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Barnsley AI Upskilling Fund Applicant guidance document

The following document is provided to assist applicants in completing their submission to the Barnsley AI Upskilling Fund. Applicants should refer to all documentation provided in completing their submission. For queries not included in FAQs please contact GGMS at barnsleyaiupskilling@cabinetoffice.gov.uk.

Assessment questions

Question 19: How will your approach meet the needs of the Fund, by responding to the challenges that DSIT has identified, and aligning to one or more of Barnsley's Inclusive Economic Growth Strategy missions?

Guidance provided to applicants:

Your response should explain how the proposed project has been designed to address one or both of the Fund's challenge areas and how it will generate evidence that contributes to the Fund's learning objectives.

Your response must cover each of the following sections.

Dimension 1: Challenge and Fund Alignment

Explain how the project contributes to the Fund's objectives, how proposed activities support one or both of the following objectives:

- Objective 1: Sector-focused AI workforce capability and adoption
- Objective 2: Reaching and enabling underserved workforce groups
- Both objectives

You should explain:

- The challenge(s) your project is seeking to address.
- How the proposed delivery model has been designed to respond to those challenges.
- Why the chosen intervention is expected to overcome the barriers identified.
- How delivery choices, recruitment methods and support activities relate directly to the challenge being tested.
- Where relevant, explain whether participants experience multiple or overlapping barriers (for example, a combination of gender, disability, age, ethnicity, location or socioeconomic disadvantage) and how delivery has been adapted in response.
- Explain the chain of logic linking identified barriers, project activities, outputs, intended outcomes and learning objectives. Applicants should explain how project delivery is expected to lead to measurable change.

Applicants should explain which Inclusive Economic Growth Strategy mission(s) the project supports and how proposed activities contribute to those mission outcomes.

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Dimension 2: Sector and Cohort Justification

Identify the sectors and/or workforce cohorts that will participate.

For each sector and/or cohort selected, provide:

- Estimated number of participants.
- Evidence supporting selection.
- Key barriers currently limiting AI adoption, participation or progression.
- Specific actions that will be used to address those barriers.

Examples of supporting evidence may include:

- Employer consultation.
- Labour market intelligence.
- Local economic data.
- Previous programme delivery evidence.
- Sector skills reports.

Strong responses will normally triangulate evidence from multiple sources (for example employer consultation, labour market data and previous delivery experience) to demonstrate why the selected sectors and cohorts have been prioritised.

Describe the intended learning outcomes for your audience, referring to the DSIT / Innovate UK AI Skills for Business Competency Framework for a clear, role-aligned articulation of industry-relevant AI skills for professionals to support your proposal.

Dimension 3: KPI Quality

Provide a set of outputs and outcomes that will be used to measure project performance and success.

Applicants should demonstrate that proposed KPIs are clearly linked to project activities, reflect the objectives of the Fund, and will provide meaningful evidence about whether the intervention has been effective.

For each KPI, applicants should provide:

- A clear KPI title or description.
- Whether the KPI is an **output** (activity delivered or participation achieved) or an **outcome** (change resulting from the intervention).
- The baseline position, where applicable.
- A quantified target.
- The data source that will be used.
- The method of data collection.
- The point at which the KPI will be measured.

Examples of outputs may include:

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- Number of participants recruited.
- Number of participants completing training.
- Number of businesses engaged.
- Number of employers receiving support.
- Number of AI implementation projects undertaken.

Examples of outcomes may include:

- Participants demonstrating improved AI skills or confidence.
- Participants progressing into employment, promotion or further training.
- Businesses adopting AI tools, processes or practices.
- Businesses reporting productivity, capability or workforce improvements.
- Changes in employer attitudes towards AI adoption.

Applicants should ensure that:

- Outputs and outcomes are clearly distinguished.
- All targets are numerical wherever possible.
- KPIs measure meaningful change rather than only participation.
- Performance measures are proportionate to the scale of the project.
- Data collection approaches are practical and capable of generating reliable evidence.
- Success can be independently verified using the proposed data sources and collection methods.

Applicants are also encouraged to explain how their KPI framework will contribute to the Fund's learning objectives. This should include how performance data will be used to understand which approaches were effective, for whom they were effective, and under what circumstances.

Strong responses will present a coherent performance framework that enables assessors to understand:

- What success looks like.
- How success will be measured.
- When measurement will take place.
- How evidence will be collected.
- How findings will contribute to future policy, programme design, or investment decisions.

