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# HEAT PUMP GRANTS

## Grant Guidance for Applicants

**Please read this guidance carefully.** It contains important information about the grant including eligibility, steps you need to follow to apply and evidence that you need to accompany your application. If you don't follow the guidance in this document, it might take longer to process your application or result in you being ineligible and losing the grant.

**Round 1**  
**v1.0 November 2023**



## CONTENTS

Summary .....	3
Application and Claim Process .....	4
Your Business .....	5
Your Project .....	7
Financial Information.....	9
Procurement.....	11
Grant Application .....	13
Grant Assessment and Award .....	15
Grant Claim .....	17
Promotion .....	19
Annexes .....	20
Version History .....	22

## WE'RE HERE TO HELP

If you have any questions about Heat Pump Grants or any of our Low Carbon Business Support schemes, you can contact us by email at [lowcarbonbusiness@westofengland-ca.gov.uk](mailto:lowcarbonbusiness@westofengland-ca.gov.uk) with your query and contact details. Please include your business name, the address of your premises within the West of England Combined Authority region and telephone and email contact details.

You can also call the Low Carbon Business Support team on [0117 332 1520](tel:01173321520) between 9.30am and 4.30pm Monday to Friday. Our phone lines can be busy so please leave a message and we will try and get back to you as soon as we can. Please leave your name, phone number, email address and a summary of your enquiry.

# HEAT PUMP GRANTS SUMMARY



A Heat Pump Grant is designed to help small and medium enterprises (SMEs) and registered charities purchase or replace old, inefficient heating systems with air-to-water, ground-to-water or water-to-water heat pumps. A heat pump reduces your greenhouse gas emissions and can cut your utility costs. If eligible, you will be able to apply for £500 - £30,000 to cover up to 60% of your costs.

Your application must be supported by independent advice and verification that installing a heat pump is a worthwhile action to take. Our [Carbon Survey scheme](#) provides this support free of charge, but you can also use a third-party consultant or assessor if you wish.

Heat Pump Grants are part of the Combined Authority's Low Carbon Business Support, funded by the West of England Green Recovery Fund. This supports the shift towards a low carbon economy and the delivery of the Combined Authority's [Climate and Ecological Strategy and Action Plan](#).

## To be eligible, you must be:

- ✓ **a small or medium sized enterprise/charity** - with fewer than 250 employees AND a turnover of equal to or less than £36 million OR a balance sheet of equal to or less than £18 million, including any partnership your organisation is a part of or any linked enterprises
- ✓ **a legal entity** such as a private limited company, community interest company, community benefit society or a registered charity
- ✓ **based in the West of England Combined Authority region** - located in Bath & North East Somerset, Bristol or South Gloucestershire local authority areas
- ✓ **content to be credit checked by a third-party credit reference agency.**

## For your project to be eligible, it must:

- ✓ **be based on recommendations from an independent source** such as a carbon survey carried out by us or a third-party independent surveyor/consultant
- ✓ **not be required to meet another legal obligation** such as a condition of planning permission
- ✓ **be procured in line with our procurement rules**
- ✓ **not be started, or any contract entered into, until we give the ok-to-proceed**
- ✓ **be above the minimum grant request of £15,000**
- ✓ **have written landlord permission, if required** - please send this with your application
- ✓ **meet current Building Regulations, where relevant**
- ✓ **have planning permission, if required**
- ✓ **be cash-flowed to completion by your company.**

# APPLICATION AND CLAIM PROCESS



## Step 1 - Identify your carbon reduction opportunities.

We can help you identify carbon reduction opportunities through our [Carbon Survey](#) scheme, or you can go to a third-party surveyor or consultant instead. The assessment must be independent and not associated with a particular technology or install contractor.

## Step 2 - Get a quote.

We need one recent quote with your application to work out the amount of grant and the potential carbon saving. Depending on the cost and type of project, you may need to [carry out more thorough procurement to meet our procurement criteria](#), but you can wait until after the grant has been approved to do that.

## Step 3 - Send in an application.

Complete an Expression of Interest form [on our website](#) to get an application pack from us. You might need to provide [other evidence](#) as detailed in this guidance, depending on your business or project.

