

Application reference number: (for internal use only)	CERG/
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## Welsh Government Energy Service Funding Application Form

*(For more information on how to complete this form, please refer to the CERG Application Guidelines)*

SECTION A – Applicant details					
Organisation name:	Add text				
Company registration number:	Add Number				
Are you able to reclaim VAT?	<input type="checkbox"/> Yes <input type="checkbox"/> No	VAT registration number (if applicable)		Add Number	
Address:	Add text				
Postcode:	Add text				
Local Authority:	Add text	Constituency:	Add text	Electoral Region:	Add text
How many employees do you have?	Add Number	How many people (staff and volunteers) are involved in the organisation?		Add Number	
Primary Contact					
Title:		Other:	Please add other title		
Forename:		Surname:			
Position in organisation:	Add text				
Telephone:	Add number	Mobile:			
E-mail:	Add email				
Contactable Hours:	Please advise normal work hours, particularly if part time role limits availability				
Secondary Contact					
Title:		Other:	Please add other title		
Forename:		Surname:			
Position in organisation:	Add text				
Telephone:	Add number	Mobile:			
E-mail:	Add email				
Contactable Hours:	Please advise normal work hours, particularly if part time role limits availability				

## About the applicant organisation

<b>Legal Status</b> <i>(300 words maximum)</i>	<p><i>Please specify the legal status of your organisation (e.g. community interest company, industrial and provident society) and briefly explain its main purpose and activities and the geographical area(s) in which it operates.</i></p> <p>Add text</p> <p><i>Please make clear why you consider that your organisation constitutes a "social enterprise" or an "SME" for the purposes of the scheme:</i></p> <p>Add text</p>
<b>Relevant Experience</b> <i>(200 words maximum):</i>	<p><i>Please provide details of any project management or development experience, or other relevant skills within the organisation.</i></p> <p>Add text</p>
<b>Governance</b> <i>(200 words maximum):</i>	<p><i>Please explain the governance arrangements of your organisation including your approach to managing conflicts of interest and specify here if there are any conflicts of interest associated with the subject of this application.</i></p> <p>Add text</p>
<b>What do you require this funding for?</b>	<p><i>Please provide details of the specific internal resource that the funding will support (number of posts, number of FTE staff, roles(s)).</i></p> <p>Add text</p>
<b>Why do you require this funding now?</b>	<p><i>Please explain why this activity cannot be directly financed by the organisation or funded via other means (e.g. limited reserves, no other suitable funding options).</i></p> <p><i>Please also explain why/how funding at this point is necessary:</i></p> <p>Add text</p>

## Authorised Signatory Form & Constitution and Accounts Request

### Designated authority to sign applications on behalf of the organisation

Please provide details of the person applying to be an authorised signatory.

<b>Name of Organisation</b>	Add text
<b>Name of Authorised Signatory</b>	Add text
<b>Specimen signature</b>	
<b>Position in Organisation</b>	Add text
<b>Address of Organisation</b>	Add text
<b>Telephone No</b>	Add Number

**This request for authorised signatory registration must be countersigned below by an Organisation director (i.e. a member of the board of directors), Organisation secretary, owner, proprietor or partner. Please note that the Counter Signatory MUST BE DIFFERENT from the Authorised Signatory.**

<b>Signed</b>	
<b>Print name</b>	Add text
<b>Position in Organisation</b>	Add text
<b>Date</b>	Add text

### Organisation Constitution Request

Please provide a copy of your group's constitution and a copy of the minutes from your last AGM.

### Organisation Accounts Request

Please provide the organisations account records for the past year and a current bank statement

## De Minimis / Small Amounts of Financial Assistance

Support provided under this scheme is classed as 'Small Amounts of Financial Assistance' (SAFA) as defined by Article 364 paragraph 4 of the UK-EU Trade and Cooperation Agreement. This allows the provision of up to 325,000 Special Drawing Rights, or approximately **£\*INSERT STERLING VALUE HERE ON THE DAY OF ISSUING THE FORM\*** to a single economic actor over the current and previous two fiscal years. This threshold includes any SAFA support or EU de minimis support received during the relevant period, from all sources.

**It is your responsibility to ensure that any support you receive under this scheme does not breach this threshold when cumulated with previous SAFA and EU de minimis support received; failure to do so will result in clawback being initiated.**

Confirmation of EU de minimis aid and 'small amounts of financial assistance' received			
I confirm that [Business] has received the following de minimis aid or UK 'small amounts of financial assistance' (SAFA) in the current and previous two financial years.			
Body providing the assistance/aid	Type of assistance/aid	Value of assistance/aid (£)	Date of assistance/aid
	<i>[EU de minimis aid/'small amounts of financial assistance']</i>	<i>[assistance/aid amount in £ at the point of award]</i>	<i>[Date]</i>
	<i>[EU de minimis aid/'small amounts of financial assistance']</i>	<i>[assistance/aid amount in £ at the point of award]</i>	<i>[Date]</i>
	<i>[EU de minimis aid/'small amounts of financial assistance']</i>	<i>[assistance/aid amount in £ at the point of award]</i>	<i>[Date]</i>

Insert additional rows as necessary

Please be aware, SAFA support can be variously referred to by any of the following names:

- SDR aid
- UK de minimis
- 'Small Amounts of Funding Exemption' (SAFE)
- 'Minimal Financial Assistance' (MFA)

If you have been in receipt of funding under any of these titles, you should include it in your statement of eligible support received.

