Smart Energy GB in Communities Fund

2023

Contents

Guidance for applicants 2023

Thank you for your interest in the Smart Energy GB in Communities Fund. This document provides guidance to help you fill in our online application form.

During 2023, three funding streams are available:
1. Grants for organisations supporting people who are living in fuel poverty. Funding requested should be between £15,000 to £25,000
2. Grants for organisations supporting people who lack basic digital skills. Funding requested should be between £10,000 to £15,000
3. Grants for organisations supporting people who are carers. Funding requested should be between £7,500 to £10,000

An online application form and an accompanying Project Plan must be completed in full. As part of the Fund's due diligence process, we will also ask you to submit a number of documents (detailed on page 27).

If you have any questions regarding the application process, please contact us using the following details:
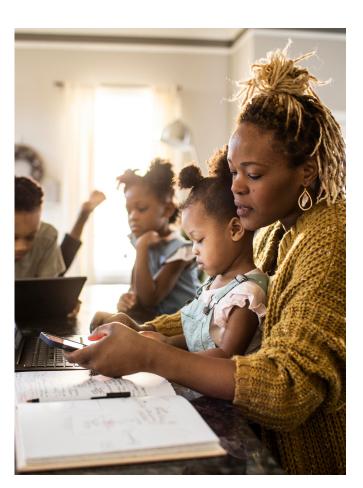Email: **smartgrants@nea.org.uk**
Phone: **07566 789483**

About Smart Energy GB

Smart Energy GB is the not-for-profit, government-backed campaign helping everyone in Britain to understand the importance of smart meters and their benefits to people and the environment.

Our national campaign is reaching homes and microbusinesses across England, Scotland and Wales. For more information visit: **smartenergyGB.org**

Smart meters and the rollout

Smart meters are the next generation of digital meters for gas and electricity, providing automatic meter readings and near real-time energy use information for households.

With energy costs rising, getting a smart meter is a simple step households can take to better manage their energy bills and household budgets. They offer greater predictability and accuracy of energy bills, and make it easier to control energy use.

And having greater control of your energy use could help the long-term financial stability of your household.

Smart meters in our homes and businesses will also help to boost Britain's energy security. They play a part in enabling us to use more renewable, home-grown energy such as wind and solar — which will mean we can be more independent and rely less on gas imported from abroad.

Smart meters are available from energy suppliers at no extra cost, and the accompanying in-home display shows energy use in pounds and pence.

As of September 2022, 30.3 million smart and advanced meters were in homes and small businesses across Great Britain.

What are the benefits of smart meters?

Many people are getting smart meters installed in their homes. Here are some of the benefits they can bring:

- help you keep track of how much energy you're using, and how much you're spending
- help you work out where you may be able to save energy
- make sure you get bills based on how much energy you use, not an estimate
- help make Britain's energy system more flexible and efficient, based on how much energy we need and when we need it
- for those who prepay for their energy, a prepay smart meter shows you when credit is running low (via the in-home display). A prepay smart meter also allows you to top-up where and when it suits you, for example online, by text, using an app or going to a top up point in a shop

Smart Energy GB in Communities

The Smart Energy GB in Communities programme is part of Smart Energy GB's campaign to inform and inspire people about smart meters and the benefits they can bring.

The programme partners with organisations from the voluntary and public sectors. This means we're able to work with trusted, expert organisations across the country to help ensure people understand the benefits of smart meters and how to get one.

The application process to become a Smart Energy GB in Communities 2023 partner is being run by the charity National Energy Action (NEA). For more information about NEA, visit **nea.org.uk**

The objectives of the 2023 fund are:

Target groups: **People living in fuel poverty OR people who lack basic digital skills**
- To ensure that people in the target group understand how smart meters can benefit them
- To increase the likelihood that those in the target group will seek or accept a smart meter

Target group: **People who are carers**
- To ensure that people in the target group understand how smart meters can benefit the person they care for
- To increase the likelihood that those in the target group would recommend a smart meter to the person that they care for

Who is Smart Energy GB in Communities trying to reach?

The programme supports those who might find it difficult to engage with the smart meter rollout.

In 2023, we are targeting grant funding to organisations who reach people that are:

- **in fuel poverty:** defined as those spending 10% or more of their annual household spend on energy bills[1]
- **lacking basic digital skills:** defined as those lacking the digital skills to manage information, communicate, transact, problem solve or create basic digital content[2]
- **carers:** a carer is defined as someone who provides unpaid care and support to a family member or friend who has a disability, illness, mental health condition, or who needs extra help as they grow older. It isn't someone who volunteers or is employed to provide support[3]

People living in fuel poverty:

Since October 2022, figures show that 6.7 million UK households are in fuel poverty, based on the definition of fuel poverty being households that spend more than 10% of their income on energy bills[4]. This equates to over 12% of the population. As the price of energy increases, it is anticipated that this audience will continue to grow.

The size and demographics of people living in fuel poverty have been rapidly shifting. Due to the price increase of gas and electricity globally, and the cost-of-living crisis in the UK, households that are not traditionally challenged by energy affordability are now falling into fuel poverty. This means people who have previously never experienced a need to change energy behaviours are now affected.

Fuel poverty affects people across the age spectrum, with those aged over 55 and those with children in the household particularly affected at this time. Many of those living in fuel poverty are renting (either privately or in social housing), and people with a long-term illness or disability are much more likely to be in fuel poverty.

