



ACTION ENERGY – Service Selection

INCREASING PROFITS, REDUCING COSTS

Action Energy is a national programme run by the Carbon Trust and backed by the Department for Environment, Food and Rural Affairs, the Scottish Executive, Invest Northern Ireland and the National Assembly for Wales.

Action Energy can help you identify and then implement opportunities for saving energy and reducing carbon emissions. Action Energy offers a variety of tailored services covering initial design in new projects, through feasibility and implementation, to improving existing facilities to help your organisation save energy, reduce costs and contribute to the UK achieving its international commitments on reducing carbon emissions.

IDENTIFYING OPPORTUNITIES

If your energy bill is greater than £50,000 per year...apply for an Action Energy General Survey

Action Energy General Surveys provide free consultancy help focused on your individual needs. The General Survey is designed to identify areas with potential energy saving opportunities and to provide an action plan for implementation. It is offered as a 'walkthrough' service with an approved consultant who has technical expertise in energy matters, understands the clients' needs and how they operate, and has a good knowledge of the client sector economy. The General Survey should not be seen as a substitute for a full energy audit, as it is not intended to provide detailed and costed proposals for change.

To apply for a **General Survey** complete **Form A** for your organisation and **Form B** for the survey site.

For multi-site organisations, e.g. retail premises, general surveys can be provided for a sample number of sites. Typically each site surveyed would have unique attributes either through building/process typology or management structure.

To apply for **General Surveys** for multiple sites please complete **Form A** for the organisation as a whole and a copy of **Form B** for each site.

If the combined energy bill of all of your sites is greater than £1 million per year please see the section below on 'A Partnership Approach'.

If your energy bill is less than £50,000 per year...ask for an Action Energy Review

Similar in concept to the General Survey, the **Action Energy Site Review** is for companies or organisations whose energy bill is less than £50,000 per year. Again, a 'walkthrough' service from an approved consultant, the Energy Review will identify potential energy saving opportunities. No application form is necessary, call the Environment and Energy Helpline on 0800 58 57 94 to arrange this service.

If you are considering a Combined Heat and Power project...ask for *Action Energy CHP Advice*
Action Energy CHP Advice is designed to support the both uptake and operation of CHP Schemes by providing targeted and independent advice free of charge at critical stages of project implementation, from feasibility through design to operation or refurbishment.

To apply for CHP Advice please complete **Form A** for your organisation and **Form E** for each site.

For new buildings or retrofit projects...apply for *Action Energy Design Advice*

Action Energy Design Advice is a consultancy service offering professional independent and objective advice on the energy efficient and environmentally friendly design of buildings. To be eligible all potential buildings / group of buildings must have a minimum floor area of 500 m². The service covers both new buildings and refurbishment projects.

To apply for Design Advice please complete **Form A** for your organisation and **Form C** for the building project.

TAKING THE OPPORTUNITIES IDENTIFIED FURTHER

Once the opportunities have been identified, Action Energy is able to offer further support to help to get them implemented via the **Action Energy Detailed Survey**. The purpose of the detailed survey is to assist you in taking recommendations identified by the consultant in the General Survey, Energy Review or Design Advice to a position where you can make an implementation / funding decision. Unlike the General Surveys, the Detailed Survey is a part funded scheme.

To apply for a Detailed Survey please complete **Form A** for your organisation and **Form D** for the project.

For Small to Medium Sized Enterprises (SME) – defined as organisations with less than 250 employees, an annual turnover of less than £25 million and not more than 25% of the capital or voting rights owned by an enterprise that is not itself a SME – Action Energy can also offer Interest Free Loans. Call the Environment and Energy Helpline on 0800 58 57 94 for more information.

A PARTNERSHIP APPROACH

If your organisation has a combined energy bill of greater than £1 million per year Action Energy may be interested in forming a Partnership with you. Within a Partnership, Action Energy can develop a tailored programme of activities designed to meet your specific needs. If you think you are eligible for a Partnership please call the Environment and Energy Helpline on 0800 58 57 94.

THE SMALL PRINT

Whilst all advice is given in good faith, it is your responsibility to confirm the applicability and appropriateness of any advice offered.

- **Confidentiality** Action Energy and its consultants will not use any information obtained in the course of this survey in any way that identifies individuals or their organisation without your agreement. However, the Government may use generic and non-attributable information collected over the course of the survey to guide future policy and activity, to optimise use of resources, and to offer your organisation further assistance.
- **Data Protection** As a result of applying for an Action Energy service, your details will be stored on a database which may be used to send you information on other Action Energy and related Government services. If you wish to update your record or have any questions, please contact the Action Energy Helpline Manager by calling the Environment and Energy Helpline on 0800 58 57 94.