## Step 4 - Application assessment and approval.

[We will assess your application and check that it meets all our criteria.](#) If we are happy that your application meets our criteria, we will recommend it for approval. Once approved we will send you a grant offer letter to sign.

## Step 5 - Complete your project.

Once you've been given the ok-to-proceed and you've completed the required procurement process, you can start work. We typically expect projects to take 6 months to complete.

## Step 6 - Claim the grant.

Once you have finished your project and paid for everything, [you will need to complete a grant claim form and provide evidence of completion, invoice and payment.](#) We aim to process claims within 4 weeks of receiving a form and all required evidence.



## Who can apply?

Heat Pump Grants are available to small & medium sized enterprises (SMEs). This means that your business needs to have fewer than 250 employees AND a turnover of equal to or less than £36 million OR a balance sheet of equal to or less than £18 million.

If your business is in a partnership or has a linked enterprise, please provide as much information as possible about your company structure on your application form. Any further investigations we have to carry out will likely result in a delay to your application.

Your business can be any type of legal entity e.g. private limited company, community interest company, community benefit society or a registered charity. You must have trading premises in the local authority areas of Bath & North East Somerset, Bristol or South Gloucestershire and your project location must also be based in this region.

You can apply for a Heat Pump Grant if you have received grant from us in the past for other projects besides a heat pump, for example if you have received a Green Business Grant for LED lighting.

## Who is not eligible to apply?

The following businesses are not eligible to apply:

- large businesses, sole traders, partnerships and businesses using cash-based accounting;
- community groups, sports clubs, village halls and similar entities unless applying as a registered charity or through a trading arm;
- GPs, dentists, opticians, care homes, schools, colleges and similar
- private domestic landlords or businesses operating from buildings that are required by law to have a domestic Energy Performance Certificate.
- organisations that have already received grant from the Combined Authority for heat pump projects in the past, such as from Green Business Grants.

## Due Diligence

We will carry out due diligence on your application, including a credit check by a third-party agency. You may be ineligible if you:

- have a County Court Judgement
- have a director who is disqualified
- have a poor grant performance record with the Combined Authority and/or the West of England Local Enterprise Partnership (LEP)
- have been requested to repay a grant under any Government scheme;
- do not have valid and adequate insurance policies in place

- have current or pending legal proceedings.

Please make sure you highlight any of the above on your application form. These responses will be risk-assessed against their relevance and significance.



## What can the grant be used for?

You can use a Heat Pump Grant for the supply and installation of air-to-water, ground-to-water or water-to-water heat pump systems. The heat output from the system may be used for space heating, water heating or process heating.

Eligible costs that can be funded by Heat Pump Grants include the supply and installation of heat pumps, hot water tanks, pipes, electrical components, cabling and system modifications such as larger radiators.

Air-to-air heat pumps, air conditioning, variable refrigerant flow and similar are not eligible for grant under this scheme, nor are hybrid systems that use anything other than electricity.

## What can't the grant be used for?

The grant cannot be used for:

- a heat pump if it is not recommended by a [suitable independent assessment](#) of your business' carbon emissions
- projects in locations where a district heat network is able to be connected to or is under construction. In these cases, we recommend speaking to the operator about connecting to the district heat network
- supporting projects such as additional insulation or solar panels. You could apply for a separate [Green Business Grant](#) for support with them.
- anything that does not meet the requirements of this Grant Guidance
- improvements that do not directly result in carbon savings or where it is impossible to estimate savings
- retrospective applications for completed projects or those where a contract/commitment has been entered into with suppliers
- applications that do not follow our [procurement guidelines](#);
- improvements that cost more than £300,000 (ex VAT) in total
- improvements to buildings that are required by law to have a domestic energy performance certificate
- activities that you are required by law to carry out, such as to meet a condition of planning permission or minimum energy efficiency standards
- revenue (non-capital) costs such as surveys, consultancy or planning fees.

## How much grant can I apply for?

You can apply for a grant of between £500 - £30,000 per business to cover up to 60% of your eligible costs. You will need to provide at least 40% match funding towards the project.

