

BSA FUND

Green Jobs

Wireframe Testing

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What we tested

- **We tested the Green Jobs wireframe**
 - **Starting at Service Description**
 - **Skipping “Create Account”**
 - **Filling in and reviewing application**

https://taob1x.axshare.com/#id=p0tbqp&p=green_jobs_service_description&g=1

Who we tested with

- **We tested:**
 - **5 potential customers**
 - **Using Video calls (Microsoft Teams)**

What we wanted to learn

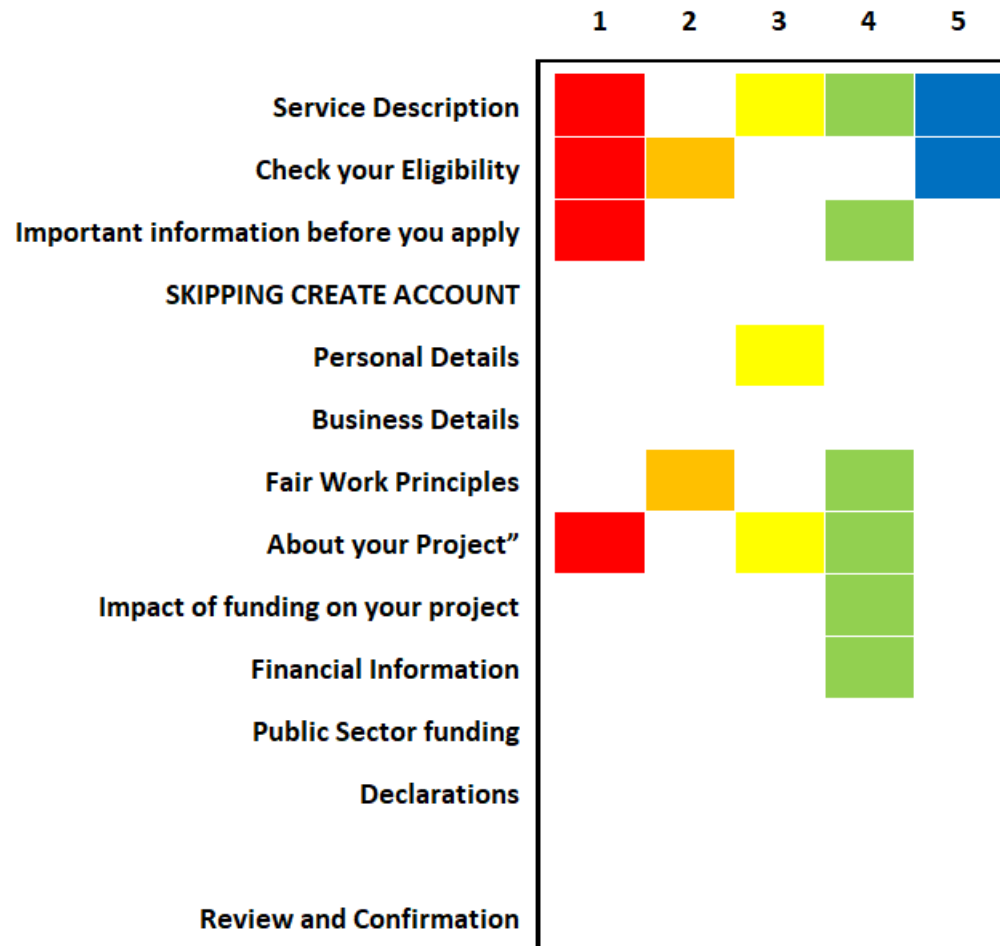
Primary questions

- Does the Application Journey have any major issues?
- How long will it take users?
- How hard will they find it (Evidence etc....)

Secondary Questions

- How do people think they can gather the evidence?
 - is it something that they have available?
 - would they know where to go and source the information?
 - how long would it take people to gather the information together?
- Does the new language on the “project plan” make sense to people?

Results Summary



Results Summary

Does the Application Journey have any major issues

- It is not obvious that it is SAVING as you go. (Do you have to submit each section or does it save each field)
- **Fair Work** is not well understood by customers. It feels like an absolute barrier to some It is not understood WHY we are asking for it
- Put all the things that would disqualify a user Up Front (Or make it feel that way)
- **RETAIL** on the banned list is too ambiguous.
- **Green Jobs** is not just about **Jobs** (a bit...)

How long will it take users?

