

# Safe and Warm Grassroots Community Scheme 2026 - 2027

Information for applicants  
July 2026



Centre for Sustainable Energy  
St James Court, St James Parade, Bristol BS1 3LH  
0117 363 4248  
[www.cse.org.uk](http://www.cse.org.uk)  
Charity 298740 | Company 02219673

## Contents

1.	Hello.....	3
	What's new.....	<b>Error! Bookmark not defined.</b>
2.	Background and aims .....	3
	Overview .....	3
	Aims .....	4
	Networking, training and opportunities for sharing learning .....	<b>Error! Bookmark not defined.</b>
	Peer mentoring .....	<b>Error! Bookmark not defined.</b>
3.	What are we looking for?.....	4
	Client facing delivery .....	4
	Peer learning and support .....	<b>Error! Bookmark not defined.</b>
	This scheme is unable to fund.....	5
4.	Geographical location .....	5
5.	Funding available .....	6
	Costing out your support.....	6
6.	Eligibility Criteria .....	9
7.	Project Outcomes.....	10
	Core outcomes .....	10
	Additional outcomes .....	11
	Referral only outcomes .....	12
	Wider capacity building outcomes.....	13
8.	Completing the application form.....	14
9.	Support for funded organisations.....	20
10.	Reporting and communication .....	20
	Reporting requirements .....	20
	Communications .....	21
11.	Other things you need to know .....	22
12.	Applying to the scheme.....	23

## 1. Hello

Hello and thank you for your interest in this scheme. We've created this document to provide guidance on applying for funding. Please take the time to read through it before submitting your application. We have **put text in red** throughout this guidance where there are key points or criteria we will be considering when assessing applications.

We're also hosting two interactive Information for Applicants webinars. At these you can find out more about the scheme, get tips on what we're looking for in the application, and ask questions. It will be a friendly and welcoming session hosted by the team at the Centre for Sustainable Energy. We will record it so if you can't make it, please register anyway and we will share the recording and slides. Information for Applicants webinars will take place, on **Thursday 16th July, 1-2pm**, and on **Wednesday 29th July, 1-2pm**. The sessions will have the same content, and you **can register for [session one here](#) and [session two here](#)**.

## 2. Background and aims

### Overview

The Safe and Warm Grassroot Community scheme builds on more than three years of previous funding the [Centre for Sustainable Energy](#) (CSE) has administered to support community based groups to reach new audiences with energy advice on similar projects.

This project is a part of the wider Vulnerability and Carbon Monoxide Allowance (VCMA) funding scheme. We're partnering with three Gas Distribution Networks (GDNs): SGN, Northern Gas Networks (NGN), and Wales and West Utilities (WWU). We are excited to bring together organisations from across these regions.

The new scheme will create a network of organisations across the UK, providing crucial support to people with energy-related needs and other crisis interventions, under one funding scheme. Many organisations will reach people who otherwise wouldn't access energy advice and support, for example because of being in an underserved geographic area or demographic community.

It's particularly focussed on helping people who will struggle to stay safe and warm over the cold winter period, but we know that it's not just the winter months that are tough, and advice and support are needed through the year.

This funding round will cover delivery during 1 September 2026 to 31 May 2027 (9 months). You can apply for up to **£14,000**, but please be aware that a limited amount of funding is available on this scheme. Therefore, the application process will be competitive and unfortunately we cannot guarantee awarding of the full amount applied for.

## Aims

The scheme will provide a mixture of continuation funding to more experienced organisations, and funding to organisations who will be new to the scheme. The network will aim to build the capacity of grassroots organisations to support their community with:

- Current information on help and support available to maintain a safe and warm home.
- Critical primary needs around energy and income maximisation.
- Joining the Priority Services Register where eligible (this is a simple sign up which offers extra security and support in the event of an unplanned power outage).
- Awareness of the risks of Carbon Monoxide and how to mitigate these.
- Reducing stress and improving health and wellbeing as a result of being helped at a time of unprecedented need.
- Support to access emergency funding, crisis support and energy funding schemes.

## Training and networking

The network aims to aid the sharing of learning and building of best practice among the funded organisations. This will include:

- Welcome event (Tuesday 8 September 2026)
- Regular networking events (19 November 2026, 10 February 2027, 6 May 2027)
- Training webinars for your staff and volunteers.
- Opportunities for CPD accredited training.
- Access to energy advice resources and expertise.
- Updates on sector developments and policy changes.
- Links to additional support, funding opportunities and resources.
- Advice from organisations recently experienced in incorporating energy advice delivery into their service offer.

