

Big Energy Saving Network (BESN) funding

October 2018 - March 2019

Specification and guidance for completion of application form



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Guidance notes

Completed applications should be sent, by email, to besn@citizensadvice.org.uk by 5pm on Tuesday 4 September 2018.

Enquiries to: besn@citizensadvice.org.uk

Each organisation must complete the entire form and provide evidence of qualified staff and/or volunteers that can fulfil the Champion role. If applying for more than one Champion, you only need to submit one application form. However, you must complete Section 3 separately for each of them. Space for submitting up to four applications for Champions is provided in this section.

Where multiple Champions from the same organisation plan to work together to deliver a project, it is acceptable for individual Champions to divide the work, for example, one may focus on reaching consumers whilst another on frontline workers.

Applicants are required to complete all sections of the application form.

Successful applicants will be required to provide further information to us including:

- Manager name and contact details
- Addresses
- Charity registration number
- Company registration number
- Bank details
- Champion contact details

Successful applicants will also be required to enter into a grant agreement.

Citizens Advice will be hosting a number of training days, for BESN, in October, at numerous venues across England and Wales. All Champions that are funded must attend one of those dates.

Key dates:

14 August 2018 – applications open

4 September 2018, 5pm – deadline for receipt of electronic applications

17 September 2018 – aim to notify successful applicants

17- 21 September 2018- appeals window

1 October 2018- grant agreement issued, delivery commences

1- 30 October 2018- training for all Champions

31 March 2019- funded activity must be completed

Summary of requirements

Below are the key points for organisations to consider before making a BESN application:

1. Applications for grants can be made by eligible third sector and legally constituted organisations located anywhere in England and Wales.
2. Each grant is for a sum of £5,000 per Champion, which is made up of an initial payment of £4,000 and a further £1,000 if the agreed objectives of the grant are met in full within the grant period.
3. Each organisation can apply for a maximum of four Champions, although we will consider the geographic spread of grants to be awarded as part of our assessment of bids to ensure that we have Champions across all regions of England and Wales.
4. Eligible organisations can either apply to deliver a single Champion-led project or they can bid for funding for up to four Champions; each leading and delivering their own programme of outreach, or working together to deliver a collective programme.
5. Each Champion is required to deliver proactive advice to 100 vulnerable consumers on energy issues via an 'assisted action' approach (completed by 31 March 2019).
 - a. The primary aim is to help vulnerable consumers switch to a cheaper tariff and/or supplier, but additional support provided can include:
 - i. Help with debt to their supplier
 - ii. Help to access assistance such as Warm Home Discount
 - iii. Help to access energy efficiency schemes.
6. Each Champion is required to deliver training to 40 frontline workers to enable them to provide advice on energy issues to consumers they assist through their day-to-day work (completed by 31 March 2019).

7. Reporting requirements:
 - a. Monthly performance data to Citizens Advice.
 - b. Champions are also required to maintain and keep records, including:
 - i. Sign in sheets for consumer and frontline worker events
 - ii. Records of one-to-one advice appointments
 - iii. Group session feedback forms

Introduction

Citizens Advice is pleased to announce the launch of the 2018/19 Big Energy Saving Network (BESN) project. BESN is made up of local community groups and charities across the United Kingdom that can advise on energy saving in the home, switching energy suppliers, different energy tariffs and available support to help vulnerable households stay warm and lower energy bills.

We invite organisations to submit applications to:

1. Nominate Network Champion(s) who will coordinate and deliver support to consumers and front line workers.
2. Administer and oversee a programme of outreach.
3. Collect and provide prescribed evaluation and monitoring information
4. Where possible, complement delivery through use of additional staff/volunteers.

Background

There is considerable evidence that vulnerable consumers are often among those most disengaged from the energy market and lack the confidence necessary to save money by taking action on tariffs, switching and improving energy efficiency. Consumers who don't regularly switch are highly likely to be on the most expensive tariffs and the Network's primary aim is to support vulnerable consumers to switch and save.

The Big Energy Saving Network complements campaigns such as Big Energy Saving Week and Energy Best Deal extra to bring together trusted third sector and community bodies to provide targeted, personalised advice that can help bring down the energy

costs of some of England and Wales' most vulnerable consumers. The Network has been very successful in engaging vulnerable consumers face to face and through training of frontline workers, reaching over 500,000 people in the first 4 years.

What does being a member of the Big Energy Saving Network involve?

BESN Training

Every BESN grant funded project will be coordinated by a Network Champion. Each named Champion will receive specialised training which will be developed and delivered in a format that is beneficial for both new members of the Network and returning Champions. The training will include information on tariffs, switching, and assistance for vulnerable consumers and incorporate practical guidance on how to deliver your BESN project and meet the specified reporting requirements.

