Specification and guidance for completion of application form

Big Energy Saving Network

Regional Energy Leads

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## Background

Big Energy Saving Network is an outreach focussed energy advice programme delivered across England and Wales. It is delivered by a network of Champions and Regional Energy Leads, based in local organisations across England and Wales. This is the guidance document if you are interested in hosting a BESN Regional Lead during 2021/22. This role will work alongside BESN Champions.

**Champions** offer advice on energy saving in the home, switching energy suppliers, and guidance on how to access schemes that help vulnerable households stay warm and lower energy bills. BESN should be delivered in an outreach setting by engaging with existing community groups. Consumers can be reached via group sessions, though all attendees should be offered one-to-one support if they would like it.

Advisers should deliver ‘assisted action’ support which means helping consumers take action to reduce their energy bills or access assistance they otherwise would not have done without BESN.

**Regional Leads** aim to cascade energy advice by training 300 frontline workers, so that they can go on to provide energy advice to the consumers, or refer consumers to someone else who can. They are also responsible for local coordination, facilitating the sharing of best practice between Champions.

For 2021/22, each government region in England and Wales will host two Regional Energy Leads. Each REL will receive £12,975, which will fund a part time role for the delivery period from 1st August 2021 to 31st March 2022.

BESN is funded by the Department for Business, Energy & Industrial Strategy and managed by National Citizens Advice.

If you have any questions about BESN, or would like to clarify anything about how the project is delivered then please contact us at:**besn@citizensadvice.org.uk**. We will aim to get back to you within 24 hours.

## Eligibility

This portion of the Big Energy Saving Network project funding is available for all applicants.

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

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

You may only apply to be a Regional Energy Lead in the government region you are based in - and you may only apply to deliver one of the two Regional Energy Lead roles in your region.

Organisations are invited to apply for both the BESN Champion, and BESN Regional Energy Lead roles - provided that the roles are for different people within the organisation. Both applications will be assessed independently, and awards will be made separately. Organisations may be successful in neither, one or both applications.

For more information about applying to be a BESN Champion as an external advice organisation, please click [here](https://docs.google.com/document/d/1lPiOWMY8hiDnkXHuXN2AeKgSL4L0YLr1OsSU2G1sTME/edit).

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.

If you are based in a local Citizens Advice you are invited to apply to deliver Big Energy Saving Network via this [link](https://docs.google.com/document/d/1Ca8wIjvxJ1PanQR9MESuEKgXhydkLp8HNWwGlrah7FU/edit). This year, BESN will be delivered in partnership with the Energy Advice Programme (EAP) as a combined project, designed to help clients from their entry into the service until all of their problems have been resolved.

## BESN Energy Regional Energy Lead Project Description

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The training element of the Big Energy Saving Network project is designed to offer training to frontline staff who work directly with energy consumers who are in fuel poverty or at risk of fuel poverty. The ultimate objective is to enable them to help the consumers that they work with take action to improve their energy situation.

**Regional Energy Leads**

In 2021/22 each Regional Energy Leads will be expected to deliver training to 300 frontline workers. This training should be targeted at frontline workers who work closely with vulnerable consumers, and the overall intention is that each frontline worker trained should cascade what they have learnt to 10-15 consumers. Secondary benefits of this training include raising the profile of energy issues and helping to develop referral pathways and better networks, to ensure that vulnerable consumers are given specialist energy advice.

The training should be pitched at a level which enables the frontline worker to resolve many energy queries by themselves, as the intention is that the BESN project will help them to help others. Citizens Advice will provide template presentations to help with this work, as well as providing guidance and clarification about the level of training required, once the project is underway.

In addition to delivering training, Regional Energy Leads will have a leadership role to play in guiding the BESN project at a regional level. Regional Leads will host a minimum of two local networking meetings throughout the delivery window, as well as making sure that they contact each Champion on a monthly basis. They will be able to offer training support, expert input for complex cases, guidance on how to deliver BESN and will also pick up ad hoc queries/issues related to their area.

To help Regional Leads provide support to those who need it, we plan to give them access to the headline data for organisations delivering the service in their region.

