Smart Energy GB in Communites Fund

2022

smart energy GB
Join the energy revolution

Contents

Guidance for applicants

Thank you for your interest in the Smart Energy GB in Communities fund. This guidance should be used to help you fill in your Smart Energy GB in Communities fund online application form.

During 2022, three funding streams are available:
1. Grants for organisations supporting people who are over 65. The total amount requested should be between £15,000 and £25,000
2. Grants for organisations supporting people on a low income. The total amount requested should be between £7,500 and £10,000
3. Grants for organisations supporting people who are carers. The total amount requested should be £5,000

An online application form and an accompanying Project Plan must both be completed in full. As part of the Fund's due diligence process, we also ask you to submit a number of documents (detailed on pages 25–26).

If you have any questions regarding the application process, then please contact us at:
smartgrants@nea.org.uk
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 gas and electricity meters, providing automatic meter readings and near–real time energy use information for households.

Smart meters and the information they provide will help Britain to achieve net zero carbon emissions by allowing for better management of energy demand and supply, providing people with the visibility needed to reduce their usage, and making the best and most efficient use of wind and solar power. Innovative technology and services enabled by smart metering is pivotal in allowing our country to decarbonise and have more electric vehicles.

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 December 2021, 25.2 million smart meters have already been installed across Britain.

What are the benefits of smart meters?

1. Potentially save some money

Your energy supplier will install your new smart meter at no extra cost, then it's up to you to see how much it can help you save. Being aware of your energy use is the best way to help bring it down, so with your handy in–home display (IHD), you'll always know exactly what you're spending and where you may be able to reduce costs. For any consumers experiencing concerns about energy bills or falling into debt, further support is available.

2. Save time

You will no longer need to go into the meter cupboard to take your own meter reading and no strangers will turn up at your home to read the meter. The meter sends your meter reading directly to your energy supplier, saving you time and effort.

3. Get accurate bills

Smart meters enable accurate billing, not estimated by your energy supplier. Once you have a smart meter this will enable accurate bills from your energy supplier, just as you do with your telephone bill.

4. Keep track of what you use

Using your smart meter's IHD, you can see how much energy you've used in near–real time for each day, week or month and compare it. This nifty tool will help you save time and energy.

5. Do your bit for the environment

With a better understanding of your usage, it's easier to see where you can make small changes to reduce your energy consumption and lower energy emissions. This could lead to lower energy bills and a smaller carbon footprint.

6. Allowing active management of our energy system

There is a lot of waste in our energy system. This is partly due to the fact that energy has to travel a long way from where it's generated before it gets to you. Smart meters could help us cut down on that waste by forecasting energy demand more efficiently. The updated system will also be able to draw on more local and renewable sources of energy too.

7. Keep your energy data safe

Some of the top data security experts in the country are behind the creation of a new secure network which allows your smart meter to communicate with your energy supplier.

8. They can help people during difficult times

During the Coronavirus pandemic, smart meters have played a role in supporting people in vulnerable circumstances, particularly as people found themselves spending more time at home. Some of these benefits include:

- for prepay customers, a smart meter allows them to top up directly online, by phone or by text, and therefore limits the need to leave the house and visit a shop to do so. There's also an emergency credit button that can be pressed if customers need a bit of extra time before being able to top up i.e. if they are waiting for funds to clear
- spending more time at home may have resulted in customers seeing their energy bills rise. In addition to this, recent concerns in regards to the increasing cost of energy may be worrying a number of people. Smart meters could help people to find ways to reduce energy waste around the home and save money. The in–home display (IHD) shows you in near–real time the amount of energy being used in pounds and pence, allowing you to keep a closer eye on energy spending habits

Coronavirus and the smart meter rollout

Following the advice issued by the UK government, energy suppliers have changed their working practices and have implemented socially distanced ways of installing smart meters and new safety procedures.

The latest advice on installation processes can be found on energy suppliers' websites.