## What are eligible project costs?

Eligible project costs include:

- supply and/or installation of the heat pump equipment. You can apply for grant for supply only, install only or supply and install.
- enabling items or works necessary to install the equipment or bring it into operation, such as cabling or pipework.
- commissioning or certification costs necessary to bring the equipment into operation

Your completed project must use Microgeneration Certification Scheme (MCS) certified products and be commissioned by an MCS certified installer. More information on requirements can be found on the [MCS website](#).

Note that your potential grant is calculated based on whole project cost and assessed for value-for-money. If high commissioning or enabling works result in your project not meeting our value-for-money criteria, we will reduce your potential grant award until it does meet our criteria.

## Can I apply more than once?

No, you can only apply once to the Heat Pump Grant scheme.

## Independent assessment of your project

It is important that your project has been verified as feasible and worthwhile for you to complete. This gives you and us the confidence that the project will result in carbon savings for your business and that the right technologies are being used.

Evidence of an independent assessment must be provided with your application. The Combined Authority can provide this through our [Carbon Survey scheme](#), which is free of charge. You can also use an existing report or third-party assessor to meet this requirement. Full details of the requirements of an independent assessment can be found in our [Grant Guidance for Suppliers](#).

## How long do I have to complete my project?

We expect projects to take 6 months to complete from the date of grant award. We may be able to provide an extension if there is good reason for the longer timescale (e.g. supply chain issues, complications with permissions etc.), but we expect some detail from you on what is being done to push the project to completion. We wouldn't typically grant extensions of any more than an additional 6 months.

Please provide details on your application form if you anticipate your project taking longer than 6 months. Your expected completion date will be included in your Grant Offer Letter when your grant is approved. If you need an extension, please contact us as soon as possible to discuss.





## How is the grant paid?

The grant is paid in arrears once the project is completed and is, in effect, cashback on your project spend. You must be able to cashflow the project while it is in progress - we do not pay grant upfront nor do we pay grants in instalments while the project is in progress.

## How should the remaining costs be covered?

The remaining costs will need to be met by your company, such as through reserves or other financial mechanisms such as a loan. You cannot use any other public money to cover the remaining cost.

## Can I fund the works through a lease or hire-purchase agreement?

Yes. If you are using a lease or hire-purchase agreement, there must be an intention to own the asset and the asset/s must be put onto your balance sheet. You must have also made a payment towards the lease or hire-purchase agreement that is equal to or more than the amount of grant that we are giving you before we can pay you, such as the deposit.

## On what legal basis are grants awarded?

The legal basis of delivery of Heat Pump Grants is the West of England Combined Authority's General Power of Competence as set out in the West of England Combined Authority Order 2017 and the Localism Act 2011. The grant is provided from funding allocated to the Combined Authority by central government from national UK sources. For businesses the funding is offered as subsidy as defined by the [Subsidy Control Act 2022](#). For registered charities the funding is offered as No Subsidy.

Your Grant Offer Letter will specify the legal basis of your grant, with all grants being awarded either through the Energy Usage Streamlined Subsidy Scheme or Minimal Financial Assistance.

## Energy Usage Streamlined Subsidy Scheme

We anticipate that grants for small businesses will be awarded through the [Energy Usage Streamlined Subsidy Scheme under category 1: subsidies for energy demand reduction](#). Grants awarded through this scheme are exempt from and do not impact your Minimal Financial Assistance limits. You may not use any other funding from a public source as match funding for this project.

## Minimal Financial Assistance

For medium businesses, grants that are unable to be awarded through the Energy Usage Streamlined Subsidy Scheme will be awarded as [Minimal Financial Assistance \(MFA\)](#).

MFA is capped at a threshold of £315,000 over 3 financial years. If your grant is expected to be awarded through MFA, you will be asked to complete a declaration form, declaring any subsidies that count towards this limit. These include:

- subsidies that fall within the category of 'Minimal or (SPEI) financial assistance'
- aid given under European Union state aid de minimis regulations
- subsidies given as small amounts of financial assistance (SAFA) under the UK-EU Trade and Cooperation Agreement after 31 December 2020 but before the Subsidy Control Act came into force.

Please consult your past Grant Offer Letters and documents for the legal basis of grants that you have received and contact previous grant issuers if you are unsure.