## 3. What are we looking for?

### Client facing delivery

The fund is intended primarily for providing gas safety, basic energy advice, and fuel poverty support to clients.

We anticipate that in many cases the funding will mean you can provide this sort of support as an add-on to your existing provision, and will be a way in which crucial information and advice about gas safety and tips about home energy use can be shared with those who will most benefit from it. We want to know that you are also able to directly provide or make referrals to other crisis support services (e.g. food banks), and that you're embedded in the community you support.

## This scheme is unable to fund

- Work that only involves information provision as opposed to advice (e.g. handing out leaflets or producing social media content). While your work may include giving people information leaflets, this needs to go alongside personalised energy advice (i.e. talking them through relevant information and giving advice based on their individual circumstances and needs, through at least a five-minute conversation).
- Unrelated provision as a standalone service, completely separate from energy advice (e.g. counselling, drug and alcohol support, advocacy, family support, wellbeing courses). But you could use this funding to provide additional support to those clients you're engaging with already through other funding streams. And if you're providing crisis support this funding could be a way to get more help to those who most need it.
- Funding of home improvement measures such as energy efficiency measures/items for householders. The funding can't be used directly for buying heat the home provisions such as electric heaters or household energy efficiency measures e.g. radiator reflector panels or draughtproofing.

## 4. Geographical location

Applications are welcome from, and restricted to, organisations operating within any of the three Gas Distribution Networks (GDNs) who are partners on this scheme:

- SGN
- WWU
- NGN

You can check which GDN area you are in using this website: <https://findmygdn.co.uk>

You might provide support over quite a wide area, or be focussed on a very local patch, that's ok. But to be eligible you must be supporting clients who live within one of these three GDN's operational areas.

## 5. Funding available

For this application process, we are looking to provide grants of a **minimum of £8,000 and a maximum of £14,000** for project delivery between **September 2026 and May 2027 (9 months)**.

In spring 2027 we may be able to invite you to apply for extension funding for further delivery covering the winter 2027 period.

This funding can be structured in a way to suit the delivery plan of the organisation. For example, operating a smaller staff team during summer months with greater capacity in the winter months, or designing a focussed delivery programme over a shorter time period. You do not need to offer a full 9 months of provision.

### Costing out your support

In the application form you'll be asked how much funding you're applying for, and how many people you intend to support. We know it can be difficult to gauge this when you're still in the planning stage. As a guide, we expect projects to provide support which costs around £78 per client on average, with all clients receiving some form of energy advice. Some organisations may be able to reach a much larger audience for a lower cost per household. There is a balance to be struck between meeting a larger number of clients at a lower cost per client and meeting the needs of those with greater needs at a higher cost per intervention. Across the whole grant scheme, and within each funded organisation, average per-household costs will reflect this. If your cost per household is higher or lower than the average, we'll ask you to tell us why. In many instances we can accommodate the different cost.

Organisations are encouraged to be mindful of fluctuating demand during different times of the year, and aware that working with clients in 'crisis' situations can be resource intensive, while only counting once towards 'households reached' targets. Make sure the amount you apply for and targets you enter are realistic for your organisation.

✓ we can fund (this is an eligible cost):

✓	Staffing costs for delivery, project management and reporting and staff/volunteer expenses.
✓	Staff costs for learning and mentoring other organisations on this funding scheme. We understand that this is a time commitment and you may wish to ringfence specific budget to cover this. We'd expect the total time you commit to learning and mentoring to be no more than 15 hours between June 2026 and May 2027. This will mostly be

