



## Welcome to the Financing Community Energy survey!

This survey is at the heart of the Financing Community Energy research project. We very much appreciate your participation!

### Information you will need

The questionnaire covers quite a lot of different topics. Information you will need to complete the questionnaire includes details of your organisation and its various projects; their financing, costs, and revenues; and who your organisation works with, and (if applicable) sells energy to.

Some of the questions ask for **annual** figures – e.g. annual revenue, annual costs, etc. Please enter the figures for the most recent year that you have them for, and indicate the time period they apply to (e.g. 2015, 04/2015-03/2016, etc). If you are able to provide data for more than one year, that would be very valuable, so please do so if you have it available (and have the time and patience to enter it all!).

Don't worry if you can't answer all the questions in one go. If you need more time, or want to check some figures, you can save your answers, and return to them later. You can also change your answers if you want to, before you've submitted the whole questionnaire. **And if you decide you want someone to go through the survey with you** - by phone or over skype - **then please contact us at** [timothy.braunholtz-speight@manchester.ac.uk](mailto:timothy.braunholtz-speight@manchester.ac.uk)

### To navigate the survey

You can move through the questionnaire using the "next" and "back" buttons at the bottom of the page. When you have finished, click on "save" and exit the questionnaire. **Please note that if you exit without clicking on "save", all your answers will be lost.**

If you want to close the questionnaire and return to it at another time, you can click "save" and shut it down. You can then return to the survey by clicking on the link you were sent - it will open at the start, but your answers will be saved.

Finally, please be aware that when you click "save", you will not be able to go back through the questionnaire - unless you exit and reopen it. For this reason, we advise only clicking on "save" when you are about to exit the questionnaire anyway.

**To get started, simply select "Next" at the bottom of the page**

## Participant Information Sheet

You have probably already received this sheet by email. If you have not read it already, please read it now. When you are ready, click 'next' at the bottom of the page to move on.

---

You are being invited to take part in a research study. Before you decide, it is important for you to understand why the research is being done and what it will involve. Please take time to read the following information carefully and discuss it with others if you wish. Please ask if there is anything that is not clear or if you would like more information. Take time to decide whether or not you wish to take part. Thank you for taking the time to read this.

### Who will conduct the research?

The research team comprises:

University of Manchester:	University of Strathclyde:
Dr Carly McLachlan (leading the project)	Dr Matthew Hannon
Dr Sarah Mander	
Dr Maria Sharmina	Imperial College London:
Dr Ed Manderson	Dr Jeff Hardy
Dr Tim Braunschweig-Speight	

### What is the purpose of the research?

The Financing Community Energy research project aims to provide the first systematic quantitative and qualitative analysis of the role of finance in the evolution of the UK community energy sector.

We are working with community energy organisations and stakeholders, to use this analysis to develop recommendations for innovative policies, business models and finance mechanisms that will support the future growth of the sector.

### Why have I been chosen?

You have been contacted because you are involved in a UK community energy organisation. We hope to survey around 100 community energy organisations across the UK.

### What would I be asked to do if I took part?

You would be asked to complete an online survey, which asks about the finances and organisation of your energy projects.

You can do this on your own, or a researcher can fill it in for you, either over the phone, or by sharing their screen on Skype or similar computer programmes.

Depending on how many energy projects your organisation runs, the survey is likely to take between 45 minutes and 2 hours to complete. You may also need to spend some time finding relevant financial documents (e.g. annual accounts) beforehand.

### What happens to the data collected?

All data gathered will be stored on secure computers. It will be analysed by the research team (see names above). The results of this analysis will be used to produce outputs such as reports, presentations, academic papers; and to inform the organisation of events for the community energy sector.

Every organisation that participates is entitled to a copy of the data they provide. You can obtain this by entering your email address in a box at the end of the online survey – a copy of your data will then be automatically emailed to you.

Full data from the survey will also be shared with the Community Energy England State of the Sector Survey Team. However, no-one else at CEE (e.g. Board Members) will have access to the data.

### How is confidentiality maintained?

Members of the University of Manchester research team, and the CEE State of the Sector Survey Team will be able to see the full data, including names of the groups and individuals participating in the survey.

However, none of the names of groups or individuals will be linked to any of the data in public outputs (reports, presentations, academic papers, etc.). In any public outputs from the project, no names of individuals or groups will be linked to any of the survey data, unless they expressly give their consent to this in writing.

After the end of the project, data will be stored on secure University computers for five years, for further analysis. Aggregated survey data will be made publicly available, in line with UK Research Council guidelines. Individual records will not be made public.

### What happens if I do not want to take part or if I change my mind?

It is up to you to decide whether or not to take part. If you do decide to take part you will be given this information sheet to keep and be asked to sign a consent form. If you decide to take part you are still free to withdraw up to the end of the survey period (end of January 2018) without giving a reason and without detriment to yourself.

### Will the outcomes of the research be published?

We intend to publish the outcomes of the research in a variety of formats. As well as a research synthesis report for policymakers and practitioners, and academic papers, we plan to produce blogs and videos, and to use the analysis of the survey data to inform the organisation of workshops and seminars for community energy groups and other stakeholders. We hope in this way to reach a wide range of relevant audiences.

### Who has reviewed the research project?

The project has been reviewed by the University of Manchester Research Ethics Committee 1.

### What if I want to make a complaint?

### **Minor complaints**

If you have a minor complaint then you need to contact the researcher(s) in the first instance.

**Dr Tim Brauholtz-Speight**, Tyndall Centre for Climate Change Research, School of Mechanical, Aerospace and Civil Engineering, University of Manchester, M13 9PL.

email: [timothy.brauholtz-speight@manchester.ac.uk](mailto:timothy.brauholtz-speight@manchester.ac.uk)

phone: (0161) 275 4354

**Dr Carly McLachlan**, Tyndall Centre for Climate Change Research, School of Mechanical, Aerospace and Civil Engineering, University of Manchester, M13 9PL.

email: [c.mclachlan@manchester.ac.uk](mailto:c.mclachlan@manchester.ac.uk)

phone: (0161) 306 3764

### **Formal Complaints**

**If you wish to make a formal complaint or if you are not satisfied with the response you have gained from the researchers in the first instance then please contact**

The Research Governance and Integrity Manager, Research Office, Christie Building, University of Manchester, Oxford Road, Manchester, M13 9PL, by emailing: [research.complaints@manchester.ac.uk](mailto:research.complaints@manchester.ac.uk) or by telephoning 0161 275 2674 or 275 2046.

### **What Do I Do Now?**

If you have any queries about the study or if you are interested in taking part then please contact the researcher(s)

**Dr Tim Brauholtz-Speight**, Tyndall Centre for Climate Change Research, School of Mechanical, Aerospace and Civil Engineering, University of Manchester, M13 9PL.

[timothy.brauholtz-speight@manchester.ac.uk](mailto:timothy.brauholtz-speight@manchester.ac.uk)

(0161) 275 4354

**This Project Has Been Approved by the University of Manchester's Research Ethics Committee**

1

**Survey Consent Form**

Please indicate your consent to take part in the survey, by ticking the boxes below. You will need to tick all the boxes to access the survey.

If you are not happy with anything here, please contact us (see previous page).

1. I have read the Project Information Sheet and have had the opportunity to consider the information and ask questions and had these answered satisfactorily.  
•  
 Yes
  
2. I understand that my participation in the survey is voluntary and that I am free to withdraw at any point, and have my data deleted, while the survey is running (up until end of January 2018).  
 Yes
  
3. I understand that neither my name, nor the name of my organisation, will be linked with any specific data (e.g. financial details) in any public output from this research, without my express consent in writing.  
  
Notwithstanding that, any data I provide will be analysed by the research team, and the results of this analysis may appear in public reports.  
•  
 Yes
  
4. It will also be available to the Community Energy England State of the Sector Survey Team (but not to anyone else associated with CEE).  
•  
 Yes
  
5. At the end of this research project, data will be stored for further analysis on secure University computers. Aggregated survey data will be made publicly available, in line with UK Research Council guidelines. Individual records will not be made public.  
•  
 Yes

**Your organisation**

These first two pages contain questions about your *organisation* as a whole.

Questions about specific *projects* that your organisation runs will follow on subsequent pages.

6. Please provide the name of your organisation.

(You must answer this question to access the rest of the survey.) \*

7. What is your position in the organisation?

8. Please provide your name.

9. Please provide a correspondence or head office address for your organisation.

(Even if another organisation handles much of your administration, please still provide an address for your own organisation. This will help us better understand the distribution of community energy organisations across the UK.)

10. Please provide your organisation's website URL

11. In what year was your organisation founded?

*If you are going to exit the survey, please remember to click 'save' before you exit.*

12. Does your organisation have charitable status? i.e. is it legally registered as a charity?

13. Please select the legal structure of your organisation

14. For the most recent year that you have data for, what was your organisation's annual turnover?

Please enter the figure to the nearest pound, and indicate what time period this figure relates to (e.g. 2016).