Where appropriate, applicants should include both short-term delivery measures (outputs) and longer-term change measures (outcomes) to demonstrate the full impact of the intervention.

Question 20: How is your proposal innovative, and what new knowledge or learning will it generate?

Guidance provided to applicants:

Your response must demonstrate how your proposal meets all five R&D criteria (novel, creative, uncertain, systematic and transferrable).

You should clearly set out.

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1. What is new or different about your approach compared to existing AI upskilling provision? (For example, new delivery model, new sequencing of training, new employer engagement approach). Describe:
    a. the existing approach being used elsewhere;
    b. the limitation, weakness or evidence gap within that approach;
    c. the specific change or intervention your project will introduce;
    d. why you expect the change to improve outcomes; and
    e. what new knowledge the project will generate if successful or unsuccessful.
2. What specific uncertainty or question is your project testing? (I.e. what is not currently know and cannot be resolved through routine AI upskilling delivery). Clearly state the hypothesis or research question being tested. Explain:
    a. what is currently unknown;
    b. why existing evidence cannot answer the question;
    c. the competing possibilities being tested;
    d. what evidence will be collected; and
    e. what outcomes would indicate a positive, negative or mixed finding.
3. How does your approach build on or improve existing innovations, including a) what similar approaches already exist, and b) precisely how your proposal advances beyond them.
4. How the project will be run as a structured test, including: a) what will be tried, b) how will learning be captured, c) how will decisions or adaptations be made duration delivery. Describe:
    a. project phases;
    b. baseline measures;
    c. evidence collection methods;
    d. success measures;
    e. comparison approaches (where applicable);
    f. review points;
    g. adaptation processes;
    h. learning documentation arrangements; and
    i. decision-making criteria governing project progression.
    j. who will oversee testing and learning activities, how decisions will be made, and the criteria that will determine whether interventions are continued, adapted or discontinued.
5. How might learning from the project be reproduced or applied elsewhere, beyond the lifetime of the Fund? Describe:
    a. what outputs will be produced;
    b. who will use them;
    c. how they will be shared;
    d. what implementation guidance, tools, templates, methodologies or resources will be made available; and
    e. how another organisation could replicate or adapt the approach.
6.

You should also state whether your innovation primarily involves:

- Applying existing AI upskilling methodologies in new contexts;
- Developing new methodologies for AI upskilling; or
- Testing a fundamentally different and disruptive approach.

Use the question to demonstrate how your proposal meets the five criteria of R&D funding. Please also tell us how you will improve on any similar innovations you have identified, and whether your innovation will focus on applying existing AI upskilling methodologies in new areas, developing new methodologies for existing areas, to a totally disruptive approach.

Question 21: How will you reach relevant businesses or cohorts across Barnsley?

Guidance provided to applicants:

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Your response must provide evidence-based, operational detail sufficient for an assessor to determine whether you can reach the required number and type of participants.

You must structure your response using the following components:

***Dimension 1:** Definition and Scale of Target Cohorts*
You must clearly define:

- *The specific businesses or individuals you intend to reach (e.g. sector, size, workforce type, demographic characteristics)*
- *The number of participants or organisations you intend to recruit, including the timeframe and delivery outputs to which those targets relate.*
- *Where relevant, segment cohorts using multiple characteristics such as sector, business size, workforce role, skill level, employment status or demographic group, and explain how engagement approaches differ between segments (e.g. priority sectors such as Digital, Logistics, Manufacturing; underserved groups; SMEs vs large firms)*
- *Explain why these cohorts have been selected, including any local demand evidence, sector analysis, labour market intelligence or previous delivery evidence.*
- *Explain how proposed recruitment volumes align with available staffing, delivery capacity, cohort sizes and planned delivery schedules.*
-

***Dimension 2:** Strength of Access Routes, Partnerships and Local Presence*
You must describe the specific channels and mechanisms you will use to access your target cohorts.
This must include:

- *Named networks, referral routes, or databases (e.g. business networks, employer groups, provider pipelines)*
- *Existing relationships or engagement history, where applicable*
- *How you will identify eligible participants (e.g. screening criteria, referral processes)*
- *For each named partner or access route, describe their specific role in recruitment, referral, onboarding, delivery or participant support and provide evidence of the relationship where available.*
- *Evidence may include formal agreements, letters of support, memoranda of understanding, documented referral arrangements, previous delivery activity or other evidence demonstrating an established working relationship.*
- *Explain how the project will align with existing Barnsley programmes, networks, business support initiatives or local priorities, including any referral pathways, collaboration mechanisms or identified gaps in provision.*

