



APPLICATION GUIDANCE NOTES – LARGE GRANTS FUND

FUND AIMS

The Large Grants Funds is targeted at SME businesses based in the borough of Telford & Wrekin. This grant fund is being used to encourage business growth by seeking to support eligible capital investment projects with grant funding that enable businesses to:

- Expand into new markets
- Adopt new to firm technologies or processes
- Improved productivity
- Launch a new product or services
- Provide Job creation / Job Safeguarding

SUPPORT PROVIDED

The Grant Fund will provide match funded grant from £5,000, up to £20,000 to businesses who are looking to grow or expand and may benefit from accessing financial assistance to deliver their growth plan. The fund will do this by supporting capital investment projects.

The fund will support business with up to a maximum of 70% funding for their proposed project, with the remaining 30% being from the business either through company reserves, bank loan, or overdraft facilities. The fund will not support match provided through credit cards, hire purchase, lease purchase or other asset finance models.

For example:

- Company A may be seeking to purchase new equipment at a cost of £10,000. Company A would be able to apply to the Large Grant Fund for a maximum grant of 70% of the cost of the new kit. This would mean Company A could apply for a maximum of a £7,000 grant, as 70% of £10,000 is £7,000. This would leave Company A to cover the remaining £3,000 cost from their own financial sources.
- Company B may be seeking to purchase a new WMS system for £26,000. Company B would be able to apply to the Large Grant Fund for a maximum grant of 70% of the cost of project. This would mean Company B could apply for a maximum grant of £18,200, as 70% of £26,000 is £18,200. This would leave Company B to cover the remaining £7,800 from their own financial sources.

Retrospective projects are not eligible, nor items purchased prior to any grant approval.

The fund will work upon a defrayal basis whereby once the grant is approved, and the grant offer letter returned, applicants will need to purchase the goods or service, evidence the purchase, and evidence the delivery. It is at this point businesses will be able to draw down their grant funding allocation. Grant payments **will not** be paid up front.

ELIGIBILITY CRITERIA

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

- The business must be based within Telford and Wrekin, or be moving into Telford and Wrekin.



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- 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.
- The business must be trading for a minimum of 12 months at the point of a full application submission.
- 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.

Priority funding will be allocated to applicants who can financially complete their project by March 2024.

All business of both B2B and B2C classification are eligible to apply, but priority sectors we are seeking to support are:

- Manufacturing
- Engineering
- Digital
- Professional or other office services
- Logistics and Distribution
- Wholesale
- Construction
- Environmental

ELIGIBLE PROJECT CRITERIA

All proposed projects must meet one or more of the following objectives that the Large Grant Fund is attempting to support. We are seeking to support projects that directly enable businesses to:

- Create new additional permanent FTE and/or PTE posts within the company:
 - All jobs must be in place by February 2025. Priority will be given to applicants who can create the post/s within 12 months
 - New means it should not have existed with the employer before the award of the grant application.
 - Permanent means it is in place for at least 12 months from the point at which it is created
 - For clarification the creation of zero hour contract employees, or subcontractor posts does not count as job creation. However, the conversion of zero hour posts or subcontract post to FTE post is an eligible output
- Safeguard Jobs as a result of support:
 - A safeguarded job is a permanent and paid job that was at risk prior to support being provided, which the support helped the business to retain. This includes sole traders and business owners
 - This includes both part-time and full-time jobs
 - At risk is defined as being forecast to be lost within 6 months
- Adopt new to firm technologies or processes:



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- A technology or process is new to the company if it did not use a technology or process with the same functionality before
- Or the production technology or process is fundamentally different from those already used
- This may be tangible (capital equipment) or intangible (software and systems)
- Improve productivity
 - Productivity refers to the gross value added per hour worked or gross value added per worker
- Engage with new markets.
 - This refers to business that are able to launch a new product or service into a new domestic or overseas market or have undertaken research or attended conferences or events to prepare a launch into a new market.
 - New market refers to a new product / service market (i.e. creation of a product/service that doesn't compete or replace previous products produced by the business) or geographic market (i.e. operating in a new area, like a new region or country)
- Introduce new products or services to market
 - A product or service is new if the company has not previously made this product or service available to the market before

The overall number of objectives that can be supported by each project will be considered when assessing all applications. Applicants who can clearly demonstrate a project that meets all objectives highlighted above will score higher in appraisal. Applicants should consider the level of grant funding needed to complete their project when submitting a project proposal. If there are a high number of competitive projects, successful applicants may be offered a reduced amount of grant funding in an attempt to support as many viable projects as possible.

Applicants who are seeking a larger amount of funding will be required to support their project with increased job creation, whilst also meeting multiple fund objectives.