	through presenting at networking events and contributing to programme training, which are events organised by CSE.
✓	<p>Training course fees to upskill staff and volunteers. Although please note that CSE will provide all successful organisations with free training on these topics (and potentially more based on identified needs):</p> <ul style="list-style-type: none"> <li>• Providing energy advice</li> <li>• Identifying fuel poverty</li> <li>• Energy efficiency</li> <li>• Low carbon technologies</li> <li>• Smart energy advice</li> <li>• Fuel vouchers</li> <li>• Carbon monoxide safety awareness</li> </ul>
✓	Publicity, venue hire and any other direct costs for outreach and events to engage and support customers.
✓	Reasonable operational overheads. We expect that this would be around 10 - 20% of your overall budget.
✓	<p>Fuel vouchers.</p> <p>The standard amount for a fuel voucher is £50 per voucher with a £3.50 admin fee, plus 20% VAT so one voucher comes to a total of £54.20</p> <p>However the amount you can buy a fuel voucher for varies depending on the way your client pays their energy bills:</p> <ul style="list-style-type: none"> <li>• For pre-payment meters, vouchers are usually available for between £10 – £99. The admin fee is typically £1.80.</li> <li>• For smart meter or credit meter accounts, vouchers are usually available for between £30 – 300. The admin fee is typically £4.20</li> </ul> <p>All fuel vouchers will typically carry a <b>£3.50 admin fee +VAT @20%</b> (e.g. total £4.20) so you should include this admin fee per fuel voucher you have in your budget.</p> <p>Please refer to the Fuel Bank Foundation for more information on this: <a href="https://www.fuelbankfoundation.org/">https://www.fuelbankfoundation.org/</a> or Charis Shop: <a href="https://charisgrants.com/shop/">https://charisgrants.com/shop/</a></p> <p><b>Please note: a maximum of 10% of your overall budget can be allocated to fuel vouchers and/or Keep Warm Pack items.</b></p>
✓	<p>'Keep Warm Packs' – can include items to keep householders warm at home including electric blankets, gloves and scarves. This must be items that can be worn on placed on a person to keep them warm – so items of clothing and blankets. They can be electrical items if they can be put on a person – for example a heated blanket, heated hand warmers.</p> <p>You can either purchase Keep Warm Pack items via online platforms such as <a href="#">Charis</a>, or from another supply source e.g. Amazon, B&amp;Q, a local store.</p> <p>Examples and prices of Heat the Person items you can buy on Charis include:</p>

	<ul style="list-style-type: none"> <li>• Heated Bodywarmer - £75</li> <li>• Heated Under-Blanket for Single Bed - £37</li> <li>• Heated Glove Mittens - £27.50</li> </ul> <p>Please note: a maximum of 10% of your overall budget can be allocated to fuel vouchers and/or Keep Warm Pack items.</p>
--	--

✘ we can't fund (this **is not an eligible cost**):

✘	<p>Energy efficiency measures/items for householders. The funding can't be used directly for buying heat the <i>home</i> provisions (such as electric heaters) or for household energy efficiency measures (e.g. radiator reflector panels or draughtproofing). While we have an outcome for this to capture signposting / advice / support leading to energy efficiency measures being taken up, the measures themselves should be paid for through a different source of funding.</p>
---	---

## 6. Eligibility Criteria

We're looking for small grassroots organisations who:

- Have experience working with underserved and seldom heard groups.
- Are embedded in their local area and able to engage and connect with individuals who may not otherwise access support.
- Have capacity to provide support and can complete by May 2027
  - (NB. We hope to be able to offer additional funding for the June 2027 to March 2028 period for those organisations who meet targets and want to continue).
- Are keen to join a network of similar organisations and want to learn from the experiences of others delivering to diverse communities nationally.
- Are legally incorporated (Registered Society / Charitable Incorporated Organisation / Registered company) and have a bank account with at least two signatories.
- Have a clear plan for this project.
- Have robust administrative and management systems, including the ability to record customer interactions, provide summary data for reporting, and willing to share detailed records for audit mid-way through the funding period.
- Will use the funding to provide support with carbon monoxide safety and energy advice.

## 7. Project Outcomes

Note, we will provide more information and access to resources to help you to provide advice and support on all of the topics which count as outcomes for this funding (see section ten below).

### Core outcomes

We expect you to have a target for all these outcomes.