Low-income and financially vulnerable households are the least able to afford high prices, and are more likely to ration their energy use or self-disconnect. Amongst some people within the fuel-poor audience, there are signs that comprehension of energy bills remains a barrier/challenge and could be improved.

The cost-of-living crisis has eroded positive perceptions of the energy sector, which has had an impact on this group's opinions on smart meters. Those in fuel poverty are less likely to request a smart meter or accept one if offered by their energy supplier.

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[1] Smart Energy GB Outlook and National Energy Action (NEA)
[2] Basic Digital Skills: UK Report 2020 Ipsos Mori: **ipsos.com/essential-digital-skills-2020**
[3] **carersweek.org**
[4] National Energy Action (NEA)

People lacking basic digital skills:
22% of adults in Britain are defined as lacking basic digital skills. This works out to an estimated population of 11.38 million[5].

They are most likely to be people in three distinct groups: those aged 65+, people with impairments that affect their day-to-day lives and people with no formal qualifications. Lower levels of digital skills amongst 65+ are driven by the oldest age group (75+)[6].

A proportion of those defined as lacking basic digital skills do not have personal internet access and can therefore be considered offline.

The rest of this audience largely contains people who have become online over the past few years. This is likely triggered by the COVID-19 pandemic, where local schemes provided people with a digital device in order to stay in touch with family or friends. However, this has not always translated into having the digital literacy and skills to use this device effectively. Access alone is not enough and providing internet access does not necessarily mean people will go online. Motivation and confidence, as well as perceived ability are likely key reasons behind this.

This audience is less likely to seek or accept a smart meter and more likely to have concerns about getting one.

Carers:
Around 1 in 4 people are carers[7], meaning they make up a significant proportion of the population.

Many carers are already providing support with energy bills or other household administration, as well as teaching others to use new technology — so carers discussing smart meters to the person they support would not feel out of place.

Whilst over a third of carers would advise the person they help or support to get a smart meter, carers need to be confident that smart meters will provide a direct benefit to that person. Therefore, smart meter benefits need to be made clear in order for carers to give a recommendation.

[5] Basic Digital Skills: UK Report 2020 Ipsos Mori: **ipsos.com/essential-digital-skills-2020**
[6] Lloyds Bank Essential Digital Skills Report 2021: **lloydsbank.com/essential-digital-skills-report-2021**
[7] Carers UK

Who can apply for funding?

We are seeking applications from regionally-based organisations (preferably with local networks) that can deliver support to people in one of the target groups outlined above. You will have a trusted voice in your community and will provide support to people in our target groups.

The target groups are significant in size (over 6 million people are in fuel poverty; 11 million people lack the most basic digital skills, 13.6 million are carers). Where possible, we are looking for projects that can engage the target groups **at scale** through a combination of direct and indirect activities.

Previous applicants, both successful and unsuccessful, are eligible to apply. Housing associations and local authorities are eligible to apply too. If your organisation is not a registered charity or local authority, then you may be required to provide further information and supporting documentation along with your grant application.

You can apply for all funding streams, but you must complete separate application forms, each setting out how you would identify, engage and support people in the relevant target group. **However, if successful, we will only award one funding stream per organisation.**

Successful applicants will be expected to participate in monitoring and evaluation activities both during and at the end of their project, as well as attend a mandatory online induction workshop in April 2023. **All projects funded by the Smart Energy GB in Communities programme must conclude by 6th December 2023.** This is a fixed deadline and cannot be extended.

Delivery expectations

We are looking for each project to engage **directly** with people. As a minimum, each project should reach the following:

- fuel poverty partners to reach 2,500 people
- lacking basic digital skills partners to reach 2,000 people
- carers partners to reach 1,500 people

Direct engagement includes face-to face events/activity, phone calls and online sessions.

In addition, projects should aim to reach people through **indirect** activities such as newsletters, website content, social media or advertising on local radio or newspapers.

The targets for indirect reach are as follows:

- fuel poverty projects to deliver 250,000 impressions
- lacking basic digital skills projects to deliver 200,000 impressions
- carers projects to deliver 100,000 impressions

We have set these targets based on our experience of working with partners in 2021 and 2022. In 2022 in particular, partners saw a higher level of engagement due to the energy crisis and people wanting to understand how they can better manage their energy costs. Due to this experience, we believe that the outlined targets are achievable and manageable through a range of existing channels used by our partners.

You can find more information on how figures for reach and impressions can be calculated in the 'Reporting on activities delivered' section of this guide (page 16). An additional document providing further guidance on how to calculate reach and impressions is available upon request.

Examples of the types of projects we might fund

Below are three examples of the kind of projects we might fund.