If you have turnover data available for more than one year, we would appreciate as many years' annual turnover figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

15. How many full-time equivalent (FTE) staff does your organisation employ?

*Working out FTEs:*  
full-time is assumed to be five days a week.  
one person working five days a week is 1 FTE;  
one person working 1 day a week is 0.2 FTE;  
two people working five days a week between them is 1 FTE;  
etc.

16. How many volunteers do you have currently?

17. If possible, could you give an estimate of how many volunteer hours your volunteers contribute per week, on average?

18. And how many members does your organisation have?

*If you are going to exit the survey, please remember to click 'save' before you exit.*

Your projects: introduction

Your projects - introduction

The next sets of questions are about the projects that your organisation runs – or has attempted to run. Please note that, even if your project is on hold, or stalled, we would still very much appreciate you giving us what information you can about it. It will be very valuable for our analysis.

What is "a project"?

By a project, we mean an activity, or group of activities, that are planned and funded as one unit. So for example, this might be an energy efficiency project, where your organisation received a grant and used it to carry out energy efficiency checks for several local households or buildings; or it might be one or more wind turbines, which you planned, financed and built as one project. (But if you got a loan and built one turbine and then, separately, financed and built another, that would be two projects.)

Some organisations will have one project, some will have several projects of the same sort - e.g. several renewable energy projects. Others will run several projects of different sorts - e.g. some solar panels, and a series of energy efficiency promotion events.

Answering the questions

We have tried to provide menus of likely answers to make it easier to complete the survey – but if your projects don't fit these, please do make use of the "other" options and tell us what you are doing. We are very keen to learn about innovations and people doing things differently!

The project questions start with some basic details about the project, followed by more specific questions depending on the type of project it is. They then ask about the project's ownership (including any partnerships), financing, costs, resources, income, customers and beneficiaries.

19. What is / was the main focus of this project?

20. What year did your organisation start working on this project?

If this is difficult to pinpoint, you could enter the year of e.g. first feasibility study, or funding application

21. What is this project's current operational status?

Even if your project is still being developed, or has stalled/is on hold, it would still be very useful for us to learn about it.

22. Please give a brief description of the project.

**If you exit the survey**, please remember to click 'save' first.

Electricity generation projects further details

Electricity generation projects - further details

23. Is this your organisation's first community energy project?

Please select the option that best fits this project

-- None --

24. Please give details for each generating site, as set out below.

If a site is not yet operational, please give its current status.

If this project has more than 10 generating sites, please note this in the box for Site 10 below.

	Postcode	Technology	Capacity (in kW, so for 1MW enter 1000)	Operational status	When it first generated electricity (month/year)	Total generation to date (number of kWh)	Date of that generation figure (month/year)
Site 1	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 2	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 3	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 4	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 5	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 6	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 7	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 8	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 9	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 10	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you exit the survey, please remember to click 'save' first.

Heat generation projects further details

Heat generation projects - further details

25. Is this your organisation's first community energy project?

Please select the option that best fits this project

-- None --

26. Please give details for each generating site, as set out below.

If a site is not yet operational, please give its current status.

If this project has more than 10 generating sites, please note this in the project description (previous page).

	Postcode	Technology	Capacity (in kW, so for 1MW enter 1000)	Operational status	When it first generated heat (month/year)	Total generation to date (number of kWh)	Date of that generation figure (month/year)
Site 1	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 2	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 3	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 4	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 5	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 6	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 7	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 8	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 9	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 10	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you exit the survey, please remember to click 'save' first.

Transport projects further details

Transport projects - further details

27. Please select the activity/ies that are part of your transport project

- Electric vehicles
- Hydrogen vehicles
- Biofuel vehicles
- Promoting walking/cycling/public transport
- Other, please specify

28. Is this your organisation's first community energy project?

Please select the option that best fits this project

29. If you have any information on, or estimates of, carbon emissions savings from this project, please enter them here

30. Please give brief further details of your transport project, e.g. number of electric vehicles

*If you exit the survey, please remember to click 'save' first.*

Demand side projects further details

Energy efficiency and demand management projects - further details

31. Which of the following energy efficiency services does this project involve?

Please select all options that apply

- Energy audits
- Energy cafes
- Energy switching
- Smart meters
- Smart thermostats
- Insulation
- Energy efficient lighting
- Advice on appliances
- Other, please specify

32. Is this your organisation's first community energy project?

Please select the option that best fits this project

33. Please give brief details of the energy efficiency and/or demand management services provided in this project.

34. What sort of support for energy efficiency and demand measures does this project provide?

Please select all the options that apply

- Loans
- Grants
- Advice
- Appliance hire purchase arrangements
- None of the above
- Other, please specify

35. If you have any estimates of how much energy your project has saved, please enter them here

36. If you have any estimates of carbon emissions savings from this project, please enter them here

**If you exit the survey**, please remember to click 'save' first.

Storage projects further details

Energy storage and other projects - further details

37. Please select the type of energy storage your project is working on

- Hydrogen storage
- Electrical storage
- Pumped storage
- Other, please specify

38. Is this your organisation's first community energy project?

Please select the option that best fits this project

39. Please provide further details of your energy storage project (e.g. storage capacity, type and number of batteries, etc.)

**If you exit the survey**, please remember to click 'save' first.

**stalled or on hold projects**

**Stalled or 'on hold' projects**

You have previously indicated that your project has stalled, or is 'on hold'.

It is important for us to learn more about what holds projects back, and what differentiates successful and unsuccessful projects – so any information you can provide will be very valuable.

After this section, any further information you can provide over the next few pages on ownership, financing to date etc. would also be much appreciated.

40. Can you please confirm the focus of the project that has stalled?

41. Please select from the following list which area(s) caused the stall?

Please select all that apply

- Revenue - FITS changes
- Revenue - any other changes
- Difficulties getting finance
- Cost changes
- Skill base not sufficient
- Engineering issues
- Local opposition
- National opposition
- Planning changes
- Attracting enough volunteers
- Keeping existing volunteers motivated
- Other, please specify

42. Please describe in more detail the problems that have held up your project.

43. **Renewable energy (electricity or heat) projects only**

Could you tell us at what stage in the project it stalled?

**If you exit the survey**, please remember to click 'save' first.

Project ownership

**Project ownership**

44. Which of these options best describes the ownership model for this project?

-- None --

45. **The next four questions relate to partnerships only.**

Could you tell use who is/are the other partner(s)?

46. What type of partnership arrangement is it?

-- None --

47. If possible, please let us know who owns what share

48. Any other information you can share on the partnership, e.g. other resources or responsibilities shared, would be much appreciated.

*If you exit the survey, please remember to click 'save' first.*

Finance

Finance

49. What is the total value (in £) of investment, including grants, in this project to date?

Have you used any start-up grant schemes?

Please enter the value (in £) of any grants you have received from any of the schemes listed in the next few questions. There will also be an opportunity to tell us about any grant schemes you have used.

50. Community and Renewable Energy Scheme (CARES) start-up grants

51. Rural Community Energy Fund (RCEF)?

52. Urban Community Energy Fund (UCEF)?

53. Ynni'r Fro?

54. Any other grant scheme?

Please give scheme name and total grant that you received, in £

Finance 2

Finance continued

55. Could you please give more information on how this project was financed, using this matrix.

- **Please use a new row for each separate bit of finance.** For example, if you took out a loan, enter that as 'Finance 1'; if you later re-financed with a cheaper loan, enter that as 'Finance 2'; etc. We hope 10 rows should be enough, but please email us if not!
- **Source:** this means where the finance came from. This might be the name of a bank, for example. In the case of community shares or other online crowdfunding, please give the name of the online platform(s) you used (e.g. Ethex).
- Finally, **in the annual repayments column**, please give the most recent year's data and indicate which time period this refers to (e.g. 2016, or 2015-16, etc.) If you have repayments data available for more than one year, we would appreciate as many years' figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

	Type	Source	Amount (in £)	Interest rate - if applicable (enter the % rate)	Term/duration - if applicable, i.e. how many months to repay it.	Annual repayments (in £)
Finance 1	-- Please Select --					
Finance 2	-- Please Select --					
Finance 3	-- Please Select --					
Finance 4	-- Please Select --					
Finance 5	-- Please Select --					
Finance 6	-- Please Select --					
Finance 7	-- Please Select --					
Finance 8	-- Please Select --					
Finance 9	-- Please Select --					
Finance 10	-- Please Select --					

56. Did your organisation use any of its own funds in this project?

57. Did you offer any tax reliefs on any of the investments in this project?

Please select all that were offered from the list below.

