

# Guidance Notes

## Purpose of this guidance

This guidance is for CITB levy registered businesses with over 250 employees who wish to apply to the Leadership and Management Development Fund for large businesses.

The guidance is intended to help you complete the application form, understand what activity is fundable and give you a clear idea of the information you need to supply.

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## Part 1

### Available funding and who can apply

This fund is open to CITB levy-registered employers with over 250 employees declared on their most recent levy return.

If your business is an '**Associated Business**' only one application in total will be accepted from across the group of businesses. For the purposes of this Guidance Note together with the terms of bidding, '**Associated Business**' is considered to be a business that does not directly or indirectly control or is controlled by or is under common control by another business.

Applicants can apply for up to £100,000 (one hundred thousand pounds) as a contribution towards costs associated with their leadership and management programmes.

The amount of funding you can apply for is determined by the total number of direct (PAYE) staff employed across all large associated businesses within your group. Entitlements are as follows:

- 250-499 up to £50,000
- 500-999 up to £75,000
- 1,000 or more up to £100,000

Please discuss any queries regarding your funding entitlement with your CITB Adviser.

Funding must be utilised and evidenced within 18 months from the date of the funding agreement, or by March 2026 (whichever is sooner). Funded activity cannot commence until after a successful funding decision has been communicated. **Retrospective activity or evidence will not be funded.**

In order to be eligible for funding the business and all Associated Businesses must be up to date with levy returns and all levy payments at the time the application form is submitted to CITB. Any previously funded projects through the Leadership & Management Fund for Large Businesses must have also been evidenced, evaluated, and closed by the CITB Funding team.

Please note, applications will only be accepted if submitted by a CITB registered business.

## Part 2

### Aims of the fund

The aims of the Leadership and Management Development Fund for large businesses are:

- To provide financial support to large businesses towards the cost of developing their managers, leaders, and supervisors
- To gain insight into which types of leadership and management training large businesses are undertaking and why
- To better understand what impact leadership training has on business performance measures

### Part 3

#### Fundable activity

The fund will support a wide range of leadership and management development activities, this includes (but is not limited to):

- External or in-house training programmes that develop leadership skills
- Recognised leadership qualifications
- Other learning activity specifically aimed at developing management skills e.g., mentoring, 360 reviews, psychometric assessments, etc
- Development of new bespoke leadership training resources
- Improvements to existing leadership training resources
- Help for businesses to understand their management training needs and develop better training and development plans

All training or related activity must focus on the development of management, leadership, or supervisory skills. This should be aimed at delegates whose primary role is as a manager, leader, or supervisor, or someone being developed to step into that role in the near future.

The following table sets out a range of items/activities that are fundable (or not fundable), this list is not exhaustive so other training or activity that fits with the aims of the fund would be considered.

#### Not fundable:

- Activity that does not align to the development of leadership skills
- Activity already funded under the grant scheme or other funding routes
- Retrospective activity
- Consultancy fees
- Items of capital expenditure e.g., buildings, IT, office equipment
- Training awards and sponsorships
- Events (i.e. networking, celebration)
- Purchasing of software and licenses
- Part-time or full-time posts

#### Fundable:

- Development of new training course content
- Improvement to existing training course content
- Delivery costs associated with running a leadership programme
- Achievement of recognised leadership qualifications
- Development of training videos or online courses (using existing platforms)
- Preparing company specific guidance or manuals for staff (where the purpose is the development of leadership knowledge or skills)
- Coaching and mentoring delivered by an accredited coach or mentor

- Apprenticeships (there is separate CITB funding for this)
- Educational activities and promoting careers
- Travel and subsistence

#### Part 4 Fund criteria

All applications will be reviewed against the following criteria:

- Value for money – evidence must be provided that all costs stated are reasonable (see [part 5](#) for guide price information)
- Quality – confirmation must be provided that all activities will be delivered to a high standard
- Impact – base line metrics must be provided that shows how you expect this funding to have an impact on your business performance
- Content – all funded activity must align to the fund aims and be focused on the development of managers, leaders, or supervisors

#### Definition of Leadership and Management

CITB's definition of Leadership and Management includes activity to develop people under the following themes:

- Providing Direction
- Facilitating Innovation & Change
- Working with People
- Using Resources
- Achieving Results
- Managing Self

CITB has developed a framework setting out the competencies needed for construction supervisors, managers, and leaders at different levels and in different roles. Following this framework is not a requirement, but it may be a helpful resource if you are developing or adapting programmes. It also provides an indication of which activities CITB defines as Leadership and Management.

