



Grant Recipient Onboarding Pack

Last updated: 13 January 2025

Contents

Grant Recipient Onboarding Pack	1
End to end process overview	2
Link User Guide	3
Communications.....	7
Schools.....	7
Parents.....	9
Award Materials and Bikeability Club	11
Award Materials	11
Bikeability Club	11
Reporting	13
Feedback and Support.....	15
Supplementary documents.....	16
Training provider user journey	16
Instructor user journey	17
School user journey.....	18
Parent user journey	19
Guidance for training providers	21
Guidance for instructors.....	21
Guidance for schools	21
GDPR.....	21
Summary.....	21
Additional data protection tasks for training providers to consider	22
Digitisation Data Sharing Role Diagram	23
Flow Diagram Roles and Explanations.....	26

End to end process overview





Link User Guide

Digitisation Overview

The Bikeability Trust has moved to digitise training delivery so that it can better gather evidence of impact for Active Travel England, provide an improved process for training providers, schools and a better experience for parents and children pre and post course.

As a grant recipient, digitisation will change the processes on Link and the details you can see. You will no longer need to input training delivery as a grant recipient as this will automatically be pulled through from the training provider's course booking details. Booked numbers confirmed by a school contact and attended numbers will automatically be populated on Link. You will just need to use the delivery confirmation tab to check and approve the details to make the course payable.

You will also have better visibility of forthcoming bookings and will have a better overview of progress towards hitting your delivery targets for the year.

We have introduced a system whereby training providers can:

- Create their own training deliveries and add courses
- Capture consent quickly and easily using an online forms with URL and QR code
- Monitor course progress including consent and outcomes
- Mark the courses complete ready for grant recipient approval and grant claims.

Using the Bikeability App, instructors can:

- See consent information
- Record rider outcomes and give feedback
- Record rider answers to post course survey

Using Link, schools will be able to:

- See consent in real time
- Confirm final booked figures (against which we calculate grant payments)
- Take last minute consents
- Add notes to individual records where they feel an instructor requires more information regarding a participant

We will be collecting the following monitoring and evaluation data as a part of the new digitised process:

- At consent: cycling frequency pre-course
- Post course: rider hands up survey feeding back on enjoyment, confidence and likelihood of cycling more post course



- Post course: parent survey feeding back in greater detail regarding course impact.

This anonymous data will be available for grant recipients and training providers as a monthly download via Link.

How will these changes affect approval for grant claims?

Currently, all training deliveries are added to Link by the grant recipient only after the training has taken place. Your training provider(s) will enter all details of the training deliveries including rider characteristics when they accept a booking to deliver grant funded cycle training. As a grant recipient, you will be able to see any training deliveries input by your training providers and their status (draft, in progress or complete) in the 'Deliveries' tab found under the applicable grant. For any deliveries that the training provider logs, you will need to confirm that delivery before it can be put through of your grant claim. Use the 'Delivery Confirmation' tab to do this. Then, make your grant claims as usual.

It is important through the transition to digitisation that you thoroughly check that no duplication has occurred.

Accessing details of deliveries:

1. Select the applicable grant. Grants can be standard or HAF.

Grants

ID	Period	Label	Source	Format	
2024/999999	2024/2025	Springfields Test 2024/25	DfT Standard	GrantFormatDFT	⋮
2023/999999	2023/2024	Springfields Test 23/24	DfT Standard	GrantFormatDFT	⋮
2020/000999	2021/2022	Test 21/22	DfT Standard	GrantFormatDFT	⋮

2. Select Training Deliveries tab to view draft, in progress and complete deliveries. Select the three dots next to a training delivery to view details. All digitised training deliveries are flagged with a * in front of the date.



Grant Details

OPTIONS ▾

Details

Move Places

Change Funding

Training Deliveries

Claims

Delivery Confirmation

SHOW DASHBOARD

RESET FILTERS

DRAFT

IN-PROGRESS

COMPLETE

Start Date	Location	Training Provider	Modules	Course Status	Provisional#	Confirmed Booked Value	Attended Value	
All ▾	All ▾	All ▾	All ▾	All ▾				
*None	Seven Sisters Primary School	Ambridge Cycling Society	Level 2	Complete	5	0	0	⋮
*None	Chorley All Saints Church of England Primary School and Nursery Unit	Ambridge Cycling Society	Plus: Fix	Complete	1	1	0	⋮
*08/04/2024	St Chad's Catholic Primary School	Ambridge Cycling Society	Learn	Complete	1	1	1	⋮

On this tab you can also view the status of each course and you have the ability to filter courses based on their different status – Complete, In Progress, Part Complete or Non Digi.



Grant Details

OPTIONS ▾

Details

Move Places

Change Funding

Training Deliveries

Claims

Delivery Confirmation

SHOW DASHBOARD

RESET FILTERS

DRAFT

IN PROGRESS

COMPLETE

Start Date	Location	Training Provider	Modules		ional#	Confirmed Booked Value	Attended Value	
All ▾	All ▾	All ▾	All ▾	Complete In Progress Non Digi Part Complete ✓ All				
*None	Seven Sisters Primary School	Ambridge Cycling Society	Level 2	Complete	5	0	0	⋮

3. Select Delivery Confirmation tab to view and confirm completed deliveries so that they may be included in your grant claim. Simply tick the boxes of completed deliveries that you wish to confirm and hit 'Apply' to update the records. You may wish to check with your training provider if there is a large variance between the booked and attended figures.

Note: You may still need to add non-digitised deliveries to Link. It is also possible to enable delivery access for your training provider to add non digitised training deliveries to the system on your behalf and to have the data go through the same approval process.