Official guidance is updated regularly with the latest information provided on relevant government websites:
- England: **gov.uk/coronavirus**
- Scotland: **gov.scot/coronavirus–covid–19**
- Wales: **gov.wales/coronavirus**

Smart Energy GB in Communities programme

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 want to get one.

The application process to become a Smart Energy GB in Communities 2022 partner is being run by the charity National Energy Action (NEA).

The objectives of the 2022 fund are:

Target groups: **people who are over 65 and people on a low income**
- 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

Target group: **people who are carers**
- to ensure 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

Who are 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 2022, we are targeting grant funding to organisations who reach people that are:
- **aged over 65**
- **on a low income**: identified as having an annual household income of less than £14,000 before tax[1]
- **carers**: a carer is 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[2]

Over 65:

24 per cent of GB Adults are over 65, which works out to an estimated population of 12.2 million[3].

Those aged over 65 tend to be more likely to have other vulnerable circumstances (e.g. no personal internet access, personal physical circumstances, etc.) It means that these circumstances need to be considered when looking at the older audience in terms of approach and the best methods for engagement.

Previous research has shown that the older audience tends to feel like they have established habits and behaviours that mean they are in control of their spending, and this extends to energy usage. As a result, they are likely to think they are already doing all they can to save energy and only use what they need.

In addition, we see in this older group a resistance to embracing change and new technologies, which can act as an additional barrier to engaging with smart meters.

Low income:

16 per cent of the British population are on a low income, which equates to approximately 8 million people[4].

Those on low income need to feel in control of their finances and saving money is key. Maintaining a steady payment is more important to them than accurate bills, as this is part of their habitual money management process.

Those on low income are more conscious of their energy use, however they also have lower levels of confidence in understanding their energy bills. While there is an opportunity to present smart meters as a way to aid understanding of energy bills, and help them budget and monitor energy use, this should be done in a way that is sensitive to their circumstances.

1   Smart energy outlook, May 2021
2   **carersweek.org**
3   ONS Mid-Population estimates 2020
4   Smart energy outlook, May 2021

Carers:

Around 1 in 4 people are carers[5], meaning they make up a significant proportion of the population.

Many carers are already providing support with energy bills and services or other household administration, and also teaching others to use new technology, meaning that carers discussing smart meters with the person they support would not feel out of place.

Whilst 1 in 3 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 benefit to the person they care for. The benefits need to be made clear in order for carers to give a recommendation.

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 group(s).

The target groups are significant in size (8 million people are on a low income, 12.2 million people are over 65, 13.6 million are carers). Where possible, we are looking for projects that can engage this group at scale through a combination of direct and indirect activities.

Previous applicants, both successful and unsuccessful, are eligible to apply and encouraged to do so. 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.

Organisations are permitted to submit an application for more than one funding stream however we will only award against one funding stream per organisation.

Each funding stream application requires a separate application form setting out how you would identify, engage and support people in the relevant target group.

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 2022. All projects funded by the Smart Energy GB in Communities programme must conclude by 7th December 2022. This is a fixed deadline and cannot be extended.

5   Carers UK

Delivery expectations

We are looking for each project to engage directly with people in the target group. As a minimum, we are looking for those targeting:

- over 65 to reach 2,000 people
- low income to reach 1,000 people,
- carers to reach 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 target for indirect reach is:

- over 65 projects to deliver 50,000 impressions
- low income projects to deliver 40,000 impressions
- Carers projects to deliver 20,000 impressions

More information on how these reach figures can be calculated is provided under 'Reporting on activities delivered' section on page 19.

Coronavirus and project activities

We understand from our 2020 and 2021 programmes that Coronavirus can have an impact on the delivery of your smart meter activities, most notably engaging with people in vulnerable circumstances in a face-to-face capacity. If the situation is still causing disruption when projects go live in April 2022, we would be keen to work with successful applicants to discuss individual delivery plans and if they need to be adapted.

