



SKILLS FOR YOUR FUTURE; UPSKILLING FUND – APPLICATION GUIDANCE NOTES

The Upskilling fund is targeted at SME businesses based in the borough of Telford & Wrekin to support employees to upskill and will support retention, and in work progression.

SUPPORT PROVIDED

The funding will cover 90% of the total cost of the training with the remaining 10% contribution to be covered by the business.

Retrospective costs are not eligible and all applications **must** be approved before training commences.

The fund will work upon a defrayal basis whereby once approved, and the offer letter returned and receipt acknowledged, applicants will need to purchase the training, evidence the purchase, and evidence the delivery. It is at this point businesses will be able to draw down the funding allocation. Payments **will not** be made up front.

ELIGIBILITY CRITERIA

To be eligible to apply, businesses must meet all of the following criteria

- The business must be based in Telford and Wrekin or be moving into Telford and Wrekin
 - For clarification on where your business is located, please input your post code into the following link - <https://www.gov.uk/pay-council-tax>.
 - If an applicant is moving into Telford and Wrekin, evidence will need to be provided of a signed lease agreement from both parties, and must be submitted with a full application submission.
- Pay Council Tax or business rats to Telford & Wrekin Council
- An SME business – This is defined as a business with less than 250 employees, and an annual turnover not exceeding £36m and/or an annual balance sheet total not exceeding £18m.
- The business can be trading B2B or B2c. (Excluded sectors are listed on the FAQ document)
- As part of their application businesses must explain the benefit of the training to the employee and to the business.
- Businesses must be able to demonstrate that the training and the outcomes can be achieved by 28th February 2025

APPLICATION PROCESS

All applications will need to go through a 2 stage process to assess against the eligibility criteria

All forms must be completed online. We will not accept paper copies of applications.

- Stage 1: Submission of the Upskilling Grant Expression of Interest (EOI Form)
 - All applicants will be required to submit an EOI form to register an interest for the funding
 - The EOI will need to include
 - Business name
 - Type of business



- Employee name/s
- Details of the training and cost
- Details of how it will support the funding outcomes
- Information regarding previous funding allocations

From this point all EOI forms will be assessed against eligibility criteria and will be notified if they are eligible to proceed to Stage 2 or have been unsuccessful at this time.

- Stage 2: If your EOI is approved you will be invited to submit a full application and if necessary a discussion with a member of the Invest Telford team.
 - You will be provided with a unique link to complete the full application form.

FULL APPLICATION INFORMATION

Please do not submit this until the EOI has been approved. You will be sent a unique link to the application form.

The application is broken down into 10 sections. The application will save your details as you go so you do not need to complete the form in one sitting. To save time we suggest that applicants gather the information needed below and type up their responses in a blank word document before proceeding with the form so that they can copy and paste their information into the online form in one session.

When submitting the full application, businesses will be required to provide all of the following information.

SECTION 1 – APPLICATION AND BUSINESS CONTACT DETAILS

| Requirement | Guidance |
|---------------------------|---|
| Business Details | Business name, business address and post code, company registration number / Unique Tax reference number, VAT (if applicable), SIC code |
| Applicant Contact details | Applicant name, surname, position in business, relevant contact details, company website (if applicable) |
| Moving | Are you moving premises in the next 6 months? If so please provide details. Date of move, address of new premises. |

SECTION 2 – BUSINESS INFORMATION AND BACKGROUND

| Requirement | Guidance |
|---------------------------------------|---|
| What type of business entity are you? | Choose from drop down list: Sole Trader, Partnership, Limited, Partnership, LLC, Other |
| Business Sector | Choose from drop down list: Manufacturing, Logistics, Food and Drink, Engineering, Professional and Office Based, Wholesale, Construction, Distribution, Environmental, Retail, Other |
| When did you begin trading? | As described |