***Dimension 3:** Recruitment and Engagement Approach*
You must describe the specific methods you will use to recruit and engage participants, including:

- Describe which organisational levels will participate (for example business owners, senior leaders, operational managers, technical specialists or frontline staff) and explain why engagement across these levels is important to achieving the project objectives.
- *How participants will be identified, contacted, converted into participants, onboarded and retained.*
- *Provide all significant access routes that will contribute to recruitment, including networks, referral channels, employer groups, databases and delivery partners.*
- *Outreach channels (e.g. direct employer engagement, events, digital campaigns)*

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- *Describe the complete recruitment pathway from participant identification through to enrolment and ongoing engagement.*
- *Ongoing engagement mechanisms (e.g. retention strategies, communication methods)*
- *Where available, provide assumptions supporting recruitment forecasts, such as anticipated referral volumes, response rates, conversion rates or retention rates.*
- *Where relevant, provide evidence from previous programmes demonstrating successful recruitment and retention of similar cohorts.*
- *Identify the principal recruitment and engagement risks, explain their cause and potential impact, and describe the mitigation actions and contingency measures that would be implemented.*
- *Where relevant, describe contingency arrangements that would be activated if recruitment performance falls materially below expectations.*
-

You must explain how each method is tailored to:
- *The specific cohort (e.g. SMEs vs individuals)*
- *Known barriers (e.g. time constraints, awareness, digital access)*

Question 22: How will this proposal be beneficial to the long-term future of Barnsley, and will there be any expected wider impacts?

Guidance provided to applicants:

You must describe how your proposal will generate measurable long-term benefits for Barnsley and any wider economic, regional, or social impacts.

For each major impact claim, provide supporting evidence such as comparable programme data, local or national datasets, published research, or a quantified assumption with a stated rationale.

You must provide quantified impacts wherever reasonably possible. Where impacts cannot be quantified, you must provide explicit numerical assumptions and explain the basis for those assumptions.

Your response must include quantified or clearly evidenced impacts wherever possible, and must distinguish between:
- Direct impacts (e.g. participants, businesses supported)
- Indirect impacts (e.g. supply chain, spillover effects)
- Long-term impacts (e.g. sustained employment, productivity gains beyond the funded period)

For each indirect impact, explain the project activity that creates the impact, who experiences it, and how the effect occurs.

You must structure your response using the following components:

Dimension 1: Long-Term Economic
You must describe how the project will contribute to Barnsley's economy beyond the funded delivery period.
You must include:
- At least two quantified economic outputs or outcomes, such as:

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  - Jobs created or safeguarded
  - Businesses supported or expanded
  - Productivity improvements (e.g. revenue per employee, efficiency gains)
- A time horizon (e.g. within delivery, 12 months post-delivery, 3+ years)
- A clear explanation of how these benefits will be sustained after funding ends

Long-term benefits must include a defined post-delivery timeframe (for example 12 months, 24 months or 3 years after project completion).

Dimension 2: Wider and Regional Impacts
You must describe broader economic impacts beyond direct project outputs.
This must include:

- At least one indirect or spillover effect, such as:
  - Supply chain impacts
  - Adoption of new technologies
  - Diffusion of skills across firms
- A clear explanation of the mechanism of impact (i.e. how the effect occurs)

Dimension C: Regional Impacts Beyond Barnsley
You must describe impacts outside Barnsley where relevant.
This must include:

- At least one clearly described regional effect, such as:
  - Replication of the model in neighbouring areas
  - Movement of skilled individuals across regions
- OR a clear explanation of why impacts are expected to remain local

Dimension 3: Alignment with Government Priorities
You must explicitly demonstrate alignment to relevant priorities.
This must include:

- At least two named government priorities, such as:
  - AI adoption and productivity
  - Inclusive growth
  - Skills development
- For each priority:
  - A specific mechanism of contribution (not just a statement of alignment)
  - A clear causal link between the project and the priority outcome

Dimension 4: Social Impacts
You must assess social impacts across at least three of the following areas:

- Quality of life
- Social inclusion or exclusion
- Employment outcomes
- Public empowerment
- Health and safety
- Diversity and access

For each area selected, you must include:

- Description of who is affected
- Description of how they are affected

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- Where possible, a measurable indicator (e.g. participation rates, employment outcomes)

Identify the specific beneficiary group (for example unemployed adults, SMEs, women returning to work, disabled people, or young people).

Where relevant, explain whether some groups may benefit more than others and identify any groups that may face barriers to benefiting from the project.