SUPPORTING EVIDENCE

All applicants will be required to evidence baseline information relating to the objectives and the proposed impact of their project. This means outlining:

- Current FTE/PTE count
- Current production capacity
- Current market evidence
- Current adopted technologies
- Current product/ service range

Once the project has been completed applicants will be required to submit post-intervention data demonstrating growth within their chosen objective/s.

For example:

- Company C may outline in their application that they currently employ 3 FTE's. This information would be recorded as baseline, pre-intervention data. Company C would evidence this by supplying HR/Payroll information. Company C may then highlight through



the support of the Large Grants Fund they will be able to increase their FTE count to 4 FTE's once the project has been completed. This would demonstrate a +1 growth in FTE count. Company C would then be required to evidence the +1 growth in FTE count, this would be done through the submission of contracts of employment, and update HR/Payroll information.

- Company D may outline in their application that they currently have 5 FTE positions at risk. This information would be recorded as baseline, pre-intervention data. Company D would be required to clearly outline what posts were at risk, why these post were at risk, and submit evidence to prove these post were at risk. Company D may then highlight through the support of the Large Grants Fund they would be able to keep these 5 posts by purchasing new machinery to bolster capacity and secure growth. This would demonstrate 5 post's being safeguarded. Through a monitoring process Company D would then be required to periodically submit evidence to confirm the at-risk posts were still secure, and in post.
- Company E may outline in their application that they currently outsource a large portion of their work to 3rd party suppliers. This information would be recorded as baseline, pre-intervention data. Company E would be required to supply evidence of the value and amount of work they currently outsource to 3rd party suppliers. Company E may then highlight in their application that through the support of the Large Grants Fund they would be able to purchase machinery to in-house this section of their business. This would enable Company E to bring new technology into the business that they currently do not have access to, or that is fundamentally different from what they currently do. This action would meet the objective criteria. Company E would then be required to evidence the introduction of new technology to the businesses.
- Company F may outline in their application that they currently produce 50 widgets a day. This information would be recorded as baseline, pre-intervention data. Supporting evidence may be the make and model number for their current machinery, or information surrounding current production capacity. Company F may then highlight through the support of the Large Grants Fund they will be able to increase their production capacity by 100% through the purchase of new machinery, or the implementation of new systems and processes, taking daily production to 100 widgets. This action would meet this objective criteria. Company F would then be required to evidence the 100% increase in production capacity.
- Company G may outline in their application that they are looking to expand into new geographical market, from which they do not currently supply or service i.e. Germany, or Wales. This information would be recorded as a baseline, pre-intervention data. Supporting sales evidence would need to be provided. Company G may then highlight in their application that through the support of the Large Grants Fund they would be able to purchase specialist 3rd party support to conduct market research or attend a business exhibition to expand into a new market. This would enable Company G to enter a new market i.e. Germany or Wales. This action would meet the objective criteria. Company G would then be required to evidence their expansion into a new market.



- Company H may seek to expand into a new market by launching a new product that is different from all their current products on the market. This information would be recorded as baseline, pre-intervention data. Supporting evidence would need to be provided that may include details of their current product range / lines, and how this new product is different. Company H may then highlight in their application that through the support of the Large Grants Fund they would be able to purchase a new machine to enable them to launch a new product or service. This would enable Company H to bring a new product / service to market. This action would meet the objective criteria. Company H would then be required to evidence the new product launch.

The examples are not exhaustive, we expect businesses to develop a project to support their growth and development that aligns with the fund objectives. For this reason all applicants are required to discuss their project with the Invest Telford team.

APPLICATION PROCESS

All applications will be required to go through a three stage process to evaluate project viability against the fund criteria.

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

- Stage 1: Submission of the Large Grant Fund Expression of Interest (EOI) form.
 - All applicants will be required to submit an EOI form to register an interest for the fund.
 - At this point applicants will need to provide information regarding:
 - Applicant details
 - Details of the proposed project and value
 - Details regarding which fund objective/s you will achieve
 - Information regarding previous funding allocations
 - From this point all EOI forms will be assessed against eligibility criteria, scheme requirements, and fund objectives.
 - Once your EOI is reviewed, applicants will be notified if they are eligible to proceed to Stage 2, or that they have been unsuccessful at this time.
- Stage 2: If your EOI is approved, you will be invited to discuss your project in full with a member of the Invest Telford team.
 - The purpose of the meeting is to scope out the project in full, build upon the information provided in the EOI form, and to make sure the proposed project aligns with the fund objectives.
 - Applicants will be unable to submit a full application until they have fully discussed the project with the Invest Telford team.
 - This is also a stage for applicants to discuss the project in more detail with the team, ask any questions, and discuss additional support options which can be provided by the Invest Telford Team.
 - Once the project is fully scoped out, applicants will be provided with full submission details.
 - Please be aware that project scoping may take more than one meeting.
 - Meetings can be arranged face to face, or over Microsoft Teams.
 - Whilst the use of 3rd party consultants to complete the application form is allowed it is an ineligible grant claim cost. We will not discuss any project



without a representative of the applying business present.

