

British Academy of Management and Partner Collaborative Research Grant Schemes Terms and Conditions 2025

EXAMPLE CONTRACT

1. Details of Grant

British Academy of Management (BAM), and (ANZAM/IAM/SIMA) will pay **<Principal Investigator Host Institution>** (Host Institution) a grant for **<Principal Investigator Name>** to undertake a research project in collaboration with **<Co-Investigator Name>** at **<Co-Investigator Institution>** entitled '**<Project Title>**' (Project) funded through the BAM and Partner Collaborative Research Grant Schemes 2025. The Contract shall commence on **<project start date>** and shall end on **<project end date>** (Term).

BAM and (ANZAM/IAM/SIMA) have agreed to support the Project for the Term at a total maximum cost of **£<total funding budget>**. The total amount requested for the grant will be paid to the Host Institution in one instalment as specified in Annex 1. The payment shall be made at the commencement of the Project upon submission of an invoice. Any underspend against grant funds already received by the Host Institution will be returnable to BAM upon submission of the End of Grant Project and Financial Report.

The Host Institution will issue an invoice for the Grant quoting '**<Grant Reference Number>**', and the dates of the project. Payments shall be made within 30 days of receipt of the invoice subject to BAM and (ANZAM/IAM/SIMA) being satisfied that the amounts claimed are proper and in accordance with the project's agreed budget. Payment will be made via BACS and will not be issued until a signed contract is received.

2. Principal Investigator summary requirements

Grant Holders are required to fulfil the following key conditions upon being awarded a grant:

- *For UK-based investigators:* the Principal Investigator and all Co-Investigators who are based in a business or management school must maintain valid membership of BAM for the duration of the project.
For Australia / New Zealand, Ireland or Italy-based investigators: the Principal Investigator and Co-Investigators based in Australia / New Zealand, Ireland or Italy must maintain valid membership of their respective Academy for the duration of the project

- The lead institution is responsible for monitoring the conduct of the award and ensuring that ethical standards are met. In cases where the research is not completed or ethical standards are not met, the lead institution will not be eligible for any future funding through a BAM and Partner grants scheme.
- The Principal Investigator must submit a 6-monthly 'Interim Project and Financial Report' to the BAM Grants Administrator via the [BAM grants portal](#). This is to ensure that the project is proceeding as planned and to update BAM regarding how much of the funding has been spent or committed.
- The Principal Investigator must submit to the BAM Grants Administrator an 'End of Grant Project and Financial Report' via the [BAM grants portal](#) within two months of the completion of the project. Lists of transactions under each of the key budget headings included in the application will be required together with supporting financial evidence.
- At least one full paper on the research outcomes must be presented at the BAM, or ANZAM, IAM or SIMA Annual Conference as relevant during the life of the project or at the next possible conference following completion of the project. Failure to present at a BAM, or ANZAM, IAM or SIMA Conference, as relevant, will result in the funds needing to be returned to BAM. Costs for travel, accommodation and subsistence, and conference fees for attendance at this conference cannot be claimed against the grant.
- The Principal Investigator and all Co-Investigators must acknowledge BAM, and ANZAM, IAM or SIMA, as relevant, for support for the project in any written or electronic publication that arises as a direct result of the project, including the grant reference number. Investigators are encouraged where possible to publish in open access journals if appropriate.
- The Principal Investigator and Co-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 on the [BAM Grants Repository](#) 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.

Terms & Conditions of the BAM and Partner Collaborative Research Grant Schemes 2025

The Terms and Conditions outlined in Annex 3 are intended to ensure that the grant is available for the project as agreed by BAM and ANZAM/IAM/SIMA; secondly, that BAM and ANZAM/IAM/SIMA are informed promptly of any significant changes in the project being supported and permission is sought where necessary; and thirdly, that BAM and ANZAM/IAM/SIMA receive a detailed account of the outcomes of the project.

