

## Guidelines: Bath & West Community Energy Fund Grant



### What is the Bath & West Community Energy Fund?

The Bath & West Low Carbon Fund ('the BWCE Fund') is the mechanism through which [Bath & West Community Energy](#) (BWCE) distributes surplus income for community benefit. BWCE develops community owned renewable energy projects, offering local people the opportunity to invest in local projects, earn a reasonable return and as members have a say in the running of the organisation. BWCE is a community enterprise, set up for the benefit of the community (a 'Community Benefit Society') and to support local action to reduce the impact of climate change.

The BWCE Fund will provide grants to local community projects in Bath and the surrounding area that reduce carbon emissions and/or tackle fuel poverty. Our area of benefit covers Bath & North East Somerset (B&NES), parts of Wiltshire and South Gloucestershire that border B&NES plus the area of Somerset close to our Crewkerne solar array at TA18 7NX. Applications from projects in the vicinity of existing BWCE projects are particularly welcome. For a full list of projects see BWCE's website:

<https://www.bwce.coop/renewable-energy/>

This is the 8th round of the BWCE Fund Grants Programme. The first was launched in 2014 and the 2020/21 grants awarded, including a short description of the funded projects, can be viewed at

<https://www.bwce.coop/community-benefit/#community-energy-fund>

The BWCE Fund is operated by a charity independent of BWCE. Bath & West Low Carbon Community Fund has its own separate governance and decision-making processes, and the trustees who oversee it have asked Quartet Community Foundation to manage the grant application process.

### What is Quartet Community Foundation?

Quartet Community Foundation administers the BWCE Fund Grant Programme on behalf of the BWCE Fund. Quartet Community Foundation has a long track record of managing funding on behalf of individuals, companies, charitable trusts and statutory agencies.

The Community Foundation makes grants to charitable groups in the West of England. We have many grant programmes to which groups can apply, the Bath & West Community Energy Fund Grant Programme is one.

### Before applying

Please read these guidelines carefully and read the 'Before Applying (Essential Information)' section on our website.

### What can you apply for?

To be eligible for funding the project must aim to reduce carbon emissions and/or address fuel poverty in Bath and the surrounding area. Carbon reduction does not just relate to energy projects; it might also include local food, sustainable transport or waste reduction or indeed any activity that reduces carbon emissions. This year we would particularly welcome applications relating to fuel poverty/affordable warmth, ensuring that everyone can access and afford energy this winter.

Applicants may wish to note:-

To be eligible for funding, fuel poverty projects need to include energy efficiency and/or environmental measures. For example, a project that involves sending staff members for training (such as the National Energy Action 3-day [Level 3 Award in Energy Awareness](#)) and devising a programme to advise local households on issues such as reducing energy use, improving the energy efficiency of their home, understanding energy bills and how to switch supplier. The Fund also welcomes projects that raise awareness of climate change and encourage positive action, including behavioural change.

If you would like to discuss your proposed project prior to submitting an application, please contact Quartet Community Foundation in the first instance.

If your application relates to energy reduction, please note that applications with a clear outline of energy use and possible savings are more likely to be successful. Seek expert advice as necessary, especially in relation to projects that relate to energy efficiency. If you are providing quotations from suppliers for proposed work, please provide at least two quotations. Please note we have taken the decision not to fund gas or oil-fired boilers because of their greenhouse gas emissions.

The BWCE Fund is happy to consider grants to fund preliminary assessments in order to support a later bid. We also welcome applications relating to energy efficiency reviews or audits in order for organisations to meet the application criteria for larger funds, such as the neighbourhood portion of Community Infrastructure Levy. Applicants based in B&NES may wish to refer to the Council's [Funding Journal and Bulletin](#) for details of other community grants that are available.

The BWCE Fund recommends that applicants focussing on energy reduction take the following energy hierarchy into account to maximise cost-effective energy savings:

Step A	Insulation	Lag pipes, draught-proof and address insulation for radiators, windows, lofts, walls and ceilings. (Applicants requesting funding for lighting and refrigeration projects do not need to address insulation first.)
Step B	Equipment	Improve or replace heating, lighting, ventilation, refrigeration and other equipment to maximise energy efficiency. Improve or introduce controls, set points, sensors and timers to ensure the efficiency of existing equipment.
Step C	Renewables	Please address insulation first (where relevant) and then equipment in order to maximise energy efficiency before applying for funding for renewables.