- A bit too long. It started to wear down people about mid way.
- Fair Work was the breaking point for some

How hard will they find it (Evidence etc...)

- It is quite straight forward but they might flag a bit toward the middle
- A bit repetitive
- None of it seems unnecessary BUT there is a lot of it.
- Smaller companies would be put off. Larger companies probably get it.

Results Summary (2)

How do people think they can gather the evidence?

Accounts are easier

Project & Business Plans are not

Is evidence it something that they have available?

Accounts are on hand or easy to generate

Project & Business Plans are not readily to hand

Would they know where to go and source the information

Yes

How long would it take people to gather the information together

Finance info would be quick

Project/Business Plans could take longer

Quotes would be as long as the supplier takes to provide them

Does the new language on the project plan” make sense to people?

Yes BUT it is not obvious from the top of the Important Information page

Evidence format was not always understood (**TEMPLATES**)

How Might We

How might we:

- Make the Apply Button less of a Cognitive Disconnect

(It does not do what it says)

- Add Templates at the right time
- Reassure users that their info is being saved
- Set expectations around time to complete

(Or totally change their mindset; Modular, Sections at your own pace...)

- Make response to Eligibility obvious to the user
- Make Fair Work easier to understand for users
- Make it clear Fair Work impacts your application
- Put disqualifiers up front

Service Description

- "A wall of words" A11Y Quote
- “50K Is a lot for a lower limit”
- “It looks like a lot of work”
- Confusing language, calls, claims, projects, policies

The screenshot shows the Scottish Enterprise website for the Green jobs call. The page is titled "Green jobs call" and includes a navigation menu with links for Home, Support for businesses, Funding and grants, Startup calls, and Green jobs funding call. The main content is organized into several sections:

- About the green jobs calls:** Explains that the calls aim to support businesses in creating and maintaining jobs that improve the environment, align with Scottish Government net zero policies, and create more quality jobs that are green, fair, and lasting. It mentions the Scottish Government's commitment to achieving net zero carbon and greenhouse gas emissions by 2045. It also states that the first call is open for applications from 9am on 30 May 2021 and closes at 12pm (noon) on 31 May 2021, and that a second call will be announced later in the year.
- How much funding is available?:** States that the call will offer grants of between £50,000 and £500,000. It notes that applicants should request the amount they need, but must be able to demonstrate why they need this amount. It also mentions that when reviewing applications, the team will consider eligible project costs, state aid rules, and activity types to determine if the amount is appropriate.
- What is a green job?:** Defines a green job as any job within a business that produces goods or provides services that benefit the environment or conserve natural resources, or a job where the worker's duties involve making their establishment's production processes more environmentally friendly or use fewer natural resources.
- What kinds of projects will this fund support?:** Lists several project activities: creation of green jobs, capital equipment purchases (such as buying new machinery), investment in premises (for example, to help you expand activities that contribute to the green economy), and research and development activities (for example, to develop innovative new products and services or improve your existing products and services to make them more sustainable). It notes that these broad activities leave the call open to a wide range of projects, but that these activities must be undertaken with the aim to: create green jobs (these are new jobs that relate directly to the transition to net zero) or facilitate the transition of a job from non-green to green, or minimize environmental impacts by developing sustainable low carbon products or services.
- Is my project eligible?:** Lists several criteria: a clear need for funding (for example, without funding it would take significantly longer to be scaled back or not go ahead at all), a grant of at least £50,000 to go ahead, not require more than £500,000 to go ahead, take place mostly in Scotland, start by 1 October 2021, and end by 31 September 2024.
- Is my business eligible?:** Lists several criteria: be registered or trading in Scotland (or looking to set up a trading location in Scotland), be a registered company, be completing the majority of the project activity in Scotland, be an individual business (we can't accept applications from call laboratories), not be able to fund the project on your own (for example, difficulty securing finance elsewhere), and be operating in the Scottish Enterprise area (either than South of Scotland Enterprise or Highlands and Islands Enterprise).

At the bottom of the page, there is a section titled "Check which agency area your business is in" with a form to enter a postcode and a "Check" button.

Check Your Eligibility

- “Why am I seeing this AFTER hitting APPLY”
- “I have already done a Post Code checker”
- “It does not tell you if you are eligible”. (See Separate Eligibility Option Testing)
- RETAIL is misunderstood by many companies who are NOT RETAIL. Needs more description.

Scottish Enterprise [Sign in](#)

Check your eligibility

To get started, we need to ask a few questions to check if you're eligible for this fund. If you're not eligible, we'll tell you straight away.