Principal Investigator Agreement

I, the Principal Investigator, confirm that I have read and understood the general requirements of grant holders outlined in section 2 of this document. I have read and accept the Terms and Conditions of the Award and the BAM Privacy Policy, and I understand the requirements of me as the Principal Investigator of the project.

Full Name	
Role	
Signature	
Date	

Institutional Agreement

On behalf of the Host Institution, I, the authorised signatory below, confirm that all the information provided in the Application Form is true and valid and that I have read and accept the Terms and Conditions of the Award and the BAM Privacy Policy.

Name and Address of Organisation	
Full Name	
Role	
Signature	
Date	

British Academy of Management Agreement

Name and Address of Organisation	
Full Name	
Role	
Signature	
Date	

ANZAM/IAM/SIMA Agreement

Name and Address of Organisation	
Full Name	
Role	
Signature	
Date	

ANNEX 1 : Agreed budget and reporting requirements

The agreed budget is included in this Annex together with the work plan for the research project. Please ensure that expenditure is incurred in line with the agreed budget, and the financial guidance set out in Annex 2.

The reporting schedule is as follows:

- **<mid-point of project year 1>** – Interim Project and Financial Report 1
- **<end of project year 1>** – Interim Project and Financial Report 2
- **<2-months after end of project>** – End of Grant Project and Financial Report

The invoicing schedule is as follows:

- **<Beginning of project>** – Invoice for approved budget upon commencement of project
- **<3 months after end of project>** – Return of any underspend subject to submission and approval of End of Grant Project and Financial Report

****NB – these schedules may change subject to final agreed budget and project duration of the awarded project*

ANNEX 2: Financial Guidance

Extract from BAM and Partner Collaborative Research Grant Schemes 2025 Guidance for Applicants

1. BAM, together with ANZAM IAM and SIMA are committed to funding up to one grant for each Collaborative Research Grant schemes dependent on the quality of submissions received. BAM/ANZAM and BAM/IAM funding is up to a maximum of £6,000 for one project per scheme. BAM/SIMA funding is up to a maximum value of £4,000 for one project.
2. The Grant cannot support full economic costing of projects in relation to staff costs, including both salaries and overheads, given BAM's position as a Registered Charity.
3. The Grant will be contracted between BAM and the Principal Investigator's Research Office. In the case of Collaborative Research Grants, BAM remains the contracting party, and administers the grants on behalf of the partner academies (ANZAM, IAM or SIMA respectively).
4. The Principal Investigator's organisation ('lead institution') will issue an invoice to the BAM Grants Administrator to claim the grant.
5. The Grant holder(s) must not commit any expenditure prior to the contract being issued and the period of the grant having commenced. All expenditure must have taken place within the dates of the project and been accounted for within two months of the project end date.
6. The lead institution must agree not to use the grant for other purposes than funding of the project. Applicants are to receive the full grant being awarded to carry out the specified research. This agreement must be included with the application.
7. The Principal Investigator must include a statement from their Research Office confirming the application terms and conditions and financial guidelines have been read and accepted.
8. The lead institution must include a financial commitment to support attendance at the British Academy of Management Annual Conference or the ANZAM, IAM or SIMA Annual Conference where the project will be presented over and above standard conference support. This agreement must be included with the application.
9. Priority will be given to applications that demonstrate value for money and financial clarity.

Eligibility of costs under the Grant Scheme

Please note, the following items are costs that ***will not be covered*** under the Grant Schemes:

- Salaries of existing staff
- Tuition or other fees
- Hardware and computer purchase
- Registration fees, travel, accommodation and subsistence to attend BAM or ANZAM, IAM or SIMA Conference

The following items are indicative of costs that ***are covered*** under the Grant Schemes:

Accommodation, Travel and Subsistence

Applicants should provide estimates of, and justification for all accommodation, travel and other subsistence costs directly relating to the project.