Applications can be for capital costs such as equipment or for revenue costs such as help towards staffing or payment of external consultant support, where necessary and appropriate. This can also include running costs, such as rent, heating, lighting and insurance.

The project work may also aim to deliver some of the following secondary objectives:

- Address a specific community issue, concern or problem
- Education of people of all ages
- Provide vocational training
- Offer training and/or support for volunteers.
- Provide practical energy efficiency improvements, where government funding is not already available
- Raise awareness and/or offer practical support for action to reduce carbon emissions or fuel poverty

Please make it clear in the application if you are applying for funding for a preliminary assessment or in order to meet the application criteria for another fund, and/or whether your project may benefit from matched funding if your application is successful.

Please note we cannot fund applications retrospectively or reimburse costs for events or projects that have previously taken place. We would normally expect projects to be completed within 6-15 months of any grant awarded, so by the end of March 2023 at the latest.

### **Who can apply?**

The Bath & West Community Energy Fund Grant Programme is open to groups or projects working in Bath and the surrounding area. It is particularly targeted at small organisations with charitable aims. You do not have to be an energy or environmental group. Applications from projects in the vicinity of existing BWCE projects are particularly welcome.

To be eligible, a group must:

- Be a community, self-help or voluntary group, a community enterprise, a local charity, or a local branch of a national charity working in Bath or the surrounding area (as defined above).
- Carry out a project that will reduce carbon emissions and/ or reduce fuel poverty.

There are no limits to the size of organisation which may apply to this fund and you do not have to be a registered charity, as long as the work you do has charitable aims and you have a constitution (set of rules), a management committee (at least 3 members), use of a group bank account with at least two signatories and, if applicable, a safeguarding policy. If an applicant organisation is holding financial reserves that could cover more than 8 months of its annual expenditure, the application will be considered a lower priority for funding. If your organisation is holding significant financial reserves, you will need to make it clear why these reserves cannot be used to cover the cost of the activities. If an applicant organisation is a Community Interest Company, please read the additional guidance in the 'Before Applying (Essential Information)' section on Quartet's website.

Trustees will favour applications in the vicinity of existing BWCE projects (see above for link), but not exclusively.

### **How much do we award?**

The BWCE Fund makes grants between £500 to £5,000 to local charities, community, voluntary or self-help groups. Priority will be given to applications where any grant awarded will make a significant contribution to the delivery of the project.

### **What we don't fund**

- Grant or loan schemes run by third parties
- Individuals
- General appeals
- Commercial companies
- Statutory organisations or the direct replacement of statutory funding
- Political groups or activities promoting political beliefs
- Religious groups for projects promoting religious beliefs
- Arts projects with no community or charitable element
- Sports projects with no community or charitable element
- Medical research, equipment or treatment
- Animal welfare
- Projects that take place before an application can be processed
- Activities that are intended to raise funds for other organisations

The BWCE Fund grants can not be used to meet the capital costs of energy efficiency improvements where the activity is eligible for government grant or subsidy. If proposals to support the capital costs of energy efficiency improvements are made, it is up to the applicant to provide evidence that the project would not be eligible for an existing government grant or subsidy.

Similarly, whilst the grant programme will not support the core educational activities of schools, independent groups within schools, such as PTAs, can apply for special projects or initiatives that do not form part of the school's core provision. Projects which incorporate a wider community focus, involving parents for example, rather than just focussing on reducing carbon emissions in the school, are of particular interest. The Fund will only consider awarding grants for school-based projects for physical measures (eg replacement of lighting) if the project includes activities to educate the school communities about energy efficiency. Potential applicants may wish to look at school specific programmes such as Energy Sparks – <https://energysparks.uk> – that may be able to help with emissions reduction and education.

### **When can you apply?**

Subject to approval by the members of Bath and West Community Energy at their AGM. The programme will be open for applications from the 27 September 2021 until 9am on the 5 November 2021. Decisions will be announced in January 2022.

