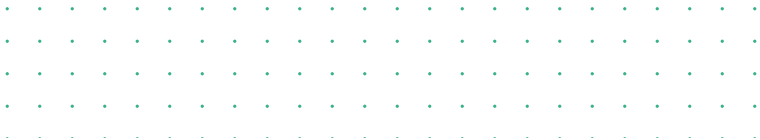# Smart Energy GB in Communities Fund
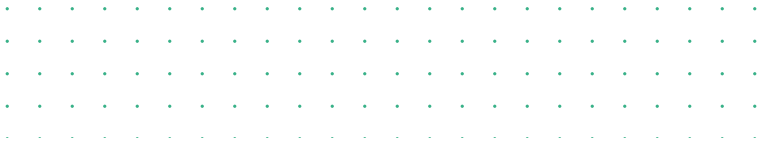
2024

smart energy GB

Join the energy revolution

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Guidance for applicants 2024

Thank you for your interest in the Smart Energy GB in Communities Fund.

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 in England, Scotland and Wales, and specifically works to communicate with vulnerable customers with whom dedicated efforts may be needed to ensure they are reached effectively. This means we're looking to partner with trusted, expert organisations across the country who can help to ensure people understand and benefit from smart meters.

This document provides guidance to help you fill in our online application form.

Funding will be available for organisations who can reach adults who are without essential digital skills, primarily those who are aged 75+. Grants between £7,500 and £25,000 are available.

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**).

The application process to become a Smart Energy GB in Communities 2024 partner is being run by the charity National Energy Action (NEA). For more information about NEA, visit **nea.org.uk** (registered charity no. 290511).

If you have any questions regarding the application process, please contact us using the following details:

Email: **smartgrants@nea.org.uk**
Phone: 07566 789 483

Drop–in session for questions and answers

During the application window, NEA and Smart Energy GB will host an online drop–in session to answer any questions you might have about the application process or your proposed project.

The session will take place on Zoom on Tuesday 23 January from 11:30am to 12:30pm. You can join via **this link**.

About Smart Energy GB

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

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.

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 2023, 33.9 million smart and advanced meters were in homes and small businesses across Great Britain.[1]

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 consumers to keep track of how much energy they're using and how much they're spending
- help consumers to work out where they may be able to save energy
- send accurate and automatic bills to a consumer's supplier so they receive bills based on what they have used, not an estimate
- help make Britain's energy system more flexible and efficient, based on how much energy the country needs and when it needs 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

[1] **DESNZ published data** [September 2023]

Hear from previous funded partners

Geraint Turner,
Operations Director at Swansea MAD:
"The funding from Smart Energy GB really enabled Swansea MAD to work with people who needed support the most. At a time where energy prices are so volatile and very confusing to people, having the ability and resource to have dedicated staff on hand to support people and provide them with information that could help them take control of their energy is important."

Swansea MAD beneficiary:
"I was always wary of smart meters because of the things you hear and read on social media and the news, but actually the one I've got is really helping us to know how much gas and electric we are using."

Hannah Forbes, Programme Director at Leigh Youth Development Trust:
"Funding from Smart Energy GB is amazing for the A team Hub, because when we set it up, we wanted to be a one stop shop. The training and resources have allowed my staff to train up, so they're very confident in speaking to people about smart meters and energy bills, as well as other support in the area like local food banks ... because our beneficiaries are from vulnerable communities or on a low income, it means so much to them to receive that support."

Objectives and target audience

Objectives

- 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 audience

The programme supports those who might find it difficult to engage with the smart meter rollout. In 2024, the target audience is **people without essential digital skills**. This would include those without the essential skills needed to operate digital devices, such using a mouse and keyboard and turning on a device.

This would also include those who would be unable to manage information, communicate, transact, problem–solve or create basic digital content. Please note, for partners involved in the 2023 project, this is the same audience as 'Lacking Basic Digital Skills'.

This audience is less likely to contact their supplier to request a smart meter or accept a smart meter if offered one from their supplier. They are also more likely to state that they do not wish or intend to get one.