We expect the Regional Lead role to be equivalent to 0.4-0.5 FTE over the course of the delivery window. Generally speaking most of this time will be spent on booking and delivering training, with a smaller focus on regional coordination and support for Champions.

**Method**

From a training perspective the key objective of BESN is to train frontline workers who work closely with clients who are in fuel poverty or at risk of fuel poverty. This objective should be central to planning how the project will be delivered and deciding which organisations you should target your training at. We expect that arranging and delivering training will make up the majority of the effort that Regional Energy Leads put in to BESN.

The best method for delivering training has been to build strong links with a large number of local organisations who work with vulnerable consumers. This could include carers groups, staff working in a healthcare setting, local authority workers, charity workers or volunteers. In some cases you can also deliver training to staff at your own organisation.

It is not uncommon for training sessions to be attended by only 5-10 frontline workers. It is important to factor this in when planning how many sessions you will deliver across the delivery window. For this reason it is also important to run training sessions throughout the delivery window, to ensure that steady progress towards your target is being made.

Training can be delivered in three ways. Firstly, via face-to-face delivery, in a traditional classroom based setting. Secondly, via delivering an online seminar, using a digital tool such as zoom. Thirdly, by arranging for frontline workers to sign up and complete a two module elearning course.

In the first two methods we expect that you should cover the training topics listed below. The topics should be covered in detail, to a level that will enable the frontline worker to solve client queries related to each topic. We expect that in most cases training sessions should take around an hour, so it is important to ensure that the frontline workers have that amount of time to commit prior to the session.

The third method, delivery via the elearning module is described below.

**Topics**

BESN training should focus on the following topics

* Switching
	+ Frontline workers should be confident after receiving training that they know how to check whether a client is on the best deal, and should be confident that they can help them switch to a better one if not.
* Warm Home Discount
	+ Frontline workers should know how to check if a client is eligible for WHD.
	+ They should also know how to register a client for WHD.
* Priority Service Register
	+ Frontline workers should know which clients are eligible for the PSR and how they can sign a client up.
* Energy efficiency
	+ Frontline workers should have a good understanding of how behavioural change can reduce a client's energy bill.
	+ They should also be aware that there are schemes available that may lead to more significant improvements to a client’s home.
* Local schemes and help
	+ Frontline workers should know about any schemes or programmes that their client’s may eligible for at a local level
	+ Frontline workers should also know where they can refer more complex clients, should they encounter a client who needs additional help.

Training delivered via BESN is not necessarily limited to the topics above, for example, you could also cover fuel debt and smart meters. However the focus of the project is to help consumers take action to improve their energy situation, and the points above have been identified as the areas which will help our consumers most.

**Digital Training Offer**

For the 2021/22 delivery window we will be introducing a digital training offer. This is in response to issues we had during 2020/21 with frontline worker availability, and problems arranging sessions at a time convenient for all workers who wanted to attend the training.

This elearning will be housed on the Citizens Advice training platform Docebo and will be accessible by frontline workers once their organisation has been referred by a Regional Lead. This referral process is simple, and will only require the Regional Lead to complete a short form providing details about the external organisation that would like to access the elearning. Once an organisations has been referred for the elearning training, the Regional Lead should ensure that a follow up face-to-face or remote session is booked in, to briefly cover any questions from the training, and provide some local context about the delivery of energy advice.

All frontline workers who sign up and complete the training following a referral will count towards the overall Regional Energy Lead target of training 300 frontline workers.

For 2021/22 we do not expect a significant amount of the training to be delivered this year and will instead focus on understanding how this delivery method could be used to plug gaps in the service in the future. We will provide more detail about how this will work at the first Regional Lead Meeting in August

**Regional coordination**

Regional Leads are also responsible for the regional coordination of the BESN project. From a formal perspective this will include hosting two regional networking meetings for Champions in your region (hosted alongside the other Regional Lead), as well as monthly contact with each organisation delivering the project.

On top of this Regional Leads will be expected to offer less formal support to delivery partners who need it. Including offering guidance on delivering the project, help with complex energy issues, guidance on local schemes and energy advice concerns, and any other ad hoc queries that arise.

As an additional task for this year Regional Leads will support the development of the BESN project, to ensure that all consumers seen via BESN have access to an organisation delivering a specialist energy casework service. Regional Leads will help to embed referral pathways between organisations in their area, to improve the service in this way.