If your company is awarded a grant, your procurement for the project must meet the rules below. You do not need to have completed the full procurement procedure before you apply for grant.

For any value of contract, **you must not enter into any contracts/commitments, start works or pay any money towards your project until you have submitted your Application Form and we have emailed to tell you it is ok to proceed.** Otherwise, your project will not be eligible for grant.

## Procurement Processes

There are different procurement processes required for different contract values. The threshold amounts apply to the total value of the contract (excluding VAT), not just the grant amount awarded. Contract values should not be artificially split; however, the value of a contract may be lower than the total value of your project if more than one installer/supplier is required, e.g. enabling works, supply of the heat pump equipment, installation and commissioning.

The different procurement processes apply if your project increases in cost while it is in progress. If your project value is close to £25,000 and you are unsure whether costs will stay fixed, we recommend that you follow the higher value process anyway.

Value of contract thresholds	Minimum procedure
£0-£24,999	One written quote sought from relevant suppliers with a detailed description of supplies/works included.
£25,000 - £300,000	Three written quotes sought from relevant suppliers against a clear specification. Justification that a reasonable decision has been made on the basis of the quotes/prices (See <a href="#">Annex A - Example Scoring Criteria</a> ).

## Written Quotes

Prices for energy efficiency and carbon reduction projects can vary considerably. For any contract value, we always recommend obtaining multiple quotes to allow you to compare and get a good understanding of costs. To support the local economy, we also recommend approaching local suppliers of goods and works where possible when obtaining quotes.

All quotes must include a detailed description of the works included, either as one document or as accompanying details. We need information of the makes, models, specifications and quantities of major items (heat pumps, buffer tanks) for us to calculate the carbon savings of your project and assess your application's value-for-money.

Quotes must be in-date when provided as evidence with your application. Suppliers should be made aware of the time that it may take for us to process your application to approval. We cannot guarantee that we can get your application approved before the quote expiry date, nor do we guarantee that additional grant can be provided if costs increase.

If you are struggling to obtain the required number of quotes, you must provide evidence to us that you have made every attempt to meet the minimum procedure **before** going ahead with the project. We will assess this evidence and indicate whether you need to provide more evidence or can go ahead with the quotes you have.

## Procurement Compliance

The following practices will not be acceptable under any circumstances.

- Direct awards to organisations where there is a conflict of interest, including:
  - A supplier where a director is also a director of the grant applicant awarding the contract
  - A supplier where a director is a family member of the director of a grant applicant awarding the contract

A signed declaration of conflicts of interests will be required as part of the Grant Offer Letter.

- Discriminatory tender conditions which prevent competition.
- Non-compliance with the thresholds above - including the artificial splitting of contracts.
- Modification of contracts. If the original contract value is below the threshold of £25,000 and an extension of the contract takes the overall above £25,000 the contract must then meet the requirements for contracts over £25,000.
- Contracts cannot be extended above 50% of their original value.

You must record any procurement and make it available as part of the project audit trail. Documentation should be retained until 31/03/2031. A lack of audit trail to demonstrate the process followed and decisions taken may lead to the Combined Authority clawing back grant funding.

The Combined Authority reserves the right to recover all the grant, in a reasonable and proportionate way, in the event of a breach of the funding agreement (as set out in the Grant Offer Letter). Please read your Grant Offer Letter carefully when you receive it so that you understand what is expected of you.



## Expression of Interest

To apply for a Heat Pump Grant, you must send us an Expression of Interest by filling in a short online form on our website. We will check the information in this form against basic criteria, such as whether you are a small or medium enterprise and if your planned project is likely to be eligible for grant.

If you are struggling to complete the Expression of Interest form online, please call us on 0117 332 1520 where we can take your details over the phone instead.

If we think you are likely to be eligible for a Heat Pump Grant, we will send you a personalised link to the online application form for you to fill in. Please note that by passing the initial expression of interest you are not guaranteed a grant.

## Application Form

The Heat Pump Grant application form is completed through Adobe Sign in your web browser. You will be able to complete all questions, attach supporting evidence, sign the declaration and submit the form. If you require the application form in a different format, please contact us and we will do our best to meet your needs. We do not accept signed application forms by post.