- EIS
- SEIS
- SITR
- Other, please specify

58. If you have any further points on how this project was financed, please note them briefly here.

59. Finally for this section, if you issued community shares, were they accredited with the Community Shares Standard Mark?

If you exit the survey, please remember to click 'save' first.

**Project costs**

**Costs**

This page asks about the costs of this project - what you had to spend to get it done (and keep it going).

If you can't give exact figures, please give your best estimates.

60. How much did you spend on this project for **capital expenditure**? Please enter a figure in £.

This includes everything from the very start of the project up to it becoming operational. So this might include:

- purchase of hardware
- purchase of software
- legal, financial and other advisory or consultancy fees
- project management costs for this period

and - in the case of energy generation projects:

- planning application fees
- grid connection fee
- purchasing a site
- construction costs

and more.

61. How much do you spend annually on this project for **operating expenditure**? Please enter a figure in £.

**What does "operating expenditure" cover?**

Operating expenditure may include equipment maintenance, staff costs, ongoing project management, insurance, site leasing, etc.

It is also likely to include financing expenditure - loan repayments etc. Please keep these in your overall operating expenditure total, but bear in mind that the next question asks for them separately. (This will help us better analyse how finance relates to overall project costs.)

**Annual figures:** please enter the most recent year's data, and indicate which time period these apply to (e.g. 2016, 2015-16, etc.). If you have expenditure data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

62. How much do you spend annually on **financing expenditure**?

Please enter a figure in £ for the most recent year.

This includes loan repayments, share interest or dividend payments, share buybacks, and any other ongoing direct costs of finance.

**Annual figures:** please enter the most recent year's data, and indicate which time period these apply to (e.g. 2016, 2015-16, etc.). If you have expenditure data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

*If you exit the survey, please remember to click 'save' first.*

**Resources**

**Resources**

Community groups are sometimes able to draw on the resources in their community in a way that commercial energy companies cannot, e.g. if local specialists provide engineering or legal help for free. This can potentially save them money and make a significant difference to project viability.

There is also an increasing number of organisations that specialise in supporting community energy groups.

However, sometimes community energy groups must often also buy services in just the same way as other energy companies.

This section asks about how you accessed services and resources, and about specialist providers.

63. For each of the services or resources listed below, please select the option which best describes how you were able to access them

	<b>Provided free of charge by our members/our community</b>	<b>Provided at a discount/favourable terms</b>	<b>We have to pay for them at commercial rates</b>	<b>Other</b>
Site for installation (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical and engineering services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

64. If there are any local organisations that have provided you with significant "in kind" support, could you please give some brief details here?

65. If it is possible, could you give an estimate of how many volunteer hours have been spent on this project?

66. Please indicate which, if any, of the following organisations you have consulted or contracted with in the course of this project.

- Local Energy Scotland
- Community Energy Scotland
- Local Energy Wales/Ynni Lleol
- Community Energy Wales
- Community Energy England
- Pure Leapfrog
- Regen SW
- Energy4All
- Sharenergy
- Mongoose
- SCENE Connect
- Communities for Renewables
- Ethex
- Lux Nova
- Wrigleys
- Bates Wells Braithwaite
- Other, please specify

**If you exit the survey, please remember to click 'save' first.**



Revenue and customers

Revenue and customers

This section is about any money that your project has earned, and the customers that have provided this revenue.

There are four basic questions for everyone, and then a series of more detailed ones, tailored to the type of project.

We would appreciate as much information as you can give, but **please do answer the four basic questions as a minimum.**

**If you can't give exact figures, please give your best estimates.**

Revenue - basic questions for everyone

Please provide figures for this project for:

67. **This project's total annual revenue from energy generation** (in £) - most recent year. Please indicate the time period that this refers to (e.g. 2016, or 2015-16, etc.)

If this project is not an energy generation project, please just leave this as zero.

If you have revenue data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

68. **This project's total annual savings on energy bills** (in £) - most recent year. Please indicate the time period that this refers to (e.g. 2016, or 2015-16, etc.)

This could be electricity or heating bills - or both; and be related to generating your own energy, or to energy efficiency and other measures (e.g. insulation).

If you have revenue data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

69. **This project's total annual revenue from all other activities** (in £) - most recent year.

Please indicate the time period this refers to (e.g. 2015, or 2016-17, etc.).

If you have revenue data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

70. **This project's total annual profit (or loss) in £**, for the most recent year (with time period that this applies to).

Please indicate whether the figure is profit or loss.

If you have profit/loss data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

**If you exit the survey**, please remember to click 'save' first.

Revenue support - energy generation

Revenue support schemes - energy generation

We would appreciate it if you could give us some details about any energy tariff support schemes, such as FITS, that you might have used for this project.

71. Which price incentive scheme did you use?

72. What initial tariff rate did you obtain?

Please enter the figure for pence per kWh (so if you received 4.5p per kWh, enter 4.5)

FITS only: enter the generation rate here.

73. FITS only: please also enter the initial export rate you obtained here (again the pence per kWh figure)

74. Finally, please enter the total revenue received under this scheme in the most recent year.

Again, please indicate which year this refers to. And if you are able to enter more than one year's figures, that would be very helpful.

*If you exit the survey, please remember to click 'save' first.*

Customers - energy generation

Customers - energy generation

We would also be very grateful if you are able to tell us more about who this project sells its energy to.

We are **not** asking you to enter the individual details of any customers. What we would like is information on the different types of customers you sell to - "customer segments" in business model language. So this page and the next ones ask about how much you sell to what sort of customer, how you find them, etc.

In some cases this will be simple - you will sell all your energy to one company and that's it. In other cases, it may be more complicated. As much information as you are able to give us would be much appreciated.

75. Please complete as much information as you can, for as many types of customers as necessary, and leave the rest blank.

When entering annual revenue, please remember to enter the total for the same year as you have entered your organisation's annual turnover, operating costs, etc.

	Type of customer	Price per kWh	Annual revenue
Customer 1	-- Please Select --		
Customer 2	-- Please Select --		
Customer 3	-- Please Select --		
Customer 4	-- Please Select --		
Customer 5	-- Please Select --		
Customer 6	-- Please Select --		
Customer 7	-- Please Select --		
Customer 8	-- Please Select --		
Customer 9	-- Please Select --		
Customer 10	-- Please Select --		

*If you exit the survey, please remember to click 'save' first.*

Electricity customers - further details

Electricity customers - further details

For each of these customers, it would be helpful to know a little more about how and why they buy electricity from you.

We appreciate that you might not always know this! But if you could give us what information you can, that would be much appreciated.

76. Firstly, how the electricity gets from you to them.

	Via the grid, conventionally	'Behind the meter' directly to them (e.g. if they have your solar panels on their roof)	Via a private wire	Via the grid with smart metering or 'virtual private wire'	Other
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

77. Then, how you find these customers.

	Via project advisor, supplier or partner	Via another community energy organisation	Through personal connection or word of mouth	At community events	Through paid salesperson or intermediary	Through advertising (e.g. leaflet drop, local newspapers)	Other
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

78. Finally, why - as far as you know - they buy their electricity from you.

Please select as many options as apply.

Customer wants...:

	electricity - origin irrelevant	renewable/low carbon electricity	to reduce their energy bills	to reduce CO2 emissions	to bring community together	benefit from a personalised service	to deal with known, trusted organisation	to support local economy	to provide educational benefits	other
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you exit the survey, please remember to click 'save' first.

Revenue and customers - further details

Revenue and customers - everything other than energy generation

The questions on this page ask for more details about any revenue-earning activities that are part of this project, i.e. anything you do that you charge money for.

This might be anything from selling low energy lightbulbs to organising energy efficiency works for an entire building.

**Please note: these questions are not about energy generation**. If your project gets money for generating energy (electricity or heat), you should have already answered questions about that. If it doesn't have any other revenue-earning activities, you can just skip this page.

There will be a separate page about goods and services that you provide for free.

79. First, could you give brief details of what your revenue-earning activities are.

80. If possible, could you give us an estimate of your organisation's annual revenue from each of these activities?

Please let us know the activity and time period that each figure relates to.

81. Next, could you tell us what types of customers you get for the different activities described in the answer to the first question?

Some types of customer might be: an energy company; another sort of company; public sector organisations (e.g NHS, local authority); other community organisations; individuals or households.

82. How do you find the customers for these activities?

For example, this might be through stalls at community events, adverts in local newspapers, through other organisations, or even through paid intermediaries or salespeople – or more.

83. And where do you deliver services to them?

For example: at their home, at business premises, over the internet, etc.

84. Thinking about how you interact with your customers, what kind of relationship do you have with them?

For example, the relationship might be one-off or ongoing, with face-to-face interaction or over the phone or email, etc.

If you offer more than one type of good or service, it would be helpful to know if this relationship differs depending on what it is you are offering.

