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CHANGING SPACES COMMUNITY SUSTAINABLE ENERGY PROGRAMME

GUIDANCE NOTES

Welcome to the Community Sustainable Energy Programme.

This programme will help community-based organisations in England to reduce their energy bills and environmental impact, as well as raising public awareness of climate change and how to tackle it.

The Community Sustainable Energy Programme is an open grants programme run by BRE as an award partner of the Big Lottery Fund. BRE carries out research, consultancy, training and testing to help create better buildings and communities. We have been made an award partner because of our experience and expertise in renewable energy.

Community based organisations can apply for a capital grant to install microgeneration equipment, such as solar panels or wind turbines, together with energy efficiency measures including loft or cavity wall insulation. We will also fund development studies that help community organisations find out if a microgeneration and energy efficiency project will work.

These guidance notes cover both capital grants and project development grants, although there are separate application forms. The guidance notes and application forms can also be downloaded from our website (www.communitysustainable.org.uk).

If you have any queries about the application process, or have specific communication needs and would like to receive this document in a different format, please call our enquiry line on

08458 63 00 25, email us at info@communitysustainable.org.uk or write to us at:

Community Sustainable Energy Programme

BRE
Building 17
Garston
Watford
WD25 9XX

We review these guidance notes regularly so before making an application please call our enquiry line or visit our website to check that you have the most up to date information. These guidance notes were published on the date shown at the bottom of this page.

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Section One: About the Community Sustainable Energy Programme

1.1 What is the programme aim?

The Community Sustainable Energy Programme aims to raise public awareness and support for renewable energy.

The programme will provide £8 million for the installation of microgeneration technologies and energy efficiency measures by community-based organisations in England, and £1 million for project development grants. By microgeneration we mean producing heat or electricity on a small-scale from a low carbon source.

Capital grants will be awarded on a competitive basis at quarterly selection panel meetings. We expect to hold the final one of these in December 2010. Project development grants will be awarded on a first-come first-served basis until all funds are spent.

For information on other Lottery grant programmes visit www.lotteryfunding.org.uk or phone the Lottery Funding hotline on 0845 275 0000 (textphone 0845 275 0022).

1.2 How is the programme managed?

The Community Sustainable Energy Programme is managed by the Building Research Establishment (BRE). We are responsible for all stages of the application and grant management process.

All development studies funded by us must be carried out by one of the businesses listed on the register of consultants on our website.

All microgeneration technologies must be supplied and installed by certificated installers who are registered with the Government's Microgeneration Certification scheme (www.greenbooklive.com).

1.3 Who can apply?

Under this programme, we will only award grants to not-for-profit community-based organisations in England. This includes:

- community groups governed by a written constitution
- registered charities and trusts
- parish councils
- schools or colleges

- companies that are not registered charities but have a charitable purpose and a community focus (for example, a company limited by guarantee and some community interest companies or social enterprises, where any surpluses are mainly reinvested for community benefit).
- mutual societies
- church based and other faith organisations (please refer to Appendix Six for more information).

We will not award grants to:

- statutory organisations (except parish councils and schools and colleges)
- NHS Trusts
- learning and skills councils
- housing associations
- organisations whose main purpose is to make a profit
- individuals and sole traders
- companies limited by guarantee whose main purpose is not community-focused
- community interest companies with share capital or profit distribution.

We will not normally award grants to organisations that are:

- applying on behalf of other organisations
- in poor financial health
- not established in the UK.

If we award a grant you must meet our terms and conditions. There are separate terms and conditions for capital and project development grants. These are available from our enquiry line or website, www.communitysustainable.org.uk

Your organisation must hold the freehold (registered or unregistered) of the site of your intended capital project or a lease that cannot be brought to an end by the landlord for at least five years (from the date the capital project is completed).

1.4 What can be funded?

Two types of grant are available. Each has separate application forms, and terms and conditions of grant.

1.4.1 Project development grants

Grants are available for studies investigating the feasibility of installing any combination of the technologies listed in 1.4.2.

The maximum grant available is £5,000 or 75 per cent of the study cost – whichever is lower.

The total fund available is £1 million. We expect to award 200 to 400 project development grants on a first-come first-served basis, to applications that meet our assessment criteria.

1.4.2 Capital grants

Grants are available for the purchase and installation of any combination of the technologies listed below.

Eligible technologies
(further details are provided in Section 4):

- solar photovoltaics
- solar thermal hot water
- wind turbines
- heat pumps
- automated wood pellet stoves
- wood fuelled boiler systems
- micro-hydro turbines.

Funding will also be available for energy efficiency measures (for example, cavity wall, loft insulation, heating and lighting controls), these need to be installed in combination with the microgeneration technologies above. Where these are not already in place, you will have to install them in order to qualify for a microgeneration capital grant.

You can apply for up to £50,000 or 50 per cent of the project cost (whichever is lower) for installing microgeneration technologies only or in combination with energy efficiency measures.

The total fund available is £8 million. An independent selection panel will meet quarterly to consider applications on a competitive basis.

1.5 What are the programme outcomes?

We would like to know about the changes that happen because of our funding. We call these changes ‘outcomes’.

The Community Sustainable Energy programme aims to achieve the following outcomes:

- reduction in CO₂ emissions
- increased community awareness of climate change and how changes to our behaviour can reduce it
- increased skills base of local trades (for example, local builders and building-services subcontractors working on renewable energy projects for the first time)
- reduction in energy bills
- reduction in reliance on imported energy, and increased independence from commercial energy suppliers
- stronger partnerships within communities with lasting social benefits
- growth of local enterprise in new technologies.

In the capital grants application form you should describe the difference your project will make, by listing up to six proposed project outcomes and explaining how they meet three or more of the programme outcomes. How your proposed project will help to achieve the programme outcomes will form an important part of our assessment of your application.

Your project outcomes should be SMART (specific, measurable, achievable, realistic and time-based) so you will need to include information such as dates and numbers, as well as what will happen and who will benefit. Some of your project outcomes might happen quickly, while others may take longer and depend on meeting other outcomes but they must be changes that will happen by the end of your project.

We do not expect you to write your project outcomes directly in response to our programme outcomes but we are interested in how you think your project will help us achieve them.

1.5.1 Example projects and outcomes

The Sunrise Environmental Centre plans to install a ground source heat pump. Display boards in the centre foyer will tell visitors about the installation, describe how a heat pump works and provide information about the savings being achieved. The heating system will also be replaced, offering a local plumbing firm its first opportunity to work on a project involving a heat pump. The project will achieve the following outcomes:

- By 2009 the centre's annual fuel bills will be 35% lower;
- CO₂ emissions will be reduced by 28% following completion of the project;
- Visitors to the centre will have more awareness of the impact of installing a heat pump and the importance of reducing carbon footprints;
- Organisations will have more awareness of local expertise in installing ground source heat pumps.

Hilltop Primary School will install a grid-connected wind turbine in its grounds. A large digital readout in the school entrance will show pupils and visitors how much electricity is being generated and the amount the school is saving. The readout is a new product developed by a local electrical components firm, working with the wind turbine installer. Pupils will produce displays showing the effect of reducing the school's CO₂ emissions on climate change. The project will achieve the following outcomes:

- By 2010 the wind turbine will achieve a 15% reduction in the school electricity bill;
- By 2010, 250 pupils will understand the effect of CO₂ emissions on climate change;
- Local businesses will develop new renewable energy technology products.

Forest Road Village Hall will install automated wood pellet stoves to replace old night storage heaters, which have become unreliable. A local timber yard has recently expanded its business to supplying wood chips and wood pellets and the village hall will be one of its first customers. The project will achieve the following outcomes:

- The installation will achieve a 50% reduction in electricity costs and an overall reduction of 20% in fuel bills;
- The hall will be used 30% more by local community groups;
- Income from bookings and hiring will increase by 5%.

1.6 Do we need a project development grant?

Before you apply for a capital grant, you will need to have confirmed that your project is technically and financially viable and appropriate to your proposed site.

Some technologies will be more suited to your site than others. You may even have a site for which none of the eligible technologies are appropriate.

Here are some of the issues you may need to consider.