The “Click to Sign” button will appear at the bottom of the page once you have answered all necessary questions - click this to send us your application. We highly recommend that you save your progress when prompted or by clicking Options > Save progress in the top left corner.

Attachments are limited to 5MB each. If you are struggling to attach the necessary evidence, send it to us immediately after you submit your application form at [lowcarbonbusiness@westofengland-ca.gov.uk](mailto:lowcarbonbusiness@westofengland-ca.gov.uk).

Please complete the application form with as much detail as you can. The application form can be completed by anyone in your business, but the form must be signed by a director or chief finance officer to be accepted.

If you have any questions about the application form or process, please call us on 0117 332 1520 where we can provide guidance on the information we need.

## Supporting Evidence

You must provide one quote per type of contract with your application to evidence your costs. If you have already obtained multiple quotes for the project, please only provide your preferred quote. The [procurement guidance](#) provides advice on what this quote should include.

If your organisation does not have a credit score, such as a registered charity without a trading arm, please provide us with your latest accounts for us to risk-assess.

The application form will indicate where you need to provide any other supporting evidence at this stage, such as landlord approval to carry out the works. You can attach documents to the relevant places in the application form, although there is a file size limit of 5MB. If you are struggling to attach evidence to the application form, please submit it without and send the supporting evidence to us at [lowcarbonbusiness@westofengland-ca.gov.uk](mailto:lowcarbonbusiness@westofengland-ca.gov.uk) as soon as possible after you submit.

## **Equality, Diversity and Inclusion**

The Combined Authority is committed to treating everyone fairly, regardless of race, colour, religion, gender, gender identity or expression, sexual orientation, national origin, genetics, disability, age, or citizenship status. An Equality Diversity and Inclusion Monitoring form is included in our grant application pack. This form is voluntary and anonymous and will help us to measure the impact of our processes, practices and culture.

## **Freedom of Information**

The Combined Authority is subject to the Freedom of Information Act 2000. Applicants are requested to state in a covering letter, which part, if any, of the information supplied with your Application Form is confidential or commercially sensitive or should not be disclosed in response to a request for information and why. Applicants' statements will be considered; however, the Combined Authority is unable to give any guarantee that the information in question will not be disclosed. In addition, any award of grant will be published in transparency data that the Combined Authority is legally obliged to publish.



## Assessment of your grant application

If your application is eligible, your project will be scored on whether it is:

- value for money, based on the carbon saved versus the calculated grant amount
- deliverable, based on the permissions required and the time it will take to complete
- financially viable, based on the source(s) of match funding and the financial strength of your business.

The full scoring criteria are set out in Annex B. Projects that score 0 in any of the three categories will not be put forward for approval. Your application is assessed on its own merits, not in competition with others.

## Assessment of value for money

We may reduce your grant offer if you do not meet the value for money criteria set out in Annex B. The minimum grant value we will offer is £500 and minimum intervention percentage we will offer is 10%. If your application still does not meet the value for money criteria at these levels, your application will be rejected. We will write to you and advise of next steps.

## Assessment of your commitment to tackling the climate and ecological emergency

It is important to us that you appreciate your business' role in addressing the climate and ecological emergency. We expect you to commit to taking action beyond the project you are applying for grant for and inspire others to follow suit.

If you are a medium business, your answers to 8.1 and 8.2 will be presented with your grant application to the decision-making group to ensure that you share these values. The Combined Authority reserves the right to delay or reject your grant application if your answers to these questions are not deemed satisfactory.

## When will I find out if I've been awarded a grant?

Grants are awarded on a rolling basis, around every 4 weeks. Decisions are made by the Combined Authority CEO, in consultation with the CEOs of the three local authorities and based on the advice of an expert advisory panel. There is no obligation for us to fund eligible bids.

We may decide to close the grant round early or prioritise grant awards if the scheme is oversubscribed. If this occurs, grant awards will be prioritised to micro and small businesses, ahead of medium businesses.

It is likely to take 6 weeks from your application to the grant award decision. This can vary based on the volume of applications we receive and the frequency of approval meetings. Please allow for this when making plans to start or complete your project.

