

# Shift

## Application Guidance

### 1 Organisations Eligible to Deliver

The types of organisations that Cycling UK considers eligible to deliver the project and apply for grant funding are:

- Commercial Businesses (Limited Company or Sole Trader)
- Community Cycle Clubs / Groups
- Local Authorities
- Not for Profit organisations i.e., Registered Charities, Social Enterprises, Community Interest Companies

Please note:

- We cannot pay grant funds into a personal bank account. If you are applying for a small grant, you will need to access an organisational or business bank account.
- If you are a sole trader without a business account, at our discretion we may request additional information to verify your trading status.
- Organisations **MUST** have a public liability insurance policy and be able to provide Cycling UK with a valid copy of the policy when requested. The validity of the policy must be at least until the delivery period ends on 31st March 2022. The policy holder **MUST** be identified in the insurance policy as an organisation eligible to provide the cycling activities as detailed in their grant application.
- Organisations must be registered and active in Scotland.
- Cycling UK reserves the right to approve or reject an application based on any information submitted, or any information that Cycling UK currently has or acquires regarding an organisation applying to take part in the project.

## 2 Application information we require you to submit

Before filling in your application, please read **Schedules 1 and 2 of the Terms and Conditions**. This will ensure you understand the Delivery Plan in full.

The type of information you will need to provide when applying, is listed below. There are 5 sections to fill-in, here is a brief description of each:

### 2.1 About your organisation

In this section we require the following details:

- Organisation name, address, postcode, local authority, social media addresses, etc.
- Year your organisation was established,
- Organisation registration number e.g., Companies House, Social Enterprise Scotland, Scottish Charitable Incorporated Organisation (SCIO)
- Number of active volunteers and number of staff members
- Organisation type e.g., Commercial Business, Not for Profit, etc.
- The main focus of your organisation e.g., active travel, community activities, education/health activities
- Primary & Secondary contact details for the person/s applying for the grant.

### 2.2 Grant Application: How you will use a Shift grant

In this section please:

- Tick the outcomes from the list that you are working towards for this project, this can be just one or a combination of several (tick all that apply).
- Describe the cycling experience of your expected participants, how many you are expecting to support and whether you are aiming the activities to target specific target.
- Tick any of the activities you intend to run from the list i.e. training sessions, bike maintenance, essential cycling skills, bike hire.
- Describe your project (up to 250 words), giving an overview of the activities you intend to deliver, how you are going to recruit participants and how these activities will meet your intended outcomes.
- Indicate what dates you plan to run your activities over and what activities will happen each month (e.g., June = Bike maintenance sessions, July = Confidence skills & route planning, July = orientation ride in local community).
- Describe what success will look like 6-12 months after the end of your Shift project
- Provide any additional information you feel will help with your application.

### 2.3 Budget breakdown

In this section you can provide a breakdown what you will spend the grant on and the total amount you are applying for.

- As part of this project, you can apply for a grant to purchase essential bike/cycling accessories for your organisation as well as covering the cost of training (including facility/room hire where required), staff/volunteer costs and other associated project costs.
- If you would like advice regarding how to cost your project, then please contact your local development officer.
- Please break down your total budget into each relevant category.
- Add up all the category costs and enter the total amount you are applying for (the total cost must be between £400-£1500).

## 2.4 Data Collection and Monitoring

Cycling UK records participant numbers and will send follow up surveys to Shift participants to monitor the impact of the project and to enable us to report back to our funder Transport Scotland. To be eligible for a grant you must agree to the following:

- To accurately record and report the number of participants at each activity.
- To ask participants for their postcodes and email addresses (they have the right to refuse, and this should not prohibit them from accessing the activities).
- To share collected postcodes and email addresses with Cycling UK in a timely manner.
- To protect any data collected in accordance with GDPR procedures.

## 2.5 Signatures

- **Terms and Conditions:** You will need to read and agree to our [Terms and Conditions](#). Acceptance of the full terms and conditions is required for Cycling UK to pay you a Shift Grant. You must confirm you have:
  - a safeguarding policy for your organisation, where required
  - adequate insurance to cover the activities you will be delivering
  - read and agreed to the terms & Conditions
- Key terms and conditions we would like to draw your attention to are:
  - (4.5) We cannot pay grant funds into a personal bank account.
  - (4.6) At our discretion we may request additional information to verify your trading status and/or registration.
  - (4.8) Organisations who are providing activities on a regular basis, as main business or for the primary income, and must have appropriate public liability insurance in place.
  - (Schedule 2 – Delivery Plan and Evaluation Requirements) The Grant Recipient shall provide the Grant Funder with evaluation data as outlined in Delivery Plan and FAQs.
- **Bank details:** Please upload a copy of your bank statement and ensure that your account number, sort code, business trading name, bank logo/name/address, are clearly visible or your application may be delayed.
- **Grant acceptance:** Please sign your acceptance of the grant payment by uploading your signature. The following file formats are accepted: .gif, .jpg or .png. A photograph of your signature is sufficient.