| | |
|---|---|
| Number of Full Time Equivalent Employees | As described |
| Number of Part Time Employees | As described |
| Number of Apprentices | As described |
| Number of zero hour, agency, or subcontractors employed | As described |
| Current Turnover | As described |
| Provide a brief history and overview of the business | Outline a history of the business since it began trading, up to now (50 words minimum - 200 words max) |
| What type of work do you undertake? | Outline the type of work the business undertakes / sells or the service it provides (50 words minimum – 300 words max) |
| Provide details of your current markets | What sectors do you sell to, where possible list some customers. Where are your customers based? What percentage of your turnover is generated through export (if applicable) (50 words minimum – 300 words max) |
| 6 tick box declarations | 6 tick box - Yes / No answers |

SECTION 3 – TRAINING AND IMPACT

| Requirement | Guidance |
|--|--|
| What will the funding be used to purchase? | Outline specifically what type of training the funding will be used to support and other relevant associated costs |
| What benefit will it bring to the business? | Will this enable the business to diversify, grow, use a new product? |
| What benefit will this bring to the employee/s | Outline how this will help the employee – retention, career progression and or other benefits. |
| How many jobs will be safeguarded or retained as a result of the funding | Insert the number of jobs the funding will safeguard. |
| Why do you need funding to support this training? | As described |
| Are there any additional benefits to the business or wider community? | Outline if the training will provide any wider business or community benefits. |
| When will the training start? | As described |
| When will the training financially complete? | As described |

Jobs upskilled (new row needed for each job)

| Position | Skill Level | Hours worked | salary | Expected training completion date |
|----------|--|--------------|--------|-----------------------------------|
| | Unskilled, semi-skilled, skilled | | | |



Number progressing in work (new row needed for each job)

| Position | Skill Level Unskilled, semi-skilled, skilled | Hours worked | salary | Start date of in work progression |
|----------|---|--------------|--------|--------------------------------------|
| | | | | |

SECTION 4 - DETAILS AND COST OF TRAINING

| Requirement | Guidance |
|-------------|---|
| | Applicants will be required to list all elements of the training. Please provide details of the training and qualification. You should also break down into individual costs for delivery, accreditation, certificate and any other costs. Please also state the preferred Training Provider and the reason for choosing this provider. |

Section 5 – Business relocation or Expansion

Only complete this section if you plan to move to new premises, within the next 6 months

| Requirement | Guidance |
|---|--|
| Current Premise details (full address including postcode) | As described |
| New or additional premise details (full address including postcode) | As described |
| New or additional Sq.Ft. | New or additional premise size in sq.ft. |
| When do you expect to complete the move/expansion | Insert expected completion date |

Section 6 – Risk Management

| Requirements | Guidance |
|--|---|
| Applicants are required to name a Director / Owner who will be responsible for the management of the training. | As Described |
| Risk Rating | Applicants are required to highlight known risks with the training, and what will be done to mitigate risk. |



Section 7 - Document upload

| | |
|--|---|
| This section is an upload section where by applicants will be required to upload the following documents. | |
| The latest 3 consecutive months of bank statements | Submit full month documents for the latest full three months. All statements must show bank name, business name, account number sort code and account name. Please be aware you may need to request this from your bank. We will not accept bank statements which are hashed out, or with missing details. |
| Evidence of funding to cover employer contribution | This can either be the most recent bank statement, evidence of loan agreements, agreed overdraft facilities, a signed document from a named company directors of the agreed loan amount. |
| Up-to-date Management accounts | Where grant requests are over £10,000. Applicants will be required to submit up to date management accounts. |
| 12 month cash flow forecast | Where grant requests are over £10,000. Applicants will be required to submit 12 month cash flow forecast. |
| Quotes in line with the procurement guidance requirements | For reference refer to the procurement guidance notes section. |
| Additional information may be requested on a per applicant basis | Whilst reviewing all applications we may need to occasionally request additional information to support our eligibility check and application assessment. This will be on an ad-hoc basis. |
| Evidence of existing staff numbers | All applicants are required to submit HR/Payroll information for all staff trained. |
| Evidencing of pre-intervention impact, and evidence of post intervention impact | All successful applicants will be required to submit evidence of their pre-intervention Data, this will be requested once grants have been awarded. We will then work with all successful applicants to provide the relevant impact evidence / post intervention data. Please note: We will be collecting this data after the grant has been awarded. Any applicant found to have submitted false data or deliberately misleading information will have their grant allocation, and funding agreement automatically withdrawn regardless of how far along with their project they are. There will be no appeals process. Where it is the case that applicants have already drawn down the funding, we will initiate a clawback procedure. |