We know that those without essential digital skills often present with a number of other characteristics that may act as barriers to understanding smart meters, some of which are due to the age of this audience. We are actively seeking applications from partners who can evidence reaching people with a number of these characteristics, including:

- aged 75+
- have at least one disability or impairment (for example, but not limited to, relating to sensory, physical, mental health or learning/memory)[2]
- from lower socioeconomic groups[2]
- lower literacy[3]

Versus the general population, this audience are much less likely to use online channels such as websites and social media.[4] In line with this, we would not expect successful partners to communicate with this audience via online channels and instead, would consider other ways of reaching them, for example but not limited to: face-to-face contact; telephone; printed media (newspaper; magazines); radio; post; events, out–of–home (posters).

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[2] **Lloyd's Digital Consumer Digital Index Report** [2023]
[3] **Lloyd's Digital Consumer Index** [2022]
[4] MSix Audience Profiling [December 2023]

Who can apply for funding?

Types of activity

We are seeking applications from regionally-based organisations (preferably with local networks) that can deliver support to people without essential digital skills. You will have a trusted voice in your community and have existing means of engagement with the target group.

We are looking for organisations who can deliver two types of activity:

- **Direct activity**: Direct contact with people in the target audience, such as face-to-face events, advice or via telephone
- **Indirect activity**: Communication or marketing channels used to indirectly reach the target audience and convey information about smart meters, such as the use of advertising (for example, but not limited to, newsletters, posters, leaflets and radio adverts)

Delivery dates

We are looking for partners who can deliver activity from early April 2024 and conclude activity by 4 December 2024. This is a fixed deadline and cannot be extended.

Previous applicants

Previous applicants, both successful and unsuccessful, are eligible to apply. **However, if you have been in receipt of funding from this programme for the last three consecutive years you are not eligible to apply this year.**

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.

If you are unsure about whether or not you can apply for funding, contact **smartgrants@nea.org.uk**

Delivery expectations

Targets

We set a number of targets, which are based on the level of grant you are awarded. These targets are based on what has been accomplished by project partners in previous years so we are confident these are achievable. Whilst successful applicants need to have the resource to deliver their activities, support is available from Smart Energy GB and National Energy Action during the programme to help you achieve these.

Level	Grant value	Targets per partner		
		Direct contacts	Indirect impressions	Consumer survey returns
1	£7,500–£15,000	1,300	145,000	100
2	£15,001–£25,000	2,600	290,000	200

Once your project is underway, we expect you to distribute a short consumer survey in paper format for face-to-face funded activities. This is crucial as it enables Smart Energy GB to evaluate the impact of the programme on the people it reaches. More information about the consumer survey can be found on **page 11**.

Also see **page 11** for more information on how these Direct Contacts, and Indirect Impressions figures can be calculated. Please contact NEA during the application window if you require further guidance.

Induction and training

Partner induction workshops

All successful partners must attend ONE partner induction workshop in April 2024, which will be held online. 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, 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 to attend.

We anticipate the online workshops taking place on 10 and 11 April. Further details will be provided closer to the time.

Smart meter training

Key project staff are encouraged to complete NEA's free short e-learning course on smart meters **at the start of their project**, to ensure consistent messages and content is shared with people in the target group.

The course provides 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.

Course participants have given the training an average rating of 4.8 out of 5 with learners commenting on how their knowledge and confidence had both increased as a result.

Other training

Additional training may be offered throughout the year (April to December 2024) to provide relevant updates and support with project delivery and it is encouraged that successful partners make every effort to join these.

Further research

So that we can 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.