This training will be hosted by Citizens Advice and will take place at a number of locations across England and Wales, in October. Attendance at one of these events will be compulsory for all BESN Champions.

Project Requirements

Each funded Champion must attend a training day, hosted by Citizens Advice at numerous venues around the country. Further details about those events will be released in due course.

Once trained, each BESN Champion is responsible for coordinating the delivery of their project, including:

1. Delivery of proactive advice to 100 vulnerable consumers on energy issues via an 'assisted action' approach (completed by 31 March 2019).

- a. "Assisted action" means helping consumers take action to reduce their energy bills or access assistance they otherwise would not have done without BESN
- b. The primary aim is to help vulnerable consumers switch to a cheaper tariff and/or supplier, but additional support provided can include:
 - i. Help with debt to their supplier
 - ii. Help to access assistance such as Warm Home Discount
 - iii. Help to access energy efficiency schemes.
2. Delivery of training to 40 frontline workers to enable them to provide advice on energy issues to consumers they assist through their day-to-day work (completed by 31 March 2019).
3. Reporting on activity including:
 - a. Complete sign-in sheets for all group sessions
 - b. Complete a case-study
 - c. Encourage as many consumers and frontline workers as possible to complete a feedback form at the group session they attend
 - d. Complete feedback forms to capture outcomes from one-to-one advice
 - e. Provide the above to Citizens Advice if your organisation is selected to be audited

In addition, it is suggested Champions recruit and train additional volunteers, including cascading training amongst colleagues, to help deliver the objectives of the project, in particular to assist at outreach events and in providing one to one advice.

Champions will be the point of contact for their project's volunteers and responsible for overseeing the activities of any volunteer(s) and for ensuring that the advice both they and their volunteers give remains accurate and up to date.

Successful Champions will be provided with a range of supporting material, access to further sources of help and advice and contact details for further support from the project delivery team.

Single and multiple Champions

Each organisation can apply for a maximum of **four** Champions. Please note that we will consider the geographic spread of grants to be awarded as part of our assessment of bids to ensure that we have Champions across all regions of England and Wales.

Eligible organisations can either apply to deliver a single Champion-led project or they can bid for funding for multiple Champions; each leading and delivering their own programme of outreach, or working together to deliver a collective programme.

For clarification:

Each Champion applied for must be a different member of staff or volunteer. This section of the application form will be assessed on an individual by individual basis.

Multiple Champions from the same organisation must deliver the aggregate outputs for their total number of Champions: for example, an organisation with three Champions must deliver to at least 300 vulnerable consumers and train at least 120 frontline workers to meet the programme requirements.

Where multiple Champions are used, it is acceptable for individual Champions to focus either on reaching consumers or frontline workers, as long as the aggregate outreach criteria are achieved. All Champions will be required to be trained to deliver the objectives of BESN.

How can you successfully deliver BESN?

The primary objectives of the Big Energy Saving Network programme are:

- To provide assisted action for the maximum number of vulnerable consumers possible with the funding available, helping them save money on their energy costs through attendance at BESN Champion and/or volunteer led outreach sessions.
- To deliver a training programme to frontline workers who come into regular contact with vulnerable consumers, so that they can give direct help and advice to consumers to help them save money on their energy costs where practical.

Who are vulnerable consumers?

For the BESN programme this includes but is not limited to fuel poor households, people on low incomes and/or on benefits, people with disabilities or long term health conditions, those who use prepayment meters, those without internet access and those who have not switched before.

Who are frontline workers?

Frontline workers are employed professionals such as Local Authority, Housing Association, health-care or social care staff and volunteers that come into regular contact with vulnerable consumers as part of their day-to-day activities.

What do we mean by delivering 'outreach' and 'reaching' vulnerable consumers and frontline workers?

The objectives of the BESN will only be met if outreach events and training offer opportunities to vulnerable consumers to use the help and advice to reduce their energy costs.

In practice, this means that consumers need to receive help and advice from the Champion or volunteer, with the opportunity to receive one to one advice as required, for it to be counted towards the outreach target of 100 consumers. Ways in which you might do this include:

- One-to-one personalised advice
- Delivery of a Network consumer event (see below for the type of events which work well), where advice is then provided face-to-face, or followed up afterwards with a one to one session.

Advice given via the telephone or information leaflets passed out at large scale public events where there are insufficient resources and/or volunteers to provide personalised advice, will **not** count towards a Champion's targets.

Similarly, training delivered to frontline workers must be delivered in a format which enables them to subsequently feel confident to provide advice to their vulnerable clients. In practice this means delivering a training session which allows participants sufficient time to go through the Network material with the Champion or volunteer and raise any questions they may have. This type of delivery can then be counted towards your target of training 40 frontline workers.

What kind of consumer events and training sessions work well?