A project supporting people who are in fuel poverty:

Organisation	Application	Award
A large charitable advice agency working with people in the target group and with an established referral network of community groups that operates alongside the charity.	£24,800 to deliver a local 'get smarter with your energy' campaign. The project works across a network of seven partner agencies who will all incorporate smart meter myth–busting messaging. 2,500 people in the target group will be reached with face–to–face information and guidance about the rollout, as well as telephone advice on how to get a smart meter. Additional people will be reached indirectly through a newsletter, radio broadcast and in–kind activities, resulting in an impressions figure of 255,000 (further information on how this can be calculated can be found under 'Reporting on activities delivered' on page 16). Face–to–face (direct) activities include advice and myth–busting surgeries (30 sessions reaching at least 800 people in the target group), multi–agency events (20 events reaching at least 700 people in the target group), Zoom coffee mornings reaching 400 people and 1–2–1 telephone advice to 600 people. Indirect activities include a tailored newsletter to tenants at risk of fuel poverty and posts on various social media/digital channels, including Facebook. Although not part of the funded activity, the charity will include information about smart meters on their staff intranet and host resources in their public–facing premises for added reach. The campaign is being united with other advice services to expand potential reach and engagement with the target group. The grant is only being used to pay for the portion of costs specific to adding in content about smart meters over and above the core provision.	£24,500 was awarded to support the project. The £300 printed materials are not eligible costs for the fund (as these are provided by Smart Energy GB, free of charge), so this was deducted from the award. The application demonstrates good value for money and reaches people in the target group.

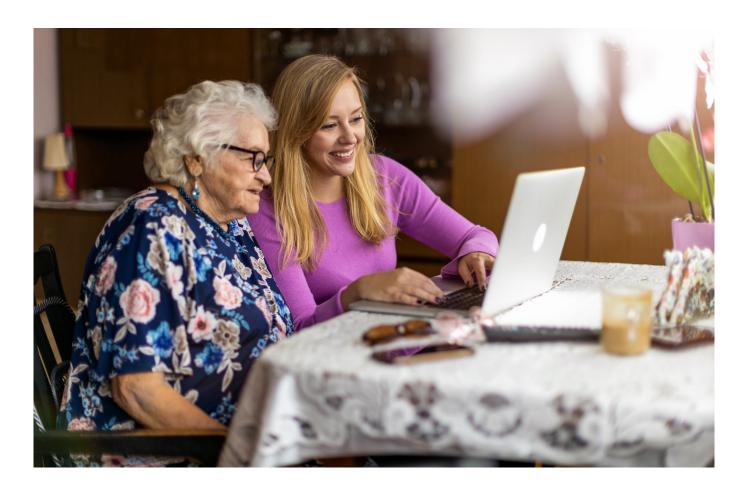| Organisation	Application	Award
	Costs also include 10% project overheads towards management and administration, project stationary, one portable tablet and Smart Energy GB's printed materials.	

A project supporting people who are lacking basic digital skills:

Organisation	Application	Award
A housing association working alongside a small energy advice charity.	£15,000 to deliver tailored information and support on how tenants can benefit from a smart meter. The project will target tenants who have low levels of digital engagement and work with a small energy charity to provide additional advice where required More than 2,000 people in the target group will be reached with face–to–face information about the rollout, as well as telephone advice on how to get a smart meter. Further people will be reached indirectly through a bespoke tenant newsletter, displaying posters and in–kind activities, resulting in an impressions figure of 200,000 (further information on how this can be calculated can be found under 'Reporting on activities delivered' on page 16). Face–to–face (direct) activities include myth–busting surgeries (reaching at least 500 people in the target group), smart meter coffee mornings to offer advice and support (20 events reaching at least 500 people in the target group), a digital skills programme event (reaching 50 people), dementia café attendance (reaching 450 people) and 1–2–1 telephone advice to 500 people. Indirect activities include a tailored newsletter, a mailout to residents and a local radio broadcast to raise awareness of smart meters and take questions from listeners. Although not part of the funded activity, the housing association will work with the small charity to host resources in their shops or waiting rooms for added reach. The grant is only being used to pay for the portion of costs specific to smart meter activities, over and above the housing association's core provision Costs include 10% project overheads and a bespoke poster which will be co–branded and designed in collaboration with Smart Energy GB.	£15,000 was awarded to support the project. The bespoke poster is an allowable cost as this will be designed specifically for the target group in collaboration with Smart Energy GB. The application demonstrates good value for money and reaches people in the target group.

A project supporting people who are carers:

Organisation	Application	Award
A regionally-based carers group	1,500 people in the target group will be reached with face-to-face and online carers group meet-ups, as well as online information about the rollout. Further people will be reached indirectly through social media posts including Twitter, Instagram, and an article in a newsletter, resulting in an impressions figure of 103,000 (further information on how this can be calculated can be found under 'Reporting on activities delivered' on page 16). Face-to-face (direct) activities include online carers group virtual meet-ups (25 sessions reaching at least 400 people in the target group), phone advice to 900 carers and 1-2-1 advice to 200 carers. Indirect activities include an article in an e-newsletter to local carers and social media posts on Facebook and Instagram. Costs also include 10% overheads for management and administration plus an internal training session for the applicant's frontline staff.	£10,000 was awarded to support the project.

The panel are looking for projects which:

- use a **combination of direct and indirect activities** to engage the target group at scale on the subject of smart meters, including giving advice face-to-face or over the phone/online, events, advertising and distributing or displaying information etc.
- reflect a clear understanding of the objectives of the programme and how the activities they will deliver respond to those objectives
- represent good value for money
- show strong links to the relevant target group and clear established relationships with other local networks to enhance reach and engagement to the target group
- can demonstrate how they will engage the target group either through innovative approaches or by building on existing work

What we cannot fund

There are a number of things that we are unable to fund. Please consult the list below and contact us if you are unsure whether your activity falls into any category mentioned.