FORM A – Organisational Details

Please enter the details requested in the shaded areas.

Organisation Contact	
Name:	
Position:	
Organisation:	
Address:	
Postcode:	
Telephone No:	
Fax No:	
Mobile No:	
E-mail:	

Organisational Information	
Nature of Business	
SIC Code (if known)	
Total Number of employees	
Annual Energy Bill £	
Is your organisation party to a Climate Change Levy Agreement	YES NO
<i>If YES – With which Trade Association</i>	
Is your organisation party to any other agreement with Government to save energy – e.g. Voluntary Agreement	YES NO
<i>If YES – Please give further details</i>	



FORM B – General Survey

SERVICE DESCRIPTION

The primary purposes of this service is to help your organisation save energy, reduce costs and contribute to the UK achieving its international commitments on reducing carbon emissions.

Action Energy General Surveys provide a review of how well your organisation is using energy and where savings may be made. They are conducted by approved independent energy consultants provided free of charge by the Government (The Department of Environment Food and Rural Affairs, The Scottish Executive, The Northern Ireland Assembly or the National Assembly for Wales) through the Carbon Trust.

Action Energy scheme managers will arrange for a consultant to undertake the assignment using the allowances from the table below as a guideline. The actual number of survey days allocated will depend on the expected complexity of the survey required.

Site Energy Bill	Site Visit Time	Report Preparation Time
Between £50,000 and £100,000	up to 1 day	up to 1 day
Between £100,000 and £500,000	up to 2 days	up to 2 days
Greater than £500,000	up to 5 days	up to 5 days

Conditions

We need your help to get the best out of the site visits and therefore it is important that the consultant is able to work in close co-operation with operational staff and Senior Management whilst on site. To facilitate this we require that:

- energy bills (and any breakdown or analysis of end energy use) are provided in advance if requested by the consultant;
- the person responsible for day-to-day energy management at the site accompanies the consultant on a site walk-through, and is available throughout the remainder of the site work;
- the consultant is able to meet with other key members of staff, as required;
- towards the end of the visit, the consultant is able to meet with an appropriate member of Senior Management to discuss preliminary findings.
- you co-operate with our efforts to obtain both immediate feedback concerning the services provided and longer term follow up of the recommendations identified.

We recognise that the time and effort required from your site's staff to support the survey could be significant, for this reason Action Energy funds the cost of the consultant in full.

The consultant may also wish to carry out a limited amount of monitoring (e.g. of internal temperatures), and the organisation's co-operation in this matter is requested.

The Government, via the Carbon Trust, is providing this fully funded assistance as part of their support for energy efficiency initiatives. In return for the advice, we expect you to act on it as far as practicable. However, the Action Energy General Survey is not a substitute for a full scope energy audit, nor will it provide you with detailed costed proposals.

At manufacturing sites, the General Surveys will not address individual processes in detail. As part of the survey our consultants will not provide advice or comment on the effectiveness of energy management services/advice provided by others working for your organisation. This service is not intended to be used as a 'second opinion' exercise.

Choice of Consultant

If you wish to nominate an approved Action Energy consultant on the application form, we will normally accommodate this request although we reserve the right to select another consultant should this be necessary. Where no consultant is nominated on the application, we will select a suitable approved consultant on the basis of sector knowledge, skills and geography. Where a nominated consultant is not known to us, we will be unable to proceed with the survey until the consultant has met our criteria for inclusion on the approved list of consultants.

Organisations receiving Action Energy assistance are free to make commercial arrangements for further work with the consultants providing the survey. However, appointment of the survey consultants by the Action Energy scheme managers does not constitute an endorsement of their competence by the Programme.

Reporting

- At the end of a site visit the consultant will give a verbal report on their initial findings to the site contact and senior management if requested;
- A draft report will be prepared for you to review following a quality check by Action Energy;
- You will have five working days to review the draft and feedback any comments to the consultant;
- If there is no feedback the final report will be issued by the consultant;
- You should receive your final report within five weeks of the date of the last visit by the consultant.

Presentation of Results to Board Level Stakeholders

If you would like the consultant to undertake a post survey briefing for Senior Management on the final report findings of the survey/s, how to proceed and to answer general queries on energy efficiency related matters, this can be arranged. Please tick the box on the application form, or ask the survey consultant to request this service. Provision of Board Level briefings is subject to scheme manager approval.

Follow-up/Feedback

There may be follow-up telephone calls or visits to assess actions you have taken as a result of the advice received after the consultant's site visit and to offer further assistance if appropriate. We will also seek your feedback on the support given.