### 3 The application process and qualifying conditions

Organisations can apply from 18 May 2021 by submitting an online application and following the advice given herein.

The application process will remain open until all the grant funding has been awarded, at the latest this will be 28 February 2022.

Once an application has been submitted, Cycling UK will review the application and the following qualifying conditions will be considered, but are not limited to:

- Eligibility to deliver
- Ability to deliver the Delivery Plan and Evaluation Requirements
- Ability to comply to our general conditions

You will receive a response to your application within three weeks following submission of the application. Cycling UK will provide one of three outcomes to all applicants:

- **Approval** – an application has been approved in full.
- **Rejected** – an application has been rejected in full or partially, and where possible and appropriate, reasons and decisions will be provided.
- **On Hold** – an application has been put on hold, due either to a lack of or clarity of information, or to discuss issues or concerns that have arisen by either party.

#### Approval

If an application is **approved**, the contact provided on the submitted application will receive a formal Offer Letter by email correspondence confirming that the application has been approved. Grant payments will be made within 3-5 working days following your receipt of the Offer Letter.

#### Rejected

If an application is **rejected**, it is not intended that this outcome will reflect on future applications, unless other notification or advise is provided.

If you have any questions regarding your application, then please contact your local development officer. Their details can be found on our [website](#) or contact the Shift Project Team at [shift@cyclingsuk.org](mailto:shift@cyclingsuk.org).

## Schedule 1 – Grant Payment and Expenditure

### Payment Schedule

Approved grants will be paid via BACS transfer.

### Eligible Expenditure

We are offering grants of between £400 and £1500 for you to either –

- Engage with your community to deliver activities and services which will increase the number of everyday journeys undertaken by bike; and/or
- Trial innovative ideas and service for business delivery

The costs for the following activities are covered by the project:

- Basic bike maintenance sessions
- Cycle demonstration or try out sessions
- Dr Bike/"M" check sessions
- Essential cycling skills sessions
- Hire or loan of cycles
- Knowledge sessions e.g., maps & route planning, riding in adverse conditions
- Purchase accessories for your organisation e.g. helmets, locks, panniers, lights
- Security bike marking sessions
- Training for staff/volunteers to be Cycle Ride Leaders
- 1:1/small group confidence or route orientation sessions
- Other activities, as specified in your application form, for example Community Events in association with other Shift activities

## Schedule 2– Delivery Plan and Evaluation Requirements

### Delivery Plan

You agree to deliver the project as documented on your submitted application; or to deliver the project as documented in any additional information provided after your application was submitted; or to deliver the project as documented in any editions or alterations after your application was submitted.

**Risk Assessments** - Cycling UK recommends that a risk assessment is undertaken for all group and bike maintenance activities.

### **Adhering to Covid-19 Guidance**

Due to the risks associated with COVID-19 Scottish Government have outlined detailed guidance for businesses to adhere to. More information on the guidance in Scotland can be found on the [Scottish Government website](#).

### Evaluation Requirements

The Grant Recipient will need to complete the following 2-point process.

1. For each activity, the Grant Recipient (or persons responsible for data collection) must enter the following details on the online Participant & Event Record Form.

#### **Participant Records:**

- **Date of attendance**
- **Type of event** e.g., Dr Bike, led ride
- **Participant postcode** (full 6- or 7-digit postcode wherever possible)
- **Participant email address** if they are happy to share it.

**Event Records:** Date of event, Type of event and Number of participants

The Grant Recipient (or persons responsible for data collection) should explain to activity participants:

- By giving their email address, the participant will receive a survey, via email, from Cycling UK asking about the impact of the activities.
  - This information is important so that we can understand the benefit this project has in supporting cycling across Scotland.
  - We are not tracking individuals and all data will be anonymized. We will never share anyone's name or identifiable details publicly.
  - We will not send them any other marketing information or use their contact information for anything beyond evaluation and monitoring of the Shift project.
  - If someone does not want to give an email address or does not have an email address, they are still welcome to participate in Shift funded activities.
2. Cycling UK will email the Grant Recipient an evaluation survey after the activities have been delivered. You are required to complete this survey as part of our funding agreement.