

## Carbon Action Fund (CAF) Checklist and Guidance

### Checklist for Applicants

We recommend you collect all of the information below before starting your CAF application. You will need this information to complete the application form within the required time.

- The date your organisation was established (Clicking the month and year at the top of the calendar will allow applicants to navigate more easily to previous years.)
- The address the company is registered at and operates from (both are required if these are different)
- A reference number such as (public sector organisations can select N/A in the application form):
  - Company Registration Number
  - VAT Number
  - Charity Number
  - Mutual Society (select Charity Number from the drop-down list)
  - Unique Tax Reference Number (you will need to upload a copy of your latest Tax Return if this number is inputted)
- For **leased** properties: you will need to upload a letter/email of written consent from the property-owner if the equipment will modify or be installed onto the building
- A Profit and Loss Sheet and a Balance Sheet
- For projects related to **the decarbonisation of a building** (solar PV for example):
  - Where Planning Permission was needed and has been granted – your planning reference number
  - If you operate from a listed building or curtilage of a listed building
- Copies of your carbon survey and carbon action plan – these can be sourced privately or through our [Carbon Action Programme](#)
- Forecast figures for carbon and/or waste reduction
- A recent bank statement and bank account details
- Two recent quotes for each piece of equipment you wish to purchase

## Guidance For Applicants

The information below outlines the main questions you will be asked as part of the application process.

### Project

All applicants will be asked the following questions. We recommend that applicants type out responses to these questions first and then copy and paste them into the application form when ready.

- Please briefly explain your proposed project [Max of 200 words]
- Why is CAF funding required to deliver your project? Why can't your organisation/business fund delivery of the project without CAF funding? [Max of 200 words]
  - You will need to upload a Profit and Loss Statement and a Balance Sheet to evidence this
- If your project will enable you to make financial savings or generate additional income, how much are you expecting to save/generate per year on average? [Max of 200 words]
- Are there any wider social or environmental benefits that your project will unlock? (waste reduction, biodiversity net gain, training opportunities) [Max of 200 words]
- You will need to estimate the annual carbon reduction (in metric tonnes of CO<sub>2</sub>) of your project and/or how much waste will be reduced annually once the equipment is operational and explain how these figures have been reached
- You will need to upload a copy of your carbon survey and carbon action plan. These can be privately funded or obtained via our [Carbon Action Programme](#)

Applicants with detailed and well explained answers to the above questions typically score higher compared to other applicants.

### Funding

All applicants will need to provide the total cost of the project – this should equal the two figures below

- The exact amount requested from the Carbon Action Fund – this must be between £2,000 and £100,000
- The amount of match committed and its source

### Quotes

All applicants will be asked to list each piece of equipment they propose to purchase using CAF funding, including any installation costs. This will need to include costs from two quotes for each piece of equipment and a preferred supplier.

- Please ensure each quote has been provided within the last six months.
- All item costs in the quote table should be exclusive of VAT.

- Please ensure the quote includes all installation costs and all other costs required for the equipment to be operational.
- Applicants cannot provide quotes from a supplier where they or a close relative are the owners/directors of that supplier.
- The 'preferred supplier' is the supplier you intend to purchase the equipment from should your CAF bid be approved.
- A list of local suppliers is available on our website. This is for information purposes only and all applicants are free to choose their own supplier, including those not on the list.
- You will need to upload copies of the quotes
- Once you have entered the details of the quotes for each piece of equipment, please ensure you press 'add equipment'. If you progress to the next page without pressing 'add equipment', this information will not be saved.

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