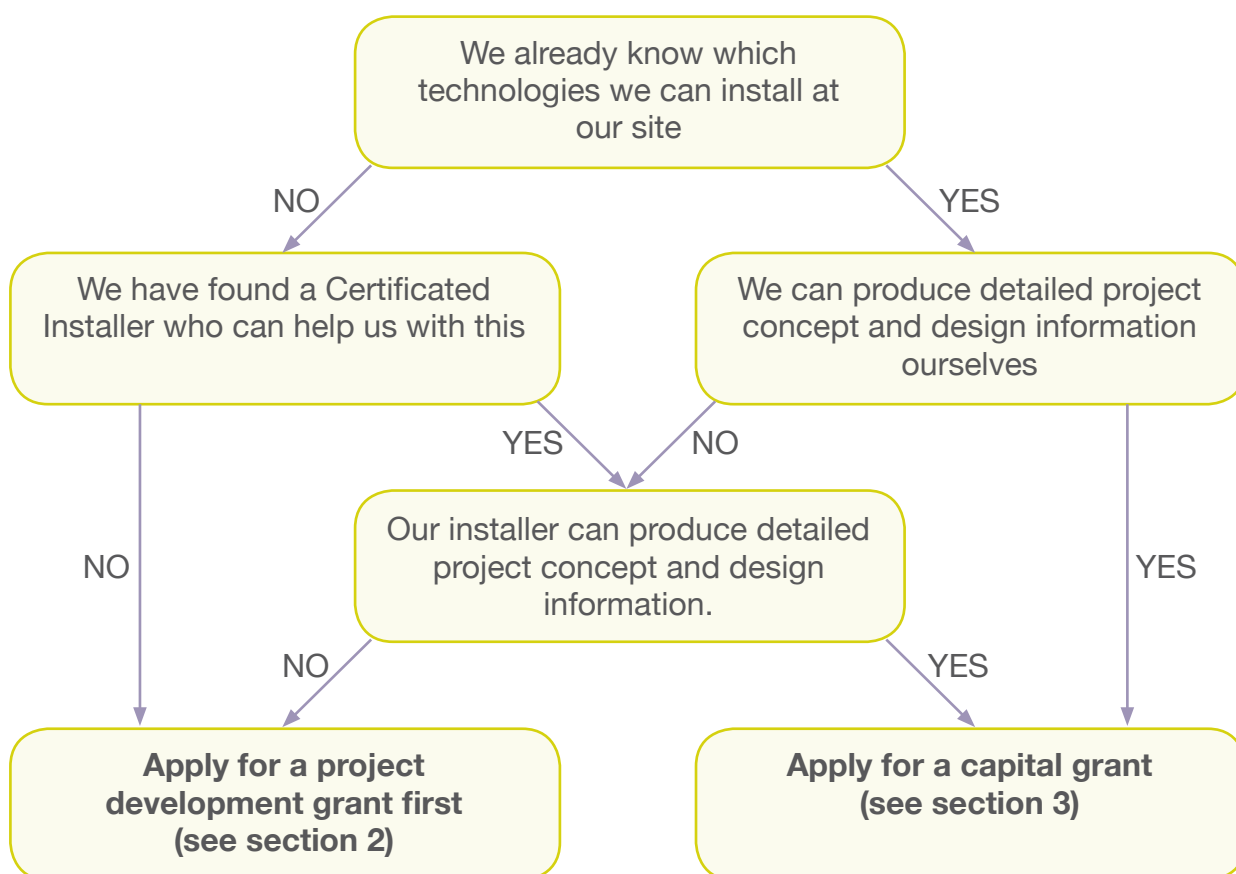
- If your building is listed or in a conservation zone, you may be limited to where you can install solar thermal and photovoltaic panels. Also, your site may not have the correct orientation (that is, north-south) to ensure an acceptable performance from the system.
- Local wind speed conditions or planning permission for a wind turbine might require a location that is too remote from your building for you to ensure that the installation is secure; this could also require long, expensive cable runs.
- Local geological conditions may mean that ground source heat pumps are not viable for your site.
- There might only be limited storage space on site making either the provision of a biomass fuel store or access for fuel deliveries impossible.
- The civil works required at your site for the infrastructure of a micro-hydro installation (such as a turbine house or mill race) could make such a project economically unviable.

These are just examples. You will need to consider all aspects of your project to apply for a capital grant, as section three of the capital grants application form requires you to give detailed information on project concept and design, to show that you have considered all options.

You may have enough expertise within your own organisation to complete this exercise, or a certificated installer may be able to provide you with the information and help you need. In either case, you can apply for a capital grant.

If you are unsure, you should consider applying for a project development grant first. A project development study report will give you the information you need to then apply for a capital grant.

Follow the steps in the flowchart to decide whether to apply for a project development grant.



Section Two: Project development grants

2.1 What can be funded?

Project development grants are available for up to £5,000 or 75 per cent of the study cost, whichever is lower.

Studies should address key issues such as technical and financial viability, legal and planning issues, and access to other sources of funding.

Studies funded by a project development grant must be carried out by one of the businesses listed on the Register of Consultants on our website (www.communitysustainable.org.uk) or available from our enquiry line.

Please note: You cannot appoint the registered consultant that carries out the study as the installer for the capital project that may result from it because this would be a conflict of interest.

The following general conditions apply to project development grants:

- We will not pay for any work carried out before you have accepted our grant offer. You must sign and return the grant offer letter to us before entering in to any contracts or making any commitments with consultants.
- Any equipment being considered for subsequent capital grant funding must be new and not refurbished. It must also be certificated by the Microgeneration Scheme and supplied and installed by a certificated installer.

2.2 How to apply

Fill in the project development grants application form and send it to us with the following supporting documents:

- a copy of the quote from your preferred registered consultant, including a summary of the proposed work and timescales
- your organisation's constitution or governing document
- three consecutive pages of your original bank or building society statement. This must be no more than three months old. (We will not accept photocopies but will return the originals to you).

We will review our application forms regularly so please call our enquiry line or visit our website before you apply, to check that the form you have

is still valid.

Before you apply you must read the terms and conditions for project development grants, available from our enquiry line and website, as you must agree to them if we offer you a grant.

Your application will be assessed by a BRE technical manager on a "first-come-first-served" basis.

If your application is successful, your grant will be paid directly into your organisation's nominated bank or building society account when we receive a satisfactory project development study report from you and a copy of your consultant's invoice.

2.3 Assessment criteria

Your application for a project development grant will be assessed against the following criteria:

● Uniqueness

Will your study consider the use of microgeneration technologies in a manner that is sufficiently different and previously untried to merit support?

● Meeting the programme outcomes

Will the study consider how the use of microgeneration technologies will achieve three or more of the programme outcomes listed in 1.5?

● Location

How many studies have we already funded in your area?

● Value of potential capital project

What is the estimated cost of the proposed capital project that may result from your feasibility study and what are the predicted CO₂ emissions savings?

● Contract value of study

How much will your study cost? (Registered consultants' day rates are fixed but the number of days quoted is likely to vary considerably depending on your proposed project size).

● Replication potential

Could your study be used as a reference for applicants with similar projects that are unlikely to be funded?

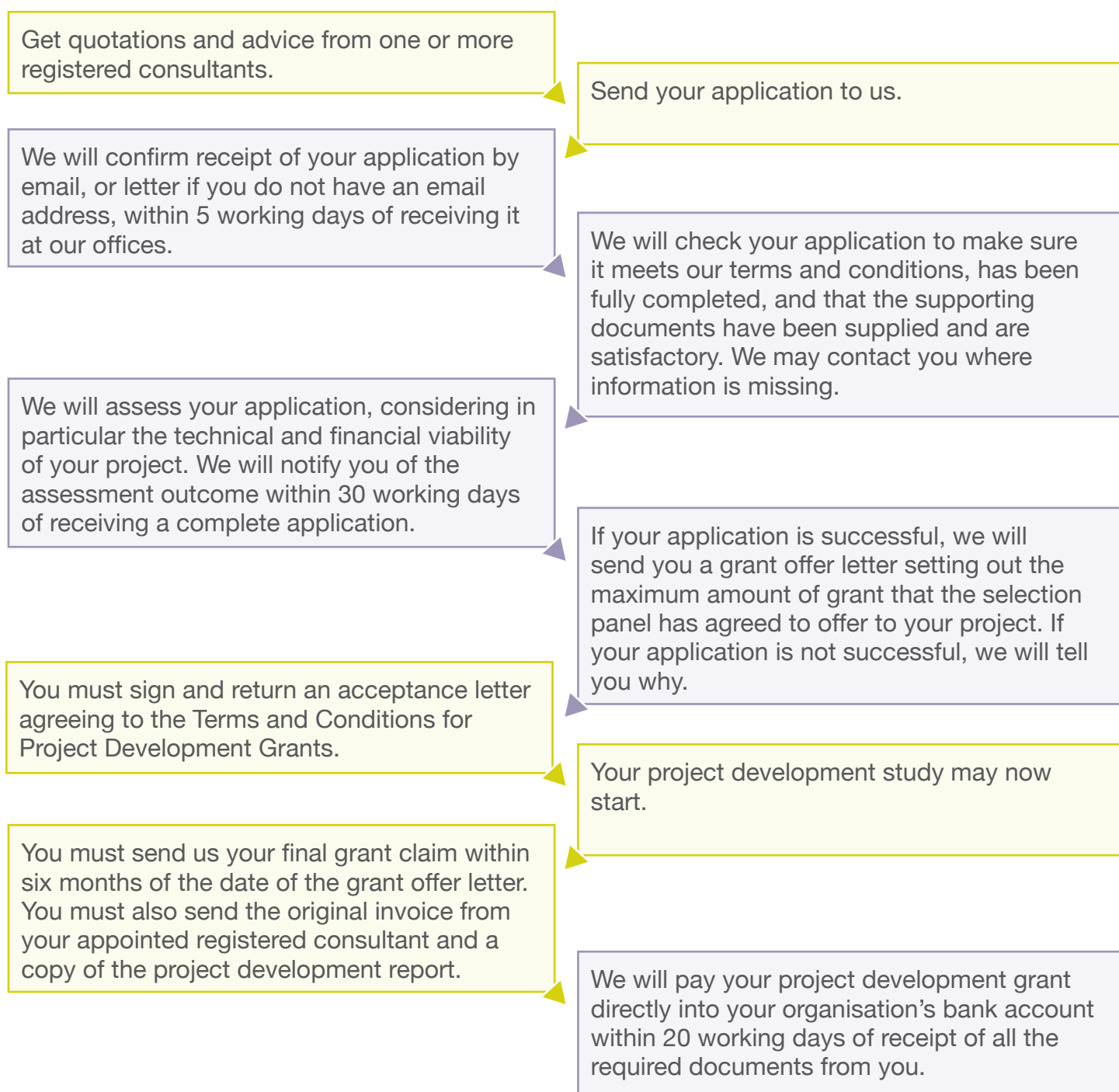
● Repetition

Has a study report already been produced which addresses your needs?