Dimension 5: Risks, Negative Impacts and Mitigation
You must identify at least two potential negative impacts or trade-offs, such as:

- Displacement of existing provision
- Unequal access to benefits
- Short-term disruption to businesses

For each, you must include:

- The cause of the negative impact
- The affected group
- The expected consequence

For each negative impact, describe the mitigation action that will be taken and explain how the action addresses the cause of the impact.

For higher-scoring responses, include contingency actions that will be implemented if specific risks or impacts materialise, together with the trigger for activating the contingency.

Question 23: How will you monitor and evaluate your project, to contribute robust data to support the Fund's overarching evaluation?

Guidance provided to applicants:

Funded projects are required to contribute high-quality monitoring and evaluation (M&E) data to support both project-level learning and the Fund's overarching evaluation.
Your response should describe your approach to collecting, managing, and reporting data throughout the delivery of the project.
At a minimum, your response must include the following:

Dimension 1: Completeness and Quality of KPI Framework
Provide quantified targets for all required KPIs, including:

- Number of applications received.
- Number of firms participating.
- Number of learners enrolled.
- Number of learners completing training.
- Characteristics of participating firms, including sector and size.
- Characteristics of participating learners, including membership of priority cohorts where applicable.

For each KPI:

- Provide a baseline where relevant.
- Provide a numerical target.

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- Explain how performance will be measured.
- Explain how data will be collected.
- Demonstrate how targets have been derived from the proposed delivery model.

For example: "We will recruit 80 learners, expecting 70 to complete training (88% completion rate), based on previous delivery of three comparable programmes which achieved completion rates between 85% and 90%.

Demonstrate how application volumes, participating firms, enrolments, completions and priority cohort participation relate to and support one another.

Dimension 2: Approach to Mandatory Data Collection
Describe how you will collect the mandatory dataset required by DSIT.
This should include collection of:

- Pre-training AI confidence.
- Post-training AI confidence.
- Pre-training AI knowledge.
- Post-training AI knowledge.
- Pre-training AI tool usage.
- Post-training AI tool usage.
- Workplace application of AI skills after training.

Your response should specify:

- Data collection methods (for example online survey, registration form, LMS data, structured interview, attendance records).
- When data will be collected.
- Which participants will provide data.
- Who will be responsible for collection.
- How data quality will be checked.
- How learner responses will be linked across collection points.
- How participant drop-off between collection stages will be managed.

Applicants should explain how they will ensure that every learner has an opportunity to provide data at each required stage.
Explain how missing data, incomplete surveys, duplicate records and learner attrition will be identified and addressed.
Identify who is responsible for data collection and who is responsible for quality assurance activities.

Dimension 3: Response Rate and Data Quality Management
Describe the specific actions you will take to maximise completion rates for surveys and other evaluation activities.
This should include:

- Reminder processes.
- In-session completion activities.
- Follow-up procedures.
- Provide response-rate targets for each mandatory collection stage, including baseline, post-training and follow-up data collection activities where applicable.
- Escalation arrangements where response rates fall below expectations. Specify the response-rate threshold that will trigger intervention (for example, where response rates fall below 85%) and explain the actions that will be taken.

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For example: "Survey completion will be built into induction sessions and final training sessions. Weekly tracking reports will identify non-responders, who will receive up to three reminders via email and SMS."

Dimension 4: Additional Evaluation Measures
Describe any additional measures you will collect that go beyond the mandatory dataset.
These may include:

- Learner progression into employment.
- Learner progression into further learning.
- AI implementation activity within participating firms.
- Business productivity indicators.
- Employer satisfaction.
- Learner satisfaction.
- Case studies.
- Structured interviews.
- Focus groups.
- Skills application in the workplace.

For each additional measure:

- Explain why it is relevant.
- Explain how it will be collected.
- Explain how findings will be used.

Explain how findings will be analysed, reported and used to improve delivery during the project.

Dimension 5: M&E Risk Identification and Mitigation
Identify the key risks that could affect the quality, completeness, accuracy or timeliness of M&E data.
For each risk provide:

- Description of risk.
- Likelihood.
- Potential impact.
- Proposed mitigation.

Examples may include:

- Low learner survey response rates.
- Learners withdrawing before completion.
- Missing baseline data.
- Inconsistent data collection across delivery partners.
- Delays in obtaining employer feedback.
- Data quality errors.
- Staff turnover affecting reporting responsibilities.

For each risk, identify the role responsible for monitoring and managing the risk.