We will not fund:

- activities which are not targeted at either of the three target groups (people who are living in fuel poverty OR people who lack basic digital skills OR carers)
- organisations not in England, Scotland or Wales
- the promotion of political or religious objectives
- work that is the responsibility of statutory authorities
- organisations that are not considered charitable (this does not relate to Local Authorities, Housing Associations or CICs)
- core funding for your organisation. However, **we will fund 10 per cent towards your overhead costs.** Anything over 10 per cent of the following will not be eligible (e.g. general operating costs, central costs, running costs, management, administration and office costs overheads and support costs)
- projects or activities that are not focussed on our programme objectives
- projects or activities that will have happened or started before we have processed your application
- projects or activities that cannot be completed by the programme end date, 6th December 2023
- projects or activities which do not demonstrate additional activity to your 'business as usual' activities and are not smart meter specific
- costs for the design of monitoring and evaluation consumer surveys (as these will be provided to you by Smart Energy GB) and any costs for research. Please note, costs for printing and/or posting the surveys are eligible — up to £250 can be included in your costs to cover the administration of this
- costs to print any items which may be downloaded for free from the partner section of the Smart Energy GB Resource Centre: **smartenergygb.org/resource-centre.** For example, Smart Energy GB's leaflets and posters aimed at the target group.
- production costs of existing newsletters or brochures which your organisation already produces as a part of your 'business as usual' activities
- costs to undertake engagement with MPs or elected Local Authority members

Online application process for 2023

There are three elements to completing an online application for funding:

1. **Download and complete an Excel Project Plan**
   The Project Plan should be submitted with your online application. Only the 2023 Project Plan will be accepted. Please do not use any versions from previous funding rounds as these will invalidate your application.

   The 2023 template can be downloaded from **nea.org.uk/smart–grants–2023**

2. **Complete the online application form**
   You will be able to start your application, save and complete it later if you wish.

3. **We ask for a number of documents to be submitted as part of our due diligence process. The full list is on page 27 of this document**
   You will be asked to upload your organisation's policies/documents at the end of your online application.

Your application cannot be processed without completing all three elements.

If you experience any difficulties in completing the online application, please email **smartgrants@nea.org.uk** or call **07566 789483**

Smart Energy GB Resource Centre

The Resource Centre hosts lots of materials that can be used to help spread the word about smart meters. A number of resources are available to download and print in alternative formats (easy read, large print, audio and British Sign Language), and some in additional languages (Welsh, Bengali, Urdu, Polish, Gujarati, and Punjabi).

If your application is successful, you will automatically be sent a 'starter pack' of materials, free of charge. These materials have been specifically designed for people in the target group, to help you get your project off the ground.

In addition, if you are successful in becoming a partner and you feel that some of the materials we have produced will not reach the audience as effectively as your own, or you are creating your own materials, then please contact **partners@smartenergyGB.org** to discuss your ideas further.

You do not need to be a partner to use the Resource Centre, so you can sign up now and start using the resources right away. To find out more visit: **smartenergyGB.org/resource–centre**

Please note that in your Project Plan we will not be able to fund any costs for materials that can be viewed, downloaded or ordered for free on the Resource Centre.

Funding timeline

Applications open	Monday 16th January 2023
Deadline for submitting your online application	12 noon on Friday 10th February 2023
Communication of outcome	End of March 2023
Project delivery commences	From Monday 3rd April 2023
Induction workshops for successful applicants	April 2023
Project delivery finishes	Wednesday 6th December 2023

Decisions, acceptance and payment

Once received, your application will be assessed and the outcome will be provided to your organisation within the timeframe outlined above. **As part of the assessment process, we may come back to you to request further information, either to clarify elements of your application or to further support our due diligence process.**

Successful applicants

For those applicants who are successful, you will be contacted via the main contact you provide in your application form. **It is therefore essential that if this contact changes (for instance, if the named contact leaves the organisation), you update us so that we can amend our records.**

If your application is successful, you will be asked to return a signed grant award letter to NEA. Unfortunately, we are unable to make any payment to organisations until this document has been received, so it is important that it is returned promptly. **This must be returned within ten working days of the date of the letter.** Failure to do so will result in expiry of the grant offer.

We also request that organisations return evidence of their bank details as part of their online application, either as a paying-in slip, cancelled cheque or a bank statement from within the last three months. This is important so that we can make payment to the correct account. Please note that any evidence of bank details (including online bank statements) should show the full name of your organisation and this should be the same as the name on your online application form.

Payment of grant is made via BACS transfer and usually takes 10 working days to reach your account. Payment will usually be made in the following proportions:
- 70 per cent at commencement of project
- 30 per cent on satisfactory completion of monitoring and evaluation requirements

Please see the section on 'Monitoring and evaluation requirements for successful grant applicants' on page 15.

Partner induction workshops

All successful partners must attend ONE online induction workshop in April 2023. The workshop will provide an overview of the grant requirements and other key updates. We ask that two members of staff from the partner organisation attend: the project lead and a member of your delivery team.

The online workshop aims to bring together appointed partners to provide an overview of the fund's objectives, the latest research and insight into the target group, project reporting processes, expectations and timelines. Therefore, it's very important that the people who are delivering the project and completing reports are the ones to attend. An agenda will be circulated in advance.

Successful applicants are also encouraged to invite local partner agencies who are supporting the delivery of your project.

We anticipate the online workshops taking place between 11th and 21st April. Further details will be provided closer to the time.

