

Places for Everyone

Match Funding Guide

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To find out more, please contact: the Places for Everyone Team
PlacesforEveryone@sustrans.org.uk

Sustrans is the charity making it easier for people to walk and cycle.

We connect people and places, create liveable neighbourhoods, transform the school run and deliver a happier, healthier commute.

Join us on our journey.

www.sustrans.org.uk

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Introduction

To support the development of quality active travel infrastructure, Sustrans Scotland provides match funding for projects awarded in Places for Everyone.

Sustrans can provide 100% funding for Stage 0-4 project costs, up to 10% of the global project cost. Project budget and programme forecasts are a requirement of *Stage 1: Preparation and Brief* and should be refined throughout project development. Where *Stage 0-4* costs have exceeded 10% of the global cost, Sustrans can offer 50% funding contribution for all remaining costs. Sustrans will provide 50% match funding for *Stage 5-7* work unless otherwise agreed through the junctions programme (see below).

We've introduced the cap on Stage 0-4 funding to support projects while ensuring costs are proportional to the overall scale of the project, helping to ensure best value for partners. If Stage 0-4 costs increase and the global project cost does not, both Sustrans and the partner must share the burden of the cost increase.

If you are a local authority, you must secure match funding before progressing to *Stage 3: Developed Design*. Non-local authority partners must secure match funding before progressing to *Stage 4: Technical Design*. This requirement has been introduced to ensure all projects being supported through the design process are deliverable and will be constructed.

Types of match funding

In order to deliver Places of Everyone projects, partners need to secure match funding for *Stage 5: Construction – Stage 7: In Use*. Sustrans accept two types of match funding. These are:

1) Direct match funding

This is funding that has been secured for the direct purpose of delivering a specific Places for Everyone project. Direct match funding can be identified for any task of a project including design development, behaviour change, monitoring and evaluation or construction. Match funding is required for *Stage 5: Construction*, and subsequent *Stages 6 and 7*.

Direct match funding is the preferred method of financing a project and will provide more certainty than using an indirect match funding approach.

2) Indirect match funding

Local authority partners

Local authority partners are able to use their entire spend on the development, design and construction of high quality active travel infrastructure across the authority area as match funding for Places for Everyone projects. This spend might come from internal budget, grant funding or other sources.

For Sustrans to approve indirect match funding, the spend must be on active travel infrastructure which meets the design principles and guidance for Places for Everyone projects to improve walking, cycling and wheeling provision. Local authority spend that only maintains existing active travel infrastructure will not be approved as indirect match funding.

Indirect match funding can only be utilised from within the same financial year which Places for Everyone are contributing funds. Exceptions, in cases such as large projects being delivered over multiple years, are at Sustrans' discretion, and may require pre-approval from Transport Scotland.

Non-local authority partners

Non-local authority partners may be able to utilise, upon agreement from the local authority, indirect match funding approved in their local authority's match funding pool. This referred to as '**match in kind**' funding.

Examples of spend eligible as match fund

All activities and deliverables identified in Places for Everyone Project Stages can be used as project match funding. This includes all tasks in:

- + Stage 0: Strategic Definition
- + Stage 1: Preparation and Brief
- + Stage 2: Concept Design
- + Stage 3: Developed Design
- + Stage 4: Technical Design
- + Stage 5: Construction
- + Stage 6: Handover & Close Out
- + Stage 7: In Use

Please refer to the Project Pack for details of the tasks of each stage.

In addition to matching against tasks of the Places for Everyone Project Stages, the following activities are eligible for **direct match funding** (not for indirect match funding):

- + Land negotiation fees
- + Land acquisition
- + Legal processes
- + Flood defense works which form part of the construction of the active travel element of the project

Match funding approval

As partners identify sources of match funding; either direct or indirect, details must be provided to Sustrans on the application portal via either an application form or the **match funding pool**. The Infrastructure team will review details uploaded into the pool and will approve or provide feedback as appropriate.

Instructions on how to input information into the match funding pool are provided in the 'Portal – Match Funding Pool' Chapter of this guide.

Junctions

Junctions currently deemed as having real or perceived safety issues for non-vehicular users and/or are strategically important to the success of a project may be eligible for 70% match funding from Sustrans for *Stage 5: Construction*.

