

**energy
saving
trust**

Energy Redress Scheme Evaluation

October 2020



Energy Saving Trust Evaluation Team

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1. Executive Summary

1.1. Energy Redress Scheme

Energy Saving Trust (EST) has been appointed by Ofgem to distribute payments from energy companies. Under Ofgem's redress process, energy companies who are found to have breached a license condition or were part of an investigation or compliance case can agree in settlement to make payments to the voluntary redress fund in lieu of, or in addition to, a financial penalty for breaches of licence conditions to remedy any harm to consumers (in addition to compensation to those directly affected).

Energy Saving Trust is required to provide an annual evaluation report for the Energy Redress Scheme. The evaluation aims to assess the overall effectiveness for end consumers of redress projects funded through redress awards allocated by EST.

In order to achieve the aims of this year's evaluation, the following three areas were examined:

- Project success metrics – analysis of the quantitative information collected by all grantees for projects funded by the Energy Redress Scheme in rounds 1 to 5.
- Completed projects – a qualitative review of the six completed projects.
- Progressing projects – a qualitative review of a sample of nine active projects.

As of 20th August 2020, the Energy Redress Scheme has funded **103 projects** over **seven funding rounds** since launching in 2018, awarding over **£15.4 million** to grantees delivering projects across England, Scotland and Wales.

Projects funded in rounds 1 to 5 are the focus of this evaluation as these grantees have commenced their projects and have started reporting on their activity and outcomes. The key metrics for these projects include:

- Of the £7.48million grant for work funded across rounds 1 to 5, **£1.9million worth of activity has been delivered** and reported on to date – 25% of the total funding awarded in rounds 1 to 5.
- **38,254 households** have been provided with energy advice to date by projects funded in rounds 1 to 5.

- **5,219 measures have been installed or provided to households.**
- Estimated lifetime savings that have been reported so far by grantees as a result of activities delivered using the funding include:
 - 341 MWh of energy savings.
 - £1m of energy bill savings from switching.
 - £0.3m of bill savings from energy advice.
- The Energy Redress Scheme funds projects which support energy consumers in vulnerable situations. All grantees provide information to demonstrate that they are targeting people in vulnerable situations in their grant applications and in subsequent reporting.

As only a few projects have completed to date, this year's evaluation has mainly focussed on a qualitative analysis; looking at lessons learned, what has worked well and what issues have arisen. In future, and once more projects have reached completion, greater analysis by type of project and delivery method will be provided to obtain further understanding of what makes a project successful and what projects should avoid doing.

The key lessons learnt by grantees so far are:

The importance of home visits for energy advice – home visits allow grantees to get into the property and understand the real issues that vulnerable people are facing, as well as allowing them to discover issues that would otherwise be hidden. Revisiting vulnerable people more than once allows more consistent support to those most vulnerable.

The importance of good partnership working – grantees noted that working with partners was advantageous for a number of reasons, such as sharing best practice and services, acquiring funding, introducing each other to clients, helping deliver targets, improving the quality of the project outputs and helping the grantee identify vulnerable people and provide a route to contact them through a trusted intermediary.

Promotional activities – word of mouth within a small community has often been found to be the most effective way to promote projects. Providing free energy saving measures was also seen as an effective way to raise project awareness, with many noting that the marketing message needs to evolve with the weather.

The benefits of simple energy saving measures – smaller, cheaper and easier to install energy saving measures which do not significantly alter the way people live in their homes are better at engaging people initially than measures that require a lot of attention after installation.

The most significant barriers and solutions identified so far are:

Public engagement – difficulties connecting or engaging with the vulnerable people that they are seeking to help. This was reported as being due to lack of interest and limited willingness from targeted energy consumers to engage in the project as well as a decline in demand for help during warmer weather. These grantees noted how they overcame the issue of community engagement through project marketing which was best achieved via word of mouth.

Project delays – difficulties with partners had also caused some delays; certain snags that their partners have encountered have impeded their own project's progress. These grantees all decided that the best solution was to be patient and wait for their partner to work through their own problems, such as issues with recruitment and training, before moving forward. It was not felt that these delays would impact on the end delivery of the project but meant that progress would be slower than they had anticipated. Energy Redress Scheme projects are allowed up to two years to complete their work programme.

Staffing – loss of staff and retaining staff resources (including volunteers) was a major project challenge for some grantees. Ensuring that the volunteer opportunities were structured with clear responsibilities has helped some projects to retain volunteers where they had previously encountered difficulties.

Impact of COVID – COVID-19 has restricted grantees' ability to carry out face to face activities and caused some staffing issues due to staff being furloughed and the upheaval of home working. EST Energy Redress Development Officers have been working with the projects which are having problems or are behind on their targets to ensure they have strategies to continue to deliver their projects within the pandemic restrictions.

1.2. COVID-19 crisis fund

The COVID-19 crisis fund is an emergency fund launched in May 2020 to support households in vulnerable situations during the COVID-19 outbreak, to maintain

adequate energy supplies for health and wellbeing and to avoid self-disconnection. The fund is only open to charities that have registered with the Energy Redress Scheme and have passed the due diligence assessment. These charities can apply to deliver emergency fuel vouchers to residents who use prepayment meters and are facing crisis situations.

This fund was developed quickly in response to the crisis and launched in May 2020. As of the 28th August 2020, **122 charities had applied** for funding for vouchers through the COVID-19 crisis fund across **three rounds** of which **75 grantees** have been successful. **£4,748,955 of funding** has been provided to these charities through this fund. Only rounds 1 and 2 have been included in the evaluation as round 3 grantees were only approved at the end of August 2020.

24 grantees responded to an online survey requesting feedback on the application process (three of these had been unsuccessful in their application). Feedback from grantees was, overall, very positive:

- 100% agreed that they completely understood the aims of the fund.
- 96% found the application process easy.
- 92% understood the eligibility criteria and rules of the fund (those that disagreed were charities that were unsuccessful in their application).
- 100% found the guidance and FAQ documents useful.

18 of the 21 successful applicants that responded to the survey had already distributed at least some of their vouchers, ranging from 3 to more than 2,000 vouchers. Of these, 78% had found it easy to distribute vouchers. Those that experienced difficulties cited the challenges of working with prepayment meters, including at the point of voucher redemption, and the fact that some of their customers were not on prepayment plans, which limited the number of vulnerable customers they could support. One grantee believed that the initial demand for vouchers had reduced whilst people were furloughed but felt that once the furlough scheme finished demand may increase. Some grantees have found it difficult to identify those who are most in need of the vouchers as these people do not actively seek support themselves. To overcome this challenge, all respondents found that working with partners helped them to find and engage with vulnerable people.

2. Introduction

Energy Saving Trust (EST) has been appointed by Ofgem to distribute payments from energy companies. Under Ofgem's redress process, energy companies who are found to have breached a license condition or were part of an investigation or compliance case can agree in settlement to make payments to the voluntary redress fund in lieu of, or in addition to, a financial penalty for breaches of licence conditions to remedy any harm to consumers (in addition to compensation to those directly affected).

The core priority of the Energy Redress Scheme is to support energy consumers. The Energy Redress Scheme aims to:

- Support energy consumers in vulnerable situations and
- Deliver benefits to the types of consumers that were negatively impacted by the specific issues that triggered the redress payment.
- It can also allocate up to 15% of funding to support innovation to benefit energy consumers.

The Energy Redress Scheme is open to charitable organisations that support energy customers in England, Scotland and Wales. Applications are made through an online system and closing dates for applications are determined each quarter. The minimum grant that can be requested is £20,000 and the maximum grant amount varies depending on the size of the fund available with the largest single award to date being £636,560. The scheme funds projects lasting up to two years, can fund 100 per cent of the project costs and can cover revenue and capital measures.

The Energy Redress Scheme launched in June 2018 and the first project commenced in August 2018.

2.1. COVID-19 crisis fund

The COVID-19 crisis fund is an emergency fund launched in May 2020 to support households in vulnerable situations during the COVID-19 outbreak to maintain adequate energy supplies for health and wellbeing and to avoid self-disconnection. The fund is

only open to charities that have registered with the Energy Redress Scheme and have passed the due diligence assessment. These charities can apply to deliver emergency fuel vouchers to residents who use prepayment meters and are facing crisis situations.

3. Evaluation requirements

Energy Saving Trust is required to provide an annual evaluation report for the Energy Redress Scheme. The contract states that EST should design, develop and implement fit-for-purpose, effective processes and records to evaluate the overall effectiveness for end consumers of redress projects funded through redress awards allocated by EST, to include:

- (i) Evaluating the extent to which redress awards have addressed the policy priorities set out in Authority Guidance.
- (ii) Evaluating the impacts of redress projects on end energy consumers.
- (iii) Evaluating the value for money achieved by the redress projects.
- (iv) Recommending how further improvements can be made to redress awards and/or redress projects following the evaluation described in this clause.
- (v) Such other reasonable matters as relate to evaluating the overall effectiveness for end consumers of redress projects funded through redress awards as the Authority may request.