Outcome	Examples of what counts for the outcome
Energy triage (total households reached with this funding)	<ul style="list-style-type: none"> <li>• Energy triage is a short conversation which aims to understand a household's issues and energy needs, ready to then provide appropriate support and signposting.</li> </ul>
Energy behaviour change	<ul style="list-style-type: none"> <li>• Information and advice for behaviour change at home to save energy and money, tailored to the individual.</li> <li>• Information on measures householders can take to improve comfort and warmth e.g. only boiling the water they need, closing thick curtains when it's dark, optimising thermostat controls.</li> <li>• We expect most or all the people you support through this project to receive some form of basic behavioural energy efficiency advice.</li> <li>• This does <i>not</i> include just giving out leaflets or sharing something on social media. You need to have at least a five minute conversation with someone, giving advice which is relevant to them and their personal circumstances.</li> <li>• Providing advice in group settings <i>can</i> count towards this target. For example if you're delivering a workshop to a group of 15 people and providing information which is relevant to them on energy efficiency advice, CO safety and the Priority Services Register then you can count that under each outcome for the topics you cover.</li> </ul>
Carbon Monoxide safety information and alarm provision	<ul style="list-style-type: none"> <li>• Providing advice about carbon monoxide safety is a key outcome for this scheme, and really important for vulnerable people who tend to be more at risk. This advice also includes doing carbon monoxide awareness surveys with households you are supporting, and providing carbon monoxide alarms which you can request from the start of your project. The Resource Pack will have information on accessing training and the survey for this.</li> <li>• As part of the scheme, you will be expected to undertake carbon monoxide awareness training with the Gas Safety Charity. Information on this is available in our Resource Pack.</li> <li>• We will ask you through your reporting how many alarms you have given out in each month. Although you will not have a target for alarms given out, this number cannot be higher than your target number of households for CO safety information.</li> </ul>

Priority Services Register (PSR) conversations	<ul style="list-style-type: none"> <li>• Directly signing up clients to the Priority Services Register.</li> <li>• Where you're not able to directly sign up clients, you can share information about PSR with them so they can sign up themselves if they wish. Sharing information and spreading awareness about PSR (where directly signing someone up isn't appropriate) can be counted towards this outcome.</li> <li>• For information about the PSR: <a href="https://www.thepsr.co.uk/">https://www.thepsr.co.uk/</a></li> </ul>
--	--

## Additional outcomes

You may also support people with these outcomes, depending on your organisation's capacity and the type of work you do. While these outcomes are not mandatory for the projects, we encourage you to set targets to support clients in at least some of these areas.

Outcome	Examples of what counts for the outcome
Welfare benefits – income maximisation	<ul style="list-style-type: none"> <li>• Providing information about how clients can check their benefits eligibility and how they can apply for what they are eligible for. You may use a tool to see whether a referral for a full check is worthwhile (benefit check tools can be found in the Resource Pack).</li> <li>• This may be a conversation to signpost support, rather than directly checking or applying there and then.</li> <li>• However, you might also be supporting clients directly to apply for benefits e.g. sitting with them and going through the process together.</li> <li>• Alternatively, you may be making referrals to another organisation for clients to access benefits eligibility checks.</li> </ul>
Debt management – income maximisation	<ul style="list-style-type: none"> <li>• Advice on managing debt and liaising with energy companies to avoid debt enforcement or debt recovery procedures, or making a referral or signposting clients to an organisation who can support them.</li> <li>• You should not give financial advice if you are not registered with the <a href="#">Financial Conduct Authority</a>. Please include referrals and signposting towards this towards if you are not registered to give the advice yourself.</li> </ul>
Energy funding – income maximisation	<ul style="list-style-type: none"> <li>• Supporting clients to access financial support to cover cost of energy (e.g. winter fuel payment; Crisis and Resilience Fund).</li> </ul>
Grant applications – income maximisation	<ul style="list-style-type: none"> <li>• Providing advice for clients to access grants and for small and large energy efficiency measures (e.g. Warm Homes Local Grant funding, Boiler Upgrade Scheme). This could cover measures like insulation or different heating systems.</li> <li>• This could include directly working with clients to apply for energy grants. Where you're not able to directly apply with clients, you can share information about so they can apply themselves if they wish.</li> </ul>

	<ul style="list-style-type: none"> <li>• Sharing information and spreading awareness about energy grants (where directly signing someone up isn't appropriate) can be counted towards this outcome.</li> </ul>
Income maximisation – tariff switching	<ul style="list-style-type: none"> <li>• Providing an overview of how to look at tariff options, including advice to clients enabling them to switch energy tariffs to access better energy prices.</li> <li>• This includes directly helping people to switch tariff, or providing information for them to do it themselves if they wish.</li> <li>• More information will be in the Resource Pack about providing tariff guidance.</li> </ul>
Fuel voucher provision	<ul style="list-style-type: none"> <li>• Directly providing or making a referral for someone to access a fuel voucher.</li> <li>• More information is in our Resource Pack about how to purchase fuel vouchers.</li> </ul>
Keep Warm Packs	<ul style="list-style-type: none"> <li>• Directly providing keep warm packs (this includes items like scarves, blankets and gloves) to people. Referrals aren't included in this outcome.</li> </ul>
Small energy efficiency measures	<ul style="list-style-type: none"> <li>• Providing advice which results in households receiving 'common' energy efficiency measures (e.g. LED bulbs, draught proofing, cylinder jackets, radiator reflectors) - either paid for by household, another source of funding, or a referral.</li> </ul>
Digital skills support	<ul style="list-style-type: none"> <li>• Providing digital skills guidance or training to people, enabling them to access online services.</li> <li>• This can include accessing energy bills online, setting up direct debit, using digital energy interfaces.</li> </ul>
Wellbeing support	<ul style="list-style-type: none"> <li>• Providing any other support which does not fit into an existing outcome, but helps people maintain and improve their overall physical or mental health.</li> <li>• This could include accessing a food bank</li> </ul>