Smart meter training

NEA is able to offer successful applicants access to a smart meter e-learning course providing an overview of the rollout, customer journey, common myth-busting and where to seek additional information. The training is aimed at those who are new to the smart meter rollout or those wishing to have a refresher.

Monitoring and evaluation requirements for projects

All successful applicants must adhere to the terms and conditions of the grant award. Failure to do so will potentially affect the release of any final payments or affect future applications from your organisation. The terms will be listed in the grant award letter.

Monitoring and evaluation of our partnerships is crucial to us. We need to understand and evaluate the impact of the smart meter activities delivered so we can work with our partners to continuously learn and improve how we support people with the rollout of smart meters. To do this effectively, successful partners are required to:

- **keep a copy of any activities undertaken during the project, for example through:**
  - attendance sheets from your activities
  - details of dates and venues where activities have taken place (online or face-to-face)
  - supporting information from partner agencies where joint activities are delivered
  - copies of emails, posters or leaflets used to promote events
  - photos (subject to appropriate permissions)
  - other relevant evidence which you consider may effectively demonstrate actual delivery against project targets

- **participate in brief monthly phone calls with NEA to discuss project progress and any support that you might require**

- **return key project documents and surveys:**
  - complete a mini headline report (a template will be provided)
  - complete an interim report (a template will be provided)
  - distribute and return a short consumer survey to the people reached by your direct project activities, with a target in terms of returns dependent on the grant you have applied for (a copy of

the survey will be provided)
- provide a case study (a template will be provided)
- complete an end of project report (a template will be provided)

Reporting on activities delivered

The details you provide in your online application form and Project Plan will include the predicted reach for your project activities. **By 'reach' we mean the number of people that you will reach, see or engage in your activities. We will use this information to track your project's progress towards its targets.**

You will be asked to report on the following:
1. Any **direct activity.** This is the number of **unique people** that have been exposed to the activity. For example, those attending a talk at their local community centre, or the number of people receiving a phone call from you
2. For **indirect activity**, this will be reported using impressions. Impressions covers both the number of people exposed and the total number of times there is opportunity for people to see content or activity. This is more likely to happen when referring to information on posters, or information sent out on social media or in an email. Further detail is provided under the 'Guidance on completing your online application' section of this guide (page 18), and an additional document is available upon request.

Once you have commenced your project activities, we will require you to provide an update on what has been delivered by submitting a headline and an interim report. Upon completion of the project, you will be required to submit an end of project report. The end of project report will need to be provided and analysed before your final grant payment can be released in early 2024, subject to meeting all criteria.

Consumer survey

Once your project is underway, we expect you to distribute a short consumer survey to the service users/beneficiaries of your project activities — this is crucial as it enables Smart Energy GB to evaluate the impact of the programme on the people it reaches.

When distributing the survey, partners are expected to return:
- for partners applying for a grant to reach people in fuel poverty, whose grant value is between £15,000 – £25,000, the target is at least 200 survey returns from the target audience
- for partners applying for a grant to reach people lacking basic digital skills, whose grant value is between £10,000 – £15,000, the target is at least 120 survey returns from the target audience
- for partners applying for grant to reach carers, whose grant value is between £7,500 – £10,000, the target is at least 100 survey returns from the target audience

We will need you to make sure that you distribute it to the people you talk to about smart meters — ideally to all of them, but if that is not possible, to a random sample to help avoid bias in responses. Smart Energy GB will provide further guidance on monitoring and evaluation to successful applicants at the online induction workshop.

Further research

To help us highlight your work more effectively or improve the programme, you may be required to participate in a site visit or take part in further in-depth research. It is expected that you will co-operate fully with this, should you receive a grant from us.

Guidance on completing your online application

The following section of this guidance document refers specifically to the questions we ask as part of the application process. As well as completing an Excel Project Plan and an online application form, we also ask you to upload supporting documentation as part of your application.

The Project Plan template and online application can be accessed here: **nea.org.uk/smart-grants-2023**

The deadline for completing your application is **12 noon, Friday 10th February 2023.**

Online application forms that are incomplete when submitted will be rejected.

Within the online application, you will be asked to confirm which funding stream you are applying for:

- projects supporting people who are experiencing fuel poverty (funding of between £15,000 and £25,000 is available)
- projects supporting people who are lacking basic digital skills (funding of between £10,000 and £15,000 is available)
- projects supporting people who are carers (funding of between £7,500 and £10,000 is available)

As outlined above, **we will only award one funding stream per organisation.**

Please remember that the assessment of your project is undertaken upon your submitted application form, and we are only able to make a decision on the information that you provide.

This is your opportunity to tell us about your organisation, project, the great work it does, and demonstrate how it will achieve the Fund's objectives and reach the target group you have selected.

Project plan

The 2023 Project Plan template can be downloaded from: **nea.org.uk/smart–grants–2023**. Please do not use other versions of the Project Plan from previous funding rounds. Your application will be invalid if the incorrect Project Plan is used. **Only the 2023 template will be accepted.**

Your Project Plan should include all of your proposed activities, the category and type of activity, start/ end date, predicted reach or number of people to benefit from the activity, and how much funding is being requested.

The template Project Plan includes an example so you can see what a completed plan could look like — please refer to the 'Example Project Plan' tab.