This evaluation report provides information to date on the 64 projects that have been funded through the first five rounds. Six projects have been completed whilst the remainder are in progress. The evaluation is continuous, builds upon the previous evaluation and will continue to be built upon each year as more projects come to completion and impact information from a greater number of projects has been collected. Future evaluation reports will allow for further analysis on the full impact of the fund and help develop a greater understanding of what makes a successful project. As only a few projects have reached completion, value for money estimations have not been included in this report but will be reported in future evaluations.

In addition, the evaluation of the COVID-19 crisis fund aims to evaluate that fund's effectiveness including:

- (i) Evaluating the satisfaction with the application process.
- (ii) Recommending how the fund could be improved.
- (iii) Evaluating the impacts on end energy consumers.

4. Evaluation methodology

The evaluation method has focussed on four areas:

- Project success metrics – analysis of the quantitative information collected by all grantees for projects funded by the Energy Redress Scheme in rounds 1 to 5. Information collected by grantees covers the delivery and self-reported impact of the projects.
- Completed projects – a qualitative review of the six completed projects.
- Progressing projects – a qualitative review of a sample of nine projects that are progressing.
- COVID-19 – an online survey to applicants to the COVID-19 crisis fund.

4.1. Project metrics

Grantees are instructed to complete quarterly reporting documents updating EST on their project's progress. Data from these reports has been used to determine the impacts of the projects to date.

The data has been analysed to understand the impact of the Energy Redress Scheme so far. This has included an analysis of application data plus data from the quarterly output reports. In this report we provide data for both completed projects and projects in progress where appropriate. Since grantees report on their own targets, there is variation in the level of detail in the data provided.

4.2. Completed projects

An overview of the impact of completed projects (five projects from Round 1 and one from Round 3) has been conducted. This included an analysis of the qualitative information on project activity and learnings from their final reports and quantitative information on project outputs from their quarterly reporting.

4.3. Projects in progress

For those projects that are currently in progress an analysis of their activity to date has been conducted. This has included an overview of the project metrics outlined above and learnings from the project so far as well as an understanding of any issues or barriers that they foresee in completing their projects. Nine projects were chosen for analysis following a combination of recommendations from the Energy Redress team at EST and random selection.

The Energy Redress team were asked to select projects that are distinct from each other so that this research could explore a wide range of projects to identify different problems and their solutions. Three projects were selected from each of rounds 2, 3 and 4, so as to include projects in different stages of progression. Projects in rounds 6 onwards were not considered as their progress reports are not due until after the completion of this report (August 2020) and Round 5 was not included for this detailed analysis as those projects are also still early on in their work programmes.

4.4. COVID-19 crisis fund

To evaluate the COVID-19 crisis fund, an online survey was sent out to both successful and unsuccessful Round 1 and 2 applicants in August 2020. The survey consisted of questions exploring applicants' opinions on the application process and impact of the fund. The survey was sent out to 102 charities. The survey received 24 responses, achieving a response rate of 23%. In this report we include an analysis of the number of applications, the number of successful/unsuccessful applicants, the number of vouchers distributed by the projects and the amount of grant funding awarded.

5. Energy Redress Scheme reporting

This section evaluates the impact of the Energy Redress Scheme by:

- 1) Reporting project impact metrics for grantees in rounds 1 to 5 (section 5.1).
- 2) Analysing the six completed projects (section 5.2).
- 3) Examining the progress of a sample of nine grantees that have not yet completed their projects (section 5.3).

Although funding has been approved for 39 grantees in Rounds 6 (28) and 7 (11), these projects were not included in the analysis as they are in the early stages of their development and therefore are yet to submit their first quarterly reports. Table 1 provides an overview of the projects in rounds 1 to 5.

Table 1: Overview of the projects in rounds 1-5 (N= 64)

Project Metric	Round					Total
	1	2	3	4	5	
Number of projects	6	15	7	6	30	64
Project start date	August 2018	January 2019	April 2019	September 2019	January 2020	N/A
Number of months since project start date	24	19	16	11	7	N/A
Total funding	£244,567	£2,103,479	£470,255	£291,796	£4,374,103	£7,484,200

Of the £7.48 million of grant funding allocated across rounds 1-5, £1.9 million worth of activity has been delivered and reported on to date.

Figure 1 shows a map of the locations of projects funded by the Energy Redress Scheme. Each pin represents the location of a project. The colours of each pin are explained below:

- Red pins represent projects in Round 1.
- Blue pins represent projects in Round 2.
- Dark green pins represent projects in Round 3.
- Yellow pins represent projects in Round 4.
- Purple pins represent projects in Round 5.

- Light green pins represent projects in Round 6.
- Orange pins represent projects in Round 7.



Figure 1: Map of Energy Redress Scheme-funded project locations

5.1. Project metrics

This section summarises the impact of Energy Redress Scheme projects to date. The data presented here represents what has been achieved to date by the 64 projects funded up to Round 5. The values provided were obtained from the quarterly reports, which were self-reported by each project.

Once successful applicants have received the funding, each project is required to complete a quarterly report to enable ongoing monitoring as required by the Energy Redress Scheme. These spreadsheets allow projects to report on their project outputs, which may include advice interventions, number of referrals, measured savings where available, capital measures installed and social benefits.

Grantees have reported reaching a total of 38,254 households so far through their advice work.

As shown in Figure 2, householders have been advised in a number of different ways:

- 10,613 have received advice at events.
- 10,522 have received telephone advice.
- 5,786 home advice visits have been carried out.
- 4,763 have received advice face to face at drop-in sessions.

The remaining households have been reached through a mixture of channels including online platforms and training. Some households may have received more than one form of intervention.

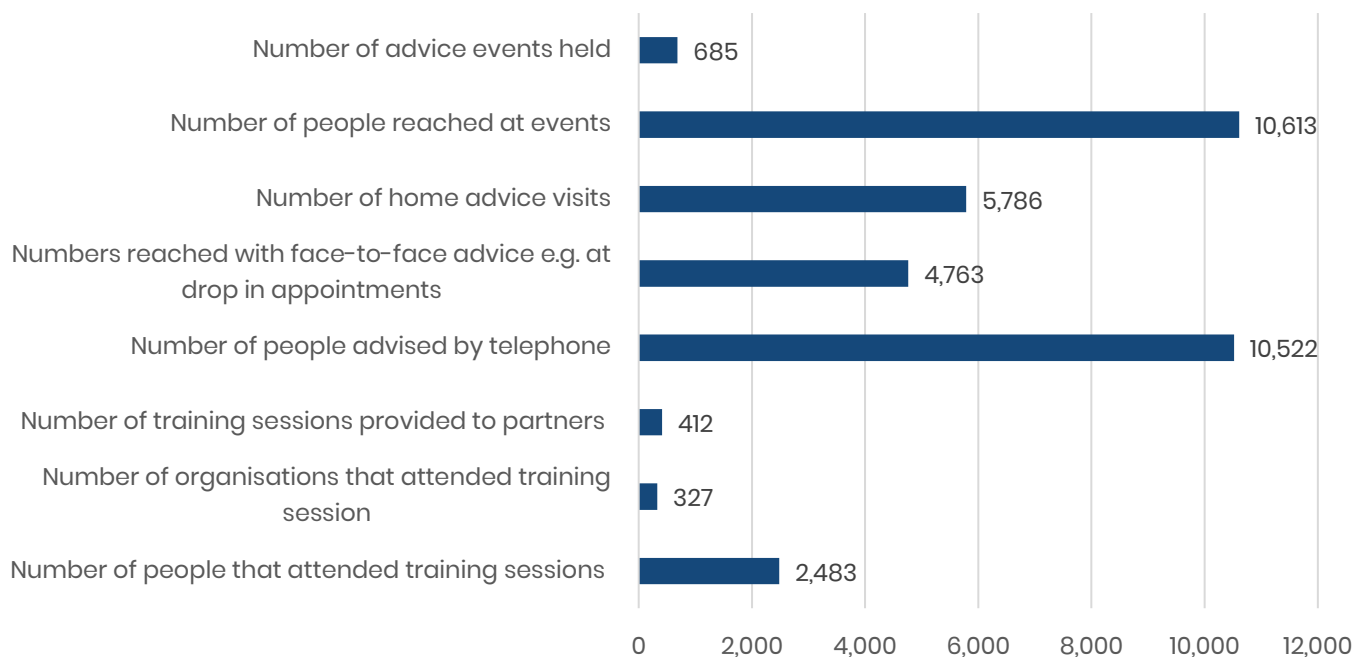


Figure 2: Deliverables reported as achieved to date by Energy Redress Scheme projects (N= 64)

Due to the small number of projects completed it is not possible to do cross-analysis of these deliverables, but in future the relationship between the way in which projects have been delivered and the success of the project will be investigated to help understand what makes a successful project.

Some grantees have quantified some of the energy and money savings achieved by households they have supported, however not all savings have been captured due to the difficulty of reliably tracking these savings and the timing at which this data can be collected. Table 2 lists the savings that have been reported and highlights that energy and bill savings have already been made as a result of the projects being supported through the Energy Redress Scheme.