Details Move Places Change Funding Training Deliveries Claims **Delivery Confirmation**

SHOW DASHBOARD

RESET ALL FILTERS

CANCEL

APPLY

Delivery Date	School/Postcode	Training Provider	Module	Booked Value	Attended Value	Delivery Input by GR/TP	Confirmed	
All ▾	All ▾	All ▾	All ▾			All ▾	All ▾	
*08/04/2024	St Chad's Catholic Primary School	Ambridge Cycling Society	Learn	1	1	TP	<input type="checkbox"/>	⋮
*08/04/2024	St Chad's Catholic Primary School	Ambridge Cycling Society	Level 1	3	3	TP	<input type="checkbox"/>	⋮
*08/04/2024	St Chad's Catholic Primary School	Ambridge Cycling Society	Level 2	3	3	TP	<input type="checkbox"/>	⋮

4. Complete your grant claims as normal



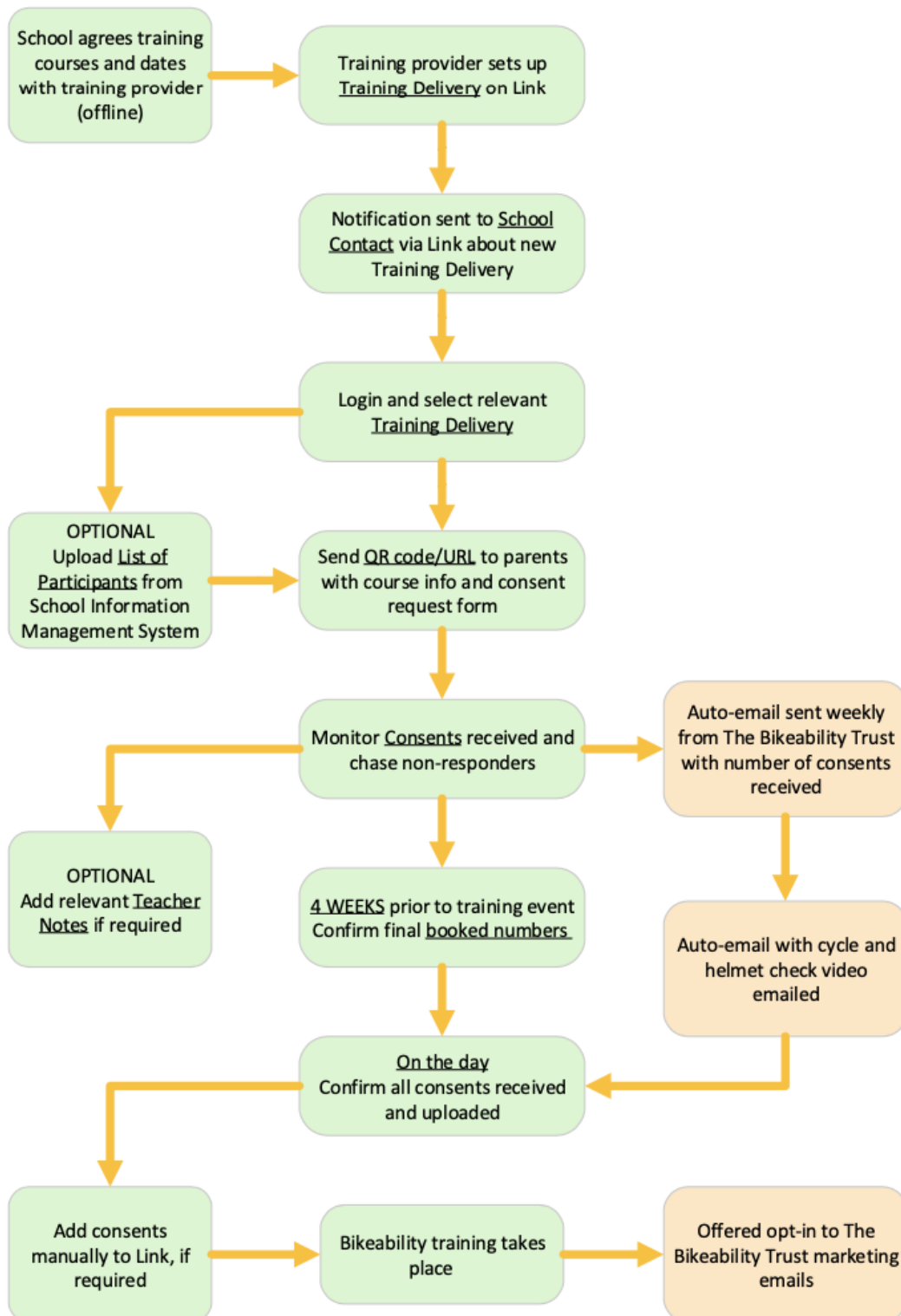
Communications

Digitisation will allow The Bikeability Trust to communicate directly with schools and parents for the first time. These communications have been designed to complement any existing communications from training providers.

Schools

Schools will receive a maximum of four emails between a Bikeability course booking and delivery. All emails will include how many consent forms have been submitted and how many consent forms are outstanding. Two emails will include links to cycle and helmet check videos. These emails are sent under legitimate interest, as these communications relate directly to Bikeability training.

After the course is completed, schools will be offered the opportunity to opt-in to marketing emails from the Trust. Schools who opt-in will be added to The Bikeability Trust mailing list and receive promotional emails, including information about events such as Cycle to School Week, additional resources such as Tools for Schools, and competitions run by the Trust.