### **How to apply.**

Complete the BWCE Fund application form at <http://quartetcf.org.uk/grant-programmes/bath-west-community-energy/>

As well as the completed application form you will also need to provide the following:

- A constitution/governing document/set of rules that sets out the purpose of your organisation and how it is managed.
- The contact details of at least **3** members of your management committee/board of trustees/board of directors.
- Evidence of a bank account in the name of the organisation. The bank account must have at least **2** signatories. Alternatively, if you belong to a small organisation that does not have a bank account another charitable organisation can look after the funds for you, but you must provide written authorisation from the organisation that will do this.
- A copy of your most recent annual accounts or financial records that show your organisation's balance of funds, income and expenditure. If you do not have financial records that cover a full year then you will need to provide the records you currently have.
- A safeguarding policy if your organisation works directly with children or vulnerable adults.
- The contact details of a referee. The referee should know the work of the applicant organisation in a professional capacity but not be directly involved in this work. For example a PTA of a school could not ask the head teacher of the same school to act as a referee.
- If your group has secured funding in the past (from any source) to support a similar project/activity, we would like to see a copy of the impact report for that work

### **What will happen next?**

Once we have received your application there will be an initial assessment by a member of staff. They may contact you for further information or to arrange to meet to discuss the application in more detail. Staff will then make a recommendation to a grants panel comprising of Trustees of the BWCE Fund who will make the final decisions on applications. Please note their decision is final and there is no appeal process.

### **Grant conditions**

Grant offers will be subject to Quartet Community Foundation's standard grant conditions, details can be obtained on request.

Successful applicants will also be required to meet the following grant conditions within three months of payment of the grant and may be contacted by BWCE's Communications and Community Outreach Officer, Nick Bird, to discuss promoting your grant and/ or developing a case study.

Successful applications must:

- Provide photos and a statement to [nick.bird@bwce.coop](mailto:nick.bird@bwce.coop) for use on BWCE's website to publicise the grant awarded and raise the profile of the BWCE Fund and the support it provides to community projects in Bath & surrounding areas.
- In providing the photos and a statement, the successful applicant agrees to BWCE using these materials & data; grants BWCE copyright in photos; and warrants & indemnifies BWCE that the successful applicant has the approval of anyone in the photos (and statement) that these materials will be used for the purposes of publicising and promoting the BWCE Fund.
- Publicise the grant awarded and the funded project by placement of the BWCE Fund logo on the organisation website and/or noticeboard to publicise the work of the Fund. Please contact [nick.bird@bwce.coop](mailto:nick.bird@bwce.coop) for copies of the BWCE Fund logo.

These additional grant requirements are intended to raise the profile of the valuable community service provided by the BWCE Fund. These requirements are in addition to Quartet Community Foundation and BWCE Fund's monitoring and evaluation requirements, below.

### **Monitoring and evaluation**

Six months after the grant has been paid and at the end of the project if this is significantly later, we will send you a grant monitoring report form to you to complete. This form asks for details of how the grant was spent and what was achieved including information about the impact of the project on carbon emissions and/or fuel poverty. Where applicable, data will be required including the likely carbon savings from the project.

In addition, a member of our staff or trustee may contact you to arrange a visit to find out more. For projects that last at least 12 months, you will be asked to complete an interim monitoring report form after 6 months, at 12 months (if requested) and at the end of the project.

The Information provided in the grant monitoring report may be used by the BWCE Fund on their website. In providing the photos and a statement, the successful applicant agrees to the BWCE Fund using these materials and data; grants BWCE and the BWCE Fund copyright in photos; and warrants and indemnifies BWCE that the successful applicant has the approval of anyone in the photos (and statement) that these materials will be used for the purposes of publicising and promoting the BWCE Fund. Please note that Quartet administers the grant programme, but grants are provided by the BWCE Fund.

### **Protecting your data**

The personal information collected via the application form is collected to solicit and process applications for grants from Quartet. All information is collected in accordance with the Data Protection Act 1998 (DPA), and the General Data Protection Regulations 2018 (GDPA). By completing an application form, you are giving consent for the information to be collected. Information is kept on our secure Customer Relationship Management database; and will be disclosed to grant panel members and donors. We publish data on grant recipients, but we anonymise details for any individual grantees. If you feel that any other information about your application or project should not be made publicly available, please contact us to discuss this. Please refer to our Privacy Policy at <http://quartetcf.org.uk/privacy-policy/>

As a community organisation itself, BWCE operates with and in local communities in the Bath and surrounding area. In applying to this Fund groups are agreeing to allow BWCE to contact them about BWCE's community activities in the area that may be of interest to them. BWCE may also use information about projects that receive grants on their website to promote and celebrate successful activities or in joint publicity where appropriate (please see Grant Conditions and Monitoring & Evaluation).

### **Need more information?**

If you need more information or wish to discuss your application before you apply, please contact: Andy O'Sullivan on 0117 989 7748 - [applications@quartetcf.org.uk](mailto:applications@quartetcf.org.uk)  
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