The savings reported have been achieved through capital measures and behavioural changes. Bill savings have also been achieved through switching suppliers. The most commonly implemented capital measures so far are LED bulbs, although many other measures have been installed such as radiator foil and heating controls and slow cookers have been provided. The projects have also started to see social benefits, with 387 volunteers involved in delivering the projects and 49 new jobs being created as a result of the projects commencing.

Table 2: Estimated lifetime energy and bill savings from quantifiable sources (e.g. switching supplier and measures) resulting from Energy Redress Scheme projects to date (self-reported)

Estimated savings	
Estimated energy savings reported (kWh)	341,032
Actual energy bill savings from switching (£)	£1,047,824
Estimated bill savings from energy advice (£)	£308,244
Capital measures installed	
Total number of capital measures installed or provided to households (such as LED bulbs, draught proofing, power down devices and radiator foils)	4,618
Other measures installed as a result of advice referrals to other funding sources (This includes insulation and boiler replacements)	601
Social benefits	
Number of volunteers involved in delivering the project	387
Number of new jobs created	49

Households have also been informed about, or referred to, other schemes; Figure 3 shows the measures installed through other funded schemes following Energy Redress Scheme-funded advice. The chart shows that many of these measures were draught proofing and replacement boilers.

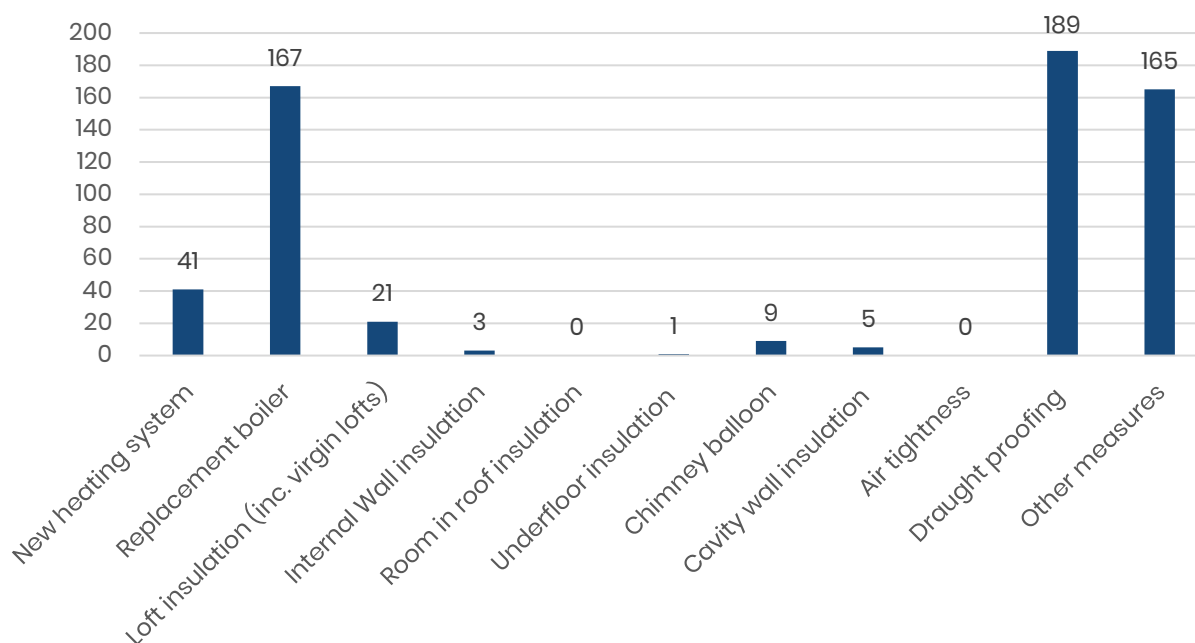


Figure 3: Measures installed to date as a result of other funded schemes following Energy Redress Scheme-funded advice (N= 64)

As of the 20th of August 2020, five charities have been awarded a grant from the Energy Redress Scheme Innovation Fund. The Innovation Fund is aimed at developing products or services which are truly innovative and not currently accessible to energy consumers or certain groups of energy consumers.

Table 3 provides a summary of the five projects that are being funded through the Innovation Fund. The total grant amount for all five projects is £675,178.

Table 3: Projects which have been funded through the Innovation Fund (N= 5)

Round	Grantee	Project	Grant amount	Country
1	Fintry Development Trust	Fintry Low Carbon Heat	£2,295	Scotland
1	Urras Sgìre Oighreachd Bharabhais Community Company	Barvas Estate Trust Community LED	£35,900	Scotland
2	Bioregional	Levelling the renewable playing field	£334,755	England
5	North Devon Homes	Making heat cheaper, smarter and greener	£163,419	England
6	National Energy Action ¹	Increasing self-consumption of solar PV	£138,809	England

5.1.1. Project metrics by round

Table 4 highlights the way in which projects have interacted with their clients. Note that this table includes all projects in rounds 1 to 5, and that projects in later rounds have been operational for a shorter time than those in earlier rounds. Round 1 grantees have now completed their projects and so have much higher outputs compared to Round 5, whose projects only started seven months ago in January 2020 and have been impacted by COVID-19. It should also be noted that many projects have fewer deliverables when they first start because in the early stages of development projects are more focused on the initial set up work, such as recruitment and training, and less so on project activity.

¹ This project was awarded funding in Round 6 and is not included within this evaluation as it is still in the early stages of its project development and has not reported on its progress. This project has been included in this table to demonstrate that it was one of five projects to be awarded funding through the innovation fund.

Table 4: Outputs delivered by all projects in rounds 1-5, broken down by each round of funding to date (N= 64)

Metric	Round					Total
	1	2	3	4	5	
Number of projects funded	6	15	7	6	30	64
Number of advice events held	172	393	34	48	38	685
Number of people reached at events	1,368	5,497	1,564	892	1,292	10,613
Number of people advised by telephone	986	4,529	687	790	3,530	10,522
Number of people advised by home visit	1,155	2,294	407	320	1,610	5,786
Number of training sessions provided to partners	3	90	288	7	24	412
Number of organisations attending training	112	182	31	2	N/A	327
Number of people attending training sessions	517	1,704	172	90	N/A	2,483

Note that Table 4 captures interventions, not unique households reached. In some cases, a single household may receive more than one intervention (e.g. basic telephone advice, followed up with a home energy advice visit).

One of the ways that Energy Redress Scheme-funded advice projects benefit energy consumers in vulnerable situations is to identify what additional support the household may qualify for and help them access that support. Many Energy Redress Scheme-funded projects record the number of households accessing additional support following their advice.

Table 5 provides the number of people advised by Energy Redress Scheme-funded projects who were subsequently referred to other forms of support by each round of funding. The most commonly accessed scheme was Warm Homes Discount (1,303).

Table 5: Scheme referrals by round of funding (N= 64)

Scheme Referral	Round					Total
	1	2	3	4	5	
Total number of clients given access to ECO	0	114	0	0	0	114
Total number of Warm Home Discount referrals	504	239	166	268	126	1,303
Total number of benefit entitlement checks	71	181	0	138	154	544
Total number of priority assistance funds	4	286	313	247	153	1,003
Total number of referrals to external switching services	189	181	320	217	101	1,008

Note: No referral mechanisms to energy supplier schemes are funded by Energy Redress, clients are referred via third party referral schemes.

Table 6 shows how many capital measures have been installed so far through projects in each round. It is evident that projects funded in the initial rounds have been able to deliver more capital measures than projects that have only just begun and may not have started engaging with their clients yet.

Table 6: Capital measures installed by round of funding (N= 64)

Capital measure	Round					Total
	1	2	3	4	5	
Total number of LED bulbs installed	2,975	452	0	259	44	3,730
Total number of radiator foils installed	330	183	0	2	11	526
Total number of power-down devices installed	76	0	0	41	0	117
Total number of slow cookers provided	57	0	0	0	0	57
Total number of heating controllers provided	18	31	65	15	0	129

Table 7 shows data provided by Energy Redress Scheme grantees that have been able to track what measures are installed in their clients' homes through other funding schemes as a result of their advice. These are broken down by measure type for each round. Draught proofing installations (189) were the most common type of measure installed overall, followed by replacement boilers installed (167).

Table 7: Measures carried out through other schemes following Energy Redress Scheme-funded advice by measure type per round (N= 64)

Measure	Round					Total
	1	2	3	4	5	
New heating systems installed	13	7	0	21	0	41
Replacement boilers installed	41	50	0	75	1	167
Loft insulation installations	8	6	0	7	0	21
Internal wall insulation installed	3	0	0	0	0	3
Room-in-roof insulation installed	2	0	0	0	0	2
Underfloor insulation installed	1	0	0	0	0	1
Chimney balloons installed	8	1	0	0	0	9
Cavity wall insulation installed	0	5	0	0	0	5
Air tightness tests	1	0	0	0	0	1
Draught proofing installed	7	179	0	3	0	189

5.1.2. Completed project metrics

Table 8 shows the key outputs that all completed Energy Redress Scheme-funded projects delivered.