To help complete the Project Plan, we've put together the following guidance on the information that is being requested:

- **What is the activity?** Enter the activity you are planning and how many you will deliver (e.g. 50 coffee morning events; develop a newsletter with smart meter information for the target group; provide 100 people with 1–2–1 advice etc.)

- **What is the activity category?** Please ensure you use a clear rationale when estimating the number of people in the target group. You can select from one of the following options:

1. Advertising or sponsorship (e.g. advertising on a local radio or in a magazine)
2. Event(s): provide information about smart meters at an event (e.g. talk at a community meeting)
3. Giving advice: give advice or have a conversation about smart meters (e.g. phone call, online conversation, or home visit)
4. Information displayed in public (e.g. putting up a poster about smart meters in a community centre, library, shop or other buildings accessed by the target group)
5. Information distributed to people (e.g. sending out a newsletter, letter, leaflets or emails about smart meters)

6. Public relations: generating coverage in the media (e.g. article in a newspaper or on a news site)
7. Training colleagues or frontline staff (e.g. training colleagues or external stakeholders about smart meters)
8. Website or social media: publish or post information online (e.g. information about smart meters on your website, Twitter/Facebook posts, online/digital banner ads or search ads, online videos such as YouTube etc.)

- **Direct / Indirect activity?** This cell on the Project Plan will be auto-filled based on the activity category you select. For reference:

1. **Direct activities** – These are activities that have direct engagement with an individual on the subject of smart meters (e.g. events, face-to-face advice, telephone advice and advice provided in online advice sessions). We ask that you predict the unique number of people that have been exposed to this type of activity. We refer to this as the number of people reached.

2. **Indirect activities** – These are activities that are being delivered indirectly (i.e. by broadcasting to an unspecified audience), but which should still have the aim of capturing the intended target group at scale. For example, sending out a newsletter about smart meters to all of a housing association's tenants, of which 75 per cent are in this year's target group. Other indirect activities can include distributing leaflets, radio broadcasts, displaying posters, mailing lists (email or otherwise), websites, social media etc.

   For indirect activity, this will be reported using impressions. Impressions is the number of times your ad or content has been seen. They key difference is that **reach refers to individual people, whereas impressions can be the same users seeing your content multiple times.**

   Impressions cover both the number of people exposed and the total number of times there is opportunity for them to see content or activity. Impressions are more likely to be referenced when referring to information shared on posters, social media or in an email. For example:

   - **social media posts** (e.g. tweets, Instagram or Facebook posts): The number reported would be the number of people following the account that made the post and the number of times it has been posted, for instance three tweets posted on your Twitter feed which has 10,000 followers = 30,000 impressions.
   - **email circulations:** The number reported would be the number of people on the distribution list multiplied by the number of each new emails sent out. For example, two emails sent out to a distribution list of 2,000 people = 4,000 impressions.
   - **information displayed in a public place:** The number reported would be the estimated footfall of people who pass the information. For example, if a community centre displays a poster for six months and the average footfall of the centre is 300 people per month = 1,800 impressions.
   - **training**: if your project intends to train colleagues or stakeholders about smart meters, this will be classed as 'training'. Should you wish to include this activity, you can apply for up to a maximum of £400 towards the delivery of your training activities (e.g. holding a face-to-face smart meter briefing session for tenant engagement officers).

Further information on how to calculate impressions for your Project Plan is available and can be provided upon request.

- **What is the activity type? Select whether your activity is:**
  1. Business to consumer (B2C) e.g. the activity is delivered to consumers/householders.
  2. Business to business (B2B) e.g. the activity is delivered to professionals.
- **When is the activity start / end date?**
- **Where will the activity take place?** Please include the area if known.
- **What is the predicted total reach of the activity?** This means the total number of people who will be reached by the activity. By 'reach' we mean the number of people that you will reach, see or engage in your activity. This includes people reached that are not in the target group. Whilst we ask partners to focus their activity on specific audiences, we recognise that they will naturally reach some further people and this can be included in the figure.
- **Who will be responsible for delivering your activity?** Will this be your organisation, an individual or a partner organisation?
- **What is the amount you are requesting from Smart Energy GB in Communities?**
- **What is the breakdown of costs?** Please provide an explanation of your costs
- **Notes (including reach rationale)** Please provide brief detail about the activity, including how the reach/impressions have been calculated. For indirect activity, please identify the asset to be used from the Resource Centre or give an outline of your ideas if creating bespoke materials.

In your Project Plan, you can choose to apply for:
- Printing/postage of the consumer survey. As part of the monitoring and evaluation of your project, it is your responsibility to ensure that people who have attended your activities or received information from you are given the opportunity to complete a consumer survey. We appreciate that the cost of printing and/or postage can be expensive — so an amount up to £250 can be included in your costs to cover this. Please note that the survey can be returned via a freepost address. When we say this cost can go towards postage, we are referring to instances where you might post out blank copies of the survey to your beneficiaries for them to complete (e.g. following advice provided over the telephone) and then return to the freepost address.
- 10 per cent towards your project overheads is automatically calculated and included in your Project Plan. If you do not wish to claim this, please contact **smartgrants@nea.org.uk** and ask for it to be removed prior to submission of your completed application.
- Training for colleagues/frontline staff. If you wish to deliver smart meter training to colleagues or other frontline partners as part of your project, you can apply for up to £400 to cover these costs.

Please note that these costs must form part of the total amount requested to deliver your project.