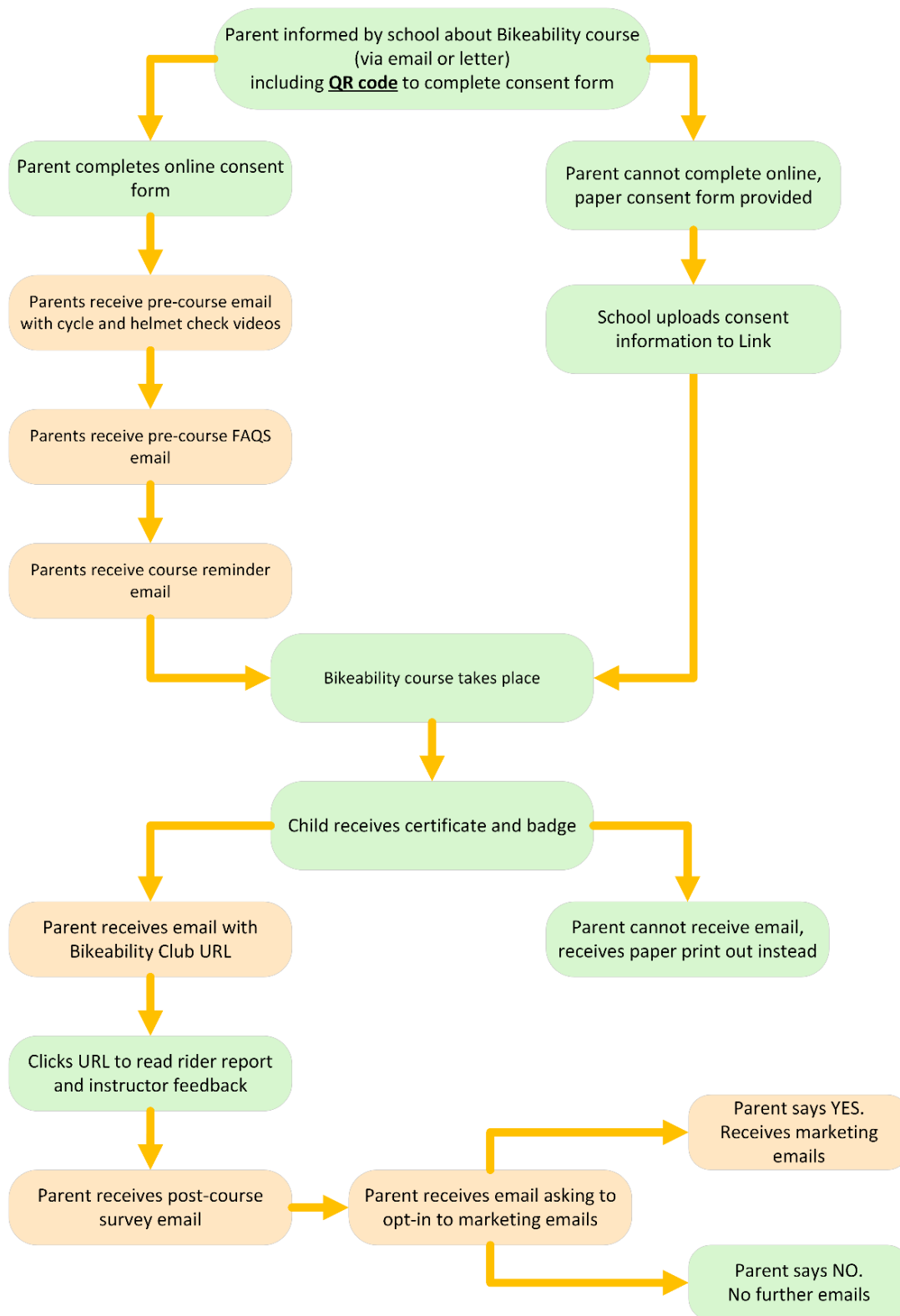




Parents

Parents will receive a series of emails in the run up to their child's Bikeability course. This will include cycle and helmet check videos, FAQs and a reminder for the course start date. After the course has been completed, parents will be sent a unique URL to access their child's rider outcomes and instructor feedback, called the Bikeability Club. They will also receive a post-course survey, in order to provide monitoring and evaluation data. These emails are sent under legitimate interest, as these communications relate directly to their child's Bikeability training.

Then, parents will be offered the opportunity to opt-in to marketing emails. Parents who opt-in will be added to the Bikeability Club mailing list and receive promotional emails, including competitions from commercial partners, additional content such as blog posts and information about events such as Celebration of Bikeability and Cycle to School Week.





Award Materials and Bikeability Club

Award Materials

We have redesigned our award materials to be more fun and engaging, and improved the quality of our badges. You may continue to use existing award materials, as we do not expect you to throw out or destroy current stock. Instructors will not need to complete the outcomes on the certificate, as these will be emailed using outcomes inputted on the Instructor App.

New certificates and stickers are available for purchase on our Shop. For any enquiries, please contact orders@bikeability.org.uk

Booklets are no longer available for purchase. Our website features [tips and advice](#) which were available in the booklet, and we have posted a variety of useful videos on our [YouTube channel](#) and website. Riders will receive further information by email and on the Bikeability Club.