## Referral only outcomes

These outcomes will only be met via referrals to the relevant organisations. You may not be doing these at all which is fine, and you can skip this section. We'll provide more information about these services in our Resource Pack.

<b>Outcome</b>	<b>Examples of what counts for the outcome</b>
Fire and Rescue Service (FRS) Safe and Well Visit referral	Referral to the FRS for the household to receive an in-home visit to identify fire risks focusing on prevention and creating fire escape plans.
Locking Cooker Valve referral	Referrals for the provision (and installation) of locking cooker valves.

## Wider capacity building outcomes

If you have good levels of energy advice experience, you may run training for other organisations in your area to upskill them (e.g. to better recognize signs and impacts of fuel poverty and where energy advice may be beneficial). Again, please skip this section if it is not relevant to your organisation.

Outcome	Examples of what counts for the outcome
Frontline worker training	<ul style="list-style-type: none"> <li>• Training your organisation delivers on energy advice to frontline workers e.g. medical professionals, health and social care professionals, housing officers, other relevant charitable organisations.</li> <li>• Training can be delivered one-to-one or as a group, but we expect the content to be at least 15 minutes.</li> </ul>

## 8. Completing the application form

Please read through this guidance before completing the application form.

Contact us if you need this application in a different format.

Application form section	Details and what we're looking for
<b>Basic Eligibility</b>	<p>We ask you to provide details of your organisation including your legal form (e.g. community group / charity / CIC) and – where appropriate – your registration number.</p> <p>If successful, we'll need you to submit your bank account details and evidence to show it is your bank account (e.g. a paying-in slip). You must have an account in the organisations name which requires the signatures of two unrelated people to make a withdrawal. You don't have to provide all these details at this stage, just to confirm this on your application.</p>
<b>Geographic eligibility</b>	<p>We want to know that the project being delivered is within one of the three partner GDN's (SGN, WWU, NGN) operational areas. If you're not sure, there is a postcode checker here: <a href="https://findmygdn.co.uk/">https://findmygdn.co.uk/</a></p>
<b>About your project</b>	<p>This is the part where you can tell us what you plan to do.</p> <p><b>Project purpose and activities</b></p> <p>Please briefly summarise the purpose of your project in a maximum of 250 words. You should tell us what you plan to do and why e.g. deliver energy advice through a drop in session at the local foodbank in order to reach families in the area who are at risk of, or are experiencing, fuel poverty.</p> <p>We ask you to tell us the activities you will deliver to meet your aims through a checklist question. If you will do any activities that aren't covered in the list provided, please add them in the 'other' box. We'll ask more about the outcomes (e.g. energy advice delivered, Priority Services Register sign ups) in another section of the application form.</p> <p><b>Audience</b></p> <p>Take some time to tell us <b>who</b> (your audience) you would support with the project and how you would reach them (e.g. through advice in your offices or through attendance at a foodbank) and <b>why you are well placed to reach them. This could include reasons why your organisation is uniquely placed/skilled to connect with your audience.</b></p>