85. Finally, we are interested in finding out what motivates your customers to use your services or goods.

What are their needs, or wants, that your project fulfills? Do they simply want a job doing and it doesn't matter who does it - or does it make a difference that you are local, or a community organisation? Are they interested in saving money, or carbon emissions – or both? And so on.

We appreciate you may not always know this! But any insight you can provide here would be much appreciated.

**If you exit the survey**, please remember to click 'save' first.

**Beneficiaries**

**Beneficiaries**

The questions on this page ask about goods and services that you provide **for free**.

As well as paid-for services, community energy groups also often provide goods and services for free to local organisations, people or the public more widely. We are calling **people who benefit from your project for free "beneficiaries"**.

We realise that you may not know why some beneficiaries use your services – but please complete what you can.

This is the final page of questions about this project.

86. First, could you give brief details of what goods and/or services your project provides to its beneficiaries.

87. Next, could you tell us what types of people or organisations are this project's benefit from these activities?

Some types of beneficiary might be: other community organisations; individuals or households; an energy company; another sort of company; public sector organisations (e.g NHS, local authority); or others.

88. We are also interested in finding out what motivates your beneficiaries to use your services or goods.

What are their needs, or wants, that your project fulfills? Do they simply want a job doing and it doesn't matter who does it - or does it make a difference that you are local, or a community organisation? Are they interested in saving money, or carbon emissions – or both? And so on.

We appreciate you may not always know this! But any insight you can provide here would be much appreciated.

89. Some community energy groups are able to secure funding to provide their services or goods for free to beneficiaries.

Is any funding linked to providing these goods or services to the project's beneficiaries? If so, please select 'yes' and give brief details

-- None --

90. Finally, we have a question about if and how you measure the value of this project – and this applies to its value to both beneficiaries and paying customers.

This measurement might be of e.g. money saved on energy bills, energy used, improved building comfort, or more intangible things like greater environmental awareness.

If you do measure it, please select 'yes' and give brief details.

-- None --

**If you exit the survey, please remember to click 'save' first.**



**Another project?**

91. **Another project?**

That completes all the questions about your project.

If you have another project to give details about, please select 'yes' below.

If you have no more projects to tell us about, please select 'no' to go on to the final few questions about your plans for the future.

*If you exit the survey*, please remember to click 'save' first.

**Your projects: introduction**

**Your projects - introduction**

The next sets of questions are about the projects that your organisation runs – or has attempted to run. Please note that, even if your project is on hold, or stalled, we would still very much appreciate you giving us what information you can about it. It will be very valuable for our analysis.

**What is "a project"?**

By a project, we mean an activity, or group of activities, that are planned and funded as one unit. So for example, this might be an energy efficiency project, where your organisation received a grant and used it to carry out energy efficiency checks for several local households or buildings; or it might be one or more wind turbines, which you planned, financed and built as one project. (But if you got a loan and built one turbine and then, separately, financed and built another, that would be two projects.)

Some organisations will have one project, some will have several projects of the same sort - e.g. several renewable energy projects. Others will run several projects of different sorts - e.g. some solar panels, and a series of energy efficiency promotion events.

**Answering the questions**

We have tried to provide menus of likely answers to make it easier to complete the survey – but if your projects don't fit these, please do make use of the "other" options and tell us what you are doing. We are very keen to learn about innovations and people doing things differently!

The project questions start with some basic details about the project, followed by more specific questions depending on the type of project it is. They then ask about the project's ownership (including any partnerships), financing, costs, resources, income, customers and beneficiaries.

92. What is / was the main focus of this project?

93. What year did your organisation start working on this project?

If this is difficult to pinpoint, you could enter the year of e.g. first feasibility study, or funding application

94. What is this project's current operational status?

Even if your project is still being developed, or has stalled/is on hold, it would still be very useful for us to learn about it.

95. Please give a brief description of the project.

**If you exit the survey**, please remember to click 'save' first.

Electricity generation projects further details

Electricity generation projects - further details

96. Is this your organisation's first community energy project?

Please select the option that best fits this project

-- None --

97. Please give details for each generating site, as set out below.

If a site is not yet operational, please give its current status.

If this project has more than 10 generating sites, please note this in the box for Site 10 below.

	Postcode	Technology	Capacity (in kW, so for 1MW enter 1000)	Operational status	When it first generated electricity (month/year)	Generation to date (number of kWh)	Date of that generation figure
Site 1	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 2	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 3	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 4	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 5	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 6	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 7	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 8	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 9	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 10	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you exit the survey, please remember to click 'save' first.

Heat generation projects further details

Heat generation projects - further details

98. Is this your organisation's first community energy project?

Please select the option that best fits this project

-- None --

99. Please give details for each generating site, as set out below.

If a site is not yet operational, please give its current status.

If this project has more than 10 generating sites, please note this in the project description (previous page).

	Postcode	Technology	Capacity (in kW, so for 1MW enter 1000)	Operational status	When it first generated heat (month/year)	Generation to date (number of kWh)	Date of that generation figure
Site 1	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 2	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 3	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 4	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 5	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 6	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 7	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 8	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 9	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 10	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you exit the survey, please remember to click 'save' first.

Transport projects further details

Transport projects - further details

100. Please select the activity/ies that are part of your transport project

- Electric vehicles
- Hydrogen vehicles
- Biofuel vehicles
- Promoting walking/cycling/public transport
- Other, please specify

101. Is this your organisation's first community energy project?

Please select the option that best fits this project

102. If you have any information on, or estimates of, carbon emissions savings from this project, please enter them here

103. Please give brief further details of your transport project, e.g. number of electric vehicles

*If you exit the survey, please remember to click 'save' first.*

Demand side projects further details

Energy efficiency and demand management projects - further details

104. Which of the following energy efficiency services does this project involve?

Please select all options that apply

- Energy audits
- Energy cafes
- Energy switching
- Smart meters
- Smart thermostats
- Insulation
- Energy efficient lighting
- Advice on appliances
- Other, please specify

105. Is this your organisation's first community energy project?

Please select the option that best fits this project

106. Please give brief details of the energy efficiency and/or demand management services provided in this project.

107. What sort of support for energy efficiency and demand measures does this project provide?

Please select all the options that apply

- Loans
- Grants
- Advice
- Appliance hire purchase arrangements
- None of the above
- Other, please specify

108. If you have any estimates of how much energy your project has saved, please enter them here

109. If you have any estimates of carbon emissions savings from this project, please enter them here

**If you exit the survey**, please remember to click 'save' first.

Storage projects further details

Energy storage and other projects - further details

110. Please select the type of energy storage your project is working on

- Hydrogen storage
- Electrical storage
- Pumped storage
- Other, please specify

111. Is this your organisation's first community energy project?

Please select the option that best fits this project

112. Please provide further details of your energy storage project (e.g. storage capacity, type and number of batteries, etc.)

***If you exit the survey,*** please remember to click 'save' first.

**stalled or on hold projects**

**Stalled or 'on hold' projects**

You have previously indicated that your project has stalled, or is 'on hold'.

It is important for us to learn more about what holds projects back, and what differentiates successful and unsuccessful projects – so any information you can provide will be very valuable.

After this section, any further information you can provide over the next few pages on ownership, financing to date etc. would also be much appreciated.

113. Can you please confirm the focus of the project that has stalled?

114. Please select from the following list which area(s) caused the stall?

Please select all that apply

- Revenue - FITS changes
- Revenue - any other changes
- Difficulties getting finance
- Cost changes
- Skill base not sufficient
- Engineering issues
- Local opposition
- National opposition
- Planning changes
- Attracting enough volunteers
- Keeping existing volunteers motivated
- Other, please specify

115. Please describe in more detail the problems that have held up your project.

116. **Renewable energy (electricity or heat) projects only**

Could you tell us at what stage in the project it stalled?

**If you exit the survey**, please remember to click 'save' first.

Project ownership

Project ownership

117. Which of these options best describes the ownership model for this project?

118. The next four questions relate to partnerships only.

Could you tell use who is/are the other partner(s)?

119. What type of partnership arrangement is it?

120. If possible, please let us know who owns what share

121. Any other information you can share on the partnership, e.g. other resources or responsibilities shared, would be much appreciated.

*If you exit the survey, please remember to click 'save' first.*

Finance

Finance

122. What is the **total value (in £) of investment, including grants**, in this project to date?

**Have you used any start-up grant schemes?**

Please enter the value (in £) of any grants you have received from any of the schemes listed in the next few questions. There will also be an opportunity to tell us about any grant schemes you have used.