Once you have completed the tab 'Project Plan', you will see the 'Project Plan Summary' tab has been automatically populated. Please review this tab as the figures in here will become your project targets and your progress will be monitored against these.

Online application

Section one: Pre-application checklist

It is important that you read the pre-application checklist before you start to complete the online application form. This will help you to understand if your organisation meets certain key criteria, which it must fulfil in order to be eligible for a grant.

If you have answered NO to any of the questions in the pre-application checklist, please email **smartgrants@nea.org.uk** or call **07566 789483** to discuss further and see if we can help you.

Section two: About your organisation

Organisation name

This should be the full name of your organisation as it appears on your governance documents, or if you are a registered charity or other registered organisation, this should be the name you are registered under.

Registered address / postcode / region / website / telephone

If you are a registered charity or other registered organisation (such as a Community Interest Company), please provide the registered address of your organisation. If you are not a registered organisation, please tell us the address of your main place of business.

Under region, please select the main geographic region where your project's delivery will take place.

Charity registration number (if applicable)

If your organisation is registered with either the Charity Commission or the Office of the Scottish Charity Regulator then please provide your registration number.

Company registration number (if applicable)

If your organisation is a registered company, then please provide the company registration number here.

When was your organisation set up?

Please provide us with the date of formation of your organisation.

Are you part of a larger regional or national organisation?

If your organisation is part of a larger regional or national organisation, please provide details.

Turnover of your organisation for the last two financial years

Turnover is another term for gross income or total income received. Please tell us the figures for the last two full financial years for which you were in operation. This should be the total income prior to any overheads or expenditure.

If your organisation has not yet been trading for a full financial year, please indicate your estimated income for the current financial year.

Number of full-time staff, part-time staff and volunteers
This information allows us to ensure that your organisation is in a position to deliver the activities within your proposed project.

It is also important to remember that any recruitment of staff that may be required to deliver your project needs to happen in an appropriate time frame. You should detail this in Section 4.

Please tell us about the set-up and staffing of your organisation (75 words max.)
Briefly tell us about the way your organisation is set up and how it is staffed.

Please summarise what your organisation does and its main activities (100 words max.)
Briefly tell us what your organisation does and summarise its main activities. Remember that we can only assess your organisation and application on the information provided to us.

Please tell us about a similar grant-funded project you have previously successfully delivered
(100 words max.)
If you have delivered a similar grant-funded project before, please tell us about the project(s). For example, what did it involve, who did you work with, did you work in partnership with any organisations etc.

Where did you hear about the Smart Energy GB in Communities Fund?
Please tell us where you heard about the 2023 Smart Energy GB in Communities Fund.

Section three: Contact information
Main contact for the application
Please provide contact details of a person within your organisation who we can contact to discuss this application with. We would normally expect this to be the person who completes and submits the application. If these contact details change for any reason, please make sure you tell us.

Day-to-day contact for delivery of the project (or a secondary contact if main contact is unavailable)
Please provide contact details of the person responsible for delivering the project or a secondary contact person in the event that the main contact is unavailable. This person will receive regular communications about the project, so it is important that this is the person involved in delivering your activities. If these contact details change, please make sure you tell us.

Communication needs (if applicable)
Please tell us if you have any communication needs (e.g. large print, text-phone etc.)

Section four: About your project

Which funding stream are you applying for?

Fuel poverty, lacking basic digital skills or carers.

Grant amount applied for in 2023

This should be the amount of grant funding you are requesting in 2023. **This figure must match the total amount requested in your Project Plan.**

Project start and end date

For this funding round, projects are expected to commence from 3rd April 2023 and finish by 6th December 2023.

The next set of questions will enable you to tell us about your proposed project in more detail. **Remember, we would like you to meet the following objectives when delivering your project.**

Objectives for the target groups: people who are in fuel poverty OR people lacking basic digital skills
- To ensure that people in the target group understand how smart meters can benefit them
- To increase the likelihood that people in the target group will seek or accept a smart meter

Objectives for the target group: people who are carers
- To ensure that people in the target group understand how smart meters can benefit the person they care for
- To increase the likelihood that people in the target group would recommend a smart meter to the person that they care for

What will the project funding be used for? (400 words max.)

Please tell us:
- a summary of what you plan to deliver, including the type of smart meter focussed activities. This is your chance to give us an overview of what your project will look like
- how activity will be recorded, for example attendance lists of events, database records etc.
- when they will be delivered and their location

Where will your project be delivered?

Please tell us which city/town(s) your project activities will take place in.

How will you staff your project? (100 words max.)

Please tell us:
- how you will staff the project (including any recruitment). As well as delivery please consider the project reporting and survey requirements.
- if the person writing the application will also be involved in the delivery, and if so how. If not, how will you ensure a smooth delivery?

Tell us how you plan to identify people in the target group (200 words max.)

This is your opportunity to tell us how you plan to identify people in this year's target group.

For the activities you propose to deliver, we would like to understand why you have chosen this approach to engage people. (250 words max. for each part of the question)

a) For your direct activities (giving advice in person/via phone/online or events), tell us:

- how this method(s) will lead to engagement and tangible impacts/benefits for the target group. Why are they suitable methods for this audience? How will this method(s) reach people in the target group at scale?

b) For your indirect activities (information displayed/distributed, public relations, advertising, websites/ social media), tell us:

- how this method(s) will lead to engagement and tangible impacts/benefits for the target group. Why are they suitable methods for this audience? How will this method(s) reach people in the target group at scale?