SECTION B – Activities and Outcomes														
<b>Project Name:</b>														
<b>Location(s):</b>	<p>Where the installation covers more than one address, provide details of the relevant geographic area.</p> <p>Add text</p>													
<b>Postcode: (if applicable)</b>														
<b>Local Authority:</b>														
<b>Summary</b> <i>(500 words maximum):</i>	<p>Please give a description of the (proposed) 'project(s)' which this resource funding will enable. We are interested to understand how this will benefit people and other stakeholders in your community, and keen to know of any local partnerships that are expected to be strengthened as a result.</p> <p>Please detail any specific indicators such as Capacity (in MW) of renewable energy equipment installed, Annual electricity generation or heat delivered (MWh / yr), Reduction in Emissions of greenhouse gases (tonnes / yr of CO<sub>2</sub>e)</p> <p>Add text</p>													
<b>Current Status</b> <i>(200 words maximum):</i>	<p>Please summarise any preparatory activity(ies) or groundwork undertaken to date.</p> <p>Please indicate your state of readiness to proceed.</p> <p>Add text</p>													
<b>Project Outputs</b> <i>(500 words maximum):</i>	<p>Please provide an explanation of the tangible outputs from this resourcing and the expected timing of these. For example: a feasibility study; implementation delivery plan; installation/commissioning of new renewable energy generation technology(ies), etc. Add more rows if necessary.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 2px;">Output (Deliverable)</th> <th style="text-align: left; padding: 2px;">Expected date of delivery</th> </tr> </thead> <tbody> <tr><td style="height: 20px;"></td><td></td></tr> </tbody> </table>		Output (Deliverable)	Expected date of delivery										
Output (Deliverable)	Expected date of delivery													
<b>Proposed Technology</b>	<p>Add text</p>	<b>Proposed Project Size (kW)</b>	<p>Add text</p>											
<b>Contribution to Wales' policy or strategic objectives</b> <i>(300 words maximum):</i>	<p>Please explain how your project contributes to the Well Being of Future Generations Act and other Welsh Government policy or strategic objectives</p> <p>Add text</p>													

<b>Wider Benefits</b>  <i>(300 words maximum):</i>	<p><i>Please highlight how the wider community will benefit from the intended project. For example, you may describe expected impacts on fuel poverty, how the initiative supports local economic outcomes (e.g. job creation or youth training, or expected retention of local value), optimised use of network assets, transition to decarbonised heat or transport solutions, etc.</i></p> <p>Add text</p>
<b>Innovation</b>  <i>(200 words maximum):</i>	<p><i>Please describe any particularly innovative aspects of your project(s). This need not be restricted to the use of new technology(ies) but could relate (for example) to a new approach towards energy communities in Wales.</i></p> <p>Add text</p>
<b>Legacy</b>  <i>(200 words maximum):</i>	<p><i>How do you anticipate ensuring that the capacity and skills deriving from this support will be retained within the organisation and/or the local community(ies)?</i></p> <p>Add text</p>
<b>Rationale</b>	<p><i>Explain how the resource funded via this application will support your project.    Why is the project necessary and why do you believe your activity plan will work?    If you have evidence of need for this project, please describe that need here.</i></p> <p>Add text</p>
<b>How will you ensure best value is achieved from this funding?</b>	<p><i>Please describe how you will be recruiting for the role with Value for money in mind and how this aligns with your organisational policy.    Will the grant cover costs of recruitment agency services?    Have you confirmed that the salary offered is appropriate / commensurate with experience? Is this benchmarked against comparable roles in other organisations?</i></p> <p>Add text</p>

**SECTION C – Funding Requirement**
**Revenue (Staffing Costs)**

Role	Activities	FTE ratio	FY22/23 Costs (£)	FY23/24 Costs (£)	Fy24/25 Costs (£)
<b>Staff TOTALS (£)</b>	Provide the combined total staff funding required per fiscal year (Apr-Mar)				
<b>Overheads (£)</b>	Associated payroll costs (e.g. National Insurance, Pension provision)				
<b>Full Time Equivalent</b>	Indicate the number of FTE personnel that the funding will support per FY				

**Other Relevant Costs**

*You may include a request for eligible costs associated with the staff appointment, such as recruitment and training*

Item	Description	FY22/23 Costs (£)	FY23/24 Costs (£)	Fy24/25 Costs (£)
<b>Other Costs TOTALS (£)</b>	Provide the combined total other relevant funding required per FY			

**External Contributions**

*Please describe any third-party funding or finance that you intend to seek or have secured to facilitate the role(s) and your project(s). You may include in-kind contributions here.*