2.4 Overview of application and grant award process

The following flowchart describes the application and grant award process for project development grants:

■ what you must do ■ what we will do



Section three: Capital grants

3.1 What can be funded?

Capital grants are available for up to £50,000 or 50 per cent of the project cost (whichever is lower) for installing microgeneration technologies and energy efficiency measures done in combination.

We will only fund specific costs associated with the installation of certain types of technology. The eligible costs for each technology are set out in Appendix three.

We also require you to install energy efficiency measures if you have not already done so. Without these relatively low-cost but energy-effective improvements, the benefits of high-cost microgeneration technologies will not be fully realised.

The following general conditions apply to capital grants:

- We will not pay for any work carried out before you have accepted our grant offer. You must sign and return the grant offer letter to us before entering in to any contracts or making any commitments with consultants.
- The equipment to be installed must be new and not refurbished.
- A certificated installer must carry out the supply and installation of the microgeneration technologies (see section 4.2).
- Microgeneration technologies must be chosen from the list of certificated products (see section 4.3).
- Installers registered with the trade bodies listed in section 4.5 must carry out energy efficiency measures.
- We will not fund DIY installations.

3.2 How to apply

Fill in the capital grants application form and send it to us with the supporting documents we ask for in time for one of the following deadlines for our quarterly funding rounds. (See enclosed list of dates, or request a copy from our enquiry line. Also available on our website).

Your application must be complete at the time of submission. You must send the following documents with the application form:

- your response to “Section three: Project concept and design” including a separate summary of the responses (maximum 150 words per criteria)
- copies of quotations from installers for all proposed microgeneration technologies and energy efficiency measures, the quotes need to be broken down sufficiently to distinguish between product costs and installation costs ideally as per the additional Section 4 Proposed measures and technologies sheet
- proof of your organisation’s not-for-profit status, for example your constitution or governing document
- three consecutive pages of your original bank or building society statement. This must be no more than three months old. (We will not accept photocopies but will return the originals to you)
- your organisation’s most recent set of accounts
- your organisation’s equal opportunities policy document and environmental policy document
- details of your applications to and any letters of commitment from other funders.

We do not require parish councils and schools to send us their accounts but if you are an organisation such as a parent-teacher association that is helping your school to get Lottery money, you must send us a copy of your most recent accounts.

We will review this application form regularly so please call our enquiry line or visit our website before you apply, to check that the form you have is still valid.

Before you apply you must read the **terms and conditions for capital grants**, available from our enquiry line and website, as you must agree to them if we offer you a grant.

Following an initial check to make sure your project and organisation can be considered under this programme, a BRE technical manager will assess your application before forwarding it to the selection panel for final appraisal.

If your application is successful, your grant

will be paid directly into your organisation's nominated bank or building society account when you have completed your project and sent us a grant claim and the following documents:

- originals of relevant certificated installer's final invoices and of eligible sub-contracted work
- copies or originals of commissioning forms for all technologies and measures installed
- photographs of the installation, showing the technologies installed and the installation site
- a completed feedback form.

You must complete your project within 12 months from the date of our grant offer letter.

3.3 Assessment criteria

To ensure a fair and reasonable spread of funding across England, an independent selection panel will consider your capital grant application against the following criteria.

- **Viability**

Have you shown that your proposed project is technically and financially feasible? Project development studies will greatly help this process, as will the involvement of certificated installers.

- **Meeting the programme outcomes**

To what extent will your project help achieve three or more of the programme outcomes listed in 1.5?

- **Community involvement**

We need to see evidence that your project design and development has had genuine community input, including consultation with and involvement of beneficiaries.

- **Raising public awareness**

How will the public hear about your project? How will you raise their awareness and understanding of renewable energy? How will your project's beneficiaries be involved in the ongoing operation of the scheme?

- **Linkage to energy efficiency**

Does your project incorporate efficiency measures beyond those required by this programme, for example, low or "zero-energy" building design?

- **Linkage to wider sustainability issues**

Does your project incorporate other sustainability measures, for example, rainwater harvesting, use of recycled construction materials?

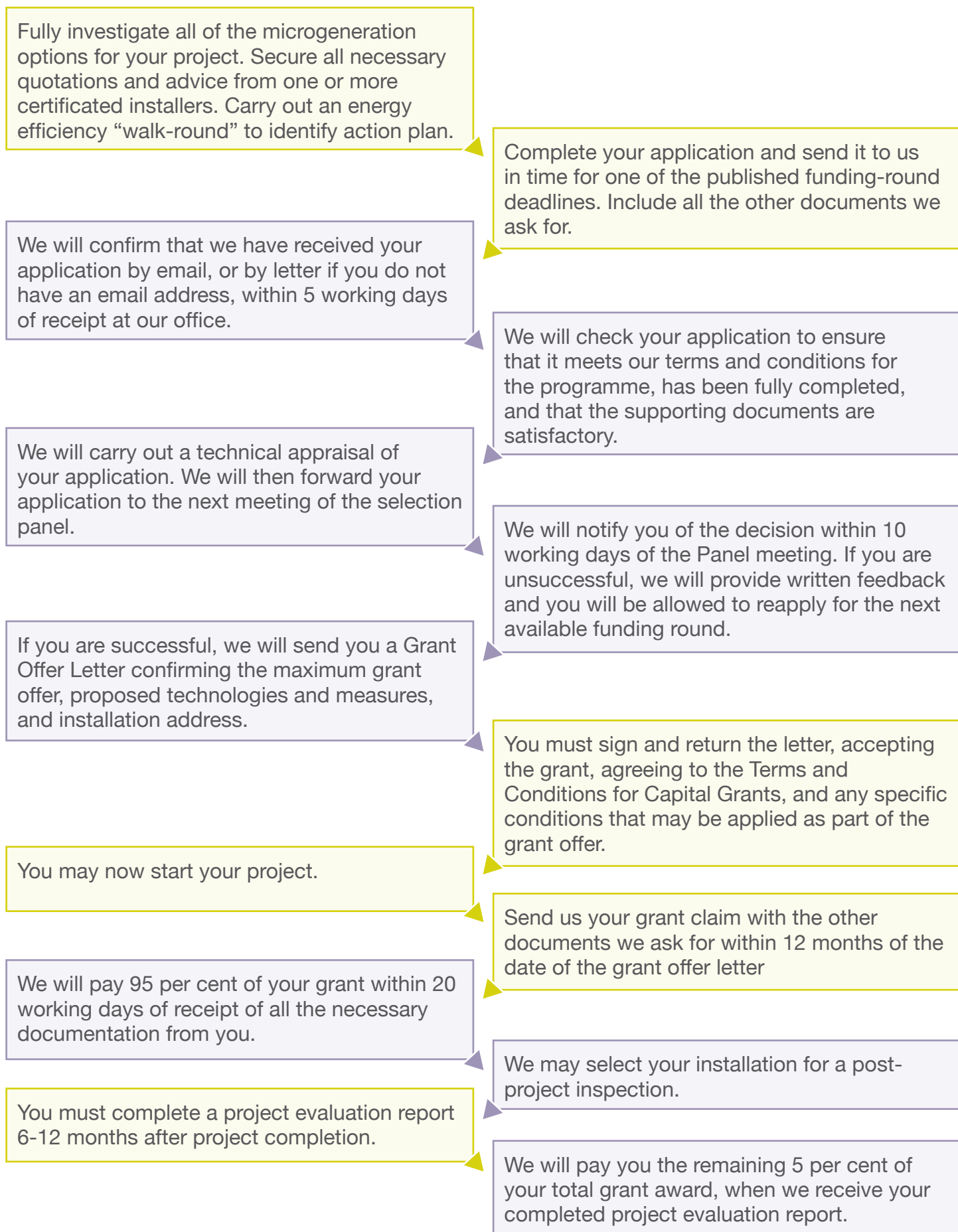
- **Value for money**

We will assess the value for money of your project using the "Benchmarks" included in Appendix four. We look at your total installation cost and the predicted energy produced to estimate the cost of saving a unit quantity of carbon dioxide over the expected lifetime of your installation.