Explain how each risk will be monitored, how often it will be reviewed, and how issues will be escalated if risks increase.

Question 24: Please outline your high-level project management strategy and governance rationale here. Your detailed week-by-week timeline, critical path, and milestone tracking must be

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uploaded via the mandatory Delivery Plan Template at the end of this form.

Guidance provided to applicants:

This question assesses whether the applicant has a realistic, structured and well-governed approach to managing the project from initiation through to completion. Assessors will consider whether the project management arrangements provide confidence that activities, costs, risks, partners and deliverables can be effectively coordinated and controlled throughout the project lifecycle.

Applicants should provide sufficient detail for an assessor with no prior knowledge of the project to understand:

- What work will be undertaken.
- Who is responsible for delivering it.
- How the project will be managed and governed.
- How progress will be monitored and reported.
- How dependencies and risks will be managed.
- How delivery will be maintained if difficulties arise.

Applicants must describe the following:

Dimension 1: Work Package Structure and Ownership

Provide a breakdown of the project into discrete work packages.

For each work package, provide:

- A work package title.
- A brief description of activities.
- The lead delivery partner responsible.
- Any supporting partners involved.
- The total cost allocated to the work package.
- The key outputs or deliverables to be produced.
- The planned start and end points.

The structure should demonstrate how individual work packages contribute to overall project delivery. Where multiple partners are involved, applicants should explain why responsibility has been allocated to each organisation.

Dimension 2: Project Management and Governance

Describe how day-to-day project delivery will be managed. This should include:

- The project management methodology that will be used (for example PRINCE2, Agile or an equivalent internal framework).
- How project progress will be tracked.
- The tools that will be used to manage delivery.
- How issues, risks and changes will be identified and managed.
- How delivery performance will be monitored against time, cost and scope.

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Applicants should explain why the chosen approach is suitable for the size, complexity and risk profile of the project.

Explain how performance information will be monitored and reported, including the frequency of project reviews, board meetings, progress reporting and performance assurance activity.

Dimension 3: Project Plan, Milestones and Dependencies

Provide a project plan showing:

- The major stages of project delivery.
- Key milestones.
- Major project outputs.
- Dependencies between work packages.
- Dependencies on external organisations, suppliers or approvals.
- Any critical path activities.

Applicants should explain what would happen if key milestones are delayed and how impacts would be managed.

Explain when issues, risks or performance concerns would be escalated, who they would be escalated to, and what thresholds or trigger points would initiate escalation.

Identify any project boards, steering groups or governance forums, their membership, responsibilities and decision-making authority.

Describe who is authorised to approve significant changes to project scope, budget, timetable or delivery arrangements.

Where delivery depends on critical activities, approvals, suppliers or partners, describe any alternative delivery arrangements that could be implemented if those dependencies fail.

Dimension 4: Risks, Uncertainties and Critical Inputs

Provide the main risks that could affect delivery. For each material risk, applicants should describe:

- The cause of the risk.
- The potential impact on the project.
- The proposed mitigation actions.
- Who is responsible for managing the risk.

Applicants should also identify critical inputs required for successful completion, such as:

- Availability of specialist staff.
- Access to facilities or equipment.
- Supplier performance.
- Partner contributions.

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- Data availability.
- Regulatory approvals.

Where critical inputs are identified, applicants should explain any contingency arrangements.

Explain how risks will be assessed and prioritised, for example using likelihood and impact ratings or an equivalent approach.

Explain how frequently risks will be reviewed, updated and reported through governance arrangements.

Question 25: Please outline your relevant experience

Guidance provided to applicants:

Applicants must provide focused, evidence-based examples of relevant organisational experience.

A strong response will demonstrate that your organisation (and any partners or subcontractors involved in delivery) has successfully delivered activity comparable to the project proposed in this application.

Include 2 to 4 clearly described examples of relevant projects. For each example, include:

- Project scope and purpose
- Target audience or beneficiaries
- Scale (e.g. number of participants, organisations, locations)
- Duration
- Delivery model
- Relevant aspects of complexity, where applicable (e.g. multiple delivery partners, multiple locations, employer engagement requirements, pilot delivery, diverse participant groups, or complex stakeholder management)

1. Provide specific examples of past delivery
Include **2–4 clearly described examples** of relevant projects.
For each example, include:

- Project scope and purpose
- Target audience or beneficiaries
- Scale (e.g. number of participants, organisations, locations)
- Duration
- Delivery model
- Relevant aspects of complexity, where applicable (e.g. multiple delivery partners, multiple locations, employer engagement requirements, pilot delivery, diverse participant groups, or complex stakeholder management)

Dimension 1: Relevance of Experience
Clearly explain how each example is comparable to the proposed project.
This may include:

- Similar types of activity
- Similar delivery model

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- Similar participant or organisational groups
- Similar sector or delivery setting
- Similar scale, reach, or duration
- Similar complexity

Avoid listing unrelated organisational activity without explaining its relevance to the proposed project.