Table 8: Total outputs that completed projects delivered with funding (N= 5²)

Deliverables	
Number of advice events held	172
Number of people reached at events	1368
Number of home advice visits	1155
Number of households given energy saving advice	2529
Number of households given other advice	3270
Total households reached with advice	5013

Table 9 provides an overview of the energy bill savings attributed to the completed grantees. As mentioned above, grantees are unable to track all savings achieved, so these figures are the savings that these grantees were able to reasonably quantify. It is likely that the actual savings will be higher.

Table 9: Financial analysis of completed projects (N= 5²)

Monetary factor	
Total grant funding received (£)	£244,567.06
Total actual energy bill savings from switching (£)	£89,063.48
Total estimated bill savings (£)	£44,877
Total estimated bill savings from small measures (LEDS, slow cookers) (£)	£27,012

² The results from one completed project are missing from tables 8 and 9 as they are yet to report these figures.

5.2. Overview of completed projects

As of the 20th of August 2020, six grantees have completed their projects. All five Round 1 grantees have come to the end of their projects and one grantee in Round 3 has also completed their project. Quantitative and qualitative data have been obtained from the interim and final report documents completed by each of the grantees. This section of the report provides an analysis of this data to highlight the project deliverables, positive outcomes, barriers and lessons learned. Since grantees report on their own targets, there is variation in the amount and quality of data provided.

In the interest of anonymity, grantee names and their locations have not been disclosed. Each grantee's project has randomly been assigned a letter to identify it.

5.2.1. Project deliverables

This section outlines the key outputs delivered during the course of the projects. Table 10 provides an overview of the key output metrics for each completed project (where targets have been met or exceeded this has been shown in green, where targets have not been met these have been highlighted in red). Every grantee that had targets on number of households reached or exceeded their target. In the qualitative reporting documents, it was made clear by many grantees that the demand for their services was much higher than anticipated, therefore grantees were able to surpass their expected targets considerably.

Two out of the three grantees that were providing other advice failed to hit this target. It is understood from the quarterly reporting that this was due to the volunteers focussing on their core priority of providing energy saving advice and other project deliverables, rather than addressing aspects of their clients lives which were less relevant to the scheme priorities. Projects that have not met some of their targets have all significantly exceeded other targets – this is often where projects have adapted over time in discussion with the development officers, which has allowed the projects some flexibility in addressing their overall project aim.

Table 10: Key outputs delivered by each completed project, by grantee (N= 63³)

Output	Grantee A		Grantee B		Grantee C		Grantee D		Grantee E		Grantee F	
	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target
Number of advice events held	77	148%	39	130%	-	-	-	-	51	2550%	5	100%
Number of people reached at events	289	289%	1079	108%	-	-	-	-	-	-	-	-
Number of home advice visits	422	65%	560	108%	68	-	-	-	7	-	98	123%
Number of people advised by telephone	810	1620%	100	77%	36	-	-	-	40	-	-	-
Number of households given energy saving advice	1717	275%	464	71%	30	-	-	-	220	110%	98	123%
Number of households given other advice	2568	411%	464	71%	30	-	-	-	166	83%	42	-
Number of training sessions provided to partners	3	75%	-	-	-	-	278	-	-	-	-	-
Number of organisations that attended training sessions	3	75%	109	363%	-	-	-	-	-	-	-	-
Number of people that attended training sessions	22	100%	481	241%	-	-	10	100%	14	127%	-	-
Total households reached with advice	2590	207%	1825	183%	31	-	9073	973%	469	117%	98	-

³ All six completed projects (including the project omitted from tables 8 and 9) are included in table 10.

Below is a list the grantees who have completed their projects, with their key deliverables outlined beneath their respective title. The aim of each project is different. Therefore, the grantees reported on different outcomes and metrics. The information reported here outlines additional information provided by the projects that has not been included within table 10. Note that the figures were reported by the grantees themselves in their quarterly reporting documents.

Grantee A

In addition to the referrals, telephone conversations with vulnerable customers as outlined in table 10, and 2,400 leaflets distributed, Grantee A has secured the following cost savings for their clients:

- £3,500 through the installation of a central heating system.
- £18,000 through the installation of nine replacement gas boilers.
- £21,500 through the installation of white goods.
- £11,511 of water bill savings through grant applications.

The total benefit to their customers was £195,787.

Grantee B

Grantee B engaged with clients at 45 promotional events and 38 presentations and trained 481 frontline workers. Grantee B also completed home visits to 560 individuals; 28% of these were to under 18s, 51% to those aged 19–64 and 21% to over 65s. They also fitted 1,678 small measures – the top three measures installed were LEDs (1,234), radiator foil (330) and door brushes (76). They have signposted 48 households onwards for large ECO funded measures such as new boilers, first time full central heating systems, cavity wall insulation and loft insulation.

The overall financial savings from the project were reported by the grantee as £65,082.06. This includes:

- Savings from switching energy supplier: £14,973.85.
- Savings from small energy saving measures: £20,866.07.
- Warm home discount applications: £20,300.
- Energy saving behavioural advice: £8,005.14.
- Other savings from water bills and broadband: £937.

Grantee C

Grantee C reported the following outcomes:

- Clients are more engaged in and have been given the opportunity to control their own heating systems at home.
- Engagement with the most marginalised and isolated groups of people enabling them to check price comparison websites and search for green energy suppliers.
- Development of a partnership with a local Citizens Advice project.

Grantee D

The aim of Grantee D's project was to develop and deliver unique new consumer information and advice about which heating controls products are easier to use for people living with a disability, through a widespread outreach and promotion programme. This was informed by three research elements – a consumer survey, product market research and usability testing of controls.

Grantee D promoted the findings of the project, signposting vulnerable individuals to their website. They launched their central heating controls research on their website in autumn 2019. This was positioned as the main feature of their newsletter (which has 5,200 subscribers) and elicited 176 direct click-throughs to the website. Over a three-month period, Grantee D has had 9,073 visits to the central heating section of their website.

Grantee E

Over the course of the project Grantee E has:

- Distributed 300 LED lightbulbs via Energy Champions.
- Promoted the project at public events.
- Made nine applications to The Children in Need Emergency Essential Programme; seven were successfully awarded.
- Successfully planned, developed and implemented an energy saving conference.
- Made 96 onward referrals for support.
- Educated 1000+ school children aged 7-11, in 33 schools.

Grantee F

Key achievements attributed to the project completed by Grantee F include:

- Distributed 74 slow cookers.
- Distributed 979 LED light bulbs.
- Organised and attended community events.
- Made 43 referrals to supporting agencies.
- Produced and distributed a cookbook containing slow cooker recipes.

5.2.2. Positive outcomes and how these were achieved

All completed grantees were asked to explain the extent to which they believed they had achieved their original project aim. All six grantees believed that they achieved their project aim; the key reasons for this are displayed in Figure 4. The chart shows that the most frequently mentioned reasons why grantees felt they accomplished their original project aim were because they reduced clients’ energy bills (67%) and they met or exceeded their targets (67%). Grantees who felt that they had achieved their aims by meeting or exceeding their targets specifically mentioned meeting their referral (3), home visit (2), distributing energy saving equipment (1) and engagement (1) targets.

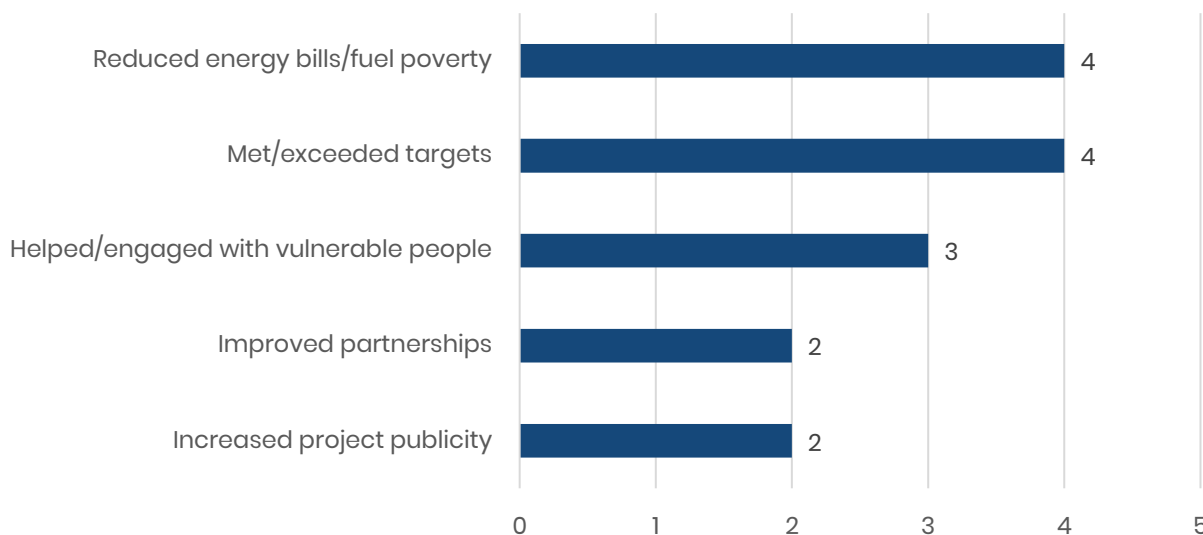


Figure 4: Key reasons why completed grantees believed they achieved their project aim (N= 6)