3.4 Overview of application and grant award process

The following flowchart describes the application and grant award process for capital grants:

■ what you must do ■ what we will do



Section four: Technical guidance

4.1 Microgeneration technologies

4.1.1 Solar photovoltaics

Solar photovoltaic (PV) systems use energy from the sun to convert solar radiation into electricity, which can be used directly to run appliances and lighting, sold to the national grid, or stored in batteries in off-grid locations.

PV systems perform best in direct sunlight, but continue to perform well in reduced light conditions. Systems come in various forms including solar tiles, roof-integrated panels, and on-roof panels. PV systems are also available for cladding buildings and covering walkways.

4.1.2 Solar thermal hot water

Solar panels, also known as “collectors”, can be fitted onto or integrated into a building’s roof. They use the sun’s energy to heat water, or a heat-transfer fluid, which passes through the panel. The fluid is fed to a heat store (for example, a hot water tank) to provide part of the hot water demand for the building. Usually another heat source will be needed to supplement collectors in winter months. Solar panels can also be used to heat swimming pools.

4.1.3 Wind turbines

A wind turbine harnesses energy from the wind to produce electricity. The most common design is of three blades mounted on a horizontal axis, which is free to rotate into the wind on a tall tower or mast. The blades drive a generator either directly or via a gearbox (generally for larger machines) to produce electricity.

Wind turbines can be mounted on masts that are freestanding or tethered with wires, or on buildings. The greatest amount of power will be generated if turbines have a constant supply of steady wind, and advice should be taken on where to site the turbine to optimise output.

The electricity can either link to the grid or, in the case of off-grid systems, charge batteries. Modern designs can be very quiet in operation.

4.1.4 Heat pumps

Heat pumps can be used effectively for space and water heating. Heat pumps take heat energy from a source such as the ground, a body of water (eg river, lake or well) or simply the outside air and

transfer it to the building. The heat is upgraded by using a pump and compressor which removes heat from one side of the circuit and ejects it to the other side.

Heat pumps require electricity for their operation and users may consider buying this through a green tariff scheme, which promotes the use of renewable energy sources by power generators.

4.1.5 Automated wood-pellet stoves and wood-fuelled boilers

Wood burning systems, unlike other renewable energy sources, emit carbon dioxide. However, as the tree is growing, it absorbs the same amount of carbon dioxide as is released when burnt. As such, it does not add to the carbon dioxide in the atmosphere and is therefore deemed carbon neutral.

To be eligible for grant funding, wood-pellet stoves can be used for heating a single room, hot water or an entire building. Wood-fuelled boiler systems should comprise the main heating system of the building, and can be run on logs, wood chips, or wood pellets. Care should be taken to ensure that the supply and storage of fuel are suitably provided for (see also Appendix seven b).

Please note: conventional multi-fuel room heaters and stoves (logs and coal) and kitchen ranges (such as an AGA) are not eligible for funding.

4.1.6 Micro-hydro turbines

Hydro-power systems use a turbine to convert the energy stored in water flowing downhill into electricity. Useful power may be produced from even a small stream. The hydro-power source should be relatively close to where the power is needed or to a suitable grid connection.

Hydro systems can be grid-connected or form part of an off-grid power system.

- In a grid-connected system, surplus electricity can be sold to electricity companies.
- In an off-grid system, electricity can be supplied directly to the devices powered or through a battery bank and inverter set up. A back-up power system may be needed to compensate for seasonal variations in water flow.

4.2 Certificated microgeneration installers

For the supply and installation of microgeneration technologies, you must use one of the “Certificated Installers” registered with the Government’s Microgeneration Certification scheme.

Certificated status is achieved following satisfactory assessment of the company’s documented control systems used to meet the Certification scheme’s design and installation requirements, and site inspection of sample installations.

For further information and contact details of certificated installers serving your region, please refer to: www.greenbooklive.com

You are strongly advised to seek at least two quotations from different suppliers for each of your proposed microgeneration technologies and energy efficiency measures, although you need only submit copies of your favoured quotations with your application.

4.3 Certificated microgeneration products

Certificated installers may only specify certificated products, the list of which is also managed by the Microgeneration Certification scheme and included on their website (www.greenbooklive.com).

These products have undergone a comprehensive registration procedure requiring compliance with strict criteria and current testing standards.

Any products exceeding the definition of microgeneration as per section 82 of the Energy Act 2004 must be listed on the Enhanced Capital Allowance (ECA) Scheme (www.eca.gov.uk). The Energy Act 2004 defines microgeneration as the production of heat and/or electricity from a low carbon source and specifies maximum size limits of 50kW electricity and 45 kW thermal.

4.4 Energy efficiency measures

The purpose of the Community Sustainable Energy Programme is to encourage the installation of microgeneration technologies in tandem with the use of energy efficiency measures, to maximise the reduction in a

building’s “carbon footprint”. It is therefore a condition of grant that certain minimum levels of energy efficiency measures are implemented at the site. Without these measures in place, the benefits of microgeneration will be considerably reduced.

At the very least, you will be required to carry out an energy efficiency “walk-round”. The Carbon Trust has produced a fact sheet (CTL003) to show you how to do this. You can find this on their website (www.carbontrust.co.uk). The Carbon Trust website also contains many documents and tools that can help to improve levels of energy efficiency.

We expect you to implement any measures identified by your walk-round at your own expense if you will save the cost of carrying them out in less than two years. More commonly though, the measures you identify will have a payback of two to five years. Some of these are eligible for funding through this programme, as explained below. Other measures, such as solid wall insulation, or insulation of loft-spaces above unused or unheated spaces, are unlikely to be cost-efficient and need not be implemented.

4.4.1 Cavity wall insulation

Un-insulated cavity walls, where present, can account for a third of all heat losses from a traditional building. Cavity wall insulation is therefore one of the most cost-effective energy efficiency measures to implement.

The insulation material is injected into the cavity between the inner and outer brickwork that makes up the external wall of the building. An installer will do this from the outside. There are a variety of different insulating materials, but they all work in the same way – by combining with the captive air, the insulation acts as a barrier to heat loss.

4.4.2 Loft insulation

Un-insulated loft spaces, where present, can account for a quarter of all heat losses from a building. Installing 250-270 mm (10 inches) of loft insulation can significantly reduce this loss at relatively low cost.

Properly trained installers should carry out loft insulation, so that members of your group do not have to access the roof space and put their safety at risk. Competent installers should ensure that a high standard is achieved by insulating across the top of the ceiling joists as well as between them, to avoid cold-bridging; pipes and tanks must be insulated to avoid freezing. It is also important to make sure there is enough ventilation to avoid condensation in the loft, and that electrical wiring and fittings are safe.

For more details on installers and the types of materials used for both cavity wall and loft insulation see: www.nationalinsulationassociation.org.uk

4.4.3 Heating controls

Heating and hot water use may account for over 80 per cent of the energy consumption in a building. The installation of a minimum standard of controls, where no controls have existed before, can reduce fuel consumption and CO₂ emissions by up to 20 per cent.

Reducing the average temperature in a building by 1°C can reduce fuel consumption by up to 10 per cent, and reducing the heating “on” time by two hours, a day may reduce consumption by up to 6 per cent. See: www.heatingcontrols.org.uk for details of available controls. For more guidance, search for fact sheet CTG002 on: www.carbontrust.co.uk

4.4.4 Lighting controls

Lighting may make up as much as 40 per cent of a building’s electricity consumption, particularly if other energy efficiency measures are already in place. Installing and using daylight-linked controls can reduce this by 25 to 50 per cent.

A wide range of controls are available, including occupancy sensors, photocell controllers, dimming and light level controls, lighting management systems and simple time switches. These provide significant energy and cost savings whilst being simple to install.

Eligible controls only include those listed on www.eca.gov.uk. For more details of installers, see also: www.esta.org.uk. For more advice, search for fact sheet GPG160 on www.carbontrust.co.uk

4.5 Approved suppliers of energy efficiency measures

For energy efficiency measures, you must seek suppliers and installers through reference to the following trade bodies:

For cavity and loft insulation:-

National Insulation Association:

www.nationalinsulationassociation.org.uk

Thermal Insulation Manufacturers & Suppliers Association (TIMSA):

www.timsa.org.uk

For heating and lighting controls:-

TACMA:

www.heatingcontrols.org.uk

Energy Systems Trade Association:

www.esta.org.uk

Eligible lighting controls are restricted to those listed on the Enhanced Capital Allowances website (www.eca.gov.uk).