Dimension 2: Evidence of Delivery Capability and Outcomes
Provide clear evidence of successful delivery.

For each example, include:
Outputs (the direct deliverables of the project), such as:

- Number of participants trained
- Number of organisations supported
- Number of workshops, events, or interventions delivered

Outcomes (the changes or benefits resulting from delivery), such as:

- Skills improvement
- Technology adoption
- Employment progression
- Improved organisational capability
- Productivity improvements
- Behavioural or organisational change

Provide quantified outputs and outcomes wherever data is available. Where quantitative measures are unavailable, explain how success was assessed and what evidence demonstrates achievement.

Dimension 3: Alignment to Proposed Delivery Model
For each example, explain how the delivery approach compares to the project proposed in this application.

This may include:

- Similar training or support methods
- Similar cohort structures
- Similar employer engagement approaches
- Similar onboarding or retention activities
- Similar advisory, mentoring, or placement models
- Similar combinations of delivery activities

Where there are differences, explain why the experience remains relevant and how it demonstrates capability to deliver the proposed approach.

Dimension 4: Application of Learning
Explain how learning from previous delivery has informed this proposal.
For at least one example, describe:

- The lesson identified
- The evidence or experience that led to that lesson
- The change made as a result
- How that change has influenced the design, targeting, implementation, or management of this proposal

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General statements such as “we will apply our experience” are unlikely to provide sufficient evidence without a clear explanation of what changed and why.

Where delivery involves multiple organisations:

- Clearly indicate which organisation delivered which elements of previous projects
- Explain the specific contribution of each partner
- Demonstrate how the combined experience covers the major delivery components of the proposed project

Dimension 5: Credibility and Confidence in Delivery
Your examples should provide confidence that your organisation and delivery partners can successfully deliver the proposed project.

Assessors will consider:

- Whether the examples collectively demonstrate capability across the major delivery components of the proposal
- Whether experience is relevant to the proposed scale, complexity, audience, and delivery model
- Whether the examples are supported by clear evidence
- Whether the experience presented is consistent with the wider application

Avoid relying on general organisational claims without supporting examples or evidence.
You do not need to duplicate information provided elsewhere in the application. However, your examples should be consistent with, and may cross-reference, the delivery approach, workforce, partnerships, and monitoring and evaluation arrangements described elsewhere in the application.

Question 26: Workforce: Please confirm workforce model.

Guidance provided to applicants:

Please describe the workforce model you will use to deliver your project.
Your response should provide sufficient detail for assessors to understand how the workforce will operate in practice and how it supports successful delivery of the proposed project.
Your response must clearly set out:

Dimension 1: Team Size and Structure

- The size, structure, and composition of the delivery team.
- All roles required to deliver the project, including delivery, management, operational support, employer engagement, quality assurance, learner support, and any other relevant functions.
- Reporting lines, management relationships, organisational structure, and governance arrangements.
- Workforce capacity associated with each role, including staff numbers, FTE, delivery allocations, caseloads, cohort allocations, delivery hours, staff-to-participant ratios, or other relevant measures.
- How workforce capacity has been determined and how it aligns with the scale of delivery proposed.

Dimension 2: Roles and Capabilities

- The responsibilities associated with each role.
- The skills, experience, qualifications, technical expertise, delivery capability, industry knowledge, and operational competencies associated with each role.
- How the combined workforce provides all capabilities required to deliver the project successfully.

Dimension 3: Management and Oversight

- Leadership responsibilities and accountability arrangements.
- Management and reporting arrangements across the workforce.
- Supervision and line management arrangements, including frequency where applicable.
- Performance management, quality assurance, staff support, induction, training, and professional development arrangements.
- How delivery quality and staff performance will be monitored and managed.

Dimension 5: Workforce Adaptability and Resilience

- How the workforce model will respond to delivery risks, including:
    - changes in learner or employer demand,
    - staff absence,
    - staff turnover,
    - recruitment delays,
    - delivery timetable changes.
- Specific resilience mechanisms, such as:
    - cross-training,
    - cover arrangements,
    - flexible deployment of staff,
    - access to additional capacity,
    - contingency staffing arrangements.
- Any operational triggers, thresholds, escalation arrangements, or decision points that determine when these mechanisms will be used.