	<p>The scheme would like to see provision directed at those and who may not have previously accessed energy advice support. So please tell us if you are meeting a particular need for energy advice in a community which may have traditionally been excluded, or which faces specific barriers to access this support. This could include isolated rural properties or a particular accessibility need.</p> <p><b>Planned timeline</b> You'll be asked to provide an overview of your timeline for project delivery, including any set up activities (such as the recruitment and training of staff/volunteers). We are expecting delivery on the scheme to run from 01/09/2026 to 31/05/2027.</p> <p>This funding can be structured in a way to suit the delivery plan of the organisation, for example operating a smaller staff team during summer months or designing a delivery programme over a shorter time period.</p> <p>We understand you may need to build in a little time to set up the project and train any staff or volunteers.</p>
<p><b>Project outcomes</b></p>	<p><b>Energy triage (total households reached)</b> This should cover the total number of households you intend to work with as part of this funding. Energy triage is a short conversation which aims to understand a household's issues and energy needs, ready to then provide appropriate support and signposting. <b>Please make sure these targets are achievable for your organisation to deliver because receiving grant payments for this scheme depends on successful delivery of these targets.</b></p> <p><b>Household outcomes</b> Then, under each outcome listed in the table, please tell us how many households you will support for each outcome. You must have a target for all asterisked* outcomes to be eligible for funding. Please refer to the <u>Project Outcomes in this guidance</u> for more information on what activities can be counted towards each outcome. While we expect Priority Services Register conversations to be a core outcome for this scheme, we don't expect everyone you support to get information on this. Many are already registered or not interested, so consider what's realistic for the type of people you support.</p> <p><b>The number of households you put for each outcome includes those you will support directly and those you will make referrals for.</b> For example, if you plan to support 100 households directly with benefits checks, and then plan to refer 50 households to another organisations for benefits checks, the total you would put under that outcome is 150.</p>

Please note that no single outcome can be higher than the total number for the Energy Triage outcome. If a household returns for advice on multiple occasions (e.g. advice on PSR one week, and on tariffs another), this only counts as one household under Energy Triage, but then counts as one household under the PSR and tariff targets.

You should also consider whether talking to clients about outcomes such as debt advice, benefits eligibility checks or tariff switching will be appropriate for all your clients. Some organisations find that it can be difficult to bring up these sensitive topics with clients and if you think you'll be unable to offer in-depth information on these topics, you should be realistic about what percentage of households you'll likely be able to support on these outcomes.

Similarly, if you don't provide debt advice, benefits checks, fuel vouchers, or energy funding scheme information directly, consider how much signposting and referrals are realistic for your organisation. This will depend on how many existing referral pathways you have, and what other organisations are in your area.

#### **Fuel vouchers**

Please tell us if you're planning to support households to access fuel vouchers and how to plan to do this by selecting the option that applies to you. If you are *not* distributing fuel vouchers, you can ignore this question. **Please note direct provision of Keep Warm Pack Items and/or fuel vouchers can be a maximum of 10% of your total project budget.**

#### **Referrals**

If you plan to support people by referring them to other organisations (e.g. AgeUK or debt advice services) please let us know how many referrals you expect – this could be a number *or* a percentage of the total households you will support through the funding. For example, if you are delivering this project to support 150 households, and you plan to refer 50 households, you will refer approximately 33% of clients. Please tell us which organisations you plan to refer people to.

#### **Warm Spaces**

We'd like to know if you already provide a warm space, whether that's registered through a scheme like Warm Welcome, or is more informal. This is a community space people can access for free to stay warm in winter. This question will not affect your application, we'd just like to understand how many warm spaces our funded organisations operate.

	<p><b>Frontline worker training</b></p> <p>If your organisation feels ready and has capacity to provide training to frontline workers in other organisations, please tell us how many people you'd expect to train and who they are e.g. type of organisation, role of the frontline workers. An example could be that you provide training on basic energy advice or the dangers of cold/damp homes to housing officers at a housing association.</p>
<p><b>Organisation capacity</b></p>	<p><b>Capacity</b></p> <p>We want to know that you have capacity to deliver the project and that you have the right people in the right roles to run it well.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>• Who will manage the project? What experience do they have of project management? How much time per month will this take?</li> <li>• Who will deliver the project activities (this may overlap with the project manager)? What relevant experience do they have and how much time per month will this take?</li> <li>• Will any of your staff or volunteers undertake training to ensure they have the necessary skills to deliver this project?</li> <li>• If applicable, will you be recruiting any new staff or volunteers?</li> </ul>
<p><b>Project budget</b></p>	<p><b>Budget</b></p> <p>Please tell us the total amount you are applying for and provide a clear and realistic budget. For example, this may include:</p> <ul style="list-style-type: none"> <li>- Staffing costs for delivery, project management and reporting</li> <li>- Staff and volunteer expenses;</li> <li>- Reasonable operational overheads;</li> <li>- Training fees;</li> <li>- Publicity, venue hire and any other direct costs;</li> <li>- The cost of any fuel vouchers, the funding <i>can</i> be used to cover the cost of these.</li> <li>- The cost of Keep Warm Pack items, this funding <i>can</i> be used to cover the cost of these.</li> </ul> <p>Please note you cannot use this funding to cover the costs of energy efficiency measures for improvements to a property e.g. draughtproofing, reflective radiator panels.</p> <p>If you will be using match funding, please let us know how much and whether it is secured yet. Clarify how scheme would complement existing (funded) activity and allow you to deliver more.</p>