### **When can I start my project?**

When we have completed processing your application and put it forward for approval, we will inform you by email as to when it is likely to be approved. There is no guarantee of grant until approval has been given by the Combined Authority CEO. Do not start your project until we have given you written confirmation that it is OK to proceed.

### **Grant Offer Letter**

Once your grant has been approved, you will be sent a Grant Offer Letter to sign. This letter will include details of your business, grant awarded, project and key dates, as well as terms and conditions of your grant. You should read this letter carefully before signing.

Grant Offer Letters will be sent to you using Adobe Sign, allowing you to use a digital signature to sign the agreement online. There is no cost to you for using this service and you do not need Adobe Sign software to use it. If you require the Grant Offer Letter in a different format, please contact us and we will do our best to meet your needs. We do not accept signed Grant Offer Letters by post.

### **Grant Recipient Setup**

For us to pay your grant when you claim, you need to be set up on our finance system. Your Grant Offer Letter includes a Grant Recipient Setup Form which will be sent to our Accounts Payable team once completed. Please fill this in to avoid delay in processing your grant when it comes to paying you.

### **Change of Scope**

The scope of the project and the amount of grant awarded are fixed as stated in your Grant Offer Letter. If you find that the project must change in scope, you must contact us as soon as possible so that we can check whether this has any impact on the project's value-for-money. If the cost of the project has increased and you want to request more grant, you can also contact us to discuss this.

We do not guarantee that we can award additional grant to you. Any additional grant would likely have to be sent for approval by the CEO as per your original application.





## When can I claim my grant?

You can only claim your grant once you have completed your project, it is operational and it has been paid for. In the case of projects that are financed by [lease or hire-purchase agreement](#), you must have paid off an amount equivalent to your grant award. We do not pay grant to you upfront.

Your Grant Offer Letter sets out all the terms and conditions that you must meet before you can claim your grant. Please check:

- that you are not claiming for expenditure that pre-dates the 'Date from which expenditure can be claimed' set out in section 1 of your Grant Offer Letter
- that you have completed your project prior to the 'Project Completion Date' set out in section 1 of your Grant Offer Letter - if this date is nearing or has passed you should contact us as soon as possible to arrange a new completion date, if possible
- the pre-grant conditions, set out in section 2 of your Grant Offer Letter - you will need to meet and evidence all these conditions as part of your claim.

## Claim Form

There are five tabs to the Grant Claim Form spreadsheet.

1. Company details - where you also sign the form
2. Project details - where you confirm how the project went, if there have been any changes since your grant award and the impact of the project to date.
3. Cost details - where you provide details of invoices, payments and the amount of grant you are claiming.
4. Procurement details - where you detail the quotes that you received.
5. Asset details - which we will keep on record.

You must fill in all parts of the claim form with as much detail as possible before sending it to us. Examples of how to fill in the cost and procurement details are shown in the form for your guidance. If you are unsure what information is required, get in touch with us.

The Grant Claim Form must be signed with an electronic or written signature. Typed names and initials will not be accepted.

## Financial Evidence

You must provide evidence of invoicing and payments made. We need to see invoices AND evidence that you have paid them. This is commonly copies of bank statements or screenshots of online banking transactions. If the payment was made as part of a bulk transaction, you must provide details of the bulk transaction as well.

- Please provide documents in an easy, organised format with appropriate names for us to match and trace invoices and payments.
- All documents must be certified with “I certify that this is a true copy of the original seen by me [Signature] [Name] [Job title] [Organisation] [Date]” for us to accept them.
- Relevant entries should be highlighted where needed, or other entries redacted.
- If the project you are claiming for was part of a larger package of works, please ensure the costs are broken down in the invoices so that the amount you are claiming can be traced.

## Procurement Evidence

For contracts over £24,999 you must prove that you have met the [procurement requirements](#). Please provide all quotes that you received for the project, as well as evidence of assessment and scoring of these quotes.

We do not expect to find out at claim stage that you failed to meet the requirements of the procurement guidance, this must be discussed with us before proceeding with your project. If this arises, we reserve the right to reject your grant claim and void your grant offer as per the terms in your Grant Offer Letter.