Monitoring and evaluation requirements for projects

Overview

All successful applicants must adhere to the terms and conditions of the grant award and failure to do so will potentially affect 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:

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

- participate in brief monthly video calls with NEA to discuss project progress, insights, learnings and any bespoke support that you might require

- return key project documents and surveys:

  o complete a headline report (a template will be provided)
  o complete an interim report (a template will be provided)
  o distribute and return a short paper consumer survey to the people reached by your direct project activities, with a target in terms of returns dependent on the size of grant you have applied for (a copy of the survey will be provided)
  o provide a case study (a template will be provided)
  o complete an end of project report (a template will be provided)
  o copies of any bespoke assets that you create
  o photos of your funded activities being delivered (with relevant permissions)

The timeline for completing these reports are as follows:

- gathering surveys from relevant people in the target group throughout their activity and posting these via a freepost address to Smart Energy GB
- completion of the 'Headline report' by 5 July 2024
- completion of the 'Interim report' by 4 October 2024
- completion of the 'Final report' by 6 December 2024

Reporting on different types of activities delivered

The details you provide in your online application form and Project Plan will include the predicted exposure for your project activities. **By exposure, 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. **Direct contacts, used for Direct Activity**: this is the number of **unique people** that you have spoken to directly — face–to–face, over the phone or at events. For example, those attending a talk at their local community centre or the number of people receiving a phone call from you.
2. **Indirect impressions, used for Indirect Activity**: this is the number of times a person has been exposed to your indirect activity, such as via posters, on the radio, information sent in the post or seen in a newspaper. This will be reported using impressions which covers both the number of people exposed and the total number of times those people have seen content or activity. For example, if one person sees a poster but also receives a leaflet through their post box, this would count as two impressions (x1 person; x2 times content has been seen). This does not include direct activity.

Further detail is provided under the '**Guidance on completing your online application**' section, and an additional document is available upon request.

Consumer survey

Once your project is underway, we expect you to distribute a short consumer survey in paper format for face–to–face funded activities. This is crucial as it enables Smart Energy GB to evaluate the impact of the programme on the people it reaches. See Targets on **page 8**.

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 avoid bias in responses. Smart Energy GB will provide further guidance on monitoring and evaluation to successful applicants at the online induction workshop.

Contact with NEA and Smart Energy GB

During the delivery period, successful project partners will be expected to participate in monthly insight/learning video calls with NEA and/or Smart Energy GB. We want to build a strong partnership with your organisation and we hope this brief regular contact will enable us to provide bespoke support and capture any insights or learnings your project is encountering. Each successful project will have a dedicated NEA point of contact who you can reach out to at any point during the delivery period.
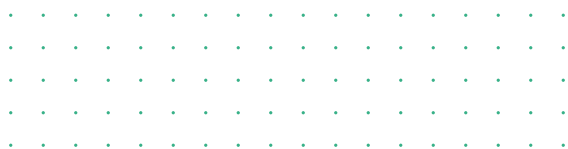
Support available for funded partners

Whilst you must have the resource and expertise to deliver the activities outlined in your application, we want you to get as much as possible out of the funding. As such, we offer a number of different opportunities to get support including:

Drop-ins

During the delivery period, a series of short online drop-in sessions will be held on Zoom. Successful partners will all be invited to join for shared learning, peer-to-peer support and the opportunity to share ideas and good practice with others. Details of these will be shared with successful applicants.

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 in alternative formats, such as Easy Read, Large Print, Audio and British Sign Language, and some in additional languages.

All materials that are found on the Resource centre can be downloaded or printed and delivered free of charge. Therefore, you should not include costs for these in your Project Plan as we will not provide additional funding for the production of these materials. Any such costs will be deducted from your award.

Example assets that you can access on the Resource centre include a poster, an 8-page leaflet and a British Sign Language video. Please note, these resources are subject to change.

You do not need to receive funding to use the Resource centre. You can download or order free printed assets right away and start promoting smart meters to your community: smartenergyGB.org/resource-centre/materials

If your application is successful, you will automatically be sent a free 'starter' pack of materials that have been specifically designed for people in the target group, to help you get your project off the ground. For example, this includes a sample of posters and leaflets.

Content creation

If you have the resource to do so, we would encourage you to create and use your own 'bespoke assets'. That is, materials that you are creating specifically for this activity. These assets must be shared with Smart Energy GB for approval prior to publicly using them, to ensure that they comply with Smart Energy GB branding guidelines but also Advertising Standards Authority guidelines. More information will be shared with successful partners about this process.