Bikeability Club

After the course has been completed, parents will be sent a unique URL to access their child's rider outcomes and instructor feedback, called the **Bikeability Club**. This website will include:

- Outcomes required for Bikeability course
- Standard achieved by rider
- YouTube example videos for each outcome
- Individual feedback from Bikeability instructor
- Digital course badge (in addition to physical badge and certificate received after course completion)
- Digital badges for activities, such as "I cycled up a big hill" or "I cycled with my family". These are self-reporting, so families can click to "claim" a badge once they have completed an activity. Badges will be sponsored by commercial partners and include unique offers for families to access.
- Links to additional resources, including how to become a cycling instructor and where to find your nearest cycling club

[An example of the website can be seen here.](#)



Reporting

Surveys are integrated throughout the digitisation process, in order to provide monitoring and evaluation data. These include:

- Hands-up rider surveys (including enjoyment of training, feelings of safety and confidence)
- Cycling frequency data: a comparison of pre-training data from the consent form with the post-training data from the post-training parent/carer survey
- Desire for further Bikeability training, and recommendation of Bikeability training

This data will be collated and anonymised to be reported to Active Travel England. At the end of every month, you will be able to access automated downloads from Link. These downloads will be generated once a month to avoid server overload.

Grant Recipient details

OPTIONS ^

Springfields Council

ID: 999

Related Link account(s):
Diini Muse
Joanne Metcalfe
System Admin
Eliska Peskova

Grant Recipient status: Active

Renewal status: Complete

Edit details

View renewals

View Digitisation Reports

Buy materials

Details

Associated Training Providers

Documents

Contacts

Additional Details

Primary Email: joanne@bikeabilitytrust.org

Secondary Email: joannem@bikeabilitytrust.org

Mobile Number: 07044042524

Address Details

Address: Springfields,
Coleshill,
Birmingham,
CV4 9EF

The datafile can be accessed from your Grant Recipient profile page. Select Options/View Digitisation Reports and select the financial year's data that you wish to download. The file will be downloaded in Microsoft Excel Format with questions and answers embedded in the first two rows of data.



Grant Recipient Digitisation Reports

Springfields Council

ID: 999

Grant Recipient status: ● Active

Renewal status: Complete

Related Link account(s):
Diini Muse
Joanne Metcalfe
System Admin
Eliska Peskova

Year	File
2024	Digitisation Surveys per Grant - Financial Year 2024
2023	Digitisation Surveys per Grant - Financial Year 2023

Feedback and Support

Please contact the System Admin inbox (system-admin@bikeabilitytrust.org) in the first instance where we will endeavour to answer your question in a speedy way. Several members of the team monitor the inbox and we hope to resolve your queries in a quick and efficient manner and will then contact you to arrange a meeting if we need further detail. If you have a technical query, then please also ensure to include screenshots along with your question.

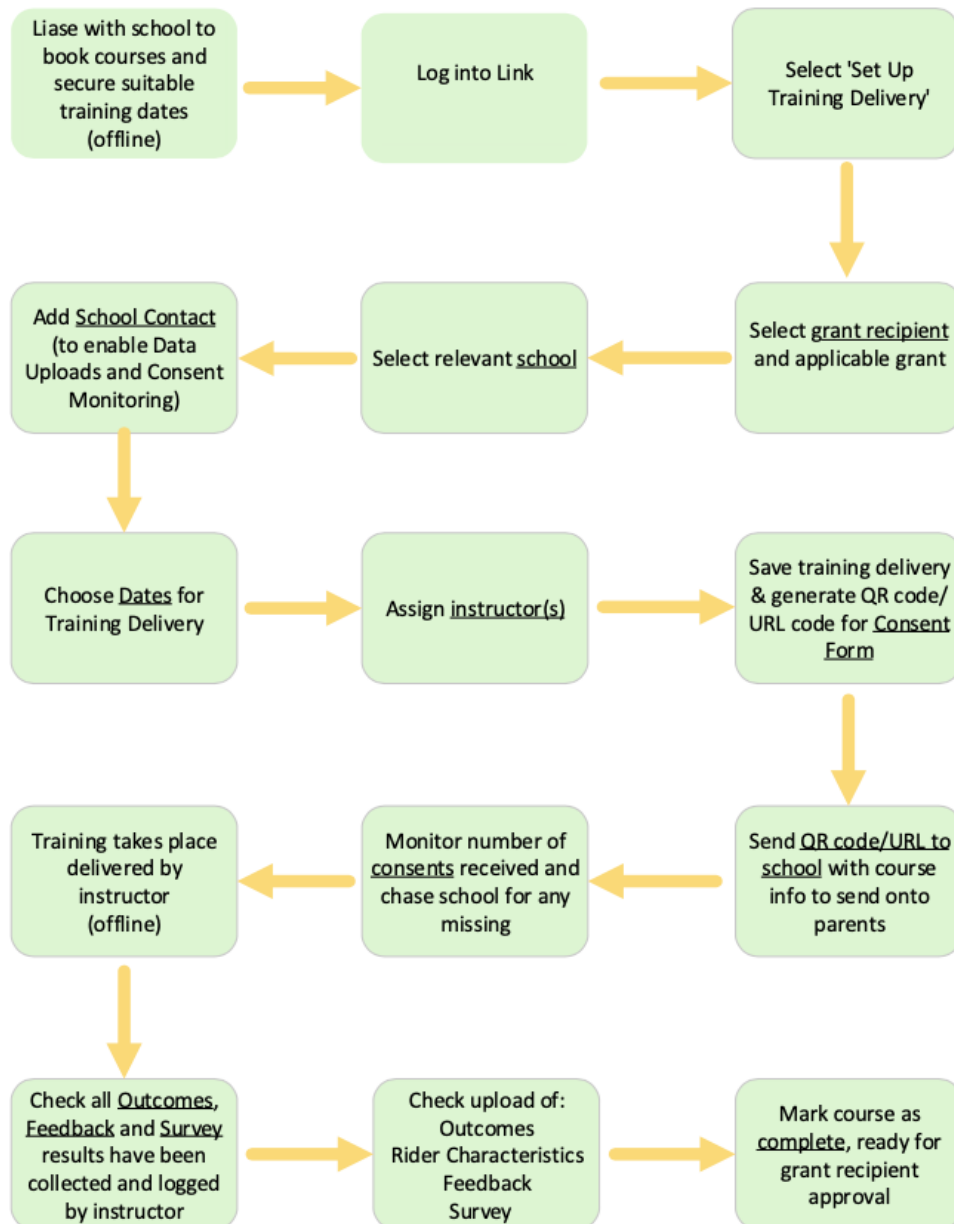
Issues and feedback can also be reported by an online form. The form is available for grant recipients, training providers, instructors and schools.