The framework refers to different functions that managers or leaders might oversee. The fund supports the development of the leadership skills that are needed to oversee and give direction to the team undertaking the function, it does not support developing the knowledge or skills of how to do the day-to-day tasks. For

example, financial management is about understanding how to manage budgets and oversee financial plans for the company, not learning how to use an accounting system (this would not be funded). The learning must focus on the management skills, not the subject matter.

CITBs Leadership and Management Framework can be accessed [here](#).

### **Type of programme**

Programmes must be aimed at those whose primary role is a leader, manager, or supervisor and focus on the development of their leadership and management skills in order to better guide and lead their business area/teams.

Proposals can include programmes that seek to tackle specific business challenges, to influence company culture or behaviours, or simply to develop new skills or knowledge amongst managers, leaders, or supervisors.

It should be noted that recipients of the funded training programme must be based in England, Scotland, or Wales in order to be eligible.

## **Part 5**

### **Application form – step by step**

#### **Section 1 – Before you apply**

Contains information that should be read and understood ahead of completing and submitting your application.

#### **Section 2 – Company details**

This section is for you to provide your company information which allows us to check that you are eligible to receive this funding.

For an independent business you will need your CITB registration details and the up-to-date number of people who are directly employed by the business. (Note: An independent business is not considered to be an Associated Business).

For businesses applying on behalf of a group of Associated Businesses, CITB registration numbers should be supplied for all large businesses within the group together with the combined total number of direct employees.

Please provide the bank account information for where you would like the funding to be paid. We will use the bank account details supplied in your application form to set up a supplier account to enable payment on our finance system.

### Section 3 – Programme overview

Please provide a summary of the full training programme you want to develop and/or deliver e.g., the training modules you have chosen, the topics that will be included, what learning outcomes you want to achieve and how you see the different elements fitting together to form a coherent programme. Please include any relevant links with further information that may be relevant.

**Programme Start & End dates:** these must be in the future (retrospective activity is not fundable), programmes should be completed and evidenced within 18 months from the date of the funding agreement, or by March 2026 (whichever is sooner).

**Training topics:** please select all topics that will be covered within the training programme or select 'other' for any additional topics.

- **Managing people** – includes day to day management skills, teamwork, delegation and planning, or managing conflict.
- **Developing individuals & teams** – includes performance management, coaching, progression.
- **Organisational culture & behaviours** – includes inclusivity, diversity, well-being and driving cultural/behavioural change.
- **Decisions making & problem-solving** – includes improving decision making and/or problem-solving skills
- **Commercial awareness** – includes improving knowledge on budget management and commercial acumen
- **Communicating with impact** – includes influencing, persuading, managing difficult conversations
- **Facilitate change and innovation** – includes introducing modern and/or remote ways of working.
- **Other** – if the training content does not broadly align to any of the listed topics, please select 'other' and add an explanation.

#### Q. How many individuals in total will participate in this training programme?

This should be the total number of delegates that will receive training during the complete programme.

#### Q. Please list all job titles that will benefit from this training programme, and the management level.

This is a list of all job titles for the individuals included in the above answer, and their level of management. E.g., middle management, executive, etc.

#### Q. Will this funding be used to support new activity, existing activity, or a mix of both?

If the training being delivered is new (either content or delivery method) – please select NEW

If the training being delivered has been delivered before – please select EXISTING

If it is a mixture of both old and new – please select BOTH

**Q. What do you feel is your biggest challenge with leadership and management skills, and why is this training important to your business?**

This question is to gain insight into the challenges that industry faces with leadership training, so this is your opportunity to be totally honest. It could be anything from other training always seems to take priority, costs are high so difficult to justify and gain approval from the Board, or delegates reluctant to participate so uptake is low.