Appendix one: Project development grants help notes

This section offers detailed advice about how to approach each of the questions on the project development grants application form. Please read these notes carefully before you start completing your application form and refer to them as you go along.

Section 1: Organisation details

1.1 Organisation name

Give the name shown in your governing document (for example, your constitution), rather than any brand or operating name. This is the organisation that will receive the grant and sign the grant acceptance letter if the application is successful. If your organisation is also known by another title, please put this in brackets.

1.2 Organisation address and contact details

Give your registered address. If you do not have a registered address, please give us your main correspondence address. It is important that you provide the correct postcode and telephone number, and website address if you have one. For “Region”, refer to Appendix five.

1.3 Related organisation

If your organisation is a branch of or related to a larger organisation, they may have a legal responsibility if we award you a grant. Please provide details and ensure that they are aware of your project, and the funding that you are applying for.

1.4 Main contact details for the project

This should be the key person involved in the application. They should be able to talk about the project in detail and be able to supply contact details for someone who has expertise in specific areas, if required. It is important that you provide the correct postcode, phone number and if applicable, fax number and email address. We ask for dates of birth so that we can verify people's identity.

We would normally expect the main contact to be reached at the organisation's main or registered address. If this is not the case, please explain why.

Please tell us if the main contact has any particular communication needs. We have listed

some of the most common ones, but please add to this if necessary.

1.5 Organisation type

We need to confirm that your organisation is eligible to apply to this programme.

You will need to provide us with a copy of your governing document (for example, constitution, set of rules, trust deed, memorandum and articles of association) unless you are a parish council or school.

1.6 Organisation summary

Tell us about your organisation, its aims and objectives, and the services you provide.

1.7 Reference or registration numbers

If your organisation has a company or charity registration number, enter it in the relevant box. If your organisation has any other registration number, include it and state what it refers to in the box marked ‘other’. We will check your charitable status and your company registration with the relevant authorities.

1.8 Your organisation's bank account

All organisations that receive a grant from us must have a bank account in the name of the organisation as shown on their governing document. Cheques and other withdrawals must require the signatures of at least two committee members who are not related. Tick the ‘Yes’ box and enclose three consecutive pages of your original bank or building society statement. This must be no more than three months old. (We will not accept photocopies but will return the originals to you).

If your organisation has more than one bank account, you should send the statement from the account that will be used to receive payments. This should usually be your organisation's main account.

Grants are payable by bank transfer (BACS) into a UK-based bank account or building society, as specified above. You should not use ATMs or debit cards to make cash withdrawals or payments from this account.

1.9 Your organisation's accounts

All organisations that receive a grant from us must produce annual accounts. You must include a copy of your most recent approved accounts, signed and dated by your chair, secretary, or treasurer and by your auditor or independent examiner where appropriate. The accounts you send us should be not more than 12 months old. However, we realise that this can be difficult if your organisation's financial year-end coincides with the period in which you are sending us your application. If this is the case, send us your previous year's accounts and a copy of your most recent management accounts.

If you are a parish council or school, we do not need you to send us your accounts at this stage, however we may ask to see your financial records when we assess your application.

Indicate if you have received a Lottery grant before, and tell us what it was for.

Section 2: About your project

2.1 Project name

We need a short (no more than 10 words) appropriate name for your project.

2.2 Site details

Please tick the relevant boxes and provide full address details of the installation site, including the "Region" (see Appendix five).

Please also provide estimates of your current annual bills for all of the fuels that you use.

2.3 Study details

Indicate which microgeneration technologies you are proposing to investigate.

Tell us about the buildings where installation of the proposed technologies will be investigated. What are the buildings used for? How have you determined whether the proposed scheme would be technically and financially viable?

Explain how your proposed project outcomes will help achieve three or more of the programme outcomes.

Section 3: Your grant request

3.1 How much grant are you applying for?

3.1.1. Total grant applied for

The maximum grant for a Project Development

study is £5,000 or 75 per cent of the study cost, whichever is the lower; (For example, for a study cost of £6,000, the maximum grant is £4,500; for a study cost of £6,666, the maximum grant is £5,000; for a study cost of £7,000, the maximum grant is also £5,000.

You may request less than 75 per cent of the total cost if you have secured sufficient other funding.

3.1.2 Total study cost

Enter the total study cost, as stated on the quotation from your preferred Registered Consultant.

For VAT-registered organisations, the total study cost is the cost excluding VAT. For non VAT-registered organisations, the total is the cost including VAT. If your organisation is VAT-registered but can only partially recover VAT, the total is the cost excluding recoverable VAT. Seek advice from a VAT expert if you require further clarification.

3.1.3 Grant as a percentage of total cost

This should not exceed 75 per cent of the figure in 3.1.2

3.1.4 Anticipated date of study completion / grant claim

If your application is successful, your grant will have to be claimed within six months of the date of grant offer letter. These letters will be issued to successful applicants, usually within 20 working days of receipt of the application by BRE. Your completion date should therefore not be longer than seven months after the date you sent it.

3.1.5 Estimated study length

Tell us the estimated length of your study in months (maximum six).

3.2 How is the balance of the study cost to be funded?

Tell us how you will fund the remainder of the study cost if your CSEP grant application is successful, and whether these sources are already secured or not. This may be from your organisation's own reserves, other grants, loans, or any combination of these.

3.3 VAT Status

Tell us what the VAT status of your organisation is.

Section 4: Compliance

4.1 Checklist

Complete the checklist to confirm that you have completed the application form and that you have sent us all the documentation we require.

Make sure that you read the Data Protection and Freedom of Information statements on page two of the application form. Your signature on this form will be taken as confirmation of your understanding of our obligations under the Data Protection Act 1998 and the Freedom of Information Act 2000 and your acceptance that we will not be liable for any loss or damage to you pursuant to our fulfillment of our obligations under the relevant law.

4.2. Declaration

The contact named in section 1.4 must read the declaration carefully, and complete and sign it.

4.3 Counter-signatory

The form should be counter-signed by the chair, chief executive, or person of similar authority in your organisation.

Section 5: Beneficiary monitoring

If possible, please provide this information. It is being gathered for monitoring purposes only and will not be used to assess your application.

Project development study contents

The feasibility study must address the following key areas, and include an Executive Summary:

- Options appraisal – Show how you have identified which renewable energy technologies are most suited to your community.
- Overall project concept – Provide a brief summary of the project detailing purpose of building (for example, housing complex, community building), the role of the building in the local community, any unique features of the project and why the building would be a good site for the proposed installation. This summary should include an outline plan of works, and should demonstrate that the project is technically sound and financially viable. Give details of any innovation in your project concept, (for example, use of large visual displays showing energy generation, linkage to computer for demonstration purposes etc).
- Project management – Show how you will ensure that a proposed capital grant project will be delivered effectively and be well managed. Include details of your timetable for principal feasibility, design, planning and construction activities, and when you think the project would start and be completed. Capital grants projects must be completed within 12 months of our offer.
- Community involvement – Provide details and evidence that the project design and development has had real community involvement and input – including an effective process of community consultation. Projects may demonstrate that consultation and project development has involved several sectors of the community – including those not directly benefiting from the project. Say who these groups are and their level of involvement.
- Establishing need – Show how you have established and verified that there is a need for the project. Estimate the total number of people benefiting from your project, and indicate the basis that you have used to calculate this figure. Where appropriate, you may provide evidence that your project is located in an area of social or economic disadvantage. Show how you have determined this need, and estimate the total number of people benefiting from your project who may be socially and/or economically disadvantaged.
- Public profile and promotion – Show how the project will enhance public awareness and understanding of renewable energy (for example, visibility or open days) and where appropriate state the level of public access. Say how you will promote your project to the people who could benefit from it and be involved in its development and ongoing operation, including any planned publicity in the local area.

- Project longevity – Say how the on-going operation of your project will be funded.
- Energy efficiency – Where relevant, say how the project concept implements appropriate energy efficiency measures, for example, low or “zero-energy” building design, high insulation standards or retrofit measures.
- Energy performance – Include details of the projected performance for all parts of the installation (including energy rating or output, in kWh, kWe or kWh/year); estimated savings in imported electricity or bought fuels (say which fuel - oil, gas, coal etc - your assumed fuel price and £ per year saving). State all your assumptions, for example, sources of wind data or solar radiation data.
- Sustainability – Where relevant, say how the project concept demonstrates evidence of linking to wider sustainability issues, for example, rainwater harvesting, use of recycled construction materials.
- Building integration – Supply basic drawings showing relevant buildings and clearly marking the siting and integration of all aspects of the proposed installation. Also, mention any other innovation related to the systems or its architectural integration into the building structure and operation. You do not have to provide full architectural plans.
- Structural design – Provide details with accompanying basic drawings of structural aspects of the system – for example, fixture to the building, weatherproofing, free-standing structures, underground piping.
- Electrical schematics – Provide basic electrical schematics/wiring diagrams for all electrical aspects of the installation – in particular for grid-connected components, and to include electrical protection systems and earthing connections.
- Project team – Give details of main project team members (including developer, builder, and agents). Also give brief details of any environmental policies the team members have and previous experience of similar renewable energy and/or environmental projects (for example, green buildings). Give details of any training and improvements in local skills (for example, solar installation training) that will form part of the project.
- Legal issues – Show how legal considerations have been addressed: ownership of project, management of project, local regulations.
- Uncertainties – Give details of any outstanding statutory approvals, planning consents, funding or resource issues that may affect the progress of the project. Also, if new build, indicate the stage the building project is at.