These junctions, and the extent of works defined as being covered, will be determined by the Infrastructure team, in discussion with the partner. The remaining 30% funding must be secured from alternative sources.

To qualify for 70% construction funding for junctions:

- + As with all Places for Everyone projects, designs must satisfy Sustrans Design Principles.
- + The proposed junction for increased funding should be agreed with the Sustrans Infrastructure team. This can include the junction itself, as well as a 5m offset from the junction's vehicle stop lines. A red line boundary should be drawn around the area and these extents approved by Sustrans. Junctions must include carriageway space for vehicles travelling in two or more directions.

Funding process stages:

- Step 1 –** Partner to propose junctions that might qualify for increased funding
- Step 2 –** Junctions proposed by partner reviewed by Sustrans. Feedback provided.
- Step 3 –** Partner draws a red line boundary around junction extents (as explained above)
- Step 4 –** Partner to calculate cost of proposed junction treatment
- Step 5 –** Evidence of spend should be clearly provided separate to main phase of works by the contractor through Bill of Quantities and final invoices
- Step 6 –** Sustrans to provide 70% of funds for approved junctions

Match funding sources

Funding for walking and cycling projects can be obtained from a variety of sources. The list below is not exhaustive and includes funding sources for both capital and revenue work, such as funding to deliver behaviour change interventions.

- + Local authority capital budgets from any department investing in walking, cycling and wheeling infrastructure
- + Cycling Walking Safer Streets (CWSS)
- + City Deals
- + Scottish Landfill Communities Fund (various local administrators, regulated by SEPA)
- + The National Lottery Community Fund; including
 - Community Asset Fund
 - Scottish Land Fund
 - Our Place
 - Grants for Community Led Activities
- + Climate Challenge Fund (CCF)
- + The National Lottery Heritage Fund
- + LEADER
- + Tesco Bags of Help
- + Scottish Natural Heritage
 - Green Infrastructure Fund
 - Community Engagement Fund

Local authorities grants available for community organisations such as:

- Vacant and derelict land fund
- Community common good fund

- + Historic Environment Scotland
 - Conservation Area Regeneration Scheme
- + Peoples Postcode Trust
- + SSE (Scottish and Southern Energy)
 - Sustainable development fund (only available in some Local Authority areas)
- + Sport Scotland
 - Sport Facilities Fund
- + Scotrail
 - Cycle Fund
 - Transport Integration Fund
- + Private Investment

Sources of funding are in continual flux. The Funding Scotland website is a great place for community based organisations to start exploring sources of match funding for projects.

<https://fundingscotland.com/>

Other Organisations which periodically have grant funding available:

- + Creative Scotland
- + Highlands and Island Enterprise
- + National Park
- + Network Rail
- + Scottish Canals
- + Scottish Enterprise
- + Regional Transport Partnerships:
 - Shetland Transport Partnership (ZetTrans)
 - Highlands and Islands Transport Partnership (HITRANS)
 - North-East of Scotland Transport Partnership (NESTRANS)
 - Tayside and Central Scotland Transport Partnership (TACTRAN)
 - South-East of Scotland Transport Partnership (SESTRAN)
 - Strathclyde Partnership for Transport (SPT)
 - South-West of Scotland Transport Partnership (Swestrans)

If you identify a potential match fund that is not on this list, please contact the Places for Everyone team at PlacesforEveryone@sustrans.org.uk

Ineligible match funding sources

It is not possible to match against Places for Everyone funds using funding which has originated from Transport Scotland, apart from Cycling Walking Safer Streets (CWSS). This includes but may not be limited to:

- + The Low Carbon Transport Innovation Fund
- + Cycling Scotland Development Grants
- + Cycling Scotland's Cycle Friendly and Sustainable Communities (CFSC) Fund
- + Smarter Choices Smarter Places (SCSP)
- + Other Sustrans funding

