

# WGES Community Energy Resource Grant

## Assessing Expressions of Interest

### Grant objectives

The Objectives of the CERG are:

- To provide initial / short-term funding to establish or strengthen in-house capacity and capability of community energy enterprises in Wales to progress their local energy projects
- To strengthen and embed technical and project management capacity within community energy enterprises with a view towards long-term retention of these skills in the local community for future initiatives
- To accelerate the development and implementation of high quality community energy projects in Wales, particularly those projects already in development that are limited by personnel capacity constraints
- To better enable community organisations to develop high impact projects that deliver positive outcomes for their local communities and for Wales

### Eligibility

#### Eligible Organisations

Community organisations established in Wales that have a clear community energy purpose and operate along charitable or community benefit principles.

#### Eligible costs

The CERG funding is principally to support revenue costs (i.e. the costs of employing staff). Eligible costs are:

- Direct wages / salary costs against a clearly identified role(s)
- Associated on-costs (including National Insurance, Tax and Pension)
- Specific training relevant to the role(s)
- Recruitment costs

#### Ineligible costs

The CERG will not support capital purchases or external project development costs including, but not limited to:

- Energy generation equipment or associated project hardware\*
- Costs associated with scoping, planning applications, grid, EIAs, legal or financial advice\*\*
- Office related costs, including rental, utilities, office equipment
- Travel or subsistence costs

## Evaluation

### Criteria for assessing bids

The evaluation of Expressions of Interest is made against a series of principally qualitative factors, which relate to the original call for Expressions of Interest and the supporting EOI guidance.

1. CERG funding is intended to **build capacity** which **stimulates projects** that will **lead to identifiable outcomes for the community**.
  - We are seeking ambition and scale
  - Innovation is encouraged
  - Partnerships with other social enterprises and local governance organisations are welcomed

**Note that this must be additional to 'Business as Usual' activity.**

2. These are reflecting key strategic and policy objectives of Welsh Government. Alignment with and impact against Welsh Government / Energy Service objectives will be the key basis for assessment:
  - Well-being of Future Generations, Climate Change Regs & Environment Act
  - Prosperity for All / Net Zero Wales / Programme for Government
  - Relevant recommendations from the Renewable Energy Deep Dive
3. We encourage applicants to consider the 'wider benefits' that projects can achieve (i.e. beyond generation capacity installed, kWh delivered and CO2 emissions savings). This could include for instance:
  - impacts on fuel poverty
  - supporting local economic outcomes
  - optimising use of network assets
  - enabling transition to decarbonised heat or transport solutions.
4. Priority will be given to organisations:
  - with project(s) that are already in development but which are essentially reliant purely on volunteer availability and goodwill
  - that are seeking to initiate activity and commence funding draw-down within the current financial year (to maximise FY22/23 in-year spend)

### Threshold Criteria

If the EOI fails to meet any of the following criteria, the bid cannot be shortlisted for potential full application / funding:

- Entity / Project is not located in Wales
- EOI is purely seeking capital or other ineligible funding.  
*for clarity, applications which describe a mix of eligible and ineligible costs may still be considered, but only the eligible costs can be supported under this funding stream*
- Funding requirement is not within the timing window  
*for clarity, funding that straddles multiple financial years may be considered, but funding is only available up to FY24/25 under this Call.*

## Scoring System

Criterion	Threshold?	Weighting	Notes
Organisation Eligibility	Yes	Pass/Fail	Is the organisation established in Wales? Does it have Not for Profit / Community Benefit purposes?
Funding Eligibility	Yes	Pass/Fail	Is the funding for staff related costs? If seeking 100% for e.g. capital or third party services it is not eligible
Project Purposes (1)	Yes	Pass/Fail	Is this funding request for a relevant <b>community energy</b> outcome?
Location (1)	Yes	Pass/Fail	Is this for a person / project based in Wales?
Alignment	No	10	Does the initiative directly reference WBFG or other WG policy / ambitions? Is it helping to respond to strategic priorities such as a just transition to net zero, or other energy sector challenges?
Innovation	No	10	Is the outline seeking to address something which is novel or early stage in terms of Wales's community energy sector's experience?
Plan & Expected Outcomes	No	20	Is the concept reasonable. Do the aims and outcomes make sense? Is the rationale solid – i.e. does the plan seem credible?
Pace	No	10	Is the activity expected to commence within the current financial year? Activities that are ready to proceed are preferred over those that will only commence in FY23/24 or later.
Ambition	No	10	Is there an indicative capacity or other measurable outcome described? Is there any indication of continuity or building legacy beyond the initial award?
Additionality	No	10	Check the current status to assure that this resource is to progress/accelerate activity beyond 'BAU'
Necessity	No	10	Is there a reasonable justification for why CERG funding is required?
Value for Money	No	20	Do the proposed outcomes appear to warrant the funding requested?

## Assessment Process:

Each Expression of Interest will be assessed by a minimum of two WGES staff.

Assessors should read through the whole EOI to understand the purpose, status and funding requirement and to confirm that the EOI does not fail against any of the threshold criteria. Once reviewed in entirety, assessors should then score each bid against the evaluation criteria using the scoring system above.

Based on that overall score and results, assessors will then make a recommendation on whether to shortlist the project for a full application.

*Note, if an EOI fails against one or more threshold criteria, the EOI should be noted as ineligible and a record made of the threshold against which it failed. It should be flagged to the second assessor. If both assessors confirm that it has failed against the threshold(s), it does not need to be scored.*

## Shortlisting

Both assessors' scores will be cross-checked against the scoring system criteria as a measure of consistency of approach. If the two scores are widely divergent a third assessor will review the bid.

The highest-ranking bids will then be considered in order from highest to lowest and recommendations will then be presented to Welsh Government as to the organisations that will be invited to make a full application.

## Assessors' additional notes

In addition to scoring, assessors are encouraged to use the notes sections to highlight any particularly strong or particularly weak areas of each bid. This may serve as additional feedback for unsuccessful bids – to help improve future prospects of funding success.