## Marketing and communications consultancy and support

Successful partners will be provided with templated content and marketing materials that can be used during project activities (e.g. text for newsletters or articles; video and radio scripts;). In addition, Smart Energy GB has a centralised marketing and communications team who are able to provide individualised support to partners with indirect activities, if this required.

Examples of previous funded projects

Funding of £24,800 requested to support a project reaching people who are without essential digital skills:

Organisation	Application	Award
A large charitable advice agency working with people who are without essential digital skills 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 7 partner agencies who will all incorporate smart meter myth busting messaging. 2,600 direct contacts will be reached with face-to-face information and guidance about the rollout and 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 indirect impressions figure of 300,000 (further information on how this can be calculated can be found under 'reporting on activities delivered' on **page 11**). Face-to-face (direct) activities include advice and myth busting surgeries (40 sessions reaching at least 800 people in the target group), multi-agency events (60 events reaching at least 1,100 people in the target group), and 1–2–1 telephone advice to 700 people. Indirect activities include a tailored newsletter to residents in the target group, and a radio interview to raise awareness of smart meters and take questions from listeners. Although not part of the funded activity, the charity will include information about smart meters on their staff intranet as well as 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. Costs also include 10% project overheads towards management and administration, project stationary, one portable tablet and Smart Energy GB's printed materials.	£24,500 was awarded to support the project. The £300 printed materials are not eligible costs for the fund (as these are provided free by Smart Energy GB), so this was deducted from the award. The application demonstrates good value for money and reaches people in the target group.
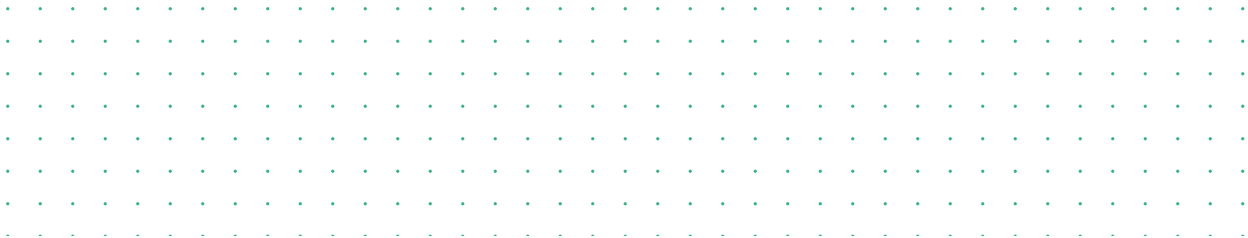
Funding of £13,000 requested to support a project reaching people who are without essential digital skills:

Organisation	Application	Award
A housing association, working alongside a small energy advice charity.	£13,000 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 will work with a small energy charity to provide additional advice where required. More than 1,300 direct contacts 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 multiple posters and in-kind activities, resulting in an impressions figure of 145,000 (further information on how this can be calculated can be found under 'reporting on activities delivered' on page 11). Face-to-face (direct) activities include myth busting surgeries (reaching at least 400 tenants in the target group), smart meter coffee mornings to offer advice and support (20 events reaching at least 400 people in the target group), a digital skills programme event (reaching 50 people), dementia café attendance (reaching 300 people) and 1–2–1 telephone advice to 150 people. Indirect activities include a tailored newsletter, a mailout to tenants and displaying bespoke posters and leaflets in various formats/languages. 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 and leaflet which will be co-branded and designed in collaboration with Smart Energy GB.	£13,000 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.