123. Community and Renewable Energy Scheme (CARES) start-up grants

124. Rural Community Energy Fund (RCEF)?

125. Urban Community Energy Fund (UCEF)?

126. Ynni'r Fro?

127. Any other grant scheme?

Please give scheme name and total grant that you received, in £

Finance 2

Finance continued

128. Could you please give more information on how this project was financed, using this matrix.

- **Please use a new row for each separate bit of finance.** For example, if you took out a loan, enter that as 'Finance 1'; if you later re-financed with a cheaper loan, enter that as 'Finance 2'; etc. We hope 10 rows should be enough, but please email us if not!
- **Source:** this means where the finance came from. This might be the name of a bank, for example. In the case of community shares or other online crowdfunding, please give the name of the online platform(s) you used (e.g. Ethex).
- Finally, **in the annual repayments column**, please give the most recent year's data and indicate which time period this refers to (e.g. 2016, or 2015-16, etc.) If you have repayments data available for more than one year, we would appreciate as many years' figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

	Type	Source	Amount (in £)	Interest rate - if applicable (enter the % rate)	Term/duration - if applicable, i.e. how many months to repay it.	Annual repayments (in £)
Finance 1	-- Please Select --					
Finance 2	-- Please Select --					
Finance 3	-- Please Select --					
Finance 4	-- Please Select --					
Finance 5	-- Please Select --					
Finance 6	-- Please Select --					
Finance 7	-- Please Select --					
Finance 8	-- Please Select --					
Finance 9	-- Please Select --					
Finance 10	-- Please Select --					

129. Did your organisation use any of its own funds in this project?

-- None --

130. Did you offer any tax reliefs on any of the investments in this project?

Please select all that were offered from the list below.

- EIS
- SEIS
- SISR
- Other, please specify

131. If you were able to offer tax reliefs on any of your financing, we would appreciate it if you could let us know the total value (in £) of any tax relief you received.

So, if someone invested £8 and this was increased to £10 with tax relief, the value to you would be £2 and you would enter 2.

132. Finally for this section, if you issued community shares, were they accredited with the Community Shares Standard Mark?

-- None --

If you exit the survey, please remember to click 'save' first.



**Project costs**

**Costs**

This page asks about the costs of this project - what you had to spend to get it done (and keep it going).

If you can't give exact figures, please give your best estimates.

133. How much did you spend on this project for **capital expenditure**? Please enter a figure in £.

This includes everything from the very start of the project up to it becoming operational. So this might include:

- purchase of hardware
- purchase of software
- legal, financial and other advisory or consultancy fees
- project management costs for this period

and - in the case of energy generation projects:

- planning application fees
- grid connection fee
- purchasing a site
- construction costs

and more.

134. How much do you spend annually on this project for **operating expenditure**? Please enter a figure in £.

**What does "operating expenditure" cover?**

Operating expenditure may include equipment maintenance, staff costs, ongoing project management, insurance, site leasing, etc.

It is also likely to include financing expenditure - loan repayments etc. Please keep these in your overall operating expenditure total, but bear in mind that the next question asks for them separately. (This will help us better analyse how finance relates to overall project costs.)

**Annual figures:** please enter the most recent year's data, and indicate which time period these apply to (e.g. 2016, 2015-16, etc.). If you have expenditure data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

135. How much do you spend annually on **financing expenditure**?

Please enter a figure in £ for the most recent year.

This includes loan repayments, share interest or dividend payments, share buybacks, and any other ongoing direct costs of finance.

**Annual figures:** please enter the most recent year's data, and indicate which time period these apply to (e.g. 2016, 2015-16, etc.). If you have expenditure data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

*If you exit the survey, please remember to click 'save' first.*

**Resources**

**Resources**

Community groups are sometimes able to draw on the resources in their community in a way that commercial energy companies cannot, e.g. if local specialists provide engineering or legal help for free. This can potentially save them money and make a significant difference to project viability.

There is also an increasing number of organisations that specialise in supporting community energy groups.

However, sometimes community energy groups must often also buy services in just the same way as other energy companies.

This section asks about how you accessed services and resources, and about specialist providers.

136. For each of the services or resources listed below, please select the option which best describes how you were able to access them

	<b>Provided free of charge by our members/our community</b>	<b>Provided at a discount/favourable terms</b>	<b>We have to pay for them at commercial rates</b>	<b>Other</b>
Site for installation (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical and engineering services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

137. If there are any local organisations that have provided you with significant "in kind" support, could you please give some brief details here?

138. If it is possible, could you give an estimate of how many volunteer hours have been spent on this project?

139. Please indicate which, if any, of the following organisations you have consulted or contracted with in the course of this project.

- Local Energy Scotland
- Community Energy Scotland
- Local Energy Wales/Ynni Lleol
- Community Energy Wales
- Community Energy England
- Pure Leapfrog
- Regen SW
- Energy4All
- Sharenergy
- Mongoose
- SCENE Connect
- Communities for Renewables
- Ethex
- Lux Nova
- Wrigleys
- Bates Wells Braithwaite
- Other, please specify

**If you exit the survey, please remember to click 'save' first.**



**Revenue and customers**

**Revenue and customers**

This section is about any money that your project has earned, and the customers that have provided this revenue.

There are four basic questions for everyone, and then a series of more detailed ones, tailored to the type of project.

We would appreciate as much information as you can give, but **please do answer the four basic questions as a minimum.**

**If you can't give exact figures, please give your best estimates.**

**Revenue - basic questions for everyone**

Please provide figures for this project for:

140. **This project's total annual revenue from energy generation** (in £) - most recent year. Please indicate the time period that this refers to (e.g. 2016, or 2015-16, etc.)

If this project is not an energy generation project, please just leave this as zero.

If you have revenue data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

141. **This project's total annual savings on energy bills** (in £) - most recent year. Please indicate the time period that this refers to (e.g. 2016, or 2015-16, etc.)

This could be electricity or heating bills - or both; and be related to generating your own energy, or to energy efficiency and other measures (e.g. insulation).

If you have revenue data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

142. **This project's total annual revenue from all other activities** (in £) - most recent year.

Please indicate the time period this refers to (e.g. 2015, or 2016-17, etc.).

If you have revenue data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

143. **This project's total annual profit (or loss) in £**, for the most recent year (with time period that this applies to).

Please indicate whether the figure is profit or loss.

If you have profit/loss data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

**If you exit the survey**, please remember to click 'save' first.

Revenue support - energy generation

Revenue support schemes - energy generation

We would appreciate it if you could give us some details about any energy tariff support schemes, such as FITS, that you might have used for this project.

144. Which price incentive scheme did you use?

145. What initial tariff rate did you obtain?

Please enter the figure for pence per kWh (so if you received 4.5p per kWh, enter 4.5)

FITS only: enter the generation rate here.

146. FITS only: please also enter the initial export rate you obtained here (again the pence per kWh figure)

147. Finally, please enter the total revenue received under this scheme in the most recent year.

Again, please indicate which year this refers to. And if you are able to enter more than one year's figures, that would be very helpful.

**If you exit the survey**, please remember to click 'save' first.

Customers - energy generation

Customers - energy generation

We would also be very grateful if you are able to tell us more about who this project sells its energy to.

We are **not** asking you to enter the individual details of any customers. What we would like is information on the different types of customers you sell to - "customer segments" in business model language. So this page and the next ones ask about how much you sell to what sort of customer, how you find them, etc.

In some cases this will be simple - you will sell all your energy to one company and that's it. In other cases, it may be more complicated. As much information as you are able to give us would be much appreciated.

148. Please complete as much information as you can, for as many types of customers as necessary, and leave the rest blank.

When entering annual revenue, please remember to enter the total for the same year as you have entered your organisation's annual turnover, operating costs, etc.

	Type of customer	Price per kWh	Annual revenue
Customer 1	-- Please Select --		
Customer 2	-- Please Select --		
Customer 3	-- Please Select --		
Customer 4	-- Please Select --		
Customer 5	-- Please Select --		
Customer 6	-- Please Select --		
Customer 7	-- Please Select --		
Customer 8	-- Please Select --		
Customer 9	-- Please Select --		
Customer 10	-- Please Select --		

If you exit the survey, please remember to click 'save' first.

Electricity customers - further details

Electricity customers - further details

For each of these customers, it would be helpful to know a little more about how and why they buy electricity from you.

We appreciate that you might not always know this! But if you could give us what information you can, that would be much appreciated.

149. Firstly, how the electricity gets from you to them.

	Via the grid, conventionally	'Behind the meter' directly to them (e.g. if they have your solar panels on their roof)	Via a private wire	Via the grid with smart metering or 'virtual private wire'	Other
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

150. Then, how you find these customers.

	Via project advisor, supplier or partner	Via another community energy organisation	Through personal connection or word of mouth	At community events	Through paid salesperson or intermediary	Through advertising (e.g. leaflet drop, local newspapers)	Other
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

151. Finally, why - as far as you know - they buy their electricity from you.

Please select as many options as apply.

Customer wants...:

	electricity - origin irrelevant	renewable/low carbon electricity	to reduce their energy bills	to reduce CO2 emissions	to bring community together	benefit from a personalised service	to deal with known, trusted organisation	to support local economy	to provide educational benefits	other
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you exit the survey, please remember to click 'save' first.