<https://forms.office.com/e/CzjwAaYXYR>



Supplementary documents

Training provider user journey



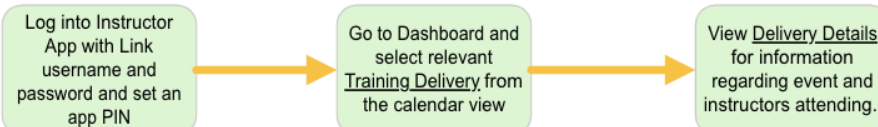


Instructor user journey

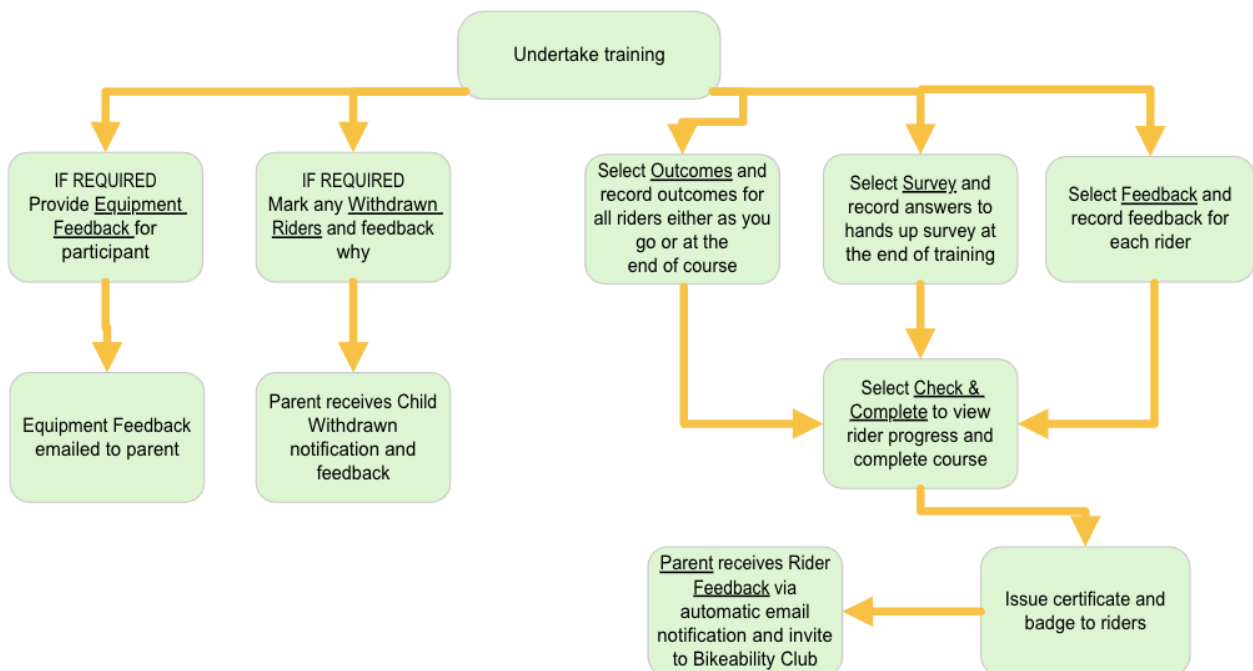
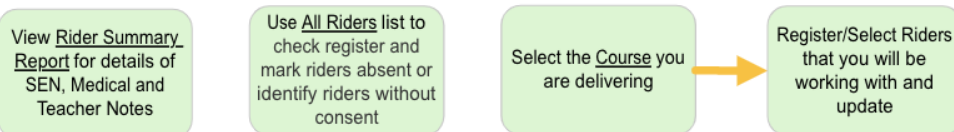
Before course starts

Instructor allocated to work
Bikeability course (via own
system)