Acknowledging the challenges which Coronavirus present, we are looking to fund partners that offer multiple routes into reaching people who are over 65, on a low income, or are carers. We would like to see projects that offer a combination of direct and indirect activities to reach people at scale. For further guidance on direct and indirect activities please refer to page 19.
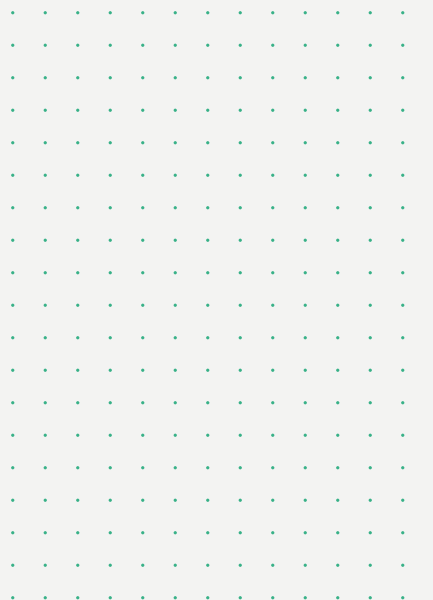
Examples of the types of projects we might fund

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

A project supporting people who are over 65:

Organisation	Application	Award
A large charitable advice agency working with people in the target group (people who are over 65) 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. 2,000 people in the target group 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 impressions figure of 55,000 (further information on how this can be calculated can be found under 'reporting on activities delivered' section on page 19). Face-to-face (direct) activities include advice and myth busting surgeries (26 sessions reaching at least 700 people in the target group), multi-agency events (20 events reaching at least 500 people in the target group) and 1-2-1 telephone advice to 800 people. Indirect activities include a tailored newsletter to all partner agencies' service users, 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 organisations within the project will host resources in their shops or waiting rooms 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 a demo in-home display, project stationery, one portable tablet and printed materials.	£24,500 was awarded to support the partnership, along with a demo in-home display unit. The printed materials are not eligible costs for the fund (as these will be provided 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.

A project supporting people on a low income:

Organisation	Application	Award
A housing association, working alongside a small energy advice charity.	£10,000 to deliver tailored information and support on how tenants can benefit from a smart meter.	£9,850 was awarded to support the project, along with a demo in-home display unit.
	The project will target tenants on a low income and work with a small energy charity to provide additional advice where required.	The printed materials are not eligible costs for the fund (as these will be provided by Smart Energy GB), so this was deducted from the award.
	More than 1,000 people in the target group will be reached with face-to-face and online information about the rollout as well as telephone advice on how to get a smart meter.	The application demonstrates good value for money and reaches people in the target group.
	Further people will be reached indirectly through a bespoke tenant newsletter, social media including regular Facebook posts, and in-kind activities, resulting in an impressions figure of 40,000 (further information on how this can be calculated can be found under 'reporting on activities delivered' section on page 19).	
	Face-to-face (direct) activities include myth busting surgeries (30 sessions reaching at least 300 people in the target group), virtual smart meter coffee mornings to offer advice & support (30 Zoom events reaching at least 500 people in the target group) and 1-2-1 telephone advice to 200 people.	
	Indirect activities include a tailored newsletter to tenants on a low income, posts on various social media/digital channels including Facebook. Although not part of the funded activity, the housing association will include information about smart meters on their staff intranet as well as host resources in their public-facing premises 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 also include a demo in-home display and printed materials.	

A project supporting people who are carers:

Organisation	Application	Award
A regionally based carers group.	More than 600 people in the target group will be reached with face–to–face and online carers group meet–ups and 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 20,000 (further information on how this can be calculated can be found under 'reporting on activities delivered' section on page 19). Face–to–face (direct) activities include online carers group virtual meet–ups (20 sessions reaching at least 400 people in the target group) and 1–2–1 advice to 200 people. Indirect activities include an article in an e–newsletter to local carers social media posts on Facebook and Instagram. Costs also include a demo in–home display.	£5,000 was awarded to support the partnership, along with a demo in–home display unit.