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Is your business trading in the Scottish Enterprise area, and will the project take place in the Scottish Enterprise area?
The Scottish Enterprise area generally includes the central belt, Ayrshire, Stirlingshire, Tayside and Aberdeenshire. Businesses in the Highlands and Islands, Moray, Dumfries and Galloway, and the Scottish Borders are unlikely to be in the Scottish Enterprise area. You can get in touch if you're not sure which agency area you're in.

Yes

No

No, but we intend to set up a trading location here by 1 October 2021

Is your business a registered company that's registered at Companies House?

Yes No

Is your business involved in any of the following sectors or activities?

Gambling

Adult entertainment

Tobacco

Locally traded services (these are businesses whose trade is limited to a local area, and whose direct competitors are other local businesses)

Retail

Any activity that could have a negative impact on human rights

Any activities that could have a negative impact on Scottish Enterprise's reputation or ethical standards

None of the above

Will all jobs that are created, protected or transitioned to green jobs as a result of this project be paid the real Living Wage (currently £9.50 in Scotland)?

Yes No

Which of the following categories does your project fall into?
You can select more than one.

A 'green' or environmental project

An innovation or research and development project

An exporting or international market project

A capital project (such as buying or renting machinery, equipment, property or other capital expenditure)

None of the above

Which of the following outcomes do you expect from this project?
You can select more than one. We'll ask for more information about these outcomes in the project details section. Only include outcomes that are directly related to the project and funding you're applying for.

Create new jobs in Scotland

...

Important information before you apply

- At the top of this page some people were disheartened. Further down the page it became more enticing (Missing Template and does not say SEE BELOW)
- Pictures or Video would help (A11Y)

Important information before you apply

Before you apply for this fund, make sure you've read the [full application guidance](#).

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About the application

Once you've read the information on this page, you'll be asked to sign in or create an account. This lets you save your progress and return to your application later if you need to. Remember, you'll still need to complete and submit your application by 15 June 2021.

If you already have an account, we'll pre-fill some of the questions in the application with information we already have stored about you. If you don't already have an account, we'll save some of your information so you don't need to re-enter it next time you apply for support.

Application evidence

During your application, you'll be asked to upload a number of documents. To save time, you may want to prepare these in advance. You'll be asked to upload:

- Personal ID such as a scan of your passport or driving licence – if you can't provide these, we'll get in touch after you submit your application to find another way to confirm your identity
- Your most recent annual accounts – even if these are in unpublished or draft form
- Your up to date management accounts
- Your business plan – if you don't have one, you can use our template. This is for guidance only, and you don't need to provide your business plan in this exact format
- A project plan
- Quotes or evidence to back up each of your eligible costs

We understand that some of these documents are highly sensitive to

Personal Details

- **People tried to click more than one PERSON TYPE**

Personal details

We'll store most of this information in your account so you don't need to provide it again if you apply for another fund or service in the future. This information will also help us verify your identity. If you already have an account, most of these details will have already been filled for you. You should check them before continuing, and update them if you need to.

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Email address

ltd@gmail.co.uk

First name

Last name

Contact number

Your position in the business

If more than one option applies, select the most relevant.

- Owner or sole trader
- Director
- Partner
- Company secretary
- Trustee
- Other authorised representative

Which of the following identification documents can you provide?

Business Details

- **Sectors** don't fit everyone that well
- **SME** definitions are Vague if you have 15 employees but a large turnover over £10 Million Which takes precedence
- Does **Sector** impact eligibility
- **Sectors** are not well understood

Business details

We'll store most of this information in your account so you don't need to provide it again if you apply for another fund or service in the future. If you already have an account, most of these details will have already been filled in for you. You should check these details before continuing, and update them if you need to.

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Business name and registered address

This is the official address your business is registered to at Companies House. It may not be where you actually do business.

Do you have a different trading address?

Your trading address is where you do business. It's the address your customers and suppliers would usually use.

No Yes, I have a different trading address

What is your Companies House registration number?

This should be 8 numbers or 2 letters followed by 6 numbers. You'll find it on the [Companies House website](#) or on letters you've received from Companies House.

What type of organisation is your business?

What is your incorporation date?

If you're not sure, this will be listed on [Companies House](#).



What size is your business?

The explanation for each answer uses euros instead of pounds

Fair Work Principles

Fair work principles

Which of the following fair work criteria do you already meet or are working towards? In some cases these principles may not apply to your business – for example for businesses with few employees.