Appendix two: Capital grants help notes

This section offers detailed advice about how to approach each of the questions on the Capital Grants application form. Please read these notes carefully before you start completing your application form and refer to them as you go along.

Section 1: Organisation details

1.1 Organisation name

Give the name shown in your governing document, for example, your constitution, rather than any brand or operating name. This is the organisation that will receive the grant and sign the grant acceptance letter if the application is successful. If your organisation is also known by another title please put this in brackets.

1.2 Organisation address and contact details

Give your registered address. If you do not have a registered address, please give us your main correspondence address. It is important that you provide the correct postcode and telephone number, and website address if you have one. For “Region”, refer to Appendix five.

1.3 Related organisation

If your organisation is a branch of or related to a larger organisation, they may have a legal responsibility if we award you a grant. Please provide details, and ensure that they are aware of your project, and the funding that you are applying for. If you are a church-based or other faith organisation, please refer to Appendix six for any special terms that may apply.

1.4 Main contact details for the project

This should be the key person involved in the application. They should be able to talk about the project in detail and be able to supply contact details for someone who has expertise in specific areas, if required. It is important that you provide the correct postcode, telephone number and if applicable fax number, and email. Date of birth is requested for verification purposes.

We would normally expect the main contact to be reached at the organisation’s main or registered address. If this is not so, please explain why.

Please tell us if the main contact has any particular communication needs. We have listed some of the most common ones but please add to this if necessary.

1.5 Organisation type

We need to confirm that your organisation is eligible to apply to this programme.

You will need to provide us with a copy of your governing document (for example, constitution, set of rules, trust deed, memorandum and articles of association).

1.6 Organisation summary

Tell us about your organisation, its aims and objectives, and the services you provide.

1.7 Reference or registration numbers

If your organisation has a company or charity registration number, enter it in the relevant box. If your organisation has any other registration number, include it and state what it refers to in the box marked ‘other’. We will check your charitable status and your company registration with the relevant authorities.

1.8 Your organisation’s bank account

All organisations that receive a grant from us must have a bank account in the name of the organisation as shown on their governing document. Cheques and other withdrawals must require the signatures of at least two committee members who are not related. Tick the ‘Yes’ box if this applies and enclose three consecutive pages of your original bank or building society statement. This must be no more than three months old. (We will not accept photocopies but will return the originals to you).

If the organisation has more than one bank account, you should send the statement from the account that will be used to receive payments. This should usually be your organisation’s main account.

Grants are payable by bank transfer (BACS) into a UK-based bank account or building society, as specified above. You should not use ATMs or debit cards to make cash withdrawals or payments from this account.

1.9 Your organisation's accounts

All organisations that receive a grant from us must produce annual accounts. You must include a copy of your most recent approved accounts, signed and dated by your chair, secretary, or treasurer and by your auditor or independent examiner where appropriate. The accounts you send us should be not more than 12 months old. However, we realise that this can be difficult if your organisation's financial year-end coincides with the period in which you are sending us your application. If this is the case, send us your previous year's accounts and a copy of your most recent management accounts.

If you are a parish council or school, we do not need you to send us your accounts at this stage, however we may ask to see your financial records when we assess your application.

Indicate if you have received a Lottery grant before, and tell us what it was for.

Section 2: About your project

2.1 Project name

We need a short (no more than 10 words) appropriate name for your project.

2.2 Site details

Please tick the relevant boxes and provide full address details of the installation site, including the "Region" (see Appendix Five below).

Please also provide estimates of your current annual bills for all of the fuels that you use.

2.3 Project details

Indicate which microgeneration technologies you are proposing to install.

In addition to the main application form, you must also complete one or more of sections 4.2 to 4.8 as appropriate to the technologies you indicate here.

Tell us about the building(s) where the proposed technologies and measures will be installed. What are they used for? How have you determined which technologies are the most suitable for the installation?

Tell us about any plans you have to carry out energy monitoring at the proposed site. Ideally,

this would be done for 3 to 6 months before and after the installation. You may be planning to install energy output displays. If so, tell us how these will deliver information to the public and BRE.

2.4 Agent details

If you have appointed an agent to manage part or all of the project, please provide their details. An organisation is considered an agent if it is an impartial third party that has been given management responsibility for key elements of the project. A certificated installer would not be considered an agent.

2.5 Project beneficiaries

Tell us about the people and organisations that will benefit most from your project and any specific needs that they have. Estimate how many people and organisations will benefit directly from your project throughout the lifetime of the installation.

2.6 Outcomes

Briefly describe what difference your project will make by listing up to six proposed outcomes. Consider what outcomes you aim to achieve and break these down into concise bullet points. Please list no more than six outcomes. You need to ensure that your proposed project outcomes meet at least three of the programme outcomes listed in section 1.5 of these Guidance notes. Explain how your proposed project outcomes will help achieve three or more of the programme outcomes.

Section 3: Project concept and design

Information provided in this section is very important to the decisions of the selection panel. Please remember that applications are considered on a competitive basis, as the total grant fund is limited. It is very likely that more funds will be requested at each selection panel meeting than will be available.

Please provide all project concept and design information as specified in the list. All areas should be addressed in order. Use no more than 5,000 words plus relevant diagrams and images. This should be enclosed with the application on CD-ROM or floppy disk, or sent by email. You must also provide a separate summary of your responses to each of the 16 criteria, using no more than 150 words per criteria. This must be provided in Microsoft Word format. If you are unable to do this, please contact us for guidance.

Section 4: Proposed measures and technologies

You must be able to show that you have fully considered both energy efficiency measures and microgeneration technologies, so that you can gain the most benefit from your project.

4.1 Energy efficiency measures

Confirm that you have carried out a “walk-round” energy survey, or tell us what you have done if different. Detail any measures you have already carried out because of the survey.

Provide details of the installers you have chosen to undertake measures eligible for funding.

Complete the budget costs in line with your installers’ quotations.

4.2-4.8 Microgeneration technologies

You need only print out and complete the sections of 4.2 to 4.8 that are relevant to the project you describe in 2.3 of the application form. These forms are available from our website [www www.communitysustainable.org.uk](http://www.communitysustainable.org.uk) or from the enquiry line: 08458 63 00 25. All of sections 4.2 to 4.8 have the following format:

Installer details

Complete the installer details for each technology. You may be using one installer for the whole project, in which case you may complete this section once and refer to it in subsequent sections. The installer named here must be the same as the installer who provides your quotations.

System details

You will probably need the help of your installer

in completing this section. All details must be provided, as they form a vital part of the technical assessment of your project.

Quotation

You should request from your installer a comprehensive breakdown of their quotation, matching as closely as possible the budget items specified in this section.

The sum of the amounts in 4.2.3a to 4.8.3a, when added to the amount in 4.1.3a, should equal the total project cost in section 5.1.3.

The sum of the grant requested amounts in 4.2.3b to 4.8.3b, when added to the amount in 4.1.3b, should equal the total grant applied for in section 5.1.1.

The grant requested amounts should not exceed 50 per cent of their corresponding total project costs.

For VAT-registered organisations, the total costs are the costs excluding VAT. For non VAT-registered organisations, the totals are the costs including VAT. If your organisation is VAT-registered but can only partially recover VAT, the totals are the costs excluding recoverable VAT. Please get advice from a VAT expert if you need more help.

Section 5: Your grant request

5.1 How much grant are you applying for?

5.1.1. Total grant applied for

The maximum grant award under this programme is £50,000, or 50 per cent of the total project cost, whichever is the lower; (For example, for a total project cost of £90,000, the maximum grant is £45,000; for a total project cost of £100,000, the maximum grant is £50,000; for a total project cost of £120,000 total, the maximum grant is also £50,000).

You may apply for less than 50 per cent of the total cost if you have secured sufficient other funding.

The total grant applied for should equal the sum of the amounts requested in 4.1.3b and 4.2b to 4.8b.

5.1.3 Total project cost

The total project cost should equal the sum of the amounts in 4.1.3a to 4.8.3a.

The installation cost claimed for each technology must comply with the table of eligible costs in Appendix Three, and should match the costs provided in your installer quotations.

For VAT-registered organisations, the “total project cost” is the cost excluding VAT. For non VAT-registered organisations, the total is the cost including VAT. If your organisation is VAT-registered but can only partially recover VAT, the total is the cost excluding recoverable VAT. Get advice from a VAT expert if you need more help.