Complaints Procedures

If you have a complaint about the service, please contact the Environment and Energy Helpline on 0800 58 57 94 and ask for the Action Energy Helpline Manager. Full details of the complaints procedures may be obtained on request.

SITE AND SURVEY INFORMATION

Please enter the details requested in the shaded areas.

Site Contact (if different from Organisational Contact)	
Name:	
Position:	
Organisation:	
Address:	
Postcode:	
Telephone No:	
Fax No:	
Mobile No:	
E-mail:	

Site Details	
Nature of business: (if different from Organisation)	
Type and use of building/s (eg office, factory, etc.):	
SIC Code (if different from Organisation)	
Number of employees on site:	
Is there an Energy Manager for the site?	YES NO
Have you run, or are you planning, any employee energy awareness campaigns?	YES NO
Are there any plans to invest in energy efficiency over the next three years?	YES NO
Are there any plans to contract out any energy services?	YES NO
Are there any plans for refurbishment of the building in the near future?	YES NO
If the answer is 'Yes' to any of the above questions, would you be prepared to give further details subsequently?	YES NO

Site Specific Data		
Please indicate the site's typical annual energy bill (£ and kWh) for a recent 12 month period:		
	From:	To:
Approximate Energy Use	kWh	£
Electricity		
Gas		
Fuel oil		
Coal		
Liquid Propane Gas		
Other		
Total Energy Bill		
Please indicate the site's typical annual water bill (£) for a recent 12 month period:		
Annual Water Consumption/Effluent Production (£)		
Combined Energy & Water Costs		
If applicable, please indicate the site's annual production over the same period:		
Amount of production (tonnes, litres, etc)		
Specific Energy Consumption benchmark if available, e.g. kWh/tonne or kWh/m ²		

Please supply additional information separately if appropriate.

Areas of Potential Savings		
Our consultant will discuss the priority areas of the survey with you. However, it would be useful to us if you indicate the areas where you think there is most potential for savings at the site:		
Air conditioning	Heat Pumps	Overview/Strategy/Policy
Benchmarks	Heat Recovery	Process Energy Efficiency*
Boilers	Lighting	Refrigeration
Compressed Air	Maintenance	Staff Training/Motivation
Controls/BEMS	Metering	Thermal Insulation
Energy Management	Monitoring & Targeting	Other**
Heating Systems	Motors & Drives	
* Limited advice can be provided		
** Other (please give further details)		

Post Survey Briefing of Senior Management (Please enter yes or no)

As part of their responsibilities, the consultants are expected to discuss their findings with site management prior to preparing their report.

There is also the possibility to arrange a presentation of the report on completion to your Managing Board or Site Senior Management.

I confirm that Site Management will be available for a survey debrief meeting with the consultant	YES	NO
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I would like a separate Senior Management presentation of the report	YES	NO
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Please note that the briefings may be available at any time and if you decide later that one would be useful, please contact the Environment and Energy Helpline (Tel: 0800 58 57 94), or contact the survey consultant.

Choice of Consultant

The scheme manager will select a suitable consultant to undertake the work. However, if you wish to propose a specific consultant please provide their contact details below. Please note, however, that if they are not currently on the approved consultant list there may be a delay in processing your application.

Name of Consultant:	Mike Boddington	Name of consultancy:	Linden Consulting Partnership
Telephone No:	01543 410 471	E-mail:	mboddington@linden-consulting.co.uk

Please note that additional Action Energy advice is available for Combined Heat & Power (CHP) projects. Please complete [FORM E](#) (available separately) to apply for specific support on CHP.

Please note that the submission of this questionnaire does not guarantee the offer of a site visit

If applying on-line or by email, please ensure that you send a signed Funding Request & Company Commitment (overleaf) under separate cover to the postal address given.

If you have any queries requiring completing or submitting this application form please contact the Environment & Energy Helpline (Tel: 0800 58 57 94) and select the energy option.





Funding Request & Company Commitment For General Survey Service

Our enquiry reference:

Organisation Details:

Name
Address

Postcode

Project site or name:

In applying for Action Energy funding, I accept the conditions outlined in the Application Pack to operate with the Action Energy scheme managers and their appointed consultants to:

- provide access to relevant information;
- provide access to relevant staff;
- participate in an end of advice debrief;
- act on practicable recommendations;
- participate with research surveys to assess progress and impact on energy efficiency.

On behalf of the above organisation, I confirm my application for Action Energy funding.

Name of Director/Senior Manager:

Signature:
Position:
Date:	

Additional Information

If you have any supporting information for your application, such as previous survey reports, energy use schedules or similar, please include with this commitment.

Please post this completed form to:

**Action Energy
PO Box 89
Witney
OX29 4WB**