<b>Cost to deliver</b>	<p>We expect the average cost per interaction to be around <b>£78/household</b>, with all households receiving at least a basic level of energy triage (e.g. if a project is awarded <b>£10,000</b>, it should support <b>128 people</b>). We want this funding to provide energy advice to as many people as possible, but also recognise that some types of interaction and client groups may cost more or less than this. If this is the case, please provide a brief explanation.</p>
<b>Reporting</b>	<p>We will ask you to give a general written update on your project progress and to share high level data (aggregated data) at the end of each month by giving the total number of new households you have helped (e.g. who have not previously been supported through this funding), and the number of households who have received specific types of support. We will not ask you to provide individual customer data although you may be required to provide anonymous detailed customer records so CSE can audit your internal record keeping as part of due diligence checks for project reporting. We know reporting can be time consuming, so we are just asking for totals each month (e.g. not individual customer records), but we will carry out more detailed sample audits during the project.</p> <p>In the application form we want to know about the systems you have in place for recording and tracking clients – for example:</p> <ul style="list-style-type: none"> <li>• What customer details do you currently record? Who inputs information?</li> <li>• Do you already have a CRM system in place? Do you use spreadsheets / database / manual records? Will you be setting up a new system for this project?</li> <li>• How do you track clients if multiple members of staff are working with them?</li> <li>• How do you count referrals (e.g. to other organisations)?</li> <li>• Are you able to pull out data as needed for monthly reporting?</li> <li>• Do you have any experience in estimating the financial impact of your support for individual clients? (this is optional for this scheme, however if you do capture this information, we'd like to know about it).</li> </ul> <p>We have tried to set up a reporting system which will be as easy as possible for you to use, while providing us with all the information which is needed. If you want to see the template report you will be required to submit each month, before you put in an application, please let us know. We can also support with providing a template CRM spreadsheet for you to use internally for tracking individual client interactions.</p>
<b>Additional information</b>	<p><b>Training</b></p> <p>The Centre for Sustainable Energy will provide training to all successful applicants to this scheme. Please select anything from the list provided in the application form you would like to receive training on.</p>

<b>Final project declaration</b>	Please take the time to read through the statements by each tick box on this page as you are going through it. It's important you understand what the requirements of this scheme are, and what you will need to do if your application is successful.

## 9. Support for funded organisations

Successful applicants will join a network of local community organisations working in this space, and will be able to access:

- A resource pack (aimed at supporting project staff and volunteers in their work with vulnerable clients), which will include:
  - Explaners of fuel price cap, energy rebate scheme, etc.
  - Benefits checkers (e.g. Marie Curie and Age UK).
  - Carbon monoxide resources and e-learning.
  - Online CSE resources on home energy advice, including in different languages.
  - Links to useful videos and information on fuel poverty and energy advice.
- Training on causes and symptoms of carbon monoxide harm.
- Information about the benefits of being on the Priority Services Register (PSR) and how to help clients sign up.
- Information on accessing fuel vouchers.
- Access to printed materials (advice factsheets, thermometer leaflets, & CO leaflets).
- Welcome event with all funded organisations.
- Quarterly network meetings for collaborating with other organisations to share learning and best practice.
- Opportunities to provide GDNs with feedback and local insights to help shape future schemes.
- Support with monitoring and reporting.
- Guidance on communication and promotion.
- Named point of contact at CSE for any enquiries (about the funding *and* about supporting your customers) throughout the funding period.
- A monthly newsletter with relevant news, updates on sector developments, support and resources which are relevant to this scheme.
- Possible future funding opportunities.

## 10. Reporting and communication

### Reporting requirements

You will need to have internal systems for recording clients, including the type of support provided (e.g. carbon monoxide awareness provided, Priority Services Register sign ups).

This could be a spreadsheet, database or manual records. CSE will provide a template client log spreadsheet that's custom to the outcomes of this scheme, so you can use that for your record keeping if you'd prefer.