## Completion Evidence

As well as financial evidence, you also need to provide us with evidence of completion. This includes:

- photos of your completed project
- where relevant, installer certificates, competent person scheme certificates, building regulations approval, planning consent details, distribution network operator approval, etc.
- any additional evidence to demonstrate that you have met your pre-grant conditions, which are in your Grant Offer Letter.

## Change of Scope at Claim

If your project has changed in scope or cost and we were not notified prior to receiving your Grant Claim, the project may need to be re-assessed and sent for approval again ([see Change of Scope](#)). It is likely that this will add at least 4 weeks to the time it takes to process your claim. We do not guarantee that you will receive additional grant if your project costs increase.

## Grant Payment

We aim to pay grants within 28 days of receiving all the information we need to process your claim. We will notify you when your claim has been processed and when to expect the grant to reach your bank account.

## PROMOTION

Details of successful applicants and their projects will be used by the Combined Authority to promote the grant. By applying for this grant, we expect you to promote the project yourself, as well as take part in the creation of a case study for the Combined Authority's website and other promotional material, to inspire others to take action and progress their journey to net-zero carbon emissions.

Businesses are expected to consult us about any publicity relating to the funded project both during and after installation, and clearly credit West of England Combined Authority in the copy.

## ANNEXES

### Annex A - Example Scoring Criteria for Project Quotes

#### Price/Quality Weighting

Price	40%
Quality*	60%

\* This could be expanded into further categories to reflect your priorities.

#### Scoring Criteria

Score		Description
0	Poor	No response and/or evidence is unacceptable or non-existent, or there is a failure to properly address any issue. The purchasing company does not have any confidence in the bidder's experience, capacity and ability to meet its requirements.
1	Weak	The response and/or the evidence are deficient (or not relevant) in the majority of areas and the purchasing company has a low level of confidence in the bidder's experience, capacity and capability to meet its requirements.
2	Unsatisfactory	Large portions of the response are not satisfactory and/or are not supported by a satisfactory level of evidence and the purchasing company has limited confidence in the bidder's experience, capacity and capability to meet its requirements.
3	Satisfactory	The response is satisfactory and supported by an acceptable standard of relevant evidence but with some reservations/issues not addressed. The purchasing company is satisfied with the bidder's experience, capacity and capability to meet its requirements.
4	Good	The response is comprehensive and supported by a good standard of relevant evidence and provides the purchasing company with a good standard of confidence in the bidder's experience, capacity and capability to meet its requirements.
5	Very Good	The standard of the response is very high and the relevance of the response and the supporting evidence is very comprehensive and provides the purchasing company with a very high level of confidence in the bidder's experience, capacity and capability to meet the purchasing company's requirements.

## Annex B - Application Assessment Criteria

0	1	2	3
<b>A1 - Value for money, carbon emissions</b> - Tonnes of carbon dioxide equivalent saved per £10,000 grant			
Less than 2 tCO <sub>2</sub> e	2 - 4 tCO <sub>2</sub> e	4 - 8 tCO <sub>2</sub> e	8+ tCO <sub>2</sub> e
<b>A2 - Value for money, % carbon emissions reduction</b> (only used if A1 scores 0, max score 1). Reduction in carbon dioxide equivalent compared to total baseline emissions per £10,000 grant.			
Less than 20%	20% +		
<b>B - Deliverability</b>			
Project cannot be delivered on time (6 months for most projects or 9 months in exceptional circumstances).	Project may be delivered on time but project plan unclear and/or permissions not in place e.g. from landlord, planning authority or district network operator.	Project likely to be delivered on time but permissions required, delayed start and/or will take longer than 6 (or 9) months.	Project will be delivered well within time. All required permissions in place.
<b>C - Financial viability</b>			
Project not financially viable because company cannot cashflow total expenditure; and/or cannot afford the remaining costs.	Project may be financially viable but cashflow and/or affordability is at risk due to high project cost with low business turnover.	Project likely to be financially viable but requires external financing to cashflow and/or afford the remaining costs.	Can easily cashflow expenditure due to high turnover; and can afford remaining costs with company reserves or existing bank facilities.

## VERSION HISTORY

Version	Date	Changes
1.0	17/11/2023	First Version