Item	Secured (yes/no)	FY22/23 Costs (£)	FY23/24 Costs (£)	Fy24/25 Costs (£)
<b>TOTALS (£)</b>				

**TOTAL RESOURCE GRANT REQUESTED**

Item	Secured (yes/no)	FY22/23 Costs (£)	FY23/24 Costs (£)	Fy24/25 Costs (£)
<b>TOTALS (£)</b>				

## SECTION D(1) – Programme

*Please outline the activities that you intend to complete in order to fulfil the objectives of your project.  
This should include initialisation steps such as recruitment and appointment of new staff.*

Task	Outcome	Start date	Completion date	Responsible
e.g. define Job description and advertise role	e.g. Job advertised and applications received	01/01/23	31/01/23	Secretary

## SECTION D(2)– Risks

*Please describe any early risks associated with this project and how these risks will be managed. For example, these may relate to recruitment and staff churn, community engagement, capacity of existing resources, organisational risks or competing priorities. You may also consider the quality of installations, data protection issues, safeguarding of staff and clients and health and safety issues (not an exhaustive list).*

#### SECTION E – Supporting Documents Checklist

***I enclose the following documents in support of our application (please tick box to indicate which you have included)***

If you are unable to provide the relevant information, please note this may delay the processing of your application.

Evidence of a Constitution or Memorandum & Articles of Association	<input type="checkbox"/>
Completion of last two fiscal years De-Minimis / SAFA declaration	<input type="checkbox"/>
Minutes of relevant committee meetings	<input type="checkbox"/>
Completion of authorised signatory	<input type="checkbox"/>
Evidence of year accounts and current bank statement	<input type="checkbox"/>

## SECTION F - Declaration

In return for the Energy Saving Trust (EST) agreeing to consider this application for funding:-

(1) I confirm for and on behalf of the applicant that:-

- all information contained in and accompanying this application is true, accurate and complete in all respects and there are no material facts which may be relevant to this application that have not been disclosed to EST;
- the applicant will notify EST without delay if at any time after this application is submitted there has been any material change to any of the information provided in support of this application or to any other facts relevant to this application;
- EST is authorised to take whatever steps it reasonably considers appropriate to verify the information provided in connection with this application, including the making of enquiries with third parties (such as credit reference agencies and any accountants or referees mentioned in the application) about the applicant, its partners (if any) and their respective management teams;
- EST is also authorised to pass information about the applicant and any organisations or individuals referred to in the application to the Welsh Government, as funders of the scheme, and to any third parties engaged by EST to assist it in assessing the application;
- any individuals about whom personal details are being disclosed as part of this application have been made aware of, and agree to, the way in which their details may be processed, as set out in the Data Protection statement referred to below.
- if applicable i.e. where the section in this form headed "Authorised representative details" has been completed) EST is entitled to assume that the authorised representative has full authority to act on the applicant's behalf for the purposes of this application, including for the purposes of giving information to, and receiving information from, EST.

(2) I acknowledge the following points for and on behalf of the applicant:-

- if any information provided in relation to the application is subsequently found to be untrue, inaccurate or incomplete, this may invalidate the entire application or lead to a reduction in the amount of grant EST is willing to offer;
- EST cannot and does not guarantee that funding for the project will be available and its decision as to whether the application meets the relevant funding criteria (as determined by EST) will be final and not subject to appeal;
- in any event, EST will not provide any grant funding for expenditure that is incurred prior to the date of any formal grant offer letter issued by EST;
- any offer of grant will be made on the basis of detailed conditions of grant, as specified by EST as attached to this application form

Signed..... *for and on behalf of the Applicant* Date .....

Print name.....

Position .....

### Data Protection



The Energy Saving Trust (EST), on behalf of the Welsh Government, will collect and process the "personal data" (i.e. information relating to individuals) provided with this application for the purposes of assessing that application and subsequently administering any offer of grant that may be made. As explained in the Declaration above, this processing may include the use of data to contact referees and other third parties for verification purposes, and the passing of data to the Welsh Government as funders of the scheme.

The Welsh Government is the data controller and processes this personal data under Article 6(e) of the General Data Protection Regulation (GDPR) to fulfil its statutory function to provide funding and advice in relation to the WG Energy service. Failing to provide the personal data will result in your application not being considered.

The Welsh Government will retain this information for the life of the scheme plus 7 years.

Under data protection legislation, you have the right:

- to be informed of the personal data held about you and to access it
- require us to rectify inaccuracies in that data
- to (in certain circumstances) object to or restrict processing
- for (in certain circumstances) data portability
- to lodge a complaint with the Information Commissioner's Office (ICO) who is our independent regulator for data protection

If you wish to exercise your rights under the GDPR, please see contact details below:

Data Protection Officer

Welsh Government

Cathays Park

Cardiff

CF10 2HH

email: [DataProtectionOfficer@gov.wales](mailto:DataProtectionOfficer@gov.wales)

You can also contact the ICO at the address below: Wales Information Commissioner's Office, 2<sup>nd</sup> Floor, Churchill House, Churchill Way, Cardiff, CF10 2HH Tel: 02920 678400

Please email the completed application to: