	<b>£136,061</b>			

Reference	Output	Output to be completed by	Claim Date	Financial value	CITB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P12.1	Direction and Partnership Management	31 December 2020	31 January 2021	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	<b>Copy of deliverables assigned to Director and Partnership Manager for next 6 months</b> <b>Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.</b> <b>Agreement with Mark Noonan that NFRC have delivered sufficiently on Key Deliverables.</b>	<b>Review point - proceeding past this point needs to be agreed with Mark Noonan in association with CITB Executive</b>
P12.2	500 new workers accredited			£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CITB Levy Registration number {Payment to be made if candidate works for Levy Registered employers only}	Individual data - age, gender, ethnicity, occupation, subsector
P12.3	End of year report			£21,015	£18,438	£2,577	Copy of invoice or timesheets	End of year progress report towards outputs and against information to be included in final report, any problems encountered in this year. Copy of specification for Research Project D and proof of value for money [include 3 quotes].	Aggregate of data collected in Period Progress against Benchmark data
<b>Period 12 Activity to 31 December 2020 total</b>				<b>£355,787</b>	<b>£219,726</b>	<b>£136,061</b>			
P13.1	Direction and Partnership Management	31 March 2021	30 April 2021	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.	
P13.2	500 new workers accredited			£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CITB Levy Registration number {Payment to be made if candidate works for Levy Registered employers only}	Individual data - age, gender, ethnicity, occupation, subsector
P13.3	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period.	Aggregate of data collected in Period Progress against Benchmark data
P13.4	Research Report D			£25,000	£20,000	£5,000	Copy of invoice or timesheets showing work on Research Project D	Research Report D	
<b>Period 13 Activity 31 March 2021 total</b>				<b>£375,787</b>	<b>£234,726</b>	<b>£141,061</b>			
P14.1	Direction and Partnership Management			£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	<b>Copy of deliverables assigned to Director and Partnership Manager for next 6 months - note that at the start of the project, there are no actual deliverables for the last 6 months, so NFRC need to agree deliverables for all 4 work areas prior to continuing.</b> <b>Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.</b> <b>Agreement with Mark Noonan that NFRC have delivered sufficiently on Key Deliverables and to agree forthcoming deliverables if continuing, insert new key deliverables into P15 and/or P16</b>	<b>Review point - proceeding past this point needs to be agreed with Mark Noonan in association with CITB Executive</b>

Reference	Output	Output to be completed by	Claim Date	Financial value	CTB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P14.2	500 new workers accredited	30 June 2021	31 July 2021	£297,231	£172,375	£124,856	Copy of invoice or timesheets showing work on 500 Accredited Roofers	Record for 500 Accredited Roofers: Record of registration Record of achievement Employer name CTB Levy Registration number [Payment to be made if candidate works for Levy Registered employers only]	Individual data - age, gender, ethnicity, occupation, subsector
P14.3	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period.	Aggregate of data collected in Period Progress against Benchmark data
Period 14 Activity to 30 June 2021 total				£350,787	£214,726	£136,061			
P15.1	Direction and Partnership Management			£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Report of Key Deliverables achieved by Director and Partnership Manager in this quarter.	
P15.2	Project Management	30 September 2021	31 October 2021	£11,231	£9,375	£1,856	Project Management work: Timesheets of 12 weeks work on project	<b>Report of Key Deliverables achieved by Project Manager in this quarter as agreed by Mark Noonan. If all objectives have been achieved, project to skip this quarter and proceed to Final Project report.</b> <b>If continuing, insert new key deliverables below:</b>	
P15.3	Quarterly Report			£16,015	£13,438	£2,577	Copy of invoice or timesheets	Report of Key deliverables achieved by Administration in this quarter Quarterly progress report towards outputs and against information to be included in final report, any problems encountered in this period.	Aggregate of data collected in Period Progress against Benchmark data
Period 15 Activity to 30 September 2021 total				£64,787	£51,726	£13,061			

Reference	Output	Output to be completed by	Claim Date	Financial value	CITB contribution	Match contribution	Evidence of Financial Expenditure	Evidence of Activities & Outputs	Data
P16.1	Direction and Partnership Management	31 December 2021	31 January 2022	£37,541	£28,913	£8,628	Timesheets of 12 weeks Direction work on project Timesheets of 12 weeks Partnership Management work on project	Report of Key Deliverables achieved by Director and Partnership Manager in this quarter. Agreement with Mark Noonan that NFRC have delivered sufficiently on Key Deliverables.	
P16.2	Project Management			£11,231	£9,375	£1,856	Project Management work: Timesheets of 12 weeks work on project	Report of Key Deliverables achieved by Project Manager in this quarter as agreed by Mark Noonan.	
P16.3	End of Project Final Project report			£32,515	£28,438	£4,077	Copy of invoice or timesheets showing work on final project report	Report of Key deliverables achieved by Administration in this quarter Refer to 'Guidance for Final Project Reports' as provided in your Welcome Pack. Final report to include: Project description Socio-demographic profile of beneficiaries Profile of participating organisations Comparison to initial benchmark and success criteria Press Articles and Case Studies Analysis of what approach worked and with whom, in any/which sector or region Work with other Roofing Federations and what approaches worked Lessons Learned Fit with CITB 3 strategic objectives Final Sustainability Plan covering 2022-2025  Participation in Final Evaluation and Case Study with CITB Evaluation Manager	Aggregate of data collected in project against benchmark data End of project overview of data: Individual data - age, gender, ethnicity, occupation, subsector, Employer data - large/SME, location, subsector
Period 16 Activity to 31 December 2021 total				£81,287	£66,726	£14,561			
<b>Total</b>				<b>£4,575,572</b>	<b>£2,892,616</b>	<b>£1,682,956</b>	<b>Match</b>	<b>37%</b>	