Before you arrive

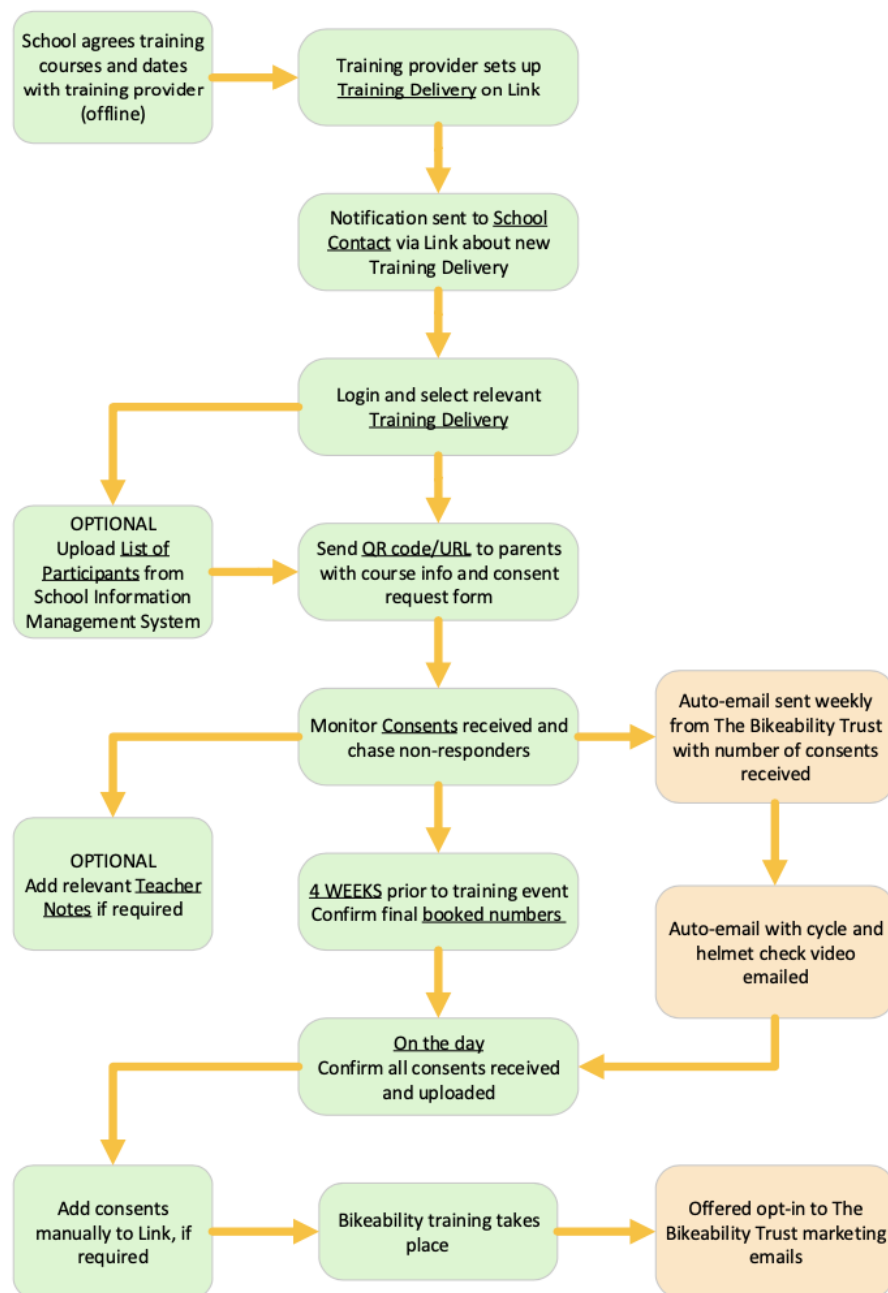


When you arrive



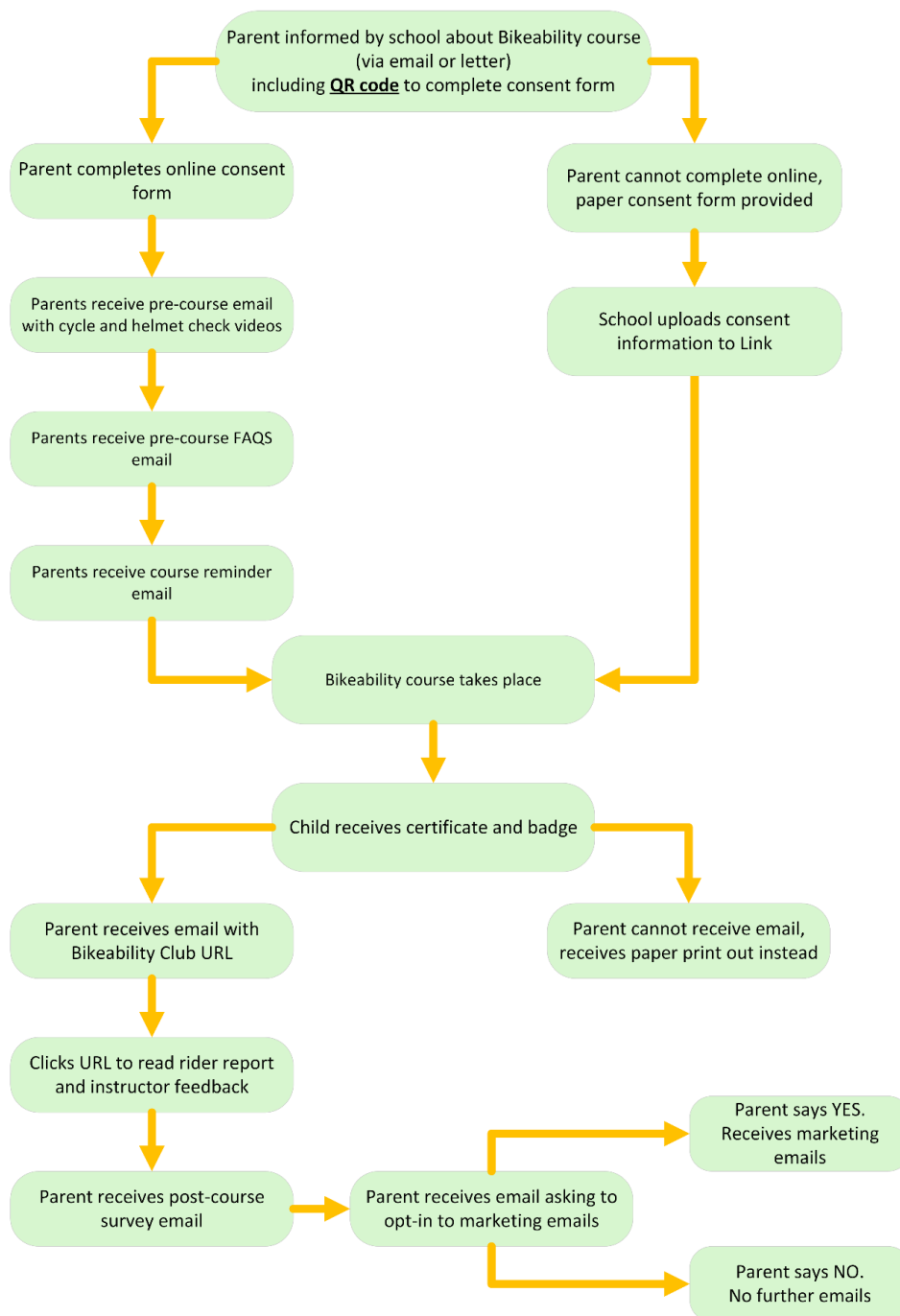


School user journey





Parent user journey





Guidance for training providers

Download the training providers onboarding pack, including guidance on how to use Link, [from our website](#).

Guidance for instructors

Download the instructor onboarding pack, including guidance on how to use the Instructor App, [from our website](#).

Guidance for schools

Download the schools onboarding pack, including guidance on how to use Link, [from our website](#).

GDPR Summary

The Bikeability Trust has worked with data protection specialists Hope & May to ensure that the guidance and resources we are providing you meet data protection legislation requirements.

During the digitisation process, each party acts as a data controller in accordance with the UK GDPR definition Art. 4(7) except where The Bikeability Trust may act as a data processor where other parties may access the electronic systems provided for by the Trust via the instructor app or Link database.

To prepare for digitisation, your training providers must

1. **Complete and upload a controller to processor data sharing agreement template to Link.**

As a data controller, it is **your training providers' responsibility** to have a data sharing agreement in place with The Bikeability Trust in their role of **data processor**. This approach reduces the risk for each party and ensures the responsibility for processing activities lies with each respective party.

To support your training providers, we have created a controller to processor data sharing agreement template, which they may [download and use](#). They can also use their own agreement if they prefer.



Additional data protection tasks for training providers to consider

1. Watch our GDPR video

Data protection specialists Hope & May have created a fifteen minute video to explain the basic principles of GDPR and how it applies to digitisation.

This video includes a summary of data protection laws in the UK, an explanation of data controller and data processors, as well as guidance on consent, retention of data and safeguarding.

Watch the video here: [YouTube video.](#)

2. Read our GDPR FAQs

We have put together a comprehensive list of GDPR related questions and answers which we hope you will find helpful.

We recommend that you take time to read these as they explain data protection and security in more detail. The [Information Commissioner's Office](#) is a useful resource for any questions about GDPR.

Read the FAQs here: [GDPR FAQs.](#)

3. Review their organisation's privacy notice and data protection impact assessment

It is a legal requirement that any organisation that processes personal data must have a [privacy notice](#) and complete a [data protection impact assessment](#) (DPIA). It is your training providers' responsibility to review your privacy notice and DPIA, and ensure that they are up to date.