Revenue and customers - further details

**Revenue and customers - everything other than energy generation**

The questions on this page ask for more details about any revenue-earning activities that are part of this project, i.e. anything you do that you charge money for.

This might be anything from selling low energy lightbulbs to organising energy efficiency works for an entire building.

**Please note: these questions are not about energy generation** . If your project gets money for generating energy (electricity or heat), you should have already answered questions about that. If it doesn't have any other revenue-earning activities, you can just skip this page.

There will be a separate page about goods and services that you provide for free.

152. First, could you give brief details of what your revenue-earning activities are.

153. If possible, could you give us an estimate of your organisation's annual revenue from each of these activities?

Please let us know the activity and time period that each figure relates to.

154. Next, could you tell us what types of customers you get for the different activities described in the answer to the first question?

Some types of customer might be: an energy company; another sort of company; public sector organisations (e.g NHS, local authority); other community organisations; individuals or households.

155. How do you find the customers for these activities?

For example, this might be through stalls at community events, adverts in local newspapers, through other organisations, or even through paid intermediaries or salespeople – or more.

156. And where do you deliver services to them?

For example: at their home, at business premises, over the internet, etc.

157. Thinking about how you interact with your customers, what kind of relationship do you have with them?

For example, the relationship might be one-off or ongoing, with face-to-face interaction or over the phone or email, etc.

If you offer more than one type of good or service, it would be helpful to know if this relationship differs depending on what it is you are offering.

158. Finally, we are interested in finding out what motivates your customers to use your services or goods.

What are their needs, or wants, that your project fulfills? Do they simply want a job doing and it doesn't matter who does it - or does it make a difference that you are local, or a community organisation? Are they interested in saving money, or carbon emissions – or both? And so on.

We appreciate you may not always know this! But any insight you can provide here would be much appreciated.

*If you exit the survey, please remember to click 'save' first.*

**Beneficiaries**

**Beneficiaries**

The questions on this page ask about goods and services that you provide **for free**.

As well as paid-for services, community energy groups also often provide goods and services for free to local organisations, people or the public more widely. We are calling **people who benefit from your project for free "beneficiaries"**.

We realise that you may not know why some beneficiaries use your services – but please complete what you can.

This is the final page of questions about this project.

159. First, could you give brief details of what goods and/or services your project provides to its beneficiaries.

160. Next, could you tell us what types of people or organisations are this project's benefit from these activities?

Some types of beneficiary might be: other community organisations; individuals or households; an energy company; another sort of company; public sector organisations (e.g NHS, local authority); or others.

161. We are also interested in finding out what motivates your beneficiaries to use your services or goods.

What are their needs, or wants, that your project fulfills? Do they simply want a job doing and it doesn't matter who does it - or does it make a difference that you are local, or a community organisation? Are they interested in saving money, or carbon emissions – or both? And so on.

We appreciate you may not always know this! But any insight you can provide here would be much appreciated.

162. Some community energy groups are able to secure funding to provide their services or goods for free to beneficiaries.

Is any funding linked to providing these goods or services to the project's beneficiaries? If so, please select 'yes' and give brief details

163. Finally, we have a question about if and how you measure the value of this project – and this applies to its value to both beneficiaries and paying customers.

This measurement might be of e.g. money saved on energy bills, energy used, improved building comfort, or more intangible things like greater environmental awareness.

If you do measure it, please select 'yes' and give brief details.

**If you exit the survey**, please remember to click 'save' first.



**Another project?**

164. **Another project?**

That completes all the questions about your project.

If you have another project to give details about, please select 'yes' below.

If you have no more projects to tell us about, please select 'no' to go on to the final few questions about your plans for the future.

***If you exit the survey***, please remember to click 'save' first.

Your projects: introduction

Your projects - introduction

The next sets of questions are about the projects that your organisation runs – or has attempted to run. Please note that, even if your project is on hold, or stalled, we would still very much appreciate you giving us what information you can about it. It will be very valuable for our analysis.

What is "a project"?

By a project, we mean an activity, or group of activities, that are planned and funded as one unit. So for example, this might be an energy efficiency project, where your organisation received a grant and used it to carry out energy efficiency checks for several local households or buildings; or it might be one or more wind turbines, which you planned, financed and built as one project. (But if you got a loan and built one turbine and then, separately, financed and built another, that would be two projects.)

Some organisations will have one project, some will have several projects of the same sort - e.g. several renewable energy projects. Others will run several projects of different sorts - e.g. some solar panels, and a series of energy efficiency promotion events.

Answering the questions

We have tried to provide menus of likely answers to make it easier to complete the survey – but if your projects don't fit these, please do make use of the "other" options and tell us what you are doing. We are very keen to learn about innovations and people doing things differently!

The project questions start with some basic details about the project, followed by more specific questions depending on the type of project it is. They then ask about the project's ownership (including any partnerships), financing, costs, resources, income, customers and beneficiaries.

165. What is / was the main focus of this project?

166. What year did your organisation start working on this project?

If this is difficult to pinpoint, you could enter the year of e.g. first feasibility study, or funding application

167. What is this project's current operational status?

Even if your project is still being developed, or has stalled/is on hold, it would still be very useful for us to learn about it.

168. Please give a brief description of the project.

*If you exit the survey*, please remember to click 'save' first.

Electricity generation projects further details

Electricity generation projects - further details

169. Is this your organisation's first community energy project?

Please select the option that best fits this project

-- None --

170. Please give details for each generating site, as set out below.

If a site is not yet operational, please give its current status.

If this project has more than 10 generating sites, please note this in the box for Site 10 below.

	Postcode	Technology	Capacity (in kW, so for 1MW enter 1000)	Operational status	When it first generated electricity (month/year)	Generation to date (number of kWh)	Date of that generation figure
Site 1	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 2	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 3	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 4	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 5	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 6	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 7	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 8	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 9	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 10	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you exit the survey, please remember to click 'save' first.

Heat generation projects further details

Heat generation projects - further details

171. Is this your organisation's first community energy project?

Please select the option that best fits this project

-- None --

172. Please give details for each generating site, as set out below.

If a site is not yet operational, please give its current status.

If this project has more than 10 generating sites, please note this in the project description (previous page).

	Postcode	Technology	Capacity (in kW, so for 1MW enter 1000)	Operational status	When it first generated heat (month/year)	Generation to date (number of kWh)	Date of that generation figure
Site 1	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 2	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 3	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 4	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 5	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 6	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 7	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 8	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 9	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site 10	<input type="text"/>	-- Please Select --	<input type="text"/>	-- Please Select --	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you exit the survey, please remember to click 'save' first.

Transport projects further details

Transport projects - further details

173. Please select the activity/ies that are part of your transport project

- Electric vehicles
- Hydrogen vehicles
- Biofuel vehicles
- Promoting walking/cycling/public transport
- Other, please specify

174. Is this your organisation's first community energy project?

Please select the option that best fits this project

175. If you have any information on, or estimates of, carbon emissions savings from this project, please enter them here

176. Please give brief further details of your transport project, e.g. number of electric vehicles

*If you exit the survey, please remember to click 'save' first.*

Demand side projects further details

Energy efficiency and demand management projects - further details

177. Which of the following energy efficiency services does this project involve?

Please select all options that apply

- Energy audits
- Energy cafes
- Energy switching
- Smart meters
- Smart thermostats
- Insulation
- Energy efficient lighting
- Advice on appliances
- Other, please specify

178. Is this your organisation's first community energy project?

Please select the option that best fits this project

179. Please give brief details of the energy efficiency and/or demand management services provided in this project.

180. What sort of support for energy efficiency and demand measures does this project provide?

Please select all the options that apply

- Loans
- Grants
- Advice
- Appliance hire purchase arrangements
- None of the above
- Other, please specify

181. If you have any estimates of how much energy your project has saved, please enter them here

182. If you have any estimates of carbon emissions savings from this project, please enter them here

**If you exit the survey**, please remember to click 'save' first.

Storage projects further details

Energy storage and other projects - further details

183. Please select the type of energy storage your project is working on

- Hydrogen storage
- Electrical storage
- Pumped storage
- Other, please specify

184. Is this your organisation's first community energy project?

Please select the option that best fits this project

185. Please provide further details of your energy storage project (e.g. storage capacity, type and number of batteries, etc.)

*If you exit the survey,* please remember to click 'save' first.

**stalled or on hold projects**

**Stalled or 'on hold' projects**

You have previously indicated that your project has stalled, or is 'on hold'.

It is important for us to learn more about what holds projects back, and what differentiates successful and unsuccessful projects – so any information you can provide will be very valuable.

After this section, any further information you can provide over the next few pages on ownership, financing to date etc. would also be much appreciated.