The panel are looking for projects which:

- use a **combination of direct and indirect activities** to engage the target group on the subject of smart meters, including face–to–face advice; advice given by an individual over the phone/online, events, advertising, 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 into 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 one of the three target groups (people who are over 65 OR people on a low income 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 (not including local authorities, housing associations or CICs)
- general core funding for your organisation, however **we do allow up to 10 per cent towards overhead costs** such as project support costs and management. Anything above 10 per cent will not be eligible
- projects or activities that are not focused 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, 7th December 2022
- 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 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**
- 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 2022

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 2022 Project Plan will be accepted. Please do not use any versions from previous funding rounds as these will invalidate your application.

The 2022 template can be downloaded from **nea.org.uk/smart-meters/smart-fund**

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 25 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 contact:
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 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, that have been specifically designed for people in the target group, to help you get your project off the ground.

In addition, as a successful partner, if you feel that some of the materials that 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 free on the Resource centre.

Funding timeline

Applications open	Monday 17th January 2022
Deadline for submitting your online application	12 noon on Friday 11th February 2022
Communication of outcome	End of March 2022
Project delivery commences	From Monday 4th April 2022
Induction workshops for successful applicants	April 2022
Project delivery finishes	Wednesday 7th December 2022

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.**

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 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.
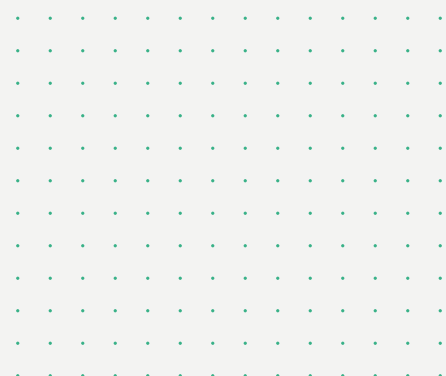
Partner induction workshops

All successful partners must attend **one** online induction workshop in April 2022. 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 programme 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 4th and 15th April. Further details on dates and details will be provided closer to the time.

Monitoring and evaluation requirements for projects

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:**
  - 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 below.

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 2023– subject to meeting all criteria.

Consumer survey

Once your project is underway, we expect you to distribute a consumer survey to the end 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 an over 65 grant, 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 low income grant, whose grant value is between £7,500–£10,000, the target is at least 100 survey returns from the target audience
- for partners applying for a carers grant, whose grant value is £5,000, the target is at least 75 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 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

So 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.

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.

The Project Plan template and online application can be accessed here: **nea.org.uk/smart–meters/smart–fund**

The deadline for completing an application is **12 noon, Friday 11th February 2022**.

Online application forms that are submitted incomplete will be rejected.

You will be asked to confirm which funding stream you are applying for within the online application:
- projects supporting people who are over 65 (funding of between £15,000 and £25,000 is available)
- projects supporting people on a low income (funding of between £7,500 and £10,000 is available)
- projects supporting people are carers (funding of £5,000 is available)

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

Please remember that the assessment of your project is undertaken 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, the great work it does and your project, and how you demonstrate it will achieve the Fund's objectives and reach the target group you have selected.

Project Plan

The 2022 Project Plan template can be downloaded from: **nea.org.uk/smart–meters/smart–fund** 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 2022 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 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?** 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:
1. Advertising or sponsorship e.g., advertising on a local radio or in a magazine.
2. Event(s): give 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 smart meter poster in a community centre, library, shop or other buildings accessed by the public.
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– YouTube etc.).
- **Direct/Indirect activity?** This cell 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 which 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 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. 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 3 tweets posted on your Twitter feed which has 10,000 followers = 30,000 impressions
- email circulations/advertorials. The number reported would be the number of people on the distribution list multiplied by the number of each new email sent out e.g. 2 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 estimated footfall of people who pass the information e.g. a community centre displays a poster for 6 months. The centre has an average footfall of 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'

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

- **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.
- **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). 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
- **predicted reach to the target group only**. Enter the number of people in the target group only (either people who are over 65, people on a low income or people who are carers) who will be reached by the activity
- **who will be responsible for delivering your activity?** Will this be your organisation, an individual or a partner organisation? Energy GB in Communities Fund
- **amount requested** from Smart Energy GB in Communities
- **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 is 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 material