5.1.4 Grant as a percentage of total cost

This should not exceed 50 per cent of the figure in 5.1.3.

5.1.5. Anticipated date of completion / grant claim

If your application is successful, you must claim your grant within 12 months of the date of our grant offer letter. We will send these letters to successful applicants within 10 working days following the date of selection panel meeting. Your completion date should therefore not be longer than 12 months and two weeks following the date of selection panel meeting.

5.1.6. Estimated project length

Estimate the length of your project in months (maximum 12).

5.2 How is the balance of the project cost to be funded?

Tell us how you will fund the remainder of the project if your application is successful, and whether these sources are already secured. This may be from your organisation’s own reserves, other grants, loans, or any combination of these.

Please enclose details of all applications and any letters of commitment from potential funders.

5.3 VAT status

Tell us what the VAT status of your organisation is.

Section 6: Compliance

6.1 Checklist

Complete the checklist to confirm that you have completed the application form and enclosed all the documents we require.

Make sure that you read the Data Protection and Freedom of Information statements on page 2 of the application form carefully, as your signature on this form will be taken as confirmation of your understanding of our obligations under the Data Protection Act 1998 and the Freedom of Information Act 2000 and your acceptance that we will not be liable for any loss or damage to you pursuant to our fulfillment of our obligations under the relevant law.

6.2. Declaration

The contact named in section 1.4 must read the declaration carefully, and complete and sign it.

6.3 Counter-signatory

The form should be counter-signed by the chair, chief executive, or person of similar authority in your organisation. If you are a church-based or other faith organisation, please refer to Appendix six for further guidance on whom the additional counter-signatory should be. If required, the additional counter-signatory should be given a copy of this section to complete.

6.4 Reference

Your independent referee must have known your organisation for at least one year, or from its start if running for less than one year, and must support your application for funding. The independent referee must be a person with a professional or public position whose status we can check, such as a

- Member of Parliament
- local councillor
- Justice of the Peace
- solicitor
- senior bank official
- chartered accountant
- senior local authority officer, civil servant or other
- public sector employee

- local authority arts development, sport development, museums or lottery officer
- senior officer from a development agency, e.g. a rural community council, or a council for voluntary service.

Your referee must not be someone who will directly benefit if you get a grant, or:

- a current member of your organisation, a trustee or a member of staff
- related to someone in one of these positions
- formerly (that is, within the last two years) in one of these positions.

Section 7: Beneficiary monitoring

If possible, please provide this information. It is being gathered for monitoring purposes only and will not be used to assess your application.

Appendix three: Capital grants – eligible costs

Technology	Minimum capacity ¹	“Eligible costs” for which you can claim a grant
Solar photovoltaics	0.5kWe	Cost of solar photovoltaic generation equipment, plus direct costs of fixing panels to roof/ground mount, any performance displays and connecting to electricity supply, but excluding (a) the cost of any extended warranty beyond the two year warranty all certificated installers are required to offer free of charge; (b) the cost of any other materials, works or other items whatsoever (such as, but not limited to, any cost of general rewiring at property).
Solar thermal hot water	None	Cost of solar thermal hot water panels controllers, solar cylinders, safety components and valves, plus direct costs of fixing panels to roof/ground mount and connecting to water supply for property, but excluding (a) the cost of any extended warranty beyond the one year warranty all certificated installers are required to offer free of charge; (b) the cost of any other materials, works or other items whatsoever.
Wind turbines ⁴	0.5kWe	Cost of wind turbine generation equipment, plus direct cost of roof/ground mount, any performance displays and connecting to electricity supply, but excluding (a) the cost of any extended warranty beyond the one year warranty all certificated installers are required to offer free of charge; (b) the cost of any other materials, works or other items whatsoever (such as, but not limited to, any cost of general rewiring at property).
Heat pumps ⁴	None	Cost of heat generation pipes and other equipment, plus direct costs of ground works for boring vertical or horizontal pipe work and connecting to the electrical supply and heat distribution system at the property, but excluding (a) the cost of any extended warranty beyond the one year warranty all certificated installers are required to offer free of charge; (b) the cost of any other materials, works or other items whatsoever (such as, but not limited to, upgrading of radiators or other elements of central heating system at property).
Automated wood pellet stoves ^{2,4}	None	Cost of all relevant stove equipment, but excluding (a) the cost of any extended warranty beyond the one year warranty all certificated installers are required to offer free of charge; (b) the cost of any other materials, works or other items whatsoever (such as, but not limited to, upgrading of radiators or other elements of central heating system at the property).

Wood-fuelled boiler systems ^{2,4}	None	Cost of relevant boiler equipment, plus direct costs of connecting the unit to an automated fuel delivery mechanism and connecting to the property's heat distribution system, but excluding (a) the cost of any extended warranty beyond the one year warranty all certificated installers are required to offer free of charge; and (b) the cost of any other materials, works or other items whatsoever (such as, but not limited to, upgrading of radiators or other elements of central heating system at the property).
Micro-hydro turbines ⁴	0.5kWe	Cost of hydro generation equipment, plus direct costs of water works, any performance displays and connecting to electricity supply, but excluding (a) the cost of any extended warranty beyond the one year warranty all certificated installers are required to offer free of charge; and (b) the cost of any other materials, works or other items whatsoever (such as, but not limited to, any cost of general rewiring at property).
Cavity wall / loft insulation	N/A	Cost of relevant insulation material, plus direct costs associated with its installation, but excluding the cost of any extended warranty beyond the warranty offered by installers.
Heating controls	N/A	Cost of relevant heating controls (room thermostats, cylinder thermostats, timers and programmers), plus the direct cost of installing and commissioning these controls within the heating system of the building, but excluding (a) the cost of any extended warranty beyond the warranty offered by installers; (b) the cost of any other materials, works or other items whatsoever (such as, remedial or general maintenance work).
Lighting controls ³	N/A	Cost of relevant lighting controls (timers, dimmers, photocell, movement and zoning), plus the direct cost of installing and commissioning these controls within the heating system of the building, but excluding (a) the cost of any extended warranty beyond the warranty offered by installers; (b) the cost of any other materials, works or other items whatsoever (such as, remedial or general maintenance work).

1. Maximum limits are set by the Microgeneration Certification Scheme, currently 50kWe / 45kWth

2. Conventional multi-fuel room heaters or stoves (such as log or coal) and kitchen ranges (such as an AGA) – are excluded.

3. Eligible controls only include those listed on: www.eca.gov.uk

4. Only civil works directly linked to the microgeneration installation can be included in the total eligible costs. Where these relate to small scale district heating systems or other system related costs not specified here, the final decision lies with the CSEP Selection Panel.

Appendix four: Benchmarks

Information gathered from section 4 of the Capital Grants application form will be used to estimate the cost (based on total installation cost) of saving a unit quantity of carbon dioxide over the expected lifetime of the installation, and therefore providing an indication of value for money. These figures are compared to the following “benchmarks” and if they are significantly higher, it may cause us to reject your application or request further information and clarification. The benchmarks (figures in bold) are expressed as £/tonneCO₂. They are aligned to those produced by the Government’s Low Carbon Buildings programme, and may therefore change from time to time. You should ensure that you are referring to the current benchmarks before applying, by checking our website (www.communitysustainable.org.uk).

	Solar PV	Solar thermal	Micro-hydro turbines	Heat pumps	Wood pellet stoves	Wood fuelled boilers
Assumed life (years)	25	20	25	20	20	20
Displaced fuel/energy						
Electricity	£990	£338	*	£119	*	£106
Natural Gas	N/A	£563	*	£212	*	£315
Oil		£489	*	£225	*	£171
Coal		£296	*	£86	*	£83
LPG		£523	*	£263	*	£185

	Wind turbines (by size in kW)				
	less than 1.5	1.6 – 5.0	6.0	15.0	20 and larger
Assumed life (years)	20	20	20	20	20
Displaced fuel/energy					
Electricity	£1,049	£531	£419	£345	£294

* These benchmarks are being developed. Please check the scheme website or contact our helpline for guidance.

Carbon emission factors for displaced fuels for use in the £/tonneCO₂ calculation	
Electricity=	0.43 kgCO ₂ /kWh
Natural Gas=	0.19 kgCO ₂ /kWh
Coal=	0.3 kgCO ₂ /kWh
Oil=	0.25 kgCO ₂ /kWh
LPG=	0.21 kgCO ₂ /kWh
Calculation formula:	
£/tonneCO ₂ = (Total cost (based on eligible costs) x 1000) / (Energy yield x emission factor x assumed life)	
Example for PV system costing £12,000 with an estimated annual yield of 1500 kWh:	
(12,000 x 1000) / (1500 x 0.43 x 25) = £744.19 /tonneCO ₂ (i.e. lower than the PV benchmark of £1,100, hence acceptable).	