Section 8 – Subsidy Control

| Requirement | Guidance |
|---|---|
| Details of funding from other public bodies | Applicants are required to outline previous fund awards, from which bodies, dates of award, funding mechanism (De-Minimis or GBER) over the past 3 years. |

Section 9 - Equality Monitoring

| Requirement | Guidance |
|--|--|
| Applicants are required to complete 4 drop down boxes. | Applicants are required to complete a table highlighting age range, gender, disability, ethnicity, religion. There are four questions, applicants are required to answer |

Section 10 – Declaration

| Requirement | Guidance |
|---|--------------|
| Applicants are required to sign a declaration confirming the information provider is complete and accurate. | As described |

Retrospective applications will not be supported, and any expenditure made before the issuing of a grant offer letter will be invalid. This will result in Telford & Wrekin Council withdrawing the funding allocation for your project.

PROCUREMENT RULES

| Total value per item / with one supplier | Procedure | Advertising Required |
|---|--|---|
| Under £10,000 | Achieve best value through informal quotes (x3 quotes) | none |
| Between £10,001 - £177,897 ex VAT (Supplies and Services) and between £10,001 - £50,000 (Works) | X3 quotes required Applicant must advertise the opportunity online for at least 10 days, highlighting: 1. Details of the opportunity 2. What is required 3. How the successful candidate will be chosen (evaluation criteria) 4. Deadline and details of how to apply | Applicant must advertise the opportunity on the grant recipient's website for at least 10 days. |



| | | |
|---|--|--|
| | Impartially assess each bid against the evaluation criteria and demonstrate justification that a reasonable decision has been made on the basis of the quotes/prices | |
| Over £177,897 ex VAT (Services and Supplies) and Over £50,000 (Works) | <p>Formal Tender process</p> <p>Competition must be advertised.</p> <p>Detailed specification must be provided and tenders invited from bidders.</p> <p>Applicant must show evaluation criteria and how the winning tender will be selected.</p> <p>The advert needs to incorporate or direct any interested party to the following information:</p> <ol style="list-style-type: none"> 1. Details of the opportunity 2. What is required 3. How the successful candidate will be chosen (evaluation criteria) 4. Deadline and details of how to apply <p>Impartially assess each bid against the same criteria and demonstrate this through use of a score/evaluation sheet and provide evidence to demonstrate that the winning bidder has been selected on merit – as a minimum this should include the rationale behind the decision to award.</p> | Applicant must advertise the opportunity on the grant recipient's website for at least 35 days |

Please note the minimum item value that will be accepted per individual item is £500.00. Applicants who are looking to purchase items with a lower individual item threshold of £500.00 per item are advised to discuss this with the Invest Telford team beforehand.

SUBSIDY CONTROL

You will be expected to inform us within your application form of any grants and other support you have received from the public sector over the last 3 financial years.

This scheme is covered by the current [UK Government Subsidy Control Act \(2022\)](#). The total amount of Minimum Financial Assistance (MFA) received over a rolling period of three fiscal years should not exceed £315,000 per business.



Funded by UK Government

It is the responsibility of the applicant to monitor the level of MFA received; you will be asked to declare that this has not been exceeded in the event of an offer being made. [* The MFA financial threshold applies at company group level.]

Where applicants do not adequately demonstrate that the proposed project is compliant under the UK Subsidy Control Regime it may be considered ineligible, and your application could be rejected.