In your Project Plan, you can choose to apply for:

- a demo in–home display: demonstration in–home display (IHD) units can be sent to all successful partners usually at a cost of £24 per IHD (cost may change slightly), which is deducted from the grant award. We have included an option for this within the Project Plan. Please indicate how many you require. Projects can request a maximum of 2 IHDs. **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 if possible rather requesting any further**
- a demo accessible in–home display: for anyone who is blind, partially sighted, or has difficulties with dexterity or memory loss, an accessible in–homes display (AIHD) with additional features could make tracking energy usage easier. We have included an option for this within the Project Plan. Projects can request a maximum of 1 demo AIHD unit
- printing of the consumer survey – please note 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 can be expensive – so an amount up to £250 can be included in your costs to cover the administration of this
- up to 10 per cent can be applied for towards overhead costs

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

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 contact: **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?
Is your organisation part of a larger regional or national organisation? If yes, 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 4.

Please tell us about the set-up, staffing and main activities of your organisation (100 words max.)
Please tell us briefly about the way your organisation is set up, how it is staffed and what your main activities include. 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.

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 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 four: About your project
Which funding stream are you applying for?
Over 65s, low income or carers.

Grant amount applied for in 2022
This should be the amount of grant funding you are requesting in 2022. The 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 4th April 2022 and finish by 7th December 2022.

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 over 65 and people on a low income
- 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

Objectives for the target group: people who are carers
- to ensure 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–focused activities
- how activity will be recorded, for example attendance lists of events, database records etc.
- when they will be delivered and their location. This is your chance to give us an overview of what your project will look like

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 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 and what you understand their specific needs to be (300 words max.)
This is your opportunity to tell us how you plan to identify people in this year's target group. You should also tell us what some of their needs or vulnerabilities might include.

Please list the main outputs your project will deliver. How many activities will you deliver and how many people will benefit from each? (200 words max.)
a) For direct activities (giving advice in person/via phone or events), tell us:
- how you have calculated the number of people that will be reached as a result

For example; 10 events attended by 120 people, 100 of which are in the target group.

b) For indirect activities (information displayed/distributed, public relations, advertising etc.), tell us:
- how you have calculated the number of people that will be reached as a result using the impressions model

For example: 1 poster displayed for 2 weeks (daily footfall of 100 people) is 1400 impressions of which 18%, 252 are in the target group.

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)

a) For direct activities (giving advice in person/via phone or events), tell us:
- how this method(s) will lead to engagement and tangible impacts for the target group

b) For indirect activities (information displayed/distributed, public relations, advertising, websites/social media), tell us:
- how this method(s) will lead to engagement and tangible impacts for the target group

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

What barriers are you trying to address through your project that may prevent individuals in the target group from engaging with the smart meter rollout? Tell us how you plan to address and overcome these barriers (400 words max.)
Specifically referring to the target group, what barriers are you trying to address through your project that may prevent engagement with the smart meter rollout? And how do you plan to overcome these barriers?

Please tell us how your project provides added value to the services you and/or your partners are already providing (250 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? (250 words max.)
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 explain how you will plan to deliver your project in line with relevant Government guidance on the Coronavirus pandemic? (250 words max.)

We appreciate the situation may look different post April 2022, however, we'd like you to consider how you will ensure your project activities are safe and meeting guidelines where appropriate.

In addition, you should consider what might happen if you need to adapt your delivery approach next year due to the pandemic.

Please identify at least two of 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. How would you mitigate these risks?

Section five: Online induction workshops and 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 you have understood this requirement of the grant.

Section five of the online application also asks whether 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:
- our completed Project Plan
- Coronavirus Policy
- Health and Safety Policy
- Safeguarding Policy
- General Data Protection Regulation Policy
- Customer Code of Practice
- 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 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 pays 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.
E-mail: **smartgrants@nea.org.uk**
Telephone: **07566 789483**