Regional Leads will have access to the performance information of the Champions in their region, and whilst proactive performance monitoring and management is not required, this may help allocate resources.

The above can be delivered via face-to-face meetings or, more likely, remotely using tools such as Zoom or Google Meets.

**Training**

As a result of the timeframes for this work, and the specialist skill set required, applications from organisations who can name a Regional Lead who already has the skills to deliver the work will be strongly preferred.

Additional training via our elearning platform will also be available, covering the six modules below:

* Module 1 - What is energy?
* Module 2 - Energy foundation
* Module 3 - Energy Contracts and complaints,
* Module 4 - Paying for Energy/bills
* Module 5 - Energy Efficiency and Smart Meters and
* Module 6 - Other fuels & areas of energy advice.

In addition to this training there will be a series of monthly meetings hosted by Citizens Advice to provide ad hoc support, and address any other requirements that may arise during the delivery window.

## KPIs and Performance

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| **Performance indicators for BESN** |
|  | * Each BESN REL is required to train a minimum of 300 front line workers in their region.
* RELs are to provide strategic leadership to BESN Champions on a regional level.
* It is the responsibility of BESN RELs to facilitate networking and the sharing of best practice across their region
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| **KPI** | **Volume** | **Reporting Method** | **Reporting Frequency** |
| Frontline worker training | 300 per REL | Google Form submitted to National Citizens Advice | Monthly |
| Frontline worker feedback | Shared with all training attendees | Google form completed by frontline worker | After all training sessions |
| BESN Champion Support | Various throughout the delivery period | N/A | N/A |
| Networking and Engagement | Various throughout the delivery period | N/A | N/A |

Each Regional Energy Lead will be responsible for training 300 front line workers across their region. This target can be achieved using a combination of the following methods:

* **Face to Face** - Traditional classroom-based training where the REL will travel to an external organisation or third party venue to deliver the training in person.
* **Online** - A similar approach to face to face training, however the session is to be delivered in an online environment such as Google Meet, Zoom, etc.
* **e-Learning** - Training is predominantly facilitated by front line workers completing the Energy Training Modules on Docebo - followed up with a Q&A or ‘office hours’ session by the REL.

Regional Energy Leads will contribute towards evidence gathering and best practice sharing. Throughout the delivery period, RELs are expected to work collaboratively with others across the Citizens Advice network, as well as external stakeholders by:

* Joining calls/meetings
* Providing timely feedback
* Sharing ideas and learning
* Developing a digital network to share information in their region

One of the roles of the Regional Energy Leads is to offer support, guidance and sector knowledge to BESN Champions in their region - achieved by an active partnership with frequent and regular catch-up sessions throughout the delivery window. Champions will engage with RELs on a frequent basis as a main source of information and support - as well as consult RELs on issues relating to the BESN project.

Regional Leads will be required to report the number of frontline workers they have seen on a monthly basis. Monthly reporting is to be completed by Regional Energy Leads using the Google Form provided. The form will be live throughout the delivery period, and each month’s data is expected to be submitted by the fifth working day of the following month.

On occasion, Citizens Advice may ask for ad-hoc reporting to help evaluate the success of the project and any changes we have made.

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## Funding and Grant Payments

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The total funding for each Regional Energy Lead for August 2021 to March 2022 is £12,975.

The funding will be paid in two equal portions - the first upon receipt of a signed grant agreement in August 2021, and the second in January 2022 if all KPIs have been met.

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.

The grant can be used to cover expenses such as staff costs, travel, venue hire, printing, IT, translation costs and other associated expenses.

By applying for the grant, the applicant organisation agrees to ensure the Regional Energy Lead’s attendance at organised Citizens Advice meetings.

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## Application process

### **Timetable**

Set out below is the proposed timetable. This is intended as a guide. We reserve the right to amend the timescale if necessary at any stage.