Please also explain your reasons for selecting this approach and what difference this training will have on your business. If the CITB funding contribution will be utilised to try a different or improved approach to one you have used before, please make this clear and explain what you anticipate the benefits on the new approach will be.

**Section 4 – Activities and costs**

Complete the boxes in the table to capture each activity (from your overall programme) that you would like the CITB funding to contribute towards. You do not need to include any elements of the programme that will be fully funded by you.

The table asks for information about:

- **Activity description** – clearly detail each component/activity, ensuring the description makes it clear what the funding will be paying for e.g., delivery of 4-hour training module on how to ‘Inspire & lead teams’ x 2 cohorts, OR 6 hours of development work to create a new training module on ‘Communicating with impact’.
- **Training provider** – who will be delivering the activity or course (in the case where the activity is a development cost, please detail who will be developing the content)
- **Delivery date:** These are only indicative dates, as we recognise that things can change and you may need to adjust timings. Please note, funding cannot support training or qualifications that have already started.
- **Delivery method:** Face to face (meaning training delivered in a live classroom environment), Remote/Virtual (meaning the instructor is delivering the information live but is in a different location to the delegates), E-learning (meaning pre-recorded information with no interaction from an instructor), Blended meaning a combination of different delivery methods. N/A to be if the activity relates to development rather than delivery.
- **No. of delegates** – the number of people who will participate in this activity (please enter N/A if the activity relates to development rather than delivery)
- **Breakdown of total cost** – please add the total cost for each activity and provide a breakdown to show how this has been calculated. e.g., 6 hours of development time at £XX per hourly rate = Total cost.
- **CITB funding request** – please add the amount of funding you are requesting from CITB towards each activity. This can either be the total cost of the activity or a partial contribution towards that cost. VAT should not be included in any costs.

The examples below illustrate the type information that is required.

Activity description	Training provider	Delivery date	Delivery method	No. of delegates	Breakdown of full costs	CITB Funding contribution
Name of activity, development or delivery, duration, number of cohorts. (Details of modules/topics to be included in Section 3: Programme Overview)	Who will be delivering the training	Provide indicative dates	How will this training be delivered	Total number of people that will participate	Show how each item has been calculated (daily/hourly rate, per person cost, etc)	Funding amount requested from CITB
<b>Delivery of Front-line management training (4 days) 2 x cohorts of 10 delegates</b>	Joe Bloggs Training	Cohort 1 = Jun 2024 Cohort 2 = Oct 2024	Face to face	20	Each cohort = £5,000 (£1,250 per day x 4 days x 2 cohorts)	£10,000
<b>Development of Middle management training</b>	In-house	N/A	N/A	N/A	5 days of in-house development (by HR Director) @ £500 per day)	£2,500
<b>ILM L5 qualification in Leadership &amp; Management</b>	Joe Bloggs Training	August 2024	Remote / virtual	5	5 delegates @ £1,500 each	£7,500
<b>Coaching for Executive Directors 1 x 1 hour session per delegate per month for 12 months</b>	Joe Bloggs Training	January to December 2024	Face to face	4	Coaching hourly rate = £200 per hour. Each delegate to receive 12 hours x 4 delegates = £9,600	£4,800 (CITB funding to contribute 50% of total cost)
<b>Delivery of Middle management training (1 day) 1 x cohort of 18 delegates</b>	In-house and Joe Bloggs Training	September 2024	Face to face	18	1 day of external trainer time @ £1300 plus 1 day of L&D Manager time @ £250 (2 facilitators required due to size of group)	£1,550

### Value for money:

We broadly expect costs to fall within the following ranges:

- Full day training course (external provider) – up to £1,500 per day
- Full day training course (in-house) – up to £750 per day
- E-learning modules – up to £200 per module
- Recognised qualification – £1,500 - £2,500 (dependent on qualification level)
- Creation of course content (external) – up to £1,000 per day
- Creation of course content (in-house) – up to £500 per day
- Videographer – up to £1,000 per day



There may be situations where quoted prices are higher than expected, due to location, specialism, or the need for a bespoke product. In this case, please add a brief explanation in the text box provided and supply quotes (or relevant additional information) with your submission e-mail.