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Appropriate channels for effective voice and employee engagement, such as trade union recognition

For more information about what this criteria means in practice and what examples of good practice look like, read the [guidance on implementing Fair Work First](#).

- We already meet this principle
- We're working towards this principle
- We can't commit to this principle
- This principle doesn't apply to my business

Investment in workforce development

For more information about what this criteria means in practice and what examples of good practice look like, read the [guidance on implementing Fair Work First](#).

- We already meet this principle
- We're working towards this principle
- We can't commit to this principle
- This principle doesn't apply to my business

Action to tackle the gender pay gap and create a more diverse and inclusive workplace

For more information about what this criteria means in practice and what examples of good practice look like, read the [guidance on implementing Fair Work First](#).

- We already meet this principle
- We're working towards this principle

- People don't have much understanding of what this is
- If it is exclusionary then put it earlier in the process
- It is viewed as an All or Nothing barrier quite often

About Your Project

- Needs Templates (And Links to Them)
- “Does it SAVE if I leave the page?”.
- People are not sure what is required
- Key section where people want a SAVE BUTTON
- Will progress be lost if I close this

About your project

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When will your project start?

DD/MM/YYYY

How long do you expect your project to last?

- 0-3 months
- 3-6 months
- 6-9 months
- 9-12 months
- Over 12 months

Tell us about your project (max 1000 words)

Give a brief description of your project to help us understand what you're aiming to do. You could include things like what you're planning on doing, why you're doing it and what research you've done.

1000 words

Upload a project plan

Your plan should offer a detailed overview of your whole project - what it involves, who your target markets and customers are, what the outputs will be and how you'll develop them, what your objectives are, and a summary of your timeline and milestones. However, it must also include details about:

- The commercial prospects for the outputs of the project (including market size, location, growth, route to market and competitor analysis)
- The technical challenge involved in the project (if it's a research and development project)
- The personnel and skills you have in place for this project, and any skills gaps you've identified
- Your freedom to operate (this should show that you won't infringe on any existing intellectual property or patents as part of the activities you're planning, and that you have the correct licences, agreements and permissions in place if the project relies on other business's or individual's intellectual

Project Costs & Funding

- Consultants and Contractors is a spurious distinction
- Total Eligible costs is a bit Vague

Project costs and funding

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What do you expect your total project cost to be?

How much of your total project cost falls into the following categories?

These are the only costs we can contribute funding to. If you're successful, we'll base our funding offer on the total costs entered here.

Capital expenditure

This includes equipment, machinery and tools.

Supplies and materials

For product development projects, eligible costs include the purchase of materials specifically for use in the production of prototypes, samples and testing.

Travel costs

Flights and accommodation for any travel required as part of this project. Accommodation is limited to £50 per person per night for up to 2 people, and flights are limited to 2 people travelling on economy rates.

Employee wages

Internal staff on your payroll who are spending all or part of their time working on the project. We can only support employee wages for employees who are paid at least the real living wage (currently £9.50 an hour).

Professional fees

This includes legal and financial services beyond those you would normally use for everyday trading.

Impact of funding on your project

- All the sections look the same and are hard to differentiate

Impact of funding on your project

In this section, we'll ask you a bit more about what impact this funding will have on your project. We'll ask you for the same set of information based on your current position, what you'd expect by the end of the project and 3 years after the project if you don't receive this funding, and what you'd expect by the end of the project and 3 years after the project if you do receive this funding.

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If you aren't successful in securing this funding from us, what effect would this have on the project?

You can select more than one.

- It wouldn't go ahead at all
- It would go ahead, but it would take significantly longer
- It would go ahead but with a smaller scope
- There would be a funding gap we can't fill
- It would go ahead as planned with no effect

Provide the following information based on your business's current position

Total headcount

This may differ from the full time equivalent employee number you previously gave us. Your headcount should include your actual number of individual employees.

Of the total headcount, how many are R&D roles?

Turnover

Profit

Exports

Scottish supply chain spend

Provide the following information based on what you would expect by the end of the project if you DON'T receive funding from us

Financial Information

- Year end should be a Date and a Month
- TEMPLATES, TEMPLATES, TEMPLATES
- Suggested different submission framing such as **"THAT YOU HAVE SUBMITTED FOR THE LAST FINANCIAL YEAR"**

Financial information

Debug Only:
Companies House false

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When is your business's financial year end?