Application process and assessment

What we are looking for
The panel are looking for projects which:

- can provide credible, trusted **direct** support to the target group, such as face-to-face or telephone advice, or contact at events
- can complement direct work through **meaningful indirect activities** which increase the scale of people in the target group reached, such as advertising or distributing and displaying information. Whilst indirect activity can often lead to a big number of people seeing your content/materials, we are looking for this to be high-quality and to be as impactful as possible so please consider this when setting out what sort of indirect activity you propose to deliver in your application form and why
- 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 into the target group and clear established relationships with other local networks to enhance reach and engagement to the target group
- can evidence they can reach people with the characteristics of the target audience (see **page 7**)
- can demonstrate how they will engage the target group either through innovative approaches or by building on existing work

What we cannot 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 the target group (people who are without essential digital skills)
- organisations **not** in England, Scotland or Wales
- organisations who have received three consecutive years of funding from this programme
- 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, 4 December 2024
- 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 or ordered 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 2024

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 2024 Project Plan template will be accepted. Please do not use any versions from previous funding rounds as these will invalidate your application. The 2024 template can be downloaded from **nea.org.uk/work–with–us/smart–meters/smart–grants–2024**.

2. **Complete the online application form**
   You will be able to start your application, save and complete 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. Any missing documentation may invalidate your application.

Your application cannot be processed without completing all three elements.

If you experience any difficulties in completing the online application please contact: **smartgrants@nea.org.uk** or call **07566 789 483**.

Funding timeline

Applications open	w/c 15 January 2024
Online drop–in session for questions and answers. Please join if you have any queries about the application process or your proposed project.	Tuesday 23 January between 11:30am to 12:30pm. This session will take place on Zoom. You can join via **this link**
Deadline for submitting your online application	12 noon on Friday 9 February 2024
Communication of outcome	End of March 2024
Project delivery commences	From Monday 1 April 2024
Induction workshops for successful applicants	10 or 11 April 2024
Project delivery finishes	Wednesday 4 December 2024

Decisions, acceptance and payment

Once received, your application will be assessed and the outcome of this provided to your organisation within the timeframe we have outlined above. **As part of the assessment process, we may come back to you to request further information, to clarify elements of your application or if you need to provide further supporting or due diligence documentation.**

Unsuccessful applicants will be notified and have an opportunity to request brief feedback on their application.

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 redacted bank statement from within the last three months. We cannot accept any other form of evidence (e.g. bank details copied and pasted into a Word document). 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.** Failure to supply this information may result in a delay to your payment.

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:

- 60 per cent at commencement of project
- 40 per cent on satisfactory completion of monitoring and evaluation requirements

Please see the section on **Monitoring and evaluation requirements for successful grant applicants**.
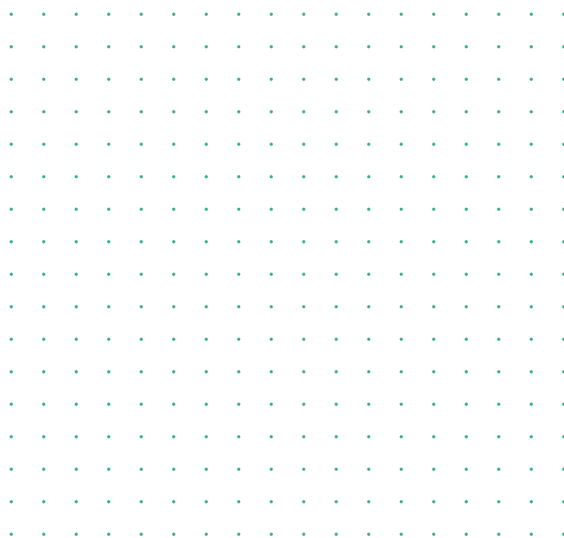
Application process

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

Your organisation can only submit **one** application for funding.

The Project Plan template and online application can be accessed here: **nea.org.uk/work–with–us/ smart-meters/smart–grants–2024**.
The deadline for completing an application is 12 noon, Friday 9 February 2024.

You will be asked to confirm which size of grant (and corresponding targets) you are applying for within the online application. Here is a reminder of the targets per grant value level from **page 8**.

Level	Grant value	Targets per partner		
		Direct contacts	Indirect impressions	Consumer survey returns
1	£7,500–£15,000	1,300	145,000	100
2	£15,001–£25,000	2,600	290,000	200

Please remember that the assessment of your project is undertaken on 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 and the great work it does, as well as your proposed project and how it will achieve the Fund's objectives with the target group.