**Quality statements:**

**Recognised qualification** – this should be selected if the training being delivered results in a recognised qualification e.g., ILM, CMI, etc

**Qualified external training provider** - this should be selected when it is known that the external training provider has the relevant qualifications/accreditations to deliver the training to a high standard

**Qualified internal training provider** - this should be selected when it is known that the in-house trainer has the relevant qualifications/accreditations to deliver the training to a high standard

**Other** – where this is selected, please provide a clear explanation as to how you know quality training will be delivered.

**Section 5 – Impact and evaluation**

This section is to capture what impact you expect the training to have on your business using an existing business performance area that is already documented and measured by your business. The purpose of the grid is to collect the current baseline for one (or more) of your business performance measures, so we can see what it looks like now and what you hope it might increase to in the future as a result of the training. Please note, it is a mandatory that you provide updated business performance scores after the funded training programme is complete (as part of the fund evaluation).

Ideally the measure selected and recorded should be directly associated to the remit of the attendees of the training, rather than captured at an overall business level (otherwise the link is less credible to be attributed back to the training itself). Whilst these measures should be realistic, any under-achievement will not affect your funding.

The examples below illustrate the type information that is required.

Business performance area	Current performance score	Date current score recorded	Target for future score
Customer Satisfaction	77%	01/01/2024	85%
Employee Engagement	6/10	01/01/2024	8/10
Productivity	65.3	01/01/2024	75.0

**Q. How will you measure the success of this training programme?**

Please explain how you will know whether the programme has been a success by describing your success criteria e.g., include statements that describe what you hope will happen as a result of your programme, the outcomes you are looking to achieve and the impact the training programme is likely to have on your business.

**Section 6 – Declaration**

All statements should be read and marked with an X to confirm your acceptance.

Signature and date required.

**Part 6**

**Submitting your application & funding decisions**

Please submit your application form via email to [L&MFund@citb.co.uk](mailto:L&MFund@citb.co.uk).

Applications must be submitted directly from the business, not from a training provider or any other intermediaries.

Assessments will take place at the end of each month with funding decisions communicated as soon as each assessment round is complete. If we have not been able to approve your application, you will be notified and given the opportunity to revise your programme to align to the aims of the fund.

Successful applicants will be asked to sign a funding contract and agree to a payment schedule. Payments will be made against achievement of milestones (50% at the mid-way point and 50% on completion) once sufficient and acceptable evidence of spend has been provided (see [part 7](#) for details).

Requests to change your funded activity should be submitted in writing to [L&MFund@citb.co.uk](mailto:L&MFund@citb.co.uk) and will be considered on a case-by-case basis (where an exceptional change in circumstance has arisen), and you may be required to complete a variation form. Terms of Funding and Terms of Bidding can be viewed on the CITB web site [here](#).

## Part 7

### Monitoring, evidence, and evaluation

If your application is successful, once the funding agreement has been signed and returned in its entirety, your funded activity can start. Please remember to keep all relevant records and evidence as you will need to submit this to CITB to clearly demonstrate the activity has taken place in order for payments to be released.

We will continue to keep in touch via e-mail at regular intervals throughout the duration of your funding agreement and will contact you when a payment milestone is reached (as stated in your funding agreement). At that point acceptable evidence must be submitted to CITB before any payment can be released. Once received, CITB will review the documentation and confirm payment (or request further information should that be necessary).

#### Examples of evidence requirements

Copies of external training provider invoices

Copies of certification and invoices (in the case of recognised qualifications)

Signed copies of delegate attendance records (both external and in-house)

Screenshot of participant lists (for virtual sessions)

Learner's portfolio of evidence and/or observation records

Copies of in-house timesheets for instructor/facilitator/developer of course

Copies of in-house requisition documents e.g., Business lead confirming work/activity/training can go ahead

#### Fund Evaluation

We will undertake evaluation of this fund to measure its impact and help shape future offers, participation in any post-funding evaluation activity is compulsory. Participants will be selected at random and be asked to give feedback e.g., group discussions, funding questionnaires or feedback interviews.