- Stage 3: Applicants will be invited to submit a full application.
 - We will provide applicants with a unique link to complete their application form

FULL APPLICATION INFORMATION AND GUIDANCE INFORMATION

The application is broken down into 10 sections. The application form will save your details as you go, so you do not need to complete the form in one sitting. To save applicants time, we would suggest that all 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 a full application, business will be required to provide all of the following information.

- **Section 1 – Applicant and Business Contract 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)

- **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, Other
Main business activity	Outline the primary service your business undertakes (25 words max)
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 – Project and Impact**

Requirement	Guidance
What will the grant assistance be used to purchase?	Outline what the funding will be used to purchase
Why do you want to undertake this project?	Why does the business need to commit to this project?
How many jobs will be created as a result of the grant (only complete if you are supporting this objective)	Insert the number of jobs the project will create. Numerical answer. If applicant is attaching job creation they will have to list: Position, skill level, hours worked, salary, expected start date. See input table below. If you are not supporting this objective, do not answer this question.
How many jobs will be safeguarded as a result of the grant (only complete if you are supporting this objective)	Insert the number of jobs the project will safeguard. Numerical answer. If applicant is attaching job safeguarding they will have to list: Position, skill level, hours worked, salary, expected redundancy date. See input table below. If you are not supporting this objective, do not answer this question.
What new technologies or process will be installed or implemented as a result of this fund (only complete if you are supporting this objective)	A technology or process is new to the firm if it did not use a technology or process with the same functionality before, Or the production technology or process is fundamentally different from those already used. This may be tangible or intangible. (50 words minimum – 400 words maximum) If you are not supporting this objective, do not answer this question.
What productivity increases are to be expected from grant support? (only complete if you are supporting this objective)	Applicants are required to outline their current production capacity on their current machinery. Applicants are then required to outline the expected increases in capacity. (20 words minimum – 400 words maximum)



	If you are not supporting this objective, do not answer this question.
What new markets will you be able to expand into or engage with? (only complete if you are supporting this objective)	Applicants are required to highlight their current markets and the new markets that they will be able to expand into or engage with. (50 words minimum – 400 words maximum) If you are not supporting this objective, do not answer this question.
What new products or services will be brought to market as a result of this project? (only complete if you are supporting this objective)	Applicants are required to highlight what new products or services will be brought to market. (20 words minimum – 400 words maximum) If you are not supporting this objective, do not answer this question
Why do you need grant funding to deliver this project?	Why is grant funding needed to support the delivery of this project?
What are the environmental benefits of this project? And how does it support the UK Net Zero Strategy?	Applicants are required to highlight the environmental benefits of the project.
Are there any additional benefits to the business or wider community?	Outline if the project will provide any wider business or community benefits.
When will the project start?	As described
When will the project financially complete?	As described

Jobs Created (new row needed for each job)

Position	Skill Level	Hours worked	salary	Expected start date
	Unskilled, semi-skilled, skilled			

Jobs safeguarded (new row needed for each job)

Position	Skill Level	Hours worked	salary	Expected redundancy date
	Unskilled, semi-skilled, skilled			

- **Section 4 – Business Relocation or Expansion**

Only complete this section if your project involves you moving 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 5 – Project Cost

Requirement	Guidance
Expenditure items	Applicants will be required to list all items they are seeking funding against, and the following information: Name / Model number, cost, preferred supplier, reason for choosing supplier.

- Section 6 – Risk Management

Requirements	Guidance
Applicants are required to name a Director / Owner who will be responsible for the management of the project.	As Described
Risk Rating	Applicants are required to highlight know risks with the project, 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 match funding	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. Please note we will not support assets purchased on lease, hire purchase or similar financial structures.
Previous year’s annual accounts	This is only applicable for business requesting over £10,000 For businesses requesting £9,999 or less, you do not have to submit this section.
A cash flow forecast for the next 12 months	This is only applicable for business requesting over £10,000.
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 application 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 current staff employed.
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. The team will work with you to collate this data, and prepare it as evidence. 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. For this reason we encourage all applicants to work with the Invest Telford team.

- **Section 8 - Subsidy Control (formerly State Aid)**

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



• **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 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	Applicant must advertise the opportunity on the grant recipient’s website for at least 10 days.
Over £177,897 ex VAT (Services and Supplies) and Over £50,000 (Works)	Formal Tender process Competition must be advertised. Detailed specification must be provided and tenders invited from bidders.	Applicant must advertise the opportunity on the grant recipient’s website for at least 35 days



	<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>	
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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.

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.