Specific comments from grantees which explained why they felt they met their initial project aim included:

- *“We have enabled the most marginalised and isolated group of people to have the opportunity to engage in this project. To some clients it has introduced them to the world of technology for the first time. This has had so many benefits, having the ability to check price comparison and more green energy suppliers. Ethics and finance are important to many of our clients.”*
- *“The original aim of the project was to reach out to the community and give advice to households, so work towards reducing fuel poverty in the community. We have done this through the 98 home visits, compared to the target of 80 households, that have been carried out where households obtained advice and energy efficient measures. This project has therefore been more successful than we had expected and has encouraged the people of the community to talk more about energy efficiency.”*
- *“The aim of this project was to reach those households who are not currently engaging with our existing statutory services and view them as a barrier, therefore, not accessing the support available. By engaging with our Energy Champion programme those households were able to receive information and advice regarding affordable warmth and will be supported to access our mainstream services.”*
- *“Fuel poverty is reduced through the following four actions: (1) Switching to lower energy tariffs, (2) Maximising household income, (3) Increasing the energy efficiency of the property, and (4) Increasing energy efficient behaviours of household members. We consider our activities to be highly successful.”*
- *“Overall, we have achieved our initial aims of the project. We have become a well-known advice agency across our region, not just the three original local authorities we specified. We have completed 133 revisits which we would not normally have been funded for. We have completed 559 home visits and recorded 100 phone calls of advice given. We have networked with 109 organisations over the project generating new referral partners.”*
- *“We believe we meet the original aim of the project. We have produced unique consumer insight into the accessibility, or otherwise, of a wide range of heating controls. We also produced relevant consumer guides on what to consider if you are purchasing new heating controls or discussing your needs with a salesperson or engineer.”*

Grantees reported what they felt were their most significant deliverables. Figure 5 displays the most commonly mentioned deliverables. Referrals, home visits and events were all mentioned by half of the grantees that have completed their projects. The quantitative data for deliverables are presented in Table 10.

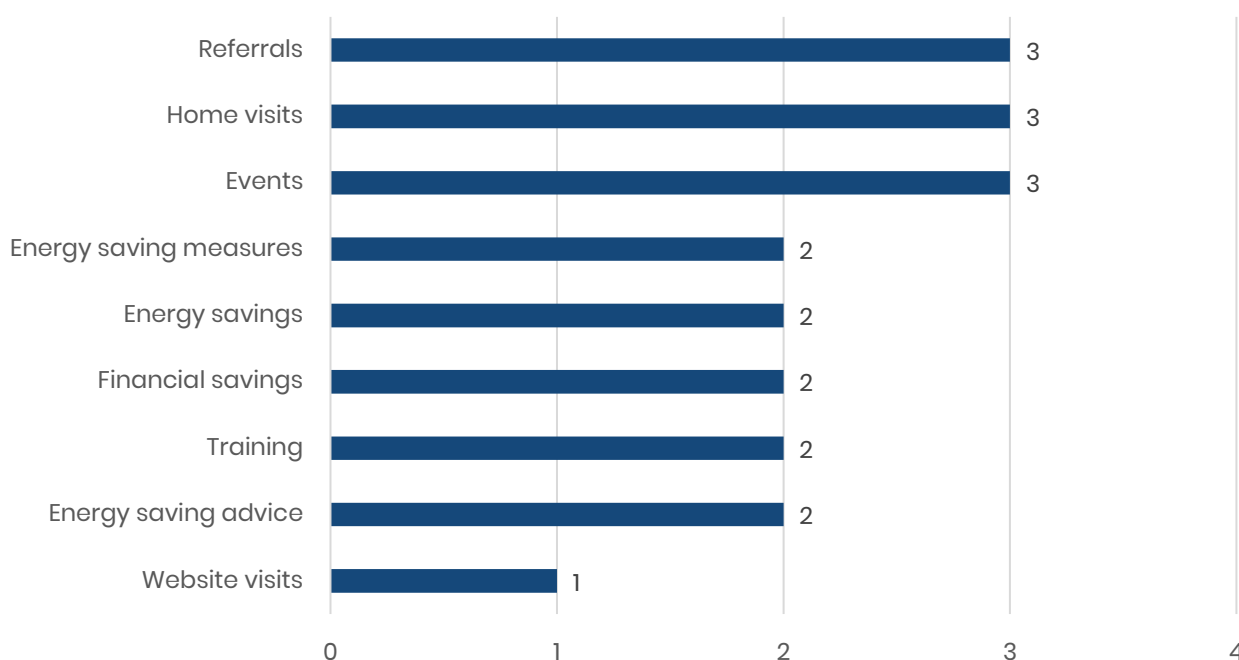


Figure 5: Grantees most significant quantitative deliverable (N= 6)

The most significant outcomes were also highlighted by each of the grantees who have completed their projects. The two most common positive outcomes mentioned by the grantees were:

- Positive working relationships with partners.
- The improvement on their clients' lives.

Partnerships

All grantees that had completed projects reported that **partnerships** were one of their most important outcomes. These grantees noted that the benefits of working with partners included sharing best practices and services, acquiring funding and introducing each other to clients. Specific quotes from grantees regarding partnerships are as follows:

- *“The partnership with some of the heating control providers have been very significant. Our partners were very generous, lending us heating controls and smart technology for the workshops; from which the bulk of our consumer insights were created. We hope to develop and grow these partnerships in the future as the interface between consumers, heating controls and smart technology emerged as an important issue during the workshops.”*
- *“From one small project, we have managed to develop a strong partnership that has enabled us to work together to reduce inequalities. It has also been the catalyst for us to apply for grant funding to further develop the initial project, which will help us to build our reputation further, and be more attractive to other funders.”*
- *“We were able to use the launch of our project to engage with new partners. We attended events with these partners and will keep them updated regarding our services so they can continue to refer their clients/members to us for support around keeping warm and well at a low cost.”*
- *“Delivering this project helped to identify new key partners who could support our commitment to tackling fuel poverty by giving residents the very best chance of a poverty free future.”*
- *“Another outcome is the good partnerships that we have created, which hopefully will continue after this project.”*
- *“We have connected with 109 organisations to make front line workers aware of our service and also enable them to further help their own client(s).”*

Improving the lives of clients

Improving the lives of clients was a significant outcome mentioned by five grantees. This aspect was discussed at length in their end of project reporting documents and various benefits were mentioned, including improved health and wellbeing, reduced loneliness and isolation, reduced fuel poverty, reduced deaths and increased independence. Comments from grantees relating to social benefits included:

- *“Two-thirds of the health conditions recorded can be connected or exacerbated with a cold home and fuel poverty, therefore by advising and assisting these households they may see improvements in their health conditions. We also helped to combat loneliness and isolation just by being the first person certain residents have chatted to in weeks. We aren’t judgemental and as energy advice is seen as non-threatening people open up to us a lot more.”*

- *“For me, it was the opportunity to provide support to a family who were at crisis, who felt that they had nowhere to turn and at breaking point. Helping that family connect with local support, including food parcels, emergency fuel vouchers and Keep Warm Packs for both mum and her daughter. Witnessing the impact this support had and what it meant to them made me feel incredibly proud to be helping people who needed it most.”*
- *“The qualitative outcomes that came out of the project are that people are talking about energy efficiency among the community. The positivity towards the project has been great with those who received home visits coming and saying thank you for them and for the help and also compliments about the staff carrying out the visits being pleasant and professional.”*
- *“Each year NEA (National Energy Action) publishes a report detailing how many deaths they consider to be directly attributed to people living in cold homes. Sadly, this figure continues to be above 10,000 each year. Through the provision of our advice and support we enable vulnerable residents to take actions necessary to escape/evade fuel poverty, and the likelihood of succumbing to the respiratory and cardiovascular conditions that comprise the majority of excess winter deaths.”*
- *“The project has been a visible presence across many local communities within the borough. The programme became a go to place of support for many local communities.”*

Other noteworthy aspects that were only mentioned by one grantee each included:

- **Mitigation of climate change:** *“We engaged with many residents who were keen to take action to reduce their household carbon footprint. We estimate our project has saved at least 190 tCO₂ through reduction in household energy demand. This is the equivalent of taking 49 petrol cars off the road.”*
- *“The production of the **Slow Cooker recipe book** was also a great outcome as it provides information on energy efficiency and also on how to cook good meals with cheap cuts of meat and vegetables and so will help impact on health and well-being.”*

- **Improved relationship with clients:** *“We have been the impartial adviser to so many vulnerable people, who know that if they phone us, we will come out to see them and help them.”*
- **Independence:** *“During the follow up calls we have noticed a number of people have been empowered to switch suppliers on their own since the visit and some are planning to do so in the coming months as tariffs come to an end.”*
- **Reduced social isolation:** *“We designed this project with face-to-face advice being at the heart of our interactions with residents. We were continuously, pleasantly surprised by the amount of people who were happy to chat to us on their doorstep. We encountered many residents who would otherwise have had nobody to speak to that day (longer in some cases). For these people the fact that we knocked on their door helped reduce feelings of social isolation.”*
- **Reduced stress:** *“Our case studies and follow ups have shown that by taking on the worries and issues of a resident we relieve a lot of stress and worry from them, helping their long-term wellbeing.”*

5.2.3. Barriers and how these were overcome

Grantees identified the barriers they faced when undertaking their projects. Since each project has different aims and objectives, and different methods of delivering these, the challenges they faced also varied, and were specific to their project type. Nevertheless, three different types of barriers were mentioned by more than one grantee; these were:

- Public engagement.
- Project delays.
- Staffing.