For reference, The Bikeability Trust's privacy notice can be found [on our website](#). This has been updated to include usage of the instructor app.

Our DPIA can be shared upon request. Please email contactus@bikeability.org.uk.

4. Create controller to controller data sharing agreements with schools

It is your training providers' responsibility to have controller to controller data sharing agreements with the schools you work in. To support them, we have created a [controller to controller data sharing agreement template](#), which they may download and use. Training providers can also use their own agreement if they prefer. This does not need to be uploaded to Link, as this is for your training providers' records only.

5. Discuss mobile phone usage with schools and groups



It is important that schools and groups understand instructors will need to use mobile phones as part of the digitisation of Bikeability. It is important that your training providers engage positively with schools and groups to ensure your instructors feel supported and empowered to embrace the Instructor App.

To support you, we have created a [letter for schools, written and signed by The Bikeability Trust](#), which outlines how and why mobile phones will be used by Bikeability instructors.

Digitisation Data Sharing Role Diagram

The law specifically defines different parties and the role they play when personal data is gathered and processed for any given purpose. Broadly, there are two roles and a party (any organisation including a sole trader or partnership) must understand which it is before any personal data is processed.

With reference to the Digitisation Data Sharing Role diagram, you will note that The Bikeability Trust acts as both a processor and controller as defined as follows:

A **data controller** is a party that determines why data is processed, what data may be gathered, the purpose for the processing activity, how long it may be retained and who it may be shared with. A controller of data must be registered with the [Information Commissioner's Office \(ICO\)](#), have a policy and be responsible for all personal data it may use to achieve any given purpose it has identified.

A **data processor** is a party that processes data but only because it has been instructed to do so by another organisation acting as a data controller. It may only process the data in accordance with the instructions it has received. Typically, these instructions will be in an agreement. It does not need a data protection policy to guide it as the instruction provides the guidance. It may also be a data controller but for a different purpose. For example, The Bikeability Trust is a data controller for most of its activities, but for the purposes of providing access to the app, it is a data processor providing services to the training providers and instructors which include secure access to the personal data of children.