We will be auditing a sample of the funded projects, so we would expect you to be able to provide these records on request within a reasonable time frame if you are selected in the sample.

Specifically, we will ask you to report on your progress.

Specifically, **each month** we will ask you to report on your progress.

Firstly, we ask for a general update on your project using a written online template in Google docs which you will have a link to, using the following questions (where they are relevant). The idea is for this to be as straightforward as possible, so just a sentence will be enough in response to most of these questions, but of course we'd like to hear more if you have updates to share.

- What project activities have you delivered?
- How have been some key achievements you'd like to share from the past month?
- Have there been any challenges?
- Submit a good news story about the work you've done in the last month or generally good practice (e.g. anonymised short case study about a client you've helped, or a good event or outreach approach you used).
- Do you have any photos to share?
- How have you provided the advice to households (e.g. mainly direct provision or referring to other organisations?)
- Have you done any training to enable you to deliver parts of this project?
- Would you like to request any specific training to help you deliver this project?

Secondly, we need some numeric information (using a Google sheets template) about the number of households you have helped in different ways, based on the outcome targets you include in your application form which will be reflected in your grant agreement.

## Communications

We will ask you to provide at least one case study for use in promoting the wider scheme, sharing with GDNs and potentially for best practice sharing. You may be contacted by the GDNs to build on your case study (or make a video blog) during the course of your project. You are expected to mention the fund in messaging about your funded project.

It would be valuable if you could flag any events or activities which you think would make a good feature or which you would like GDNs help to promote.

There may be specific opportunities through the year (e.g. national awareness days, showcase events, stakeholder engagement activities) to raise your profile and flag key messages.

The GDNs may also contact you about evaluation of the funding you've received, including permission to contact beneficiaries of the funding about the impact of your work (if appropriate).

## **11. Other things you need to know**

### **Payment plan**

We intend to pay successful applicants 60% on signing of a Grant Agreement, and 40% on successful completion of the project, when final reports are submitted. If you need to make a different arrangement - for example because you plan to complete early and need to ensure there is no cash flow issue - please let us know and we can tailor your payment plan. Receiving your final payment will be dependent on you making sufficient progress and successfully reaching the target number of households for each outcome which will be in your grant agreement (based on the numbers you put in the application form and subsequently agree with CSE).

### **Governance**

We will ask you to provide details of a secondary contact who should be a director of trustee, who is fully aware of your project plan and delivery targets, and has the authority to sign a grant agreement on behalf of the organisation.

### **Legacy**

We are keen to capture any learning and insights from the groups throughout this project, so will ask you to submit case studies and have regular discussions with CSE and the GDNs.

### **Contact with CSE and GDNs**

Funded projects will have a named contact at CSE who will be your first point of contact for support, reporting and any enquiries. The GDNs plan to build and support this network and as such are keen to meet with the funded organisations.

It may be possible for GDN staff to attend your events, meet with you to talk about news stories and case studies, and hear your feedback in online meetings and face to face networking events.

When you report back on your project each month, CSE will share your information back with the GDNs. The GDNs are keen to know about how clients are benefiting from the funding and will also help to publicise your project.

## 12. Applying to the scheme

[Please access the application form here.](#)

**The application deadline is Monday 10 August at 11am.**

You can also see a PDF copy of the application form hosted on our website. You can use this to preview the questions. However **please use the online form** to submit your application. We will not accept applications via the PDF form.

The online form has a 'save and finish later' feature so it doesn't need to be completed in one go. There is an option to have a copy of your completed form emailed to you.

If you need a printed copy of the application form, please call or email us using the details below.

We aim to provide an outcome on your application by **Friday 28 August** at the latest. Successful applicants will be required to attend a Welcome event on **Tuesday 8 September 10:00 – 13:00**.

### Information for applicants webinar

We're also hosting two interactive Information for Applicants webinars. At these you can find out more about the scheme, get tips on what we're looking for in the application, and ask questions. It will be a friendly and welcoming session hosted by the team at the Centre for Sustainable Energy. We will record it so if you can't make it, please register anyway and we will share the recording and slides.

Information for Applicants webinars will take place, on **Thursday 16th July, 1-2pm**, and on **Wednesday 29th July, 1-2pm**. The sessions will have the same content, and you can register for [session one here](#) and [session two here](#).

### Questions

If you have any questions, hesitations or concerns about applying, please email us on [safeandwarmcommunities@cse.org.uk](mailto:safeandwarmcommunities@cse.org.uk).