Once you've identified people in the target group, how will your chosen project activities seek to engage and benefit them? Why have you chosen those particular approaches? You might have a tried and tested method, or you may be trying something new and innovative.

Some individuals in your target group may face barriers that prevent them from engaging with the smart meter rollout. What are these barriers, needs or vulnerabilities? Please also tell us how you plan to address and overcome them (350 words max.)

Specifically referring to the target group, what barriers or needs are you trying to address through your project that may prevent engagement with the smart meter rollout? And how do you plan to overcome them?

Please tell us how your project provides added value to the services you and/or your partners are already providing (200 words max.)

In this question, please consider how your organisation and its partners are best placed to deliver this project and how it is over and above 'business as usual' activity.

Please note that Smart Energy GB cannot fund existing core activities. The amount requested from the Smart Energy GB in Communities Fund must only be for the elements which are additional to 'business as usual' activities for yourselves and your partner organisation(s).

What local partners/organisations are you working with to further the reach of your project?

To further the reach of your proposed project, we anticipate some applicants to be working with other local partners/organisations to deliver your project. Please list any local partners that you are currently working with that will be involved in your smart meter project.

How will the involvement of these partners help you to achieve your project objectives?
(250 words max.)

Detail how the involvement of these local organisations will help support and deliver your project. For example, they may help you to engage directly with the target group, or they may have events that you can incorporate smart meter activity into.

If you do not plan to work with partners, please provide a rationale as to how you plan to achieve your objectives.

Please identify at least two potential risks or issues you see with the delivery of your project and how you propose to overcome them (250 words max.)

For example, you may encounter challenges when engaging with the target group about smart meters, or your organisation may have insufficient staffing to deliver the activities within the planned timeframe. It might be that you face issues with beneficiaries completing the consumer survey. How would you mitigate these risks?

Section five: Online induction workshops and project resources

All successful partners are expected to attend a mandatory online induction workshop. We ask that two members of staff from the partner organisation attend: the project lead or manager responsible and a member of your delivery team. Successful applicants are also encouraged to invite local partner agencies who are supporting the delivery of your project.

In this section of the application form, you will be asked to confirm that you have understood this requirement of the grant.

Section five of the online application also asks whether you require a demonstration in-home display or accessible in-home display to aid the delivery of your project activities.

In-home display (IHD): smart meters come with a small device known as an IHD, which enable the householder to see in real-time how much energy is being used in pounds and pence.

Accessible IHD: this has been specifically designed for people who are blind, partially sighted, or have difficulties with dexterity or memory loss. The accessible IHD has additional features that could make tracking energy usage easier.

Please indicate how many demo IHD units you require. Projects can request a maximum of two IHDs and/or one accessible IHD.

If you have received funding from Smart Energy in Communities in the past and still have working demo IHD units from then, we request that you re-use these, rather than requesting any further.

Section five also asks if you are already using Smart Energy GB's online Resource Centre to access smart meter materials.

The Resource Centre currently provides the majority of materials in the following alternative formats and languages:
- English, Welsh, Polish, Punjabi, Gujarati, Bengali and Urdu
- British Sign Language (BSL), English and Welsh audio, easy read, large print and braille (braille upon request)

If you were to be successful in your application, are there any languages or alternative formats beyond those listed that you may need?

Section six: Supporting documentation

We now require you to upload your organisation's supporting documentation for our due diligence process. You can upload a maximum of 150MB.

The documents to upload include:
- Your completed Project Plan
- Health and Safety Policy
- Safeguarding Policy
- General Data Protection Regulation Policy
- Customer Code of Practice or similar
- Public Liability Insurance
- Employers Liability Insurance
- Professional Indemnity/Contract Liability
- Bank Statement, paying–in slip or cancelled cheque (from within the last 3 months). This must show the full name of your organisation
- Audited Accounts or Independently Examined Accounts for the last two years

If your accounts are available online, there is the option to provide the location URL.

There is also an opportunity to provide any additional information about the policies/documents that have been requested. For example, if your organisation does not have professional indemnity insurance you can tell us why not.

Section seven: Declaration

Please ensure that you have ticked all the relevant boxes and enter the contact details of the person submitting the application form.

The information in your declaration will be used to confirm that your organisation is eligible for funding. We may contact you if we need to clarify any of the information that you provide.

By submitting this application, you understand and confirm that the information you have provided in this application form is correct. This particularly relates to:
- what your organisation does
- describing your organisation's activities and areas of operation
- how you would use a grant from us to support your smart meter activities, what you plan to do and what you will spend the money on to make it happen
- this bank account is solely used to manage your organisation's finances
- you fully understand that the grant award funding that NEA pay into this nominated account must be used in accordance with the Terms and Conditions of the grant

The information supplied in the online application form and any supporting documentation will be submitted to NEA, to assess the eligibility and suitability of each potential applicant to participate in the Smart Energy GB in Communities programme.

Next steps

After you submit your online application, you should receive an email notification.
If you do not receive this within 24 hours, please check your junk folder and then contact smartgrants@nea.org.uk

We may reach out to you if we have any questions or need further information.

Contacting us

If you have a query about your application, please get in touch.

E–mail: **smartgrants@nea.org.uk**
Telephone: **07566 789483**