Project Plan

The 2024 Project Plan template can be downloaded from: **nea.org.uk/work–with–us/smart-meters/smart–grants–2024**. 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 2024 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 to deliver and how many (e.g. 50 coffee morning events; develop a newsletter with smart meter information for the target group; provide 100 people with 1–1 advice).

What is the activity category?

You can select from one of the following options. Please ensure you use a clear rationale when estimating the number of people in the target group:

- Advertising or sponsorship (e.g. advertising on a local radio or in a magazine)
- Event(s): give information about smart meters at an event (e.g. talk at a community meeting)
- Giving advice: give advice or have a conversation about smart meters (e.g. phone call or home visit)
- Information displayed in public (e.g. putting up a smart meter poster in a community centre, library, shop or other buildings accessed by the target group)
- Information distributed to people (e.g. sending out a newsletter, letter or leaflets)
- Public relations — generating coverage in the media (e.g. article in a newspaper)
- Training colleagues or frontline staff (e.g. training colleagues or external stakeholders about smart meters)

Given the target group by definition do not have the skills to confidently utilise digital tools and channels, we would not expect digital channels, such as website or social media, to feature heavily, if at all, in funded activities. If you think this is an important part of your proposed activities, for example to enable communication with support networks for this audience, this can be considered but please provide a rationale for doing so in your application.

Direct/Indirect activity?

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

Direct activities
Direct contact with people in the target audience, such as events, face-to-face or telephone advice. This is measured using Direct Contacts. This is the total number of individual, or unique, people that you have engaged through direct activity.

You attend or host an event and spoke directly to 100 people about smart meters. 10 of those people came over to speak to you twice. Direct Contacts = The total number of people you directly spoke to at the event = 100. You do not count again for those you spoke to twice.

Indirect activities
Communication or marketing channels used to indirectly reach the target audience and convey information about smart meters, such as the use of advertising (for example, but not limited to, newsletters, posters, leaflets and radio adverts). This is measured using Indirect Impressions. This is the number of times your indirect activities have been seen/heard. This includes the same users seeing/hearing the content multiple times. For example, how many times your radio advert has been heard. If the same person listens to this advert three times, then this counts as three Indirect Impressions.

For example:

- 1 radio advert played once on 10 days. The radio station has informed you they receive an average of 1,000 listens per day. Indirect Impressions = 1 advert impressions figure (1,000) x number of times played (10) = 10,000 impressions
- 1 article displayed on a news website for 8 weeks. The page on the news website receives on average 100 views per day. Indirect Impressions = Daily page views (100) x time live (8 weeks) = 5,600 impressions

- 1 poster in a community centre for 6 months. The average number of people going past the information each month is 300. Indirect Impressions = Average number of people going past the information each month (300) x number of months information is displayed (6) = 1,800 impressions
- 10 individual mailings are sent out to a distribution list. The number of people on the distribution list is 100. Total Indirect Impressions = Number of people on the distribution list (100) x by the number of individual mailings sent (10) = 1,000 impressions.

Training

If your project intends to train colleagues or stakeholders about smart meters, this will be classed as 'Training' in your Project Plan. Should you wish to include this activity, you can apply for up to a maximum of £400 towards the delivery of your **own** training activities e.g. holding a face-to-face smart meter briefing session for tenant engagement officers. To aid this activity, you will be provided with a training pack which covers key information about the rollout.

Breakdown of information required in the Project Plan

- activity type? Select whether your activity is:
  - Business to consumer (B2C) e.g. the activity is delivered to consumers/householders
  - Business to business (B2B) e.g. the activity is delivered to professionals or internal staff, such as training
- activity start/end date
- where will the activity take place? Please include the area if known
- **predicted total reach of the activity** (including people 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). Enter here 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. Further information on how to calculate impressions for your Project Plan is available and can be provided upon request
- **who will be responsible for delivering your activity?** Will this be your organisation, an individual or a partner organisation?
- **amount requested** from Smart Energy GB **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 has been calculated

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 up to £250 can be included in your costs to cover this. Please note 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 **smargrants@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 your own smart meter training to colleagues or other frontline partners as part of your project, you can apply for up to £400 to help you deliver this activity.