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| **Date** | **Activity** |
| **Applications open** | Monday 21 June 2021 |
| **Application window** | Monday 21 June 2021 - Monday 05 July 2021 |
| **Deadline for submission** | Monday 05 July 2021 - 5pm |
| **Evaluations** | Tuesday 06 July 2021 - Friday 16 July 2021 |
| **Provisional awards** | W/C Monday 19 July 2021 |
| **Appeals accepted** | Two days following provisional awards |
| **Appeals heard** | Two days following appeals window |
| **Final awards** | W/C Monday 26 July 2021 |
| **Grant agreement issues** | Monday 02 August 2021 |
| **Service commences** | Monday 02 August 2021 |
| **Training** | August 2021 |
| **Project completed** | Thursday 31 March 2022 |

**Application form**

A link to the application form can be found [here](https://docs.google.com/forms/d/1Lq0ktyy7lWQulFfHxhEV6WzDJE_ySr-Mhwvq-eH-kpM/edit). We advise that you complete your answers on a separate document and then copy them across to this form, to avoid a situation in which any work is lost.

If you are having difficulty using this form then please contact us as soon as possible so we can arrange to receive your application in an alternativ format.

**After submitting your form**

Upon completion of your application, you will receive an email via the Google Forms service to confirm your application has been submitted. This is also confirmation that your application has been received. If you have received this confirmation, no further action from you is necessary. If you do not receive this confirmation within one hour of submission, please get in touch with us.

## Assessment and next steps

**Assessment process**

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.

The scoring for each question will be based on the matrix set out below.

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| **Score Awarded** | **Requirement for Score** |
| **Score 0:** | Requirement not answered. |
| **Score 2:** | Limited response providing minimal evidence of whether or how the applicants will meet the requirements, including simply stating that the requirements will be met. |
| **Score 3:** | Limited response but contains some of the relevant information |
| **Score 5:** | Good response and approach demonstrating good understanding and interpretation of the requirement. |
| **Score 7:** | Good response that provides additional information beyond what is required for a score of 5 |
| **Score 9:** | Excellent and comprehensive response and approach, demonstrating complete understanding of the requirement. |

Evaluation of your application will be carried out by trained members of the Citizens Advice grant evaluation panel. All applications will be assessed by two staff members who will moderate their scores to ensure consistency. Nobody eligible for funding will be a part of this process.

The score for each section of the application will be broken down in your notification email.

**Weighting**

It is important to note that some questions on this application are weighted more strongly than others. This will mean they will contribute more to your overall score. The table below breaks down this process:

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| **Section** | **Weighting** |
| 1 | This section will not be scored, however it must be completed or your application will not be accepted. |
| 2 | This section will not be scored, though it may be used to ensure that we have a geographic spread of grants awarded.  |
| 3.1 | 20% |
| 3.2 | 20% |
| 3.3 | 20% |
| 4 | 30% |

**Successful applicants**

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.

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

**Appeals**

If you do not receive any funding, there will be an appeals process. Appeals will only be available to those who receive no funding.

You must let us know of your intention to make an appeal within 48 hours of receiving your result. We will acknowledge your intention within 24 hours and you must then give us the reasons for your appeal within the 48 hours following our acknowledgement.

Appeals should be submitted to: **besn@citizensadvice.org.uk**

The person assigned to review your appeal will:

* Review the scores awarded to any areas highlighted in your appeal, taking account of the concerns raised in the appeal - where appropriate, revised scores will be applied
* Examine whether due process has been followed

The appeal score for your application (if the original score has been adjusted), and/or the result of the investigation into the process followed will then be communicated to you via email. If your appeal is particularly complex or detailed and the person dealing with it needs longer to complete a full investigation, we will notify you and let you know when you can expect to receive a response

The decision of the manager dealing with the appeal will be final.

**Feedback**

Unfortunately we will be unable to provide feedback to those who submit an unsuccessful application.

**Questions and clarification**

You may submit questions and ask for clarification regarding the application process by emailing: besn@citizensadvice.org.uk**.**

We have also created a live [FAQs document](https://docs.google.com/document/d/1Vn81lGMY40U1J1AksE09ucLNovl2bgoTZve7D_Du0bs/edit?usp=sharing) and will add any additional questions asked to this.

## Application questions and guidance

Please see the guidance below, for instructions on how to complete the application form. We advise that you complete your answers to the application in a separate document and then copy your answers into the form. This will ensure that you have a copy of your answers should anything happen to the form.