The key to successful delivery of your project is to be flexible with your approach and ensure that:

- Events are held in a suitable location – for example the venue should be accessible to all potential attendees.
- Consumer events need to be suitably advertised – a Network outreach event should be publicised through existing contacts and also via press and social media. This will help to encourage consumers to bring along any relevant information such as a copy of their most recent energy bill.
- Make full use of your organisation's contacts, links with community groups and established partnerships with frontline organisations in your area. Champions and volunteers should also be proactive in developing further links to help publicise the Network and ensure that the right consumers are being reached.
- Schedule your BESN consumer sessions as part of existing events where vulnerable consumers already meet. This also applies to your sessions for frontline workers – try to schedule your training as part of pre-existing team meetings, offer to deliver your session at the organisation's premises and tailor your BESN presentation to meet their needs and learning requirements.

Events and training sessions need to be of an appropriate duration to convey the key messages of the programme. This will enable time for the one to one assisted action that follows and ensure that frontline workers are confident to deliver advice to their clients.

Examples of successful events include:

- Attending health clinics such as asthma, flu or diabetes clinics to provide advice
- Attending food bank drop in sessions
- Parent and toddler groups
- Debt advice clinics
- Library events
- Having a stall at a local market to provide advice
- Housing Association community events
- Attending community group events
- Advice to different faith groups in the community
- Advice at the Job Centre Plus
- Local Authority referrals for assistance

Why are volunteers important?

The Network model encourages Champions and volunteers to work together to deliver the aims and objectives of the programme. Successful Champions are encouraged to recruit and train two volunteers per Network project. Additional volunteers could be of particular benefit to organisations where only one Champion and/ or member of staff is leading delivery.

Volunteers can help Champions to organise and deliver outreach events as well as generating a positive legacy for the key messages of the programme to continue after delivery ends.

It will be important that Champions are open and accessible and can provide encouragement and guidance to volunteers as they go about delivering consumer advice sessions.

Reporting requirements

As part of the programme, organisations are required to collect and submit:

- A summary of consumer and frontline worker activities, including details of planned events
- Reports on BESN events delivered.
- Details of the actions consumers have taken to reduce their energy bills
- Feedback forms from consumers and frontline workers who attended a BESN group session.
- An interim report - overview of progress to date, potential risks to delivery and proposed steps to mitigate risks
- Final report – feedback on how the project was delivered, including suggestions as to how BESN could be improved for future delivery
- A case study from each Champion by 31 March 2019
- Champions are also required to maintain and keep records, including:
 - Sign in sheets for consumer and frontline worker events
 - Records of one to one advice sessions
 - Frontline worker training feedback forms

Each Champion will be required to submit one case study setting out how they have been able to help a vulnerable consumer take action as a result of their Network activity either through one to one advice to a consumer, or from feedback of a frontline worker that received BESN training (in the capacity of their job or volunteering role).

We recognise that collecting information, particularly from consumers, can be a challenge, but this information is very important because it provides evidence of delivery for audit purposes and helps Citizens Advice demonstrate the impact of the project. It also helps us to understand better what your organisation and Champions have achieved and the impact of this on individual consumers and frontline workers.

Funding available and applicant eligibility

Each successful grant is for a sum of £5,000 per Champion, which is made up of an initial payment of £4,000 and a further £1,000 if the agreed objectives of the grant are met in full within the grant period.

Citizens Advice may seek to recover all or part of the initial payment if there is insufficient evidence that the objectives of the grant have been met. Citizens Advice will refer to the reporting requirements, together with sample checks of sign-in sheets and feedback forms to assess whether the terms of the grant have been met.

The grant can be used to cover such expenses as staff costs, travel to training events, venue hire (if required), publicity, printing, IT, translation costs, travel and other associated expenses incurred to run events and/or make home visits.

By applying for the grant the applicant organisation agrees to ensure the Champion's attendance at organised Citizens Advice training opportunities.

Applications for grants can be made by the following eligible organisations located anywhere in England and Wales:

1. Charities
2. Parish Councils
3. Community Interest Companies
4. Community Co-operatives and Community Benefit Societies (Industrial and Provident Societies)
5. Voluntary Associations
6. Development Trusts
7. Faith Groups
8. Registered Social Landlords
9. Local Authorities

Funding will not be available for commercial activity and applicant organisations should check with Citizens Advice if they are in any doubt as to their eligibility to apply for grant funding.

About the application form

Applicants should answer all of the application questions, clearly setting out how they meet the following criteria.

The table below shows the weighting of each question:

Section	Weighting
1	This section will not be scored, however it must be completed or your application will not be accepted.
2.1	This section will not be scored, though it may be used to ensure that we have a geographic spread of grants awarded.
2.2	20%
2.3	20%
2.4	20%
3.1, 3.2, 3.3, 3.4*	40%

*If you apply for more than one champion each will be scored separately and will be added to your section 2 score (i.e.) if you apply for 4 champions your application will end up with four scores which will then be ranked.