Appendix five: England regions

Where you are asked in the application forms to state the region of an address, please use one of the following:

East of England

(Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk, Suffolk)

East Midlands

(Derbyshire, Leicestershire, Lincolnshire, Northamptonshire, Nottinghamshire, Rutland)

London

(Inner London, Greater London, Middlesex)

North East

(Cleveland, Durham, Northumberland, Tyne & Wear)

North West

(Cheshire, Cumbria, Greater Manchester, Lancashire, Merseyside)

South East

(Berkshire, Buckinghamshire, East Sussex, Hampshire, Isle of Wight, Kent, Oxfordshire, Surrey, West Sussex)

South West

(Avon, Cornwall & Isles of Scilly, Devon, Dorset, Gloucestershire, Somerset, Wiltshire)

West Midlands

(Herefordshire, Shropshire, Staffordshire, Warwickshire, West Midlands, Worcestershire)

Yorkshire & Humberside

(Humberside, North Yorkshire, West Yorkshire, South Yorkshire)

Appendix six: Additional advice for faith organisations

Church-based faith organisations

If you are a church-based faith organisation, section 6.3 of the capital grants application form may also need to be signed by a representative of another part of your organisation. There may also be some variations in our terms and conditions of grant.

This is because there may be legal relationships between the family of organisations which form your faith that affect how your organisation deals with property. These differences may mean that some other part of the family of organisations that make up your faith holds the title for the property you wish to work on. If this is the case:

- this other part of your organisation will need to sign a copy of the declaration in section 6.3 of the capital grants application form and accept our terms and conditions of grant if we award you a grant
- the other part of your organisation will need to be aware of your application and support it
- the security of tenure we require will need to be in the name of this other part of your organisation, not yours.

In addition, the way you are established in law may affect the terms and conditions of grant you can accept and the form of planning permission you require. We have specific terms and conditions of grant for these cases. The table below gives further details.

If your application involves changes to buildings on Church of England consecrated ground, we will expect that you have gained “faculty” permission for the works.

Other faith organisations

If you are a faith organisation and not included in the list below, please contact us, as we will need to check if there are legal relationships between you and other parts of your faith which would affect our relationship with you if we award you a grant.

Faith	Name of part which makes application	Name of part which holds title to land or buildings	Name of parts which must sign terms and conditions if we award a grant	Name of part which needs to support application	Do we have variations to standard terms and conditions
Church of England	Parochial Church Council	Incumbent of parish or Diocesan Board of Finance	Parochial Church Council; and either the incumbent or Diocesan Board of Finance (whichever holds title)	Either the incumbent or Diocesan Board of Finance (whoever holds title)	Yes
Methodist Church	Church Council	Trustees for Methodist Church Purposes	Church Council and Trustees for Methodist Church Purposes	Methodist Council	Yes
United Reformed Church	Church Meeting	United Reformed Church Trust Corporation	Church Meeting and United Reformed Trust Church Corporation	Provincial Synod	Yes
Baptist Church in Baptist Union of Great Britain	Local Baptist Church Meeting	A Baptist Trust Corporation	Local Church Meeting and Baptist Trust Corporation	Baptist Trust Corporation	Yes
Roman Catholic Church	Diocese	Custodian Trustees	Diocese and Custodian Trustees	Bishop of Diocese	No

Appendix seven: Contacts

a) Community Sustainable Energy Programme

Enquiry line:	08458 63 00 25
Website:	www.communitysustainable.org.uk
Email:	info@communitysustainable.org.uk
Address:	Community Sustainable Energy Programme BRE Building 17 Garston Watford WD25 9XX

b) Useful websites (BRE is not responsible for the content of external websites.)

BRE	www.bre.co.uk
Low Carbon Buildings Programme – Phase 1	www.lowcarbonbuildings.org.uk
Low Carbon Buildings Programme – Phase 2	www.lowcarbonbuildingsphase2.org.uk
Microgeneration Certification Scheme	www.greenbooklive.com
BERR's microgeneration homepage	www.dti.gov.uk/energy/sources/sustainable/microgeneration
Community Renewables Initiative Archive	www.countryside.gov.uk/LAR/Landscape/CRI
Carbon Trust*	www.carbontrust.co.uk
Energy Saving Trust	www.est.org.uk
Micropower Council	www.micropower.co.uk
Biomass fuel suppliers	www.nef.org.uk/logpile/

* A good source of information on developing energy management policies and procedures, and valuable support for consultancy-led energy surveys for organisations with annual fuel bills over £50K.

Appendix eight. State Aid

Overview

The European Commission has considerable powers to monitor, control and restrict the forms and levels of aid given by all Member States to undertakings. The objective of State Aid control is to ensure that government interventions do not distort competition and intra-community trade. In this respect, State Aid is defined as an advantage in any form whatsoever conferred on a selective basis to undertakings by national public authorities. The State Aid rules apply to aid granted by the State or through State resources and include any private body established or appointed by the State to administer aid (eg. BRE administering the Community Sustainable Energy Programme on behalf of the BIG Lottery Fund).

Details

Grant awards under the Community Sustainable Energy Programme cannot be made to any organisation or public body which falls within the concept of an 'undertaking', defined by Article 87(1) EC Treaty as any entity engaged in an economic activity, regardless of the legal status of the entity or the way it is funded. An activity can be regarded as 'economic' even if it is not profitable, or if it lacks an economic purpose provided that it is carrying on some commercial activity.

Article 87(1) sets out criteria, all of which must be met for a State Aid to be present:

- The grant favours certain undertakings or the production of certain goods;
- The grant is provided through State resources;
- The grant distorts or threatens to distort competition;
- The grant affects trade between Member States.

If it is absolutely certain that one or more of these conditions is NOT met, then your organisation is not affected by State Aid rules.

Organisations not covered by State Aid

It is impossible to provide a categorical definition of this because each organisation will have to assess whether it is an undertaking. However, it can be stated that an undertaking is an organisation or individual that carries on an economic activity. The following types of organisations will be undertakings for the purpose of the State Aid rules:

- Sole traders;
- Partnerships running a business;
- Companies running a business.

However, it is likely that the payment of grants to organisations and public bodies which carry out the following functions and activities will NOT amount to State Aid:

- a. Organisations and public bodies which administer matters which are intrinsically prerogatives of the State (such as ensuring internal and external security, the administration of justice, the conduct of foreign relations and other exercises of official authority - Police Authorities & Government Departments);
- b. Organisations and public bodies which provide services where the State is not seeking to engage in gainful activity but is fulfilling its duty towards its own population in the social, cultural and educational fields (such as national education - Schools, NHS, GP surgeries & Local Authorities);
- c. Organisations and public bodies which provide services/schemes based on the principle of solidarity, which are non-profit-making and where the benefits paid are not proportional to the amount of the compulsory contributions (such as organisations charged with the management of State-imposed compulsory basic social security schemes);
- d. Organisations and public bodies which perform largely social functions, are not profit-oriented and are not meant to engage in industrial or commercial activity (such as the non-economic activities of trade unions, political parties, churches and religious societies, consumer associations, learned societies, charities as well as relief and aid organisations).

Please note that whenever such organisations, in performing a general interest task, engages in economic activities then the State Aid rules can apply.

Examples

The examples below provide guidance on the way in which certain types of organisation are likely to be classified. Please note that these examples are illustrations only and in each case you will need to assess your organisation's activities to determine whether your organisation is an undertaking.

Example 1

A community group owns and manages a community hall. The community group rents the hall out to local clubs and charges a nominal fee to cover electricity costs. The community group also arranges various fundraising events such as jumble sales and sponsored walks to raise funds for the hall. The community group does not raise funds in any other way. The community group is not an undertaking.

Example 2

A charity is set up to protect local wildlife. The charity raises funds through donations and by selling gifts through a mail order catalogue. All the profits raised by sale of goods through the catalogue are used to protect local wildlife. The charity is an undertaking because it carries on commercial activities by selling goods through the catalogue.

Frequently Asked Questions

Is funding to universities treated as aid?

Not normally: the funding of universities to provide teaching to students is not deemed State Aid. Neither the universities nor the students (individuals) are considered to be "undertakings". However, where universities enter into collaboration with firms, there may be State Aid present. There will be no State Aid where the firms pay a commercial fee for the use of university facilities or where the results of the collaboration are made available to all-comers, but otherwise, there is a danger of State Aid being present.

Why must we comply with the State Aid rules?

The State Aid rules work to create fair competition for UK companies in Europe. Application of the rules means that competitors in other EU Member States cannot receive unlawful State subsidies which distort competition. Unauthorised State Aid is illegal. These are the consequences for giving such aid:

- aid payments can be suspended;
- firms may have to repay the State with interest;
- policies may have to be altered;
- legislation may need to be amended;
- a recipient could be sued by a competitor for damages.

I am still unsure about my organisation's status with regard to State Aid, where can I go for further advice?

See www.berr.gov.uk/bbf/state-aid/advice/index.html for further details.

NB. If an organisation contravenes State Aid regulations, the Community Sustainable Energy Programme funded organisation will be responsible, not the Big Lottery Fund or BRE.