Case Study - Scenario

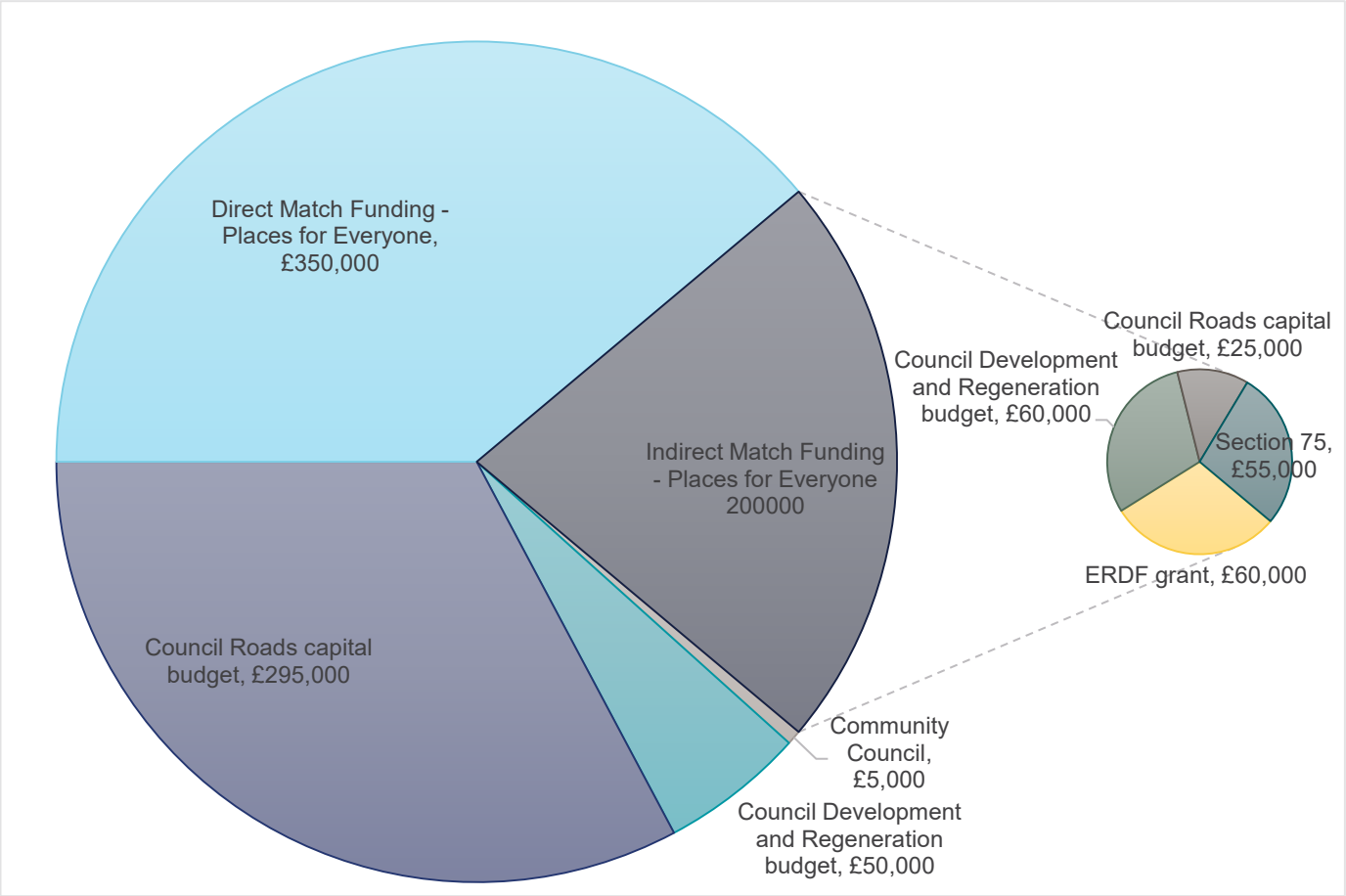
Example Scottish Council (ESC) has a project in Townsville with estimated Stage 5: Construction cost of £900k. The project is being delivered by ESC's Roads Team. ESC has already received a Places for Everyone grant of £100k to complete Stages 0-4 of the Places for Everyone project stages.

How can they fund the construction of this project?