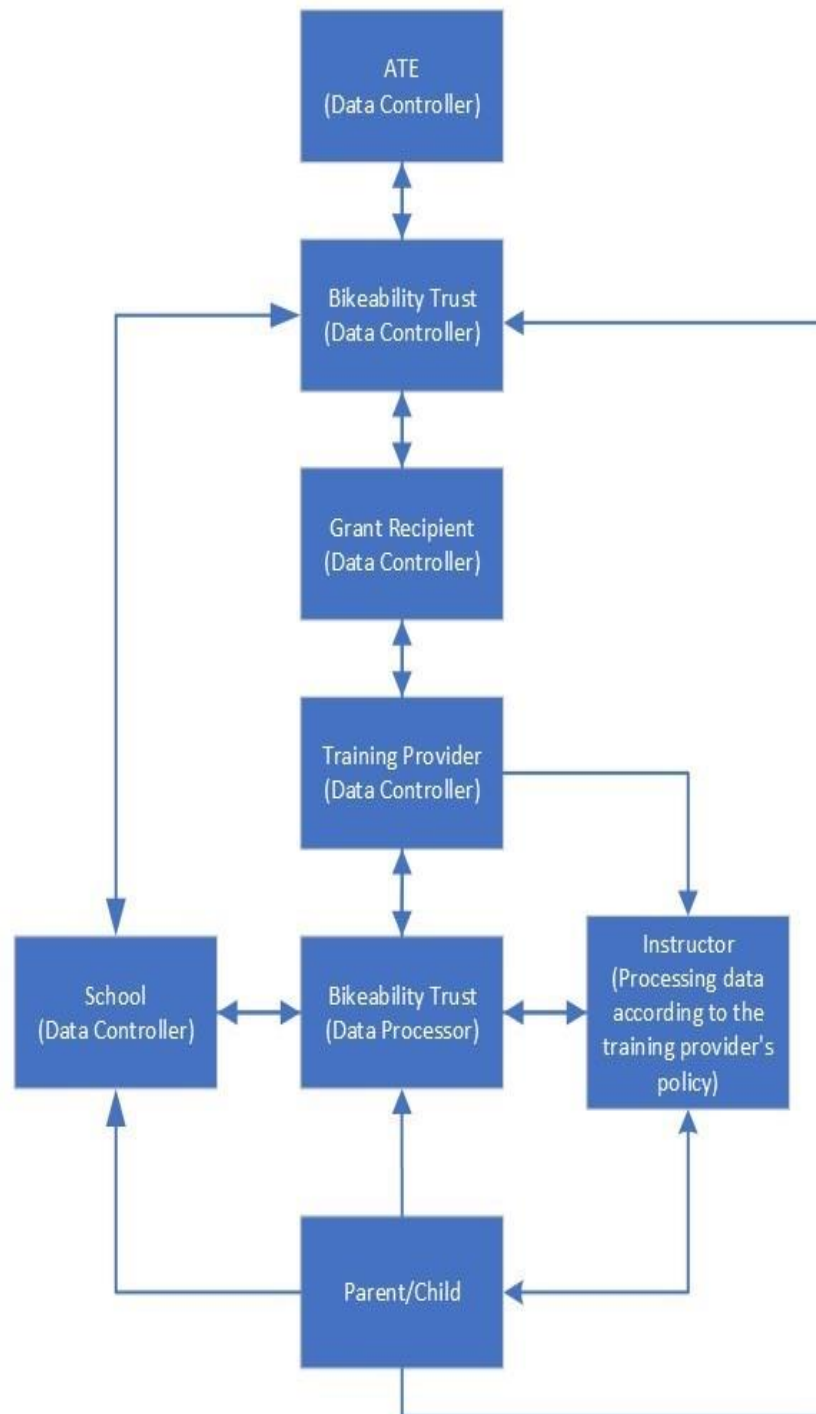
We have identified different roles where we make determinations or decisions about the data and where we don't. For example, where we store the data you upload to the Instructor App, we are not making any decisions, merely providing safe storage for you, and ensuring you can access the data you upload when required. In this way, we are a processor acting on your behalf as the data controller. However, where we may use the data to make determinations such as the effectiveness of the scheme, or for analytical or reporting purposes, we are the controller of the data. **A training provider will be a data controller.** For illustrative purposes only, an instructor who is a third party to a provider, is likely to be a data processor to the provider who will be the data controller. However, this can vary so if you are in doubt, you should take legal advice.



Where each party is a data controller they may process the data in accordance with their policy, the parties may also share such data with other controllers where it has established a clear purpose as defined in the diagram.

Each party must establish a lawful basis for processing the data. Such bases may be different depending upon the purpose that has been identified. There must also be a lawful basis to share the data with another party to the agreement.

A controller to processor agreement between the training provider and the Trust, should be in force. Where the Trust acts as a processor the UK GDPR Article 28 processor clauses should be included in the contractual agreement. A controller-to-controller data sharing agreement should also be in force between the training provider and school.





Flow Diagram Roles and Explanations

Data Processors

The Bikeability Trust

For the purposes of providing the Instructor App. The Bikeability Trust's responsibilities include securely storing the data uploaded and ensuring access to the data for all authorised parties. They do not determine what data is uploaded. In this case, they are the data processor who is working on behalf of the controller who use the Instructor App.

Instructors

Instructors are responsible for delivering Bikeability training and follow the instructions of the training provider, for example, the date training will be delivered. This makes the instructor a data processor. The associated training provider is responsible for making sure the instructor has appropriate instructions.

Data Controllers

Active Travel England

Active Travel England processes personal data to determine the outcome of the project. Information may be anonymised, this information is not applicable to the law.

The Bikeability Trust

The Bikeability Trust measures the progress of the project and determines the best way to achieve various objectives connected to the project.

Grant recipients

The grant recipient decides how to deliver the training and who will deliver it.

Training providers

The training provider decides how best to meet its obligations when delivering Bikeability training. Making these decisions make the training provider a data controller.

Schools

For the purpose of ensuring children and their parents/carers can access the course information. They may determine who attends the course and when.

Parents/Carers and Child Riders

The parent/carer and child rider are not subject to data protection law. They are neither a data controller or data processor. Any personal data they handle or share is referred to as "domestic" use. However, they do have UK GDPR information rights that all parties must uphold.