186. Can you please confirm the focus of the project that has stalled?

187. Please select from the following list which area(s) caused the stall?

Please select all that apply

- Revenue - FITS changes
- Revenue - any other changes
- Difficulties getting finance
- Cost changes
- Skill base not sufficient
- Engineering issues
- Local opposition
- National opposition
- Planning changes
- Attracting enough volunteers
- Keeping existing volunteers motivated
- Other, please specify

188. Please describe in more detail the problems that have held up your project.

189. **Renewable energy (electricity or heat) projects only**

Could you tell us at what stage in the project it stalled?

**If you exit the survey**, please remember to click 'save' first.

Project ownership

Project ownership

190. Which of these options best describes the ownership model for this project?

191. The next four questions relate to partnerships only.

Could you tell use who is/are the other partner(s)?

192. What type of partnership arrangement is it?

193. If possible, please let us know who owns what share

194. Any other information you can share on the partnership, e.g. other resources or responsibilities shared, would be much appreciated.

*If you exit the survey, please remember to click 'save' first.*

Finance

Finance

195. What is the **total value (in £) of investment, including grants**, in this project to date?

**Have you used any start-up grant schemes?**

Please enter the value (in £) of any grants you have received from any of the schemes listed in the next few questions. There will also be an opportunity to tell us about any grant schemes you have used.

196. Community and Renewable Energy Scheme (CARES) start-up grants

197. Rural Community Energy Fund (RCEF)?

198. Urban Community Energy Fund (UCEF)?

199. Ynni'r Fro?

200. Any other grant scheme?

Please give scheme name and total grant that you received, in £

Finance 2

Finance continued

201. Could you please give more information on how this project was financed, using this matrix.

- **Please use a new row for each separate bit of finance.** For example, if you took out a loan, enter that as 'Finance 1'; if you later re-financed with a cheaper loan, enter that as 'Finance 2'; etc. We hope 10 rows should be enough, but please email us if not!
- **Source:** this means where the finance came from. This might be the name of a bank, for example. In the case of community shares or other online crowdfunding, please give the name of the online platform(s) you used (e.g. Ethex).
- Finally, **in the annual repayments column**, please give the most recent year's data and indicate which time period this refers to (e.g. 2016, or 2015-16, etc.) If you have repayments data available for more than one year, we would appreciate as many years' figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

	Type	Source	Amount (in £)	Interest rate - if applicable (enter the % rate)	Term/duration - if applicable, i.e. how many months to repay it.	Annual repayments (in £)
Finance 1	-- Please Select --					
Finance 2	-- Please Select --					
Finance 3	-- Please Select --					
Finance 4	-- Please Select --					
Finance 5	-- Please Select --					
Finance 6	-- Please Select --					
Finance 7	-- Please Select --					
Finance 8	-- Please Select --					
Finance 9	-- Please Select --					
Finance 10	-- Please Select --					

202. Did your organisation use any of its own funds in this project?

-- None --

203. Did you offer any tax reliefs on any of the investments in this project?

Please select all that were offered from the list below.

- EIS
- SEIS
- SISR
- Other, please specify

204. If you were able to offer tax reliefs on any of your financing, we would appreciate it if you could let us know the total value (in £) of any tax relief you received.

So, if someone invested £8 and this was increased to £10 with tax relief, the value to you would be £2 and you would enter 2.

205. Finally for this section, if you issued community shares, were they accredited with the Community Shares Standard Mark?

-- None --

If you exit the survey, please remember to click 'save' first.



**Project costs****Costs**

This page asks about the costs of this project - what you had to spend to get it done (and keep it going).

If you can't give exact figures, please give your best estimates.

206. How much did you spend on this project for **capital expenditure**? Please enter a figure in £.

This includes everything from the very start of the project up to it becoming operational. So this might include:

- purchase of hardware
- purchase of software
- legal, financial and other advisory or consultancy fees
- project management costs for this period

and - in the case of energy generation projects:

- planning application fees
- grid connection fee
- purchasing a site
- construction costs

and more.

207. How much do you spend annually on this project for **operating expenditure**? Please enter a figure in £.

**What does "operating expenditure" cover?**

Operating expenditure may include equipment maintenance, staff costs, ongoing project management, insurance, site leasing, etc.

It is also likely to include financing expenditure - loan repayments etc. Please keep these in your overall operating expenditure total, but bear in mind that the next question asks for them separately. (This will help us better analyse how finance relates to overall project costs.)

**Annual figures:** please enter the most recent year's data, and indicate which time period these apply to (e.g. 2016, 2015-16, etc.). If you have expenditure data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

208. How much do you spend annually on **financing expenditure**?

Please enter a figure in £ for the most recent year.

This includes loan repayments, share interest or dividend payments, share buybacks, and any other ongoing direct costs of finance.

**Annual figures:** please enter the most recent year's data, and indicate which time period these apply to (e.g. 2016, 2015-16, etc.). If you have expenditure data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

*If you exit the survey, please remember to click 'save' first.*

**Resources**

**Resources**

Community groups are sometimes able to draw on the resources in their community in a way that commercial energy companies cannot, e.g. if local specialists provide engineering or legal help for free. This can potentially save them money and make a significant difference to project viability.

There is also an increasing number of organisations that specialise in supporting community energy groups.

However, sometimes community energy groups must often also buy services in just the same way as other energy companies.

This section asks about how you accessed services and resources, and about specialist providers.

209. For each of the services or resources listed below, please select the option which best describes how you were able to access them

	<b>Provided free of charge by our members/our community</b>	<b>Provided at a discount/favourable terms</b>	<b>We have to pay for them at commercial rates</b>	<b>Other</b>
Site for installation (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical and engineering services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

210. If there are any local organisations that have provided you with significant "in kind" support, could you please give some brief details here?

211. If it is possible, could you give an estimate of how many volunteer hours have been spent on this project?

212. Please indicate which, if any, of the following organisations you have consulted or contracted with in the course of this project.

- Local Energy Scotland
- Community Energy Scotland
- Local Energy Wales/Ynni Lleol
- Community Energy Wales
- Community Energy England
- Pure Leapfrog
- Regen SW
- Energy4All
- Sharenergy
- Mongoose
- SCENE Connect
- Communities for Renewables
- Ethex
- Lux Nova
- Wrigleys
- Bates Wells Braithwaite
- Other, please specify

**If you exit the survey, please remember to click 'save' first.**



**Revenue and customers**

**Revenue and customers**

This section is about any money that your project has earned, and the customers that have provided this revenue.

There are four basic questions for everyone, and then a series of more detailed ones, tailored to the type of project.

We would appreciate as much information as you can give, but **please do answer the four basic questions as a minimum.**

**If you can't give exact figures, please give your best estimates.**

**Revenue - basic questions for everyone**

Please provide figures for this project for:

213. **This project's total annual revenue from energy generation** (in £) - most recent year. Please indicate the time period that this refers to (e.g. 2016, or 2015-16, etc.)

If this project is not an energy generation project, please just leave this as zero.

If you have revenue data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

214. **This project's total annual savings on energy bills** (in £) - most recent year. Please indicate the time period that this refers to (e.g. 2016, or 2015-16, etc.)

This could be electricity or heating bills - or both; and be related to generating your own energy, or to energy efficiency and other measures (e.g. insulation).

If you have revenue data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

215. **This project's total annual revenue from all other activities** (in £) - most recent year.

Please indicate the time period this refers to (e.g. 2015, or 2016-17, etc.).

If you have revenue data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

216. **This project's total annual profit (or loss) in £**, for the most recent year (with time period that this applies to).

Please indicate whether the figure is profit or loss.

If you have profit/loss data available for more than one year, we would appreciate as many years' annual figures as you are able and willing to provide. Again, please indicate which time period(s) any figures relate to.

**If you exit the survey**, please remember to click 'save' first.

Revenue support - energy generation

Revenue support schemes - energy generation

We would appreciate it if you could give us some details about any energy tariff support schemes, such as FITS, that you might have used for this project.

217. Which price incentive scheme did you use?

218. What initial tariff rate did you obtain?

Please enter the figure for pence per kWh (so if you received 4.5p per kWh, enter 4.5)

FITS only: enter the generation rate here.

219. FITS only: please also enter the initial export rate you obtained here (again the pence per kWh figure)

220. Finally, please enter the total revenue received under this scheme in the most recent year.

Again, please indicate which year this refers to. And if you are able to enter more than one year's figures, that would be very helpful.

*If you exit the survey*, please remember to click 'save' first.

Customers - energy generation

Customers - energy generation

We would also be very grateful if you are able to tell us more about who this project sells its energy to.

We are **not** asking you to enter the individual details of any customers. What we would like is information on the different types of customers you sell to - "customer segments" in business model language. So this page and the next ones ask about how much you sell to what sort of customer, how you find them, etc.