Scenario	Add	Total funds available for Townsville project
Places for Everyone provides £100k for Stage 0-4 project cost.	-	-
The council Roads Team, who are leading the Townsville project, are able to contribute £295k of their own capital budget.	£295k	£295k
Places for Everyone are immediately able to match this, and provide an additional £295k as direct match funding.	£295k	£590k
ESC check their match funding pool on the portal (see instructions on page 16 for portal instructions) where ESC teams involved in Places for Everyone can record all eligible match funding sources for a given financial year, for example the council's eligible CWSS budget, and the cost of any non-Sustrans funded Places for Everyone-standard infrastructure projects. They see that they have £25k left over in match from projects across the local authority area and decide to use this for the Townsville project.	-	£590k
Places for Everyone are immediately able to match this, and provide an additional £25k indirect match funding.	£25k	£615k
The Sustrans Places for Everyone officer discusses the project with their contact in the ESC's Development and Regeneration Team. An aspect of the project involves placemaking partway along the route. By coordinating a meeting between ESC's Roads Team and the Development and Regeneration Team, the Development and Regeneration Team agree to commit £50k as direct match funding for the Townsville project.	£50k	£665k
Places for Everyone are immediately able to match this, and provide an additional £50k direct match funding.	£50k	£715k

At this meeting it also transpires that the Development and Regeneration officer is aware of a £60k project taking place in a park in the ESC area, which improves pedestrian and cycling access. The Places for Everyone officer asks the Development and Regeneration officer for a contact in the Parks Team, and creates a meeting. The parks project are bringing access through the park up to a Places for Everyone-standard. The project is being funded entirely by City Deal (non-Sustrans funded). ESC are able to add this £60k spend to the Match Funding Pool on the portal. Places for Everyone then approve the spend on the portal.	-	£715k
Places for Everyone are immediately able to match this, and provide an additional £60k indirect match funding.	£60k	£775k
ESC receive a planning application for the conversion of a derelict site alongside the route into a mixed use commercial/residential offering. ESC grant permission for the development to go ahead, but stipulate in the section 75 that the developer must create two active travel accesses from the development to the new Townsville project. These works are valued at £45k. ESC are able to add this £45k spend to the Match Funding Pool on the portal. Places for Everyone then approve the spend on the portal.	-	£775k
Places for Everyone are immediately able to match this, and provide an additional £45k indirect match funding.	£45k	£820k
ESC receive another planning application a little further away from the proposed Townsville route. They grant permission but stipulate in the section 75 that the developer contribute £20k for ESC to carry out improvements in the local area, half of which are walking and cycling improvements. ESC are able to add this £10k spend to the Match Funding Pool on the portal. Places for Everyone then approve the spend on the portal.	-	£820k
Places for Everyone are immediately able to match this, and provide an additional £10k indirect match funding.	£10k	£830k
Throughout the engagement process, the local Community Council have been extremely supportive of the project, and are able to add £5k of their funds as direct match funding.	£5k	£835k
Places for Everyone are immediately able to match this, and provide an additional £5k direct match funding.	£5k	£840k
The Community Council see an opportunity to vastly improve active travel opportunities in their local area through this scheme if they work in partnership with ESC. The Community Council therefore decide to apply to ERDF for an additional £60k of funding for other local walking and cycling improvements. Their application is successful. ESC are able to add this £60k spend to the Match Funding Pool on the portal. Places for Everyone then approve the spend on the portal.	-	£840k
Places for Everyone are immediately able to match this, and provide an additional £60k indirect match funding.	£60k	£900k

The chart below illustrates the sources of funding to construct the Townville project.



Portal – match funding pool

Instructions for match funding page on portal

Step 1: Log in to the Sustrans Scotland Portal

Go to [Sustrans Scotland Portal](https://ScotlandPortal.sustrans.org.uk) (ScotlandPortal.sustrans.org.uk) and log in.

Users who have not yet registered to use the Portal can easily do so for the first time.

- + Select “Not yet registered”

Your username is your (organisation-specific) email address

Choose your own password. It must be at least 8 characters long

Use the “Forgotten your Password” or “Not yet registered” links as necessary to gain access.

Contact the Portal team on the number or email given on the login page if you encounter any difficulties.

Step 2: Go to portal user guide on Match Funding

You do this by:

- + selecting the **red tab** “help and documentation” at the top of the screen
- + select any item from the list under “user guide”
- + select “Match funding” from the list on the left

Contact Us

If you have any queries please do not hesitate to contact:

0131 346 1384 or

placesforeveryone@sustrans.org.uk