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| **3.1 - Tell us about your organisation - Word limit: 300** |
| Explain why your organisation would be good at delivering as a Regional Lead* What experience do you have providing training to other organisations in your area?
* What partnerships do you have in your region that will give you access to the target frontline worker group?
* What does your organisation do, on a regional level, to provide guidance and leadership to others delivering in the energy advice sector?
* How do you cooperate with other organisations delivering energy advice?

Within this answer, we are looking for the reasons why your organisation is well-placed to deliver BESN. We are looking for examples that show that you have the regional links necessary to reach your training target, and that those links will connect you to frontline workers working with vulnerable consumers. We also want to know how your existing work will enhance your ability to deliver BESN, and are looking for examples of how your organisation leads on energy advice in your region. Finally, we want to know what experience you have coordinating different organisations to enable the sharing of best practice, to improve services across a wide area.  |

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| **3.2 How will you deliver BESN? - Word limit: 300** |
| Please set out your organisation’s proposed approach to reach 300 frontline workers in your region, and how you will share best practice among BESN delivery partners across your region* What will you do to ensure that you reach your overall target?
* Which organisations will you target for training and how will you engage with them effectively?
* How will you ensure you reach organisations across your region (i.e. not just those in your immediate locality)
* How will you encourage BESN Champions in your region to collaborate and engage with one another?

We are looking for an understanding of how your organisation will achieve the aims and objectives for BESN. You should be clear about the steps you will take to reach your target and the timeframes associated with this project. Your response should also highlight how your organisation will establish new partnerships as well as building on those which already exist. We are looking to find out how you will ensure that you are able to engage organisations from across your entire region, as well as the immediate local community. You should also clearly outline how, as a Regional Lead, you will support the BESN champions in your area - and the strategies you will use to nurture excellent working relationships. |

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| **3.3 How will your model guarantee effective delivery in unpredictable circumstances? - Word limit: 300** |
| Please tell us about your organization's ability to adapt to changing delivery conditions and new ways of working.* What will you do in the event that you cannot deliver training in a face-to-face setting?
* How will you support Champions in your region exclusively via remote communication?
* How will you integrate the elearning energy training module into your plans to deliver training in your region?

We are looking for information on how your delivery model can adapt in response to the current working climate. You should outline the contingencies you have in place to ensure continuous delivery throughout a lockdown environment, as well as examples of effective remote delivery and communication. We are also looking for information around how, as a regional lead, you can provide support to BESN Champions throughout the region with limited scope for travel and face-to-face interaction. Finally we are looking for how you will integrate new ideas, such as the elearning training module, into delivery, and how yo think you can take advantage of tools such as this.  |

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| **4.1 Details of Champion - Word limit: 500** |
| Please provide the name of your nominated Regional Lead. They should be a paid member of staff.* What type of training events have they delivered and what was their role at those events?
* What type of organisations have they trained and how do they help vulnerable energy consumers?
* Tell us about any skills, experience or qualifications they have which are related to delivering training
* What are the outcomes of any training they have delivered in the past?
* Tell us about any links they have which will enable them to reach organisations across your region
* Tell us about any experience they have facilitating networking between different organisations
* Do they have any experience or qualifications related specifically to delivering energy advice or energy training?
* How would you successfully deliver the project if the Regional Lead named leaves your organisation or is absent for an extended period?

We are looking for a profile of the person you are putting forward as a Regional Energy Lead. We would like to know about their experience delivering training, what existing connections they have that will support this work, and what qualifications they have for the role. You should also tell us about any outcomes they have achieved as part of this work. In addition to this we would like to hear about any success they have had building relationships between different organisations, and creating a network that improves a service over a wider area. This could include examples of how they have supported other organisations, or led groups that have tackled broader issues in your locality.  |

**Declarations**

A signed declaration from the CEO is required (and partner(s) if applicable). The Google Form provides an ‘add file’ option and you can attach the declaration as a document, PDF or an image. A copy of the deceleration form can be found [here](https://docs.google.com/document/d/1wp1lKrKAFqcOJI74E_1EIMUQJsJLLnXxkraQ5S_YSNc/edit).