Dimension 6: Deliverability and Confidence

Explain how the workforce model:

- Is proportionate to the scale, complexity, and geographical coverage of the project.
- Supports the proposed delivery model and delivery plan.
- Is consistent with the outputs, milestones, delivery approach, project management arrangements, risks, and budget described elsewhere in the application.
- Provides sufficient workforce capacity and capability to deliver all proposed activities throughout the project lifecycle.

Avoid generic statements such as "staff will have appropriate experience" or "the team will be flexible". Instead, provide specific and evidenced descriptions of workforce arrangements, capabilities, management processes, capacity assumptions, and contingency arrangements. This should enable assessors to understand how delivery will be achieved without needing to infer missing information.

Question 27: Cost breakdown

Guidance provided to applicants:

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Please complete the budget template provided in the Supporting Documents section of the grant advertisement.
The budget should provide a clear, complete, and evidence-based breakdown of all costs associated with delivering the proposed project. Assessors will consider the extent to which the budget is complete, transparent, linked to delivery, internally consistent, and provides confidence that the funding request is accurate and reliable.

Dimension 1. Completeness and Accuracy of the Budget
Applicants should ensure that:

- All relevant sections of the budget template are completed.
- All material project costs required to deliver the proposal are included.
- Cost categories, totals, subtotals, time periods, and supporting breakdowns are completed where requested.
- Calculations are accurate and reconcile correctly throughout the template.
- The level of detail provided enables assessors to understand how the budget is structured without needing to make assumptions.

Dimension 2. Transparency and Clarity of Cost Assumptions
Applicants should clearly explain how significant costs have been calculated.
For example:

- Staff costs should normally be presented using role, time input (e.g. FTE or days), and rate.
- Non-pay costs should normally be based on quantities and unit costs.
- Overheads should include an explanation of the allocation methodology used.
- Significant cost items should be supported by sufficient information for assessors to understand how the cost has been derived.
- Applicants should avoid presenting material costs as unexplained lump sums.

3. Linkage Between Costs and Delivery
Applicants should clearly demonstrate how costs support project delivery.
In particular:

- Significant costs should be linked to specific activities, work packages, milestones, outputs, or delivery functions.
- Costs should correspond to activities described elsewhere in the application.
- Assessors should be able to understand what each significant cost is intended to deliver.
- All major delivery activities described in the proposal should be reflected in the budget.

Dimension 4. Internal Consistency
The budget should be consistent both internally and with the wider application.
Applicants should ensure that:

- Staffing levels, roles, activities, timelines, and outputs align with information presented elsewhere in the application.
- Similar cost items are calculated using consistent approaches and assumptions.
- The profile of expenditure aligns with the proposed project timetable and delivery approach.
- Activities described in the application are appropriately costed within the budget.

5. Overall Confidence in the Budget
Assessors will form an overall judgement regarding the extent to which the budget can be relied upon as a realistic estimate of the resources required to deliver the project.

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Applicants should therefore ensure that:

- Costs are arithmetically correct.
- Assumptions are clearly explained.
- Costs are proportionate to the scale and nature of the proposed activity.
- Significant cost items are justified.
- The budget provides a clear and credible basis for the funding request.

Applicants must submit a fully completed Budget Management Template

Question 28: How does your project represent value for money for you and the taxpayer?

Guidance provided to applicants:

This question assesses whether the funding requested is proportionate to the activities proposed and whether the project is expected to deliver measurable benefits that justify public investment. You are not expected to undertake a formal economic appraisal. However, you should provide sufficient evidence and explanation for an assessor to understand:

- What the funding will be spent on.
- Why those costs are necessary.
- How costs have been minimised where possible.
- What benefits are expected to be delivered.
- Why those benefits justify the investment requested.
- How value extends beyond the immediate project and benefits the wider taxpayer.

Applicants should address all five dimensions below.

Dimension 1: Costs and Proportionality
Describe how the funding requested relates to the activities proposed.

For each major cost category, explain how cost estimates were calculated, including key assumptions, volumes, staffing levels, rates, unit prices or procurement estimates where relevant.

Where staff costs form a material part of the budget, explain how salary levels or day rates compare to relevant market benchmarks. Where specialist expertise increases costs, quantify the additional cost and explain why equivalent delivery could not reasonably be achieved through lower-cost alternatives.