This will help us check the documents you provide are up to date for your business.

Provide the following information for your last full financial year

Turnover

Profit before tax

Fixed assets

Cash

Current assets

Current liabilities

Share capital

Provide the following details from the end of your last financial year up until 31 March 2021

Turnover

Profit before tax

Fixed assets

Public Sector funding

- Taking "De Minimis" out of the heading has massively improved this.



Public sector funding

Some public funding comes in the form of de minimis aid. We need to ask you about any previous de minimis aid you've received to make sure this grant won't exceed your de minimis allowance. If you've ever been given de minimis aid as part of public sector funding, you will have been told in writing at the time.

If you're unsure what de minimis aid is and whether it applies to you, please read the guidance before answering the questions on this page. It's especially important to read this guidance if your business is part of a corporate group, is linked to other businesses, or has been part of an acquisition or merger in the last few years.

[Read the full de minimis guidance](#)

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Has your business or any businesses in your corporate group received any de minimis aid from a UK source during your business's current financial year or the previous two financial years?

This includes any businesses which were part of the same 'single undertaking' that you're in up until this financial year or the previous two financial years.

Yes No

Confirm

Declarations

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Please confirm whether you agree to the following disclaimers before submitting your application

- I understand that any payment received may need to be declared to HMRC as appropriate as part of the tax return of the business
- My organisation (or any organisation within the group) is not subject to an outstanding recovery order following a decision of a subsidy enforcement body (whether in the UK or elsewhere) declaring any aid received by us illegal and incompatible with the relevant compliance regime (this excludes aid schemes to make good the damage caused by natural disasters)
- My organisation (or any organisation within the group) has never received rescue or restructuring aid, either within the UK or anywhere in the EU, or if it has, this has been reimbursed in full, any guarantee provided has been terminated, and are no longer subject to any agreed restructuring plan.
- I understand that any funding is subject to Scottish Enterprise's approval and the company's written acceptance of the terms and conditions of any offer of support Scottish Enterprise may make.
- I confirm that none of the directors of the business I'm applying for funding on behalf of are listed on the Sanctions List, are located in or incorporated under the laws of any Sanctioned Country and are not otherwise a target of Sanctions. For more information, see the [UK government list of current sanctions](#).
- I confirm that either:
 - I am a Director, Authorised Signatory, Company Secretary, Trustee or other appointed officer of the organisation that I'm submitting this application on behalf of
 - I am a sole trader or am authorised by the sole trader to submit this application on their behalf
- I understand that Scottish Enterprise may require evidence of the signing authority of any individual.
- I certify that the information given on this form is accurate to the best of my knowledge.

[Confirm](#)

Declarations

- **Good**

Review, Submit & Confirmation phase

Thanks for applying for
the green jobs call.
Good luck!

Your reference number is:

111-111-111

We've sent you a confirmation email. If you can't find it, remember to check your spam or junk folder.

We'll let you know [insert timescale - within X days/weeks or by X date] whether or not your application has been successful. In the meantime, we may get in touch if we need any more information from you.

If you'd like to speak to someone about this fund or your application, you can get in touch on **0300 013 3385** and quote your reference number.

[Back to your account](#)

- Fine
- Like the Reference Number

Timescales

Service Description

- 4 to 10 mins

The Form

- 20 to 30 mins raw typing time

Total

- **24 to 40 mins without having to get documents or even think too deeply.**

Evidence

- **Varies with Sector**
- **Accounts are on hand or easy to find**
- **Business Plans are dependant on how much their business has changed recently**
- **Project Plan....**
- **Would get Quotes for work**
- **LINK TO TEMPLATES AT POINT OF NEED**
- **There is no Project Plan Template. Just a Business Plan template**

More Quotes

- “It isn’t very well explained (Service Description)
- “I could read this page and easily apply this” (Service Description)
- “I would have been off making a cup of tea by now” (About your project)
- "None of it seems unnecessary - there's just a lot of it"
- "I would be starting to zone out and think nah, this isn't for me" (Fair Work section)
- "This is getting a bit like a riddle" (Impact of funding section)
- “That wall of words is off-putting. I’d prefer to see it broken down a wee bit” (dyslexic)
- “Overall that’s quite a straightforward application”
- “It feels like there is a massive gap there” (Eligibility Response)
- “I would leave the website at this point, and go make a plan based on this page” *and then come back with my Word Doc* (About your Project)
- “I have completed my Eligibility and I have no idea if I am eligible?”

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