Public engagement

Four grantees specifically highlighted difficulties connecting or engaging with the vulnerable people they were targeting. The reasons they gave were limited willingness to engage in the project and a decline in demand during warmer weather. These grantees also noted how they overcame the issue of community engagement. They explained that effective project marketing, best achieved via word of mouth, was key to improving public interaction. Specific comments from grantees included:

- *“When delivering the project, the main barrier was trying to get the community involved and wanting to partake in the home visits. Social media brought very few referrals for home visits but when we carried out an event and got a few referrals and had these home visits carried out, word of mouth created the majority of referrals for home visits. The next barrier we faced was then being able to organise the times of the visits, but we eventually got through the barrier.”*
- *“One barrier was that residents weren’t always at their homes. We ensured all residents would be able to take advantage of our advice and support even if they weren’t home when we knocked on their doors. We did this by first delivering a leaflet to them, letting them know that we were in their area and would be knocking on their door. We also provided them with the number for our advice line that they could phone, free of charge, and we provided them with details of at least one community energy advice drop-in.”*
- *“During the summer period we saw a steady decline in demand for the programme because the warmer weather focused resident’s priorities elsewhere and our strategy was to focus on attending community events taking place regularly throughout the summer and focus on energy consumption reduction.”*
- *“Lack of interest in the project from clients was a big barrier. I understand more publicity helped somewhat. I think back over the project, the numbers were low, this was a hard model to sell to clients, however the impact made up for that.”*

Project delays

Two grantees discussed how delays caused problems for their project delivery. Both grantees aimed to collect data to aid their research, but project delays resulted in a smaller sample size than they had originally planned. Despite this issue, the grantees both believed that they were able to obtain sufficient information that would help them achieve their projects aims. Specific quotes are as follows:

- *“Due to unforeseeable delays in creating an app that effectively recorded the information we wanted, we didn’t start completing full questionnaires until later into the project which is why some of the data only has a sample size of 370. Equally we didn’t start recording telephone conversations until halfway through the year, so our actual number of advice phone calls is probably higher than 100.”*

However, the sample size of completed questionnaires has been large enough to gain a lot of insight.”

- *“The start date of the project was delayed and therefore we were surveying people during a heatwave, so the importance of the topic may not have been at the fore of most people’s minds. However, by trying to articulate the benefits to disabled and older consumers of having the right heating controls (and knowing what to ask for) we got good support from our panel members.”*

Staffing

Two grantees stated that staffing the project was a major challenge. In these two cases, staff leaving and retaining volunteers were the issues. As explained below, the two grantees adapted to this by finding a staff member who had once worked on the project in a part time role and offering a permanent full-time role, respectively:

- *“As with any medium/long-term project, there is always the possibility that key members of staff might be absent/unavailable for a prolonged period or might leave the organisation. We are able to deliver recruitment drives very quickly and were required to do so during the project when our primary energy advisor departed. We were able to recruit someone who had worked on the project previously in a temporary capacity, assisting clients over the phone. In the interim, other members of the team were able to cover key tasks, such as attendance at community events.”*
- *“As the programme progressed, it became obvious that retaining volunteers would be an issue, with feedback suggesting that a more structured role should be created for those who prefer that style of working and be offered alongside the current one. Moving forward we will develop a tiered volunteer offer, which people can choose. The tiered offer will include, light touches, community engagement and a more formal structured role which will be based on the needs of the project and skills of the volunteer.”*

Other barriers

Other barriers that were only identified by one grantee each included:

- **Scope:** *“As energy advisers it is difficult to know where our intervention stops and another organisation’s begins, we can’t solve every problem for a resident. This is why the networking and training we do provides good referral partnerships within local areas to ensure onward referrals are made to the relevant places.”*
- **Help for hoarders:** *“We are still facing massive barriers when it comes to help for hoarders. There still isn’t much help or funding in place to get people the mental and physical help they need to clear their homes. When it comes to the warmth of their homes there are many houses that couldn’t have new boilers or central heating because of hoarding issues. This barrier is an ongoing issue that we are yet to overcome.”*

5.2.4. Lessons learned

Grantees were also required to report on their lessons learned. Due to the diverse delivery methods of the different projects, the lessons learned varied across the different grantees. Three aspects were mentioned by more than one grantee, these were:

- The importance of home visits.
- Promotional activities.
- The benefits of simple energy saving measures.

Home visits

Two grantees explained how they realised the effectiveness of home visits over the duration of their projects. One grantee explained that home visits allowed them to get into the property and understand the real issues that their clients are facing, as well as allowing them to discover issues that would otherwise be hidden. The second grantee explained the benefits of home revisits, which enables longer term support to clients. Specific comments from these grantees were:

- *“We found doorstep advice delivery to be greatly successful, allowing us to find the hidden need for our advice and support in properties where the residents have never previously engaged with us or our partners. We have been keeping our partners updated regarding the progress of our project, and we will be presenting them with a final report so they can see what we achieved. We will be keen to advise them, whenever possible to knock on doors to find new clients.”*

- *“One of the successes of the project has been the ability to offer additional visits to residents, which we have shown is often required to ensure a resident feels happy to go forward unassisted. Our aim is always to help empower customers to continually monitor their energy usage and bills in order to prevent any fuel poverty issues developing in the future. However, certain customers require additional visits due to mental/physical health conditions, cold homes, and disputes with landlords, explaining bills and switching, debt and meter issues etc.”*

Promotional activities

Two grantees shared their lessons learned on promoting their project. One grantee found that word of mouth is the most effective way to promote the project in a small community. Another grantee found that providing free energy saving measures was an effective way to raise project awareness and also noted that the marketing message needs to evolve with the weather. Specific comments are as follows:

- *“The most important learning point is the power of word of mouth in a small community. This created more response to our project than that of social media and local media issues. Also, the fact that we want to help the community showed us that this is greatly appreciated and receiving thanks showed that.”*
- *“We are always learning what promotional techniques work and we have to adapt to suit the time of year and what the customer wants. Quite often the offer of free lightbulbs gets us through the door only to find there is plenty more we can help with. Equally we are having to market our visits differently in summer to winter. For example, in winter talking about boilers and draught proofing is effective, whereas now it is, ‘fix your energy tariff before winter to build up credit or are you ready to apply for the warm homes discount’. However, it is quite clear that we get more visits in areas where we do presentations and events. Therefore, the technique is to make ourselves known to community groups, organisations and the public via face-to-face interactions where we can introduce ourselves, and show that we are a friendly, local team.”*

Simple measures

Two grantees reported that they felt there were advantages to smaller, cheaper and easier to install measures. These grantees found that in some situations simple

measures which do not alter the way that people live in their homes too much are helpful in engaging vulnerable people. Specific quotes were:

- *“We have learnt that certain energy saving measures are taken up by customer because they are easier to implement, i.e. Radiator foils and installing energy lightbulbs, because once they are installed there is little action required by the resident. Whereas other actions will save residents more money but require them to maintain this behavioural change.”*
- *“I think smaller, cheaper equipment such as magnifiers, and other low vision equipment could work well and be far more accessible to clients on lower incomes.”*

Other lessons learned

Other lessons that grantees have learned when completing their projects which may benefit grantees in the future included:

- **Working with partners:** *“I think looking back over the project, the numbers were low, I would have preferred to have worked jointly with other organisations, and set up a referral pathway, identifying those most ‘at risk’. However, this does not reflect badly on the project we delivered, it’s an observation from someone who came in at the end of the project. Often, it’s the simpler approach that can have more impact.”*
- **Clearly explaining the benefits:** *“We also only looked at the heating controls themselves but not, in the case of the smart heating controls, the technology that enables them to work and how disabled and older use apps etc. We think if we had taken more of a systems approach to the subject we might have come up with a more in-depth rounded piece of work. We also felt there are issues of prevention that could be highlighted more. Changing heating controls is not an impulse decision and one that can be perceived as quite complicated. However, a clearer articulation of the benefits of having greater control over your heating could prompt more people to switch to smarter and more appropriate controls.”*
- **Identifying vulnerable people:** *“We are always coming across new types of vulnerability and groups of people that could benefit greatly from our service. For example, care leavers and young people living alone, either leaving education or during education. One issue we are still facing is how to identify the most isolated and vulnerable members of the community, those who don’t have family and*

don't go out. When we get to them, we can help them massively but how do we reach them, the only way we could think of is via radio or tv adverts as they are the only things that residents have on all the time."