For example, if you applied for three Champions A, B & C, this would work as follows:

You will submit one application; this will include answers for section 2 and answers in section 3.1, 3.2, and 3.3 (as you have applied for three Champions). You will leave section 3.4 blank as you are not applying for four Champions.

When we score this application, we will score section 2 once. We will then score section 3.1 for Champion A, section 3.2 for Champion B, and section 3.3 for Champion C. These scores will be added to section 2, as below:

Section 2 + Section 3.1 = score for Champion A
Section 2 + Section 3.2 = score for Champion B
Section 2 + Section 3.3 = score for Champion C

The scores for each Champion will then be ranked, alongside applications from other organisations, and the highest scoring Champions will be most likely to receive funding.

Section 1- Delivery organisation details

This is the basic information we require to process your application. The Centre Manager/CEO will be the primary contact we use should we require additional information and to update you regarding the outcome of your application.

Section 2- BESN funding questions

2.1 - Region

Please indicate which region or regions you will be delivering in. This information will not be scored, however we may use it to ensure that we have a geographic spread of grants awarded across England and Wales.

2.2 - Tell us about your organisation

When assessing this question our evaluators will be looking for evidence of why your organisation is well placed to deliver BESN. We will look for examples of your organisation's experience engaging vulnerable consumers and delivering training to frontline workers who work with them. We will also look for local links and partnerships you may have. Any statistics you can provide or examples of engaging consumers with similar projects, in the past, will also be valuable.

2.3 - How will you deliver BESN?

You should identify which type of events you intend to deliver and outline how your organisation will reach 100 consumers and 40 frontline workers per Champion. Your response should clearly lay out who will deliver the work, where you expect the events to take place and when you expect the work to take place. We also want to know what links you will use to promote your events and how you will ensure that you reach your target.

The answer should also outline how you will provide one-to-one energy advice and who will deliver this, as well as the outcome you expect those appointments to lead to.

If you intend to apply for multiple Champions and they are going to work together please ensure you clearly explain how you will approach this. Will they work together, or will they work towards their targets independently?

Finally, there should be key milestones in your project plan, such as when you plan to start delivery, key events your delivery will focus around and when you expect to achieve 50% of your targets.

2.4 - What contingency plans do you have in place?

You should explain how your organisation is going to mitigate the three risks we have identified in the application form. We will be looking for specific plans and actions that are achievable and realistic. We also want to know who will be responsible for ensuring those plans are carried out.

Section 3- Details of Champion

You will need to complete this section for each Champion that you are applying for and indicate this number at the beginning of the section.

Each Champion should be named and the region they will carry out their work in should be clarified (please use the list from section 2.1). When assessing applications we will be looking for prospective Champions to have verifiable experience and skills in the delivery of advice to vulnerable consumers and the training of frontline workers.

We would also like you to outline previous experience that each Champion has delivering energy advice, whether that is via BESN or a different energy project. Please let us know how successful they were when delivering any previous projects. We will look for relevant experience and/or qualifications, particularly in relation to giving energy advice.

If you are applying for more than one Champion then please complete the additional questions boxes provided.

Assessment process

Citizens Advice will acknowledge receipt of your application within two working days. If you do not hear from us in this period then please assume that we have not received it and contact us again.

Applications will be evaluated by a panel, comprised of national Citizens Advice staff, for two weeks following the end of the application window. All applicants will then be notified, regarding the outcome of their application.

If you are successful we will provide a form for you to complete in the notification email. Successful applicants will be required to provide additional details prior to us issuing them a Grant Agreement.

The project requires that we provide coverage of service across England and Wales. To ensure this happens, we reserve the right to amend the level of funding we award to individual applicants.

If you do not receive any funding, there will be an appeals process. Further details of the appeals process will be provided in the email giving you the result of your application. Appeals will only be available to those who receive no funding.

Successful applicants will be offered a grant agreement, via email, prior to the project's start date. Further participation in delivery of the Network, including grant of funds, will be conditional on applicants agreeing to terms and conditions applicable to the grant.

Data protection

To inform assisted action on tariffs and switching, successful organisations are required to collect information on consumers' income and energy use, which will include personal data. Each grant funded organisation will also be required to provide Citizens Advice with evaluation data, which will be shared with the Department for Business, Energy and Industrial Strategy (BEIS) to inform the success of the Network's activities.

Each grant funded organisation will be responsible for complying with all requirements of the General Data Protection Regulations (GDPR) and Data Protection Act (2018).

Applicant organisations need to have appropriate policies and procedures in place for the processing of personal data, and understand their obligations under data protection legislation. Successful organisations will act in accordance with the data protection provisions set out in our grant agreement.

END