These guidance notes have been written for Administrators who are supporting successful Leverhulme Trust Early Career Fellows.

When an application is successful, Leverhulme Trust will contact the Fellow by email in the first instance. When the Fellow accepts, the Trust will then send an award email to the Head of Department.

When your Head of Department receives the award email, please forward to Research Services and confirm on behalf of the Department/Faculty that you agree to the statements a) to g) on the award letter and provide the extra information requested below:

d) State the source of funds for the University’s contribution to the Fellow’s salary

e) Confirm the starting salary and spine point

f) Confirm:
   - The actual year 1 salary
   - The actual year 1 NI & Superannuation
   - The total overall salary cost
   - The 50% figure to be charged to Leverhulme
   - The first increment date

Please submit the X5 award costing, having removed the research expenses costs that were included at application stage (please see notes on research expenses) and updated the project dates to ensure the salary calculations are accurate.

Once you have provided this information and the X5 is submitted, Research Services will prepare an award acceptance letter to send to Leverhulme.

Once Leverhulme have received institutional acceptance of the award, they will send a formal award letter to the Fellow – please ensure this is forwarded to Research Services. At this stage, please confirm with the Fellow whether they wish to receive their research expenses directly or via the institution, and complete the relevant Payment of Research Expenses form (please see notes on research expenses).

Once Research Services has received the formal award letter and payment of research expenses form, we will be able to set up the award.

Humanities, Social Sciences & GLAM updated 15th June 2018
Early Career Fellowship awards are initially set up with the salary costs only in agreement with Research Accounts – the research expenses have to be agreed with Leverhulme Trust in advance and are paid separately. Research Expenses for each year of the Fellowship will be processed as uplifts to the account.

The Fellow can decide whether to receive their Research Expenses directly or via their project account. This is up to the Fellow except if they have the following costs in their expenses:

- Research Assistance: any expenses including research assistance must be received via the project account
- Laptops: any expenses including laptops must be received directly (Leverhulme's T&Cs state that any equipment purchased belongs to the Fellow after the grant)

If the Fellow chooses to receive their expenses directly, they need to complete the relevant payment form and send directly to Leverhulme. If they are receiving their expenses via their project account they need to send a signed copy to Research Services for institutional acceptance.

Please ensure the Fellow is aware of the QR income generated on research expenses received via their project account when they are deciding how to receive their research expenses.

Research Services need confirmation of how the Fellow wishes to receive their Research Expenses (and a payment of research expenses form if appropriate) prior to set up for the account.

**X5 Award set up**
If the Fellow has decided to receive their research expenses through the University then do not enter the costs into the X5 award as Research Accounts will uplift them directly each year, without the need for the RPF2.

**Year 1 Research Expenses**
- Please ensure the Fellow submits their budget for the first year of the project to Leverhulme at least 1 month before the start date as this will need to be approved by Leverhulme and there may be some negotiation.
- Once Leverhulme have agreed to the budget, please forward confirmation of this to Research Accounts and they will uplift the account accordingly
- If the Fellow is receiving their expenses directly, Leverhulme will arrange payment to the Fellow’s bank once they are agreed

**Year 2 and 3 Research Expenses**
- Please ensure the Fellow submits their budget for years 2 and 3 at least 1 month before the start of that year
- Once Leverhulme have agreed to the budget, please forward confirmation of this to Research Accounts and they will supplement the budget for that year’s expenses
- If the Fellow has elected to receive their research expenses directly, it is up to them to confirm these with Leverhulme before costs are incurred in years 2 and 3

Leverhulme Trust must be provided with a summary of projected expenditure for each year before any costs are incurred.

**USEFUL LINKS**

Leverhulme Terms and Conditions: [https://www.leverhulme.ac.uk/grant-holders/terms-and-conditions](https://www.leverhulme.ac.uk/grant-holders/terms-and-conditions)
Payment of Research Expenses forms: [https://www.leverhulme.ac.uk/grant-holders/payment-expenses](https://www.leverhulme.ac.uk/grant-holders/payment-expenses)
# Early Career Fellowship award process

1. Fellow receives notification of successful application
2. Fellow accepts
3. Head of Department receives award email requesting institutional confirmation
4. Department confirms details requested in award email and submits X5
5. RS sends formal confirmation to Leverhulme
6. Fellow receives formal award letter
7. Fellow accepts
   - Department confirms how Fellow will be receiving their research expenses and sends payment of expenses form to RS for signature
8. RS forwards signed payment of expenses form to Leverhulme and sets up award for Fellow’s salary

# Research Expenses process: one month before project starts and repeated for years 2 and 3

1. Fellow sends proposed budget to Leverhulme
2. Budget negotiated, then approved by Leverhulme
3. Confirmation of approved budget sent to RS, along with X5 supplement costing
4. RS uplifts account