Your response should:

- Identify the largest cost categories within the project budget.
- Explain what each major cost category funds.
- Explain why each significant cost is necessary for delivery.
- Demonstrate how costs relate to delivery volumes and outputs.
- Explain any unusually high-cost elements.
- Explain any specialist expertise requirements which increase costs.
- Explain any contingency amounts included within the budget.

Where relevant, provide metrics such as:

- Cost per learner recruited.
- Cost per learner completing.

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- Cost per employer engaged.
- Cost per placement delivered.
- Cost per curriculum developed.
- Cost per organisation supported.

Where subcontractors are used, explain:

- Which activities will be subcontracted.
- Why subcontracting is necessary.
- Why delivery cannot reasonably be undertaken internally.
- How suppliers were identified and selected.
- Whether competitive procurement, benchmarking, framework agreements or market testing were used.

Examples of evidence

- Budget breakdowns.
- Unit cost calculations.
- Staff salary benchmarking.
- Procurement documentation.
- Market-rate comparisons.
- Previous delivery cost data.

Dimension 2: Efficiency of Delivery

Describe how the project maximises outputs and outcomes from available resources.

Wherever possible, quantify efficiency gains achieved through reuse of assets, partnerships, technology or delivery design.

Where relevant, explain alternative delivery approaches considered and why the chosen approach provides better value for money.

Your response should explain:

- How existing infrastructure, systems, facilities, curriculum materials, technology or partnerships will be used.
- How duplication of effort or expenditure has been avoided.
- How delivery volumes have been structured to achieve efficient delivery.
- How staffing arrangements have been optimised.
- How employer contributions or partner support reduce costs.
- How project management and governance arrangements support efficient resource use.

You should provide specific examples rather than general statements.

Examples of evidence

- Reuse of existing training materials.
- Use of existing digital platforms.
- Shared support services.
- Existing employer networks.
- Existing learner recruitment channels.
- In-kind partner support.

Dimension 3: Expected Benefits and Returns

Explain how public investment will generate benefits beyond direct participants, such as increased employment, productivity, employer capability, reduced inequalities, improved public services or reusable resources.

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Benefits should be clearly defined and linked to project activities.

Where possible, quantify expected benefits and link them to investment.

Describe any benefits expected to continue beyond the funding period and explain why these outcomes are likely to persist.

Your response should include:

- Direct participant benefits.
- Employer benefits.
- Wider economic or social benefits.
- Benefits to priority groups.
- Long-term benefits where relevant.

You should explain how project activities lead to identified outcomes.
Possible benefit measures include:

- Number of participants trained.
- Qualification achievement rates.
- Placement completion rates.
- Job outcomes.
- Progression outcomes.
- Employer adoption of AI technologies.
- Productivity improvements.
- Engagement of underrepresented groups.
- Resources or models made available for wider use.

Where possible, relate benefits to cost.
Examples:

- Cost per learner completing.
- Cost per positive destination achieved.
- Cost per employer supported.
- Cost per placement delivered.

Dimension 4: Benchmarking and Comparators
Demonstrate that costs are reasonable by comparing them against relevant evidence.

Benchmark as many material cost categories as possible, particularly staffing, delivery, subcontracting and specialist technical costs.

Comparisons may include:

- Previous projects delivered by your organisation.
- Similar grant-funded programmes.
- Skills Bootcamps.
- Apprenticeships.
- Commercial training provision.
- Published salary benchmarks.
- Market rates for specialist contractors.
- Historic pilot projects.

Where your costs are materially higher than comparator programmes, explain:

- Why the difference exists.
- Why the additional cost is necessary.
- What additional outputs or outcomes are expected as a result.

Applicants should identify comparator sources wherever possible. Where possible, use more than

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one comparator source to demonstrate that costs are reasonable.

Dimension 5: Leverage and Additionality

Describe how the project increases value beyond the grant funding requested.
Your response should include:

- Cash contributions from partners.
- In-kind contributions.
- Use of existing assets or infrastructure.
- Staff time funded from other sources.
- Employer contributions.
- Existing intellectual property, curriculum or tools utilised.

You should also explain additionality.
Additionality means demonstrating that:

- The activity would not happen without grant funding; or
- The scale, quality, reach or speed of delivery would be materially lower without grant funding.

Simply stating that funding is required is not sufficient. Applicants should explain what would happen in the absence of grant funding and how the grant changes delivery.

Quantify partner contributions wherever possible, including estimated monetary values for in-kind support.

Describe any value, capability, assets, partnerships or resources that will continue to generate benefits after grant funding ends.