In some cases this will be simple - you will sell all your energy to one company and that's it. In other cases, it may be more complicated. As much information as you are able to give us would be much appreciated.

221. Please complete as much information as you can, for as many types of customers as necessary, and leave the rest blank.

When entering annual revenue, please remember to enter the total for the same year as you have entered your organisation's annual turnover, operating costs, etc.

	Type of customer	Price per kWh	Annual revenue
Customer 1	-- Please Select --		
Customer 2	-- Please Select --		
Customer 3	-- Please Select --		
Customer 4	-- Please Select --		
Customer 5	-- Please Select --		
Customer 6	-- Please Select --		
Customer 7	-- Please Select --		
Customer 8	-- Please Select --		
Customer 9	-- Please Select --		
Customer 10	-- Please Select --		

*If you exit the survey*, please remember to click 'save' first.

Electricity customers - further details

Electricity customers - further details

For each of these customers, it would be helpful to know a little more about how and why they buy electricity from you.

We appreciate that you might not always know this! But if you could give us what information you can, that would be much appreciated.

222. Firstly, how the electricity gets from you to them.

	Via the grid, conventionally	'Behind the meter' directly to them (e.g. if they have your solar panels on their roof)	Via a private wire	Via the grid with smart metering or 'virtual private wire'	Other
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

223. Then, how you find these customers.

	Via project advisor, supplier or partner	Via another community energy organisation	Through personal connection or word of mouth	At community events	Through paid salesperson or intermediary	Through advertising (e.g. leaflet drop, local newspapers)	Other
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

224. Finally, why - as far as you know - they buy their electricity from you.

Please select as many options as apply.

Customer wants...:

	electricity - origin irrelevant	renewable/low carbon electricity	to reduce their energy bills	to reduce CO2 emissions	to bring community together	benefit from a personalised service	to deal with known, trusted organisation	to support local economy	to provide educational benefits	other
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer 10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you exit the survey, please remember to click 'save' first.

Revenue and customers - further details

**Revenue and customers - everything other than energy generation**

The questions on this page ask for more details about any revenue-earning activities that are part of this project, i.e. anything you do that you charge money for.

This might be anything from selling low energy lightbulbs to organising energy efficiency works for an entire building.

**Please note: these questions are not about energy generation** . If your project gets money for generating energy (electricity or heat), you should have already answered questions about that. If it doesn't have any other revenue-earning activities, you can just skip this page.

There will be a separate page about goods and services that you provide for free.

225. First, could you give brief details of what your revenue-earning activities are.

226. If possible, could you give us an estimate of your organisation's annual revenue from each of these activities?

Please let us know the activity and time period that each figure relates to.

227. Next, could you tell us what types of customers you get for the different activities described in the answer to the first question?

Some types of customer might be: an energy company; another sort of company; public sector organisations (e.g NHS, local authority); other community organisations; individuals or households.

228. How do you find the customers for these activities?

For example, this might be through stalls at community events, adverts in local newspapers, through other organisations, or even through paid intermediaries or salespeople – or more.

229. And where do you deliver services to them?

For example: at their home, at business premises, over the internet, etc.

230. Thinking about how you interact with your customers, what kind of relationship do you have with them?

For example, the relationship might be one-off or ongoing, with face-to-face interaction or over the phone or email, etc.

If you offer more than one type of good or service, it would be helpful to know if this relationship differs depending on what it is you are offering.

231. Finally, we are interested in finding out what motivates your customers to use your services or goods.

What are their needs, or wants, that your project fulfills? Do they simply want a job doing and it doesn't matter who does it - or does it make a difference that you are local, or a community organisation? Are they interested in saving money, or carbon emissions – or both? And so on.

We appreciate you may not always know this! But any insight you can provide here would be much appreciated.

*If you exit the survey, please remember to click 'save' first.*

**Beneficiaries**

**Beneficiaries**

The questions on this page ask about goods and services that you provide **for free**.

As well as paid-for services, community energy groups also often provide goods and services for free to local organisations, people or the public more widely. We are calling **people who benefit from your project for free "beneficiaries"**.

We realise that you may not know why some beneficiaries use your services – but please complete what you can.

This is the final page of questions about this project.

232. First, could you give brief details of what goods and/or services your project provides to its beneficiaries.

233. Next, could you tell us what types of people or organisations are this project's benefit from these activities?

Some types of beneficiary might be: other community organisations; individuals or households; an energy company; another sort of company; public sector organisations (e.g NHS, local authority); or others.

234. We are also interested in finding out what motivates your beneficiaries to use your services or goods.

What are their needs, or wants, that your project fulfills? Do they simply want a job doing and it doesn't matter who does it - or does it make a difference that you are local, or a community organisation? Are they interested in saving money, or carbon emissions – or both? And so on.

We appreciate you may not always know this! But any insight you can provide here would be much appreciated.

235. Some community energy groups are able to secure funding to provide their services or goods for free to beneficiaries.

Is any funding linked to providing these goods or services to the project's beneficiaries? If so, please select 'yes' and give brief details

236. Finally, we have a question about if and how you measure the value of this project – and this applies to its value to both beneficiaries and paying customers.

This measurement might be of e.g. money saved on energy bills, energy used, improved building comfort, or more intangible things like greater environmental awareness.

If you do measure it, please select 'yes' and give brief details.

**If you exit the survey, please remember to click 'save' first.**



**Another project?**

**Another project?**

That completes all the questions about that project.

After this, the next questions are about your organisation's plans for the future, and any community benefit funds you may maintain.

There are no more pages of questions about individual projects. But if you have any further projects you would like to tell us about, please email [timothy.braunholtz-speight@manchester.ac.uk](mailto:timothy.braunholtz-speight@manchester.ac.uk) and we will contact you asap.

***If you exit the survey***, please remember to click 'save' first.

**Community benefit funds**  
**Impacts and the future**

We are now leaving our focus on individual projects, and returning to ask about your organisation as a whole.

This page asks about community benefit funds.

The next and final page asks about how your organisation sees its future.

**Community benefit funds**

These questions relate to any funds that you have built up from your projects, and that you distribute to your community.

They ask about both the total value of the fund, and how much you have spent in the last year.

(Again, this means the last year you have information for, and should be the same year as you gave turnover, revenue etc. figures for.)

If your organisation does not have a community benefit fund, please simply skip this section.

237. How much money do you currently have in your community benefit fund, if any?

Please give the figure in £.

238. And how much did you spend from the community benefit fund over the last year?

239. Do you expect this annual spending to increase, stay about the same, or decrease over the lifetime of your project(s)?

240. How many years are left in your community benefit fund?

241. If it's possible, could you say how much different projects contribute to the community benefit fund annually?

242. Which of the following wider benefits are provided by your organisation?

Please select all that apply.

- Grants
- Loans
- Donations
- Reduced electricity price
- Job creation
- Community asset purchase or development
- Initiatives to improve local environment
- Education initiatives
- Reduction of fuel poverty
- Other, please specify

243. If there is anything else you would like us to know about your community benefit funds and impacts, please provide details and/or links to further information.

*If you exit the survey, please remember to click 'save' first.*

Looking to the Future

Looking to the Future

Finally, the questions on this page ask about how you see the future of your organisation, and its community energy activities.

244. Are you planning on undertaking new activity in **the next 12 months**?

245. Looking further ahead, please describe the organisation's plans over **the next five years**.

246. What are the most important factors, positive or negative, that you think will influence your plans and how they turn out?

Are there specific risks, or opportunities, that you are considering how to deal with?

247. What type of support or policies do you think would help you to realise your organisation's plans?

248. Are there any other innovations or changes in how you or others work that you think would help realise these aims?

249. Finally, if your organisation is involved in any other activities you think we should know about, please give brief details here.

*If you exit the survey, please remember to click 'save' first.*

Thank you

## Thank you!

You are finished!

Thank you very much for completing this survey.

Your answers are highly valued. Your participation in this survey is important, as it will help to influence policy and support the continued development of the community energy sector in the UK.

The next steps for this research is to analyse your answers, and undertake some more in-depth case studies of a small number of community energy groups.

We will then be working with community energy organisations and other stakeholders to produce policy and practice recommendations, based on our analysis.

We envisage running several events in 2018 to help get further feedback on these recommendations. If you would like to go on our mailing list for events and reports, you can opt-in by clicking yes to the appropriate question below.

Thank you once again, we wish you and your organisation all the best for the future.

250. If you would like to **receive an email containing all the information you have input into this questionnaire**, please enter the email address you would like this to go to in the box below:

251. Would you consider being used as a more in-depth case study in this research?

Our case study research will take place later this year.

Answering 'yes' to this question does not commit you to anything. It just means that we may contact you about this later on.

252. Would you like to receive details of events and reports connected to this research, by email?

253. Do you have any photographs of your project that you would be happy for us to use in our report?

Please remember to **click "save" below** before you exit the survey.