- **Accommodation:** Applicants should obtain reasonably priced hotel accommodation in accordance with their own institution's travel and subsistence policy.

- **Travel:** Applicants should book early and take advantage of cheaper advance tickets, where possible, and be by the most economical means of transport. BAM expects that travel will be at the lowest available fare, which should normally be economy/standard travel.

Transcription/data input/translation/research assistance/other external services

Assistance in transcription, data input, translation, research assistance or other external services may be funded from the grant if the following conditions are met:

- The application must include details of how the estimated number of hours has been calculated.

Consumables and other costs:

The following items **may be covered** under the Grant Schemes if sufficient justification is provided:

- Stationery
- Computing consumables (e.g. USB data sticks, CDs), equipment rental charges and software fees or purchases specifically required for the project
- Specialist publications that cannot be obtained through the Principal Investigator's or a Co-Investigator's institution
- Subject/interviewee incentives
- Cost of microfiche records
- Specialist reprographic services
- Copyright permission fees

Conference attendance – travel, accommodation and fees:

- BAM may, in certain circumstances, consider expenses relating to a single conference attendance if the theme and subject of the conference is of direct and particular relevance to the project and there are no other sources of funding available to the applicant. This does not replace the requirement to present a full paper at an annual BAM Conference.

ANNEX 3: Terms and Conditions

1. General Requirements

- 1.1 The Principal Investigator must observe the summary requirements for successful Principal Investigators as set out in the Scheme Guidance for Applicants 2025.
- 1.2 Grants must be used solely for the purposes set out in the application as agreed by BAM and ANZAM, IAM or SIMA and cannot be transferred to another individual to carry out the agreed project, nor be used for a different purpose to what was originally agreed, without prior permission..
- 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 October 2025 and no later than December 2025.
- 1.6 No additional funding from BAM, ANZAM, IAM or SIMA will be available from this scheme 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 Head of Department or institutional approval acknowledging necessary confirmations as required in the BAM and Partner Grant Schemes 2025 Guidance for Applicants and application form.
Please note: applications without the agreement will be rejected at the administrative desk 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. The Principal Investigator 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 The Principal Investigator is 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 and Partner 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 and ANZAM, IAM or SIMA, 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 to the original estimates in the application approved by the BAM and Partner Grant Awards Committee. If the Principal Investigator wishes to introduce a new budget item or make any 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 via the BAM grant portal 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 via the BAM grant portal. 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 intends 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 and Partner 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 and ANZAM, IAM or SIMA, reserves the right to judge whether any project would be compromised by the proposed changes. If the BAM Grant 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 The Principal Investigator is required to attend and present the research outcomes via a *full paper* at the BAM Annual Conference, or ANZAM, IAM or SIMA conference, 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 must be acknowledged, as appropriate to the particular grant scheme, in any publication (written or electronic, scholarly or targeted at practitioner or general audiences) 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. The Principal Investigator 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 BAM and Partner Collaborative Research Grants Scheme, BAM and ANZAM, IAM or SIMA, 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. Intellectual Property

- 6.1 BAM and ANZAM, IAM or SIMA, will not claim any title to arising Foreground Intellectual Property generated as a result of the Grants Scheme. Any agreement of distribution of Intellectual Property ownership shall be determined between the Host Institution and their collaborating partners. Neither BAM nor ANZAM, IAM and SIMA, shall be liable for any claim made against a third party for the infringement of Intellectual Property Rights.

7. Ethics

- 7.1 The Principal Investigator is 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) or other relevant international guidelines.
- 7.2 BAM and Partners do not require that research data is made publicly available as a condition of funding. However, if any funded project does produce aggregate and anonymous research data that may be of benefit to the broader academic community, we have no restrictions on this being publicly available, and would be delighted for anonymous datasets

to be available as long as the requirements of GDPR legislation are adhered to and the publication of any dataset is managed by the host institution and any partners responsibly.

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