Please note 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

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 contact: smartgrants@nea.org.uk or call 07566 789 483 to discuss further and see if we can help you.

Section one: 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 number of 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 2.

Please tell us about the set–up and staffing of your organisation (75 words max.)
Please tell us briefly 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.)
Tell us briefly what your organisation does and your 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.

Have you previously received funding from the Smart Energy GB in Communities programme before? Remember, you cannot apply for funds if your organisation has received three consecutive years of funding from this programme.
Please tick the box to indicate if you have previously been awarded a grant from us before.

Where did you hear about the Smart Energy GB in Communities fund?
Please tell us where you heard about the 2024 Smart Energy GB in Communities fund.

Section two: 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
Please provide contact details of the person responsible for delivering the project. 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 as soon as possible.

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

Section three: About your project

Grant amount applied for in 2024

You should indicate whether you are requesting Grant Category 1 (£7,500–£15,000) or Grant Category 2 (£15,001–£25,000), which relate to the activity targets (see **page 8**). The detail of your Project Plan should then state the exact level of funding you require within this category. **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 1 April 2024 and finish by 4 December 2024.

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 group – people who are without essential digital skills

- to ensure 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

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 activities will be delivered

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 who are without essential digital skills and with as many of the following characteristics as possible:

- be aged 75+
- 1+ disability or impairment (for example, but not limited to, relating to sensory, physical, mental health or learning/memory)
- lower socioeconomic status
- lower literacy

This is your opportunity to tell us how you plan to identify people in this year's target group. If your organisation has previously been funded by the programme, please tell us how you plan to reach new beneficiaries. (200 words max.)

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

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.

- For your direct activities (giving advice in person/via phone 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?
- For your indirect activities (information displayed/distributed, public relations, advertising), 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? If you plan to develop your own resources (e.g. posters, leaflets, videos, articles etc.) then please detail this here. Whilst we appreciate indirect activity has the opportunity to reach people at scale, we're keen to understand how you will make this as impactful as possible.

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 (300 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.

If you have previously received funding from the programme, tell us how added value will be demonstrated over and above what has been delivered before.

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 and 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 various 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 four: Online Induction workshops and project resources

All successful partners are expected to attend a mandatory online induction workshop on 10 or 11 April 2024. 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 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.
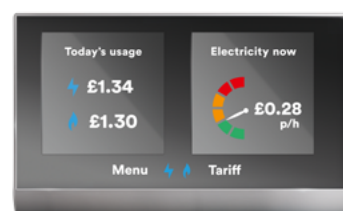
Please indicate how many demo IHD units you require. Projects can request a maximum of two IHDs plus one additional accessible IHD (maximum 3 in total).

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 requesting any further.

Section five also asks if you are already using Smart Energy GB's online Resource centre to access smart meter materials. See **page 12** for more information.

The Resource centre currently provides the majority of materials in the following alternative formats and languages:

- English, Welsh, Polish, Punjabi, Gujarati, Romanian and Urdu (other languages may be available upon request)
- British Sign Language (BSL) video
- 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?

In addition to the content available on the Resource centre, if you plan to develop your own bespoke materials to engage the target group (e.g. posters, leaflets, videos, articles etc). Please tick this box so Smart Energy GB can support you with this process.

Section five: 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
- Redacted bank Statement, paying–in slip or cancelled cheque (from within the last 3 months). This must show the full name of your organisation. We cannot accept any other form of evidence (e.g. bank details copied and pasted into a Word document). Any evidence of bank details should show the full name of your organisation and this should be the same as the name listed in your online application form.
- Audited Accounts or Independently Examined Accounts for the last two years. These must be physically signed copies.

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.

Failure to attach any of the requested documentation may result in your application being ineligible.

Section six: 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 and 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 contact you if we have any questions or need further information.

Contacting us

If you have a query about your application, please get in touch.
Telephone: 07566 789 483
Email: smartgrants@nea.org.uk