- **Utilising fuel poverty statistics:** *"There is always a time delay in the publication of these statistics. Using the 2017 data published in 2019 we now know fuel poverty in our local ward was estimated as affecting 21.2% of residents. In future years we'll be able to compare this with estimates for the ward following our interventions."*
- **Importance of referrals:** *"Having good referral routes between organisations can make a massive difference to residents. Some residents have commented that since one organisation came out to see them, they have had a number of other visits, and that they never knew all this help was out there."*
- **Raising awareness:** *"We have discovered that out of the households who aren't aware about the Warm Homes Discount, 77% of these are households with people under 65 in them. A lot of people don't realise that the Warm Homes Discount isn't just for older people and are therefore missing out."*

5.2.5. Project legacy

All six grantees will continue to deliver their project and support vulnerable people in some form and two grantees have applied for further funding from the Energy Redress Scheme. Specific comments from these grantees of these completed projects regarding legacy are as follows:

- *"We have clearly discovered that there has been a need for this service across our area. We have shown that there is a need to offer residents revisits if required, therefore we will continue to bid for money related to additional visits as certain people can't be given all the help they need in a one hour visit. Despite the Redress coming to an end, we will continue revisiting certain residents as they require it because their needs always come first, and we will not leave them alone if we have yet to resolve their issues."*
- *"The legacy is the existence of consumer tested heating controls that are targeted at disabled and older people who might struggle with standard or more traditional controls. The fact that it has been tested by people with a lived experience of disability means that the guidance and information have an authenticity and relevance to this group of people. We will maintain the*

information on the website and ensure it is promoted through our newsletter and other communication channels.”

- *“We have recently had contact from two clients who needed follow up support, mainly having problems with Alexa, we took a technology volunteer to visit the clients and managed to resolve the issues. We will continue to support any clients of the project in any way we can.”*
- *“Our volunteers will continue to operate across the borough and are encouraged to attend quarterly meetings. Our staff will continue to receive updates via the partnership to help them stay connected and up to date with new service developments.”*
- *“We are looking for further funding to continue the project and have applied to Round 6 of the Energy Redress Scheme. The legacy of the project is that the community has gained knowledge and experience which can be passed on down the generations but also used to support each other in energy efficiency and fuel poverty matters. The project also produced a slow cooker recipe book which will be a legacy of the project as the community use it and their slow cookers to prepare meals.”*
- *“We were successful in our recent bid to the 5th Round of the Energy Industry Voluntary Redress Scheme. Through our new project we will continue to support the locations that we have been working in for the past twenty months. We are also taking our learning into another local area where we will deliver the same pattern of weekly leaflets, drop-in energy advice events, door-knocking and home visits. Both areas will be served by the new project for the next two years.”*

5.2.6. Case studies

Five of the completed grantees provided case studies to demonstrate the impact of their projects. For the purpose of anonymity, each case study is provided with a pseudonym and the names of any grantees or locations have been replaced. These are provided in Appendix 1.

5.3. Projects in progress

Quantitative and qualitative data have been obtained from quarterly reporting grant documents which were completed by each of the grantees. We have selected nine projects from rounds 2, 3 and 4 for this evaluation, in order to provide a broad overview of the progress of projects that are yet to complete. The projects were chosen for analysis via a combination of recommendations from the Energy Redress team to ensure a variety of projects and random selection. Three projects were selected from each of rounds 2, 3 and 4 in order to include projects at different stages of progression.

This section of the report provides an analysis of this data to investigate the projects' metrics, learnings from the projects thus far and an understanding of any perceived issues or barriers in completing these projects. Charites from Round 6 onwards are yet to submit sufficient data for analysis as they were still in their initiation phase at the point they submitted their first reports. Round 5 projects are also early on in their progress so were excluded from this part of the analysis.

Since grantees report on their own targets, there is variation in the amount and quality of data provided. In the interest of anonymity, grantee names and their locations are not disclosed. Each grantee has randomly been assigned a letter to provide it with an identity within the report.

5.3.1. Project deliverables

Table II shows the key outputs delivered by each project in the sample. Where the output is highlighted green, the project has met or exceeded their target already. None of these projects have yet completed their work programme so are not expected to have achieved all their targets. For example, Grantee L has provided 66 households with energy saving advice, which is 66% of their target. Since they are only 46% of the way through their project, they are delivering this output ahead of schedule and are therefore highlighted green.

Outputs that are highlighted amber are those where targets have not yet been achieved. Many of the grantees who are not yet achieving their targets are still in the early stages of their project lifetime. Many projects deliver fewer outputs when they first start because in the early stages of development projects are more focused on the initial set up work, such as recruitment and training and less so on project activity. It is

also worth noting that COVID-19 has had a major impact on projects' ability to deliver their outputs and achieve their targets.

Table 11: Key outputs delivered by each project in the sample (N= 9)

Output	Grantee G		Grantee H		Grantee I		Grantee J		Grantee K		Grantee L		Grantee M		Grantee N		Grantee O	
	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target
Funding round	2	-	3	-	4	-	2	-	3	-	4	-	2	-	3	-	4	-
Project completion in months	19	79%	16	67%	11	46%	19	79%	16	67%	11	46%	19	79%	16	67%	11	46%
No of advice events held	13	260%	18	120%	12	30%	82	683%	7	-	7	70%	14	70%	-	-	-	-
No of people reached at events	189	378%	132	110%	318	53%	622	259%	631	-	119	119%	547	55%	-	-	-	-
No of home advice visits	-	-	-	-	-	-	55	-	77	55%	172	86%	65	65%	200	22%	69	35%
No of people advised by telephone	-	-	-	-	14	-	677	170%	196	196%	191	382%	391	26%	187	19%	62	-
No of households given energy saving advice	111	-	132	110%	-	-	678	136%	588	47%	66	66%	386	129%	291	29%	30	6%

Output	Grantee G		Grantee H		Grantee I		Grantee J		Grantee K		Grantee L		Grantee M		Grantee N		Grantee O	
	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target	Total	% of target
No of households given other advice	-	-	132	110%	-	-	568	114%	241	241%	103	103%	206	69%	527	53%	30	10%
No of training sessions provided to partners	12	240%	5	50%	6	30%	4	-	-	-	-	-	9	-	1	100%	-	-
No of organisations attending training	11	5.5%	19	-	-	-	4	-	-	-	-	-	37	-	9	100%	-	-
No of people attending training	238	95%	81	81%	74	74%	184	307%	-	-	-	-	67	-	9	100%	-	-
Total households reached with advice	640	128%	132	-	349	58%	1237	55%	588	47%	503	44%	899	36%	532	27%	112	19%

 - Project has met or exceeded target

 - Project has not yet achieved target

Grantee G

The aim of Grantee G's project is to support vulnerable energy consumers in creative ways. This will provide support capacity and understanding for people with learning disabilities and/or autism, some of whom have enduring mental health issues making them amongst the most vulnerable in society. The project will give innovative, accessible and interactive advice and training about energy and energy providers where understanding is limited; developing accessible ideas through piloting innovative work with partners and engaging people to speak confidently to energy providers giving maximum impact for vulnerable adults.

Grantee H

Grantee H's project aims to support new and expectant mothers and families with young children by helping them maintain a warm and healthy home. The project aligns with the fund criteria by supporting energy consumers in vulnerable situations, both before and after the arrival of a new child. Supporting vulnerable consumers is key to the project, and a holistic package of assistance has been developed to ensure new and expectant mothers are supported.

Grantee I

Grantee I's project aims to improve housing conditions for vulnerable residents living in the worst performing privately rented properties. The project will do this by raising awareness of Minimum Energy Efficiency Standards (MEES) and the Housing Health and Safety Rating System (HHSRS) amongst tenants and landlords, as well as increasing energy literacy and empowering tenants to act.

Grantee J

The aim of Grantee J's project is to enable disabled people and those with limiting health conditions to become more informed, safe and effective consumers of energy. A holistic approach will address the barriers that disabled people face in engaging with energy markets and making their homes more energy-efficient, empowering

beneficiaries to participate fully in mainstream energy markets. The project aims to deliver crisis management interventions where needed and also enable beneficiaries to undertake “Prevent First” actions that will permanently reduce their risk of fuel-poverty. The project will also measure the extent to which this has been achieved by the beneficiaries.

Grantee K

Grantee K’s project aims to deliver an impartial, free, targeted advice and home visit service to the fuel poor. Vulnerable people will access energy advice to gain grants and benefits, tackle their fuel bills and fuel debt, maximise income and obtain advice through referral to other services as needed. This service will provide the in-depth, tailored advice needed to complement services offered by others.

Grantee L

Grantee L’s project aims to keep vulnerable elderly people warm and independent in their own homes. The project will reduce their risk of living in fuel poverty and reduce their customers’ risk of unnecessary admission to hospital or being forced into a care home. The service will provide independent, quality-assured energy efficiency information, advice and advocacy. It will also supply and fit equipment to make the customers’ homes more energy efficient, reducing their fuel bills and carbon footprint and measure improvements in people’s health and wellbeing.

Grantee M

The aim of Grantee M’s project is to establish an independent and holistic local energy advice service which is nuanced, compassionate and flexible to the needs of callers. Over two years, it will directly support 2600 vulnerable households to reduce their energy bills and be healthy and warm at home. It will also earn the trust of householders, health care and third sector partners and through this will lay the basis for sustained future support beyond the end of the project. This will allow many more vulnerable households, furthest from the energy market, to be supported in the future.

Grantee N

The aim of the grantee N's project is to reduce fuel poverty by making it easier for everyone to access energy advice and by identifying and supporting those who struggle the most to pay for fuel. The project aims to have a positive impact on people's health and wellbeing and give them a greater sense of control over their lives. The aim is also to enhance understanding of the complex range of factors which cause and contribute to fuel poverty and identify the most effective ways of supporting people to make sustainable changes which will reduce fuel poverty.

Grantee O

Grantee O's project aims to create confident energy consumers by providing an advice and advocacy service to vulnerable consumers. These consumers are vulnerable because of economic change, age, disability, chronic illness or having young children. This aligns with the Fund's priority of supporting vulnerable consumers at different points during their lives. The service aims to work with local pharmacies to increase take-up. The project will provide energy advice and advocacy to alleviate their risk of fuel poverty. This will include advice on energy saving in the home, billing and smart metering.

5.3.2. Learnings gained thus far

Since these projects are yet to be completed, these grantees have only reported on their lessons learned thus far and have not completed the full final report which reviews delivery overall. Figure 6 shows that ways to address the impact of COVID-19 (67%) was the most frequently reported lesson learned from these grantees. COVID-19 has undoubtedly had a significant impact on all of the projects and therefore the analysis of COVID-19 related learnings has been addressed at length in its own sub-section further on in the report.

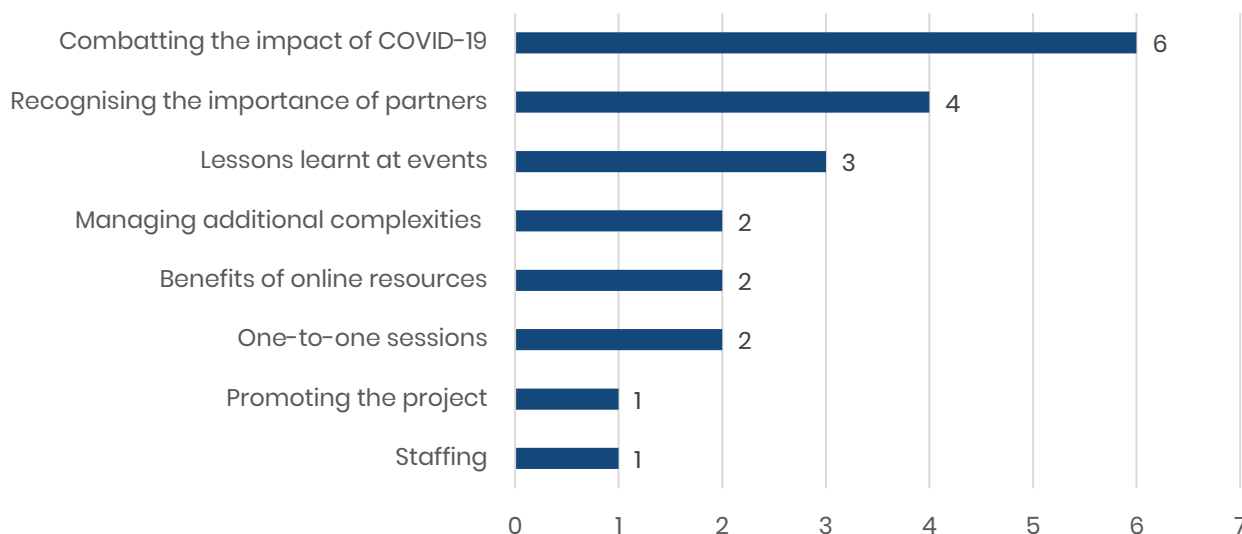


Figure 6: Lessons learned by grantees whose projects are still progressing (N= 9)

Aside from the impact of COVID-19, recognising the importance of partners was the most frequently mentioned learning point highlighted by grantees in the sample. 44% of these grantees explained how partners can help to deliver targets, improve the quality of the project outputs and help the grantee reach out to vulnerable people. Specific comments included:

- *“This quarter we have been in contact with a number of local authorities around the country, learning about their work in the private rented sector, their experiences of compliance and enforcement and the challenges and successes they have faced. We have been sharing this knowledge with the local authorities we are working with and will be incorporating the learning into future follow up meetings with key stakeholders.”*
- *“Good partnership work is really useful for discussing case studies, joint working and sharing good practice, funding opportunities and new initiatives.”*
- *“We have had meetings with our partner who is very interested in us delivering the sessions in house for their service users, and we are looking at opportunities to work together for them to provide the signer for our sign over on the eLearning modules so that deaf and hard of hearing individuals can access the service. There are also a lot of other organisations out there that can support the project, and we have been working with them to make sure that the service user has a clear pathway. For example, we are working with an organisation to effectively*

refer into their service so that individuals will receive free energy saving appliances and access their boiler insulation programmes.”

- *“Having some built-in flexibility in what and how we deliver with a supportive funder is invaluable.”*

A third of the grantees in the sample reported that they learned valuable lessons via events. These lessons included recognising the benefit of sharing knowledge with professionals, the ability to identify those who need in-depth one-to-one support and working out how to adapt their events in order to better connect with their audience. Quotes from grantees are as follows:

- *“Attendance at events allow us to discuss the project with a range of frontline professionals and gain their insights on their current level of knowledge on fuel poverty and energy efficiency. The feedback, specifically from both community and student midwives, was extremely positive and reiterated the need for this training and support for their vulnerable service users. One Student Midwife working in a deprived ward said the information is specifically useful for her as she starts her career.”*
- *“We have identified that there is a high demand for energy workshops and that these generate a lot of well needed one-to-one support. So, we are looking to change our delivery model slightly and run more workshops, as this helps cut down barriers allowing people to open up and come to see us for advice.”*
- *“At our most recent organised event, we learnt the following lessons:*
 - *There is need for flexibility; more visual aids; staff/trainer to trainee ratio may be an issue in larger groups. In bigger groups some advance planning and pairing of delegates may resolve this, possibly into mixed ability pairs where possible so that they can work and engage together with the training.*
 - *After the break, the training session continued to go well, but did become trickier because the subject matter was more difficult for the group to understand.*
 - *The group had a good discussion about bills and tariffs and came to the conclusion that a trusted circle was needed for people to support them to switch. People understood that a tariff could be fixed or variable but did not understand the unit cost. People thought that auto switching services were a good idea.”*

Two grantees reported that they have learned to identify and manage the additional complexities that vulnerable people are struggling with. Additional complexities are the other issues which grantees discover that lie beyond the initial problem they originally set out to resolve. These two grantees both acknowledge that addressing these additional complexities is time consuming, but also note that it is necessary to tackle all of the vulnerable person's underlying issues. Specific comments on additional complexities included:

- *“The demand and complexity of fuel poverty in the cases we take on can be very complex. We are finding that it is not unreasonable that we are working with the clients for over three months. Because of this we may need to look at our way of working so to still increase the amount of people we are able to reach out to.”*
- *“Home energy visits are providing much greater opportunities to reduce domestic energy costs by discovering issues that the client was not aware of. However, this has also uncovered much greater complexity than anticipated resulting in more time investment per client. Adding to the general complexity has been a high number of billing issues, often involving issues arising from energy suppliers going bust, meter problems, and ‘bill-shock’ after long periods of estimated bills. These cases often involve many follow up interactions with suppliers over weeks and months to get full resolution.”*

Other valuable lessons learned by grantees included:

- **Benefits of online resources:** *“We are learning to use new technology for internal and external communication and understanding the risk of exclusion for those isolated and lacking the means to connect digitally. We have been learning about online platforms and how they work for the different users, working on engagement methods that are best suited for online delivery and adapting content to ensure it is accessible, sensitive and reflects current circumstances.”*
- **One-to-one sessions:** *“Some of the energy advice sessions have identified participants who are experiencing complex energy-related problems which have necessitated a one-to-one session with our staff to resolve. Whilst there is no capacity within this project to deliver one-to-one advice, we have other funding streams which have enabled us to respond to this need. Whilst this is a suitable solution to this issue currently, it has highlighted that there is a need for greater one-to-one support for new and expectant mothers. We will continue to provide*

this additional support for as long as funding and capacity continue to be available as we see it as important added value to the services we provide.”

- **Promoting the project:** *“It is clear that the Priority Services Registers are not known about by very many people, including professionals and health workers. We are making every attempt to publicise the Priority Services Registers whenever there is an opportunity.”*
- **Staffing:** *“It has taken time to recruit to the two posts which are crucial to delivery. The specialist nature of the roles and the rate of pay required to attract the calibre of applicant has been a learning point.”*
- **Gaining feedback:** *“More and more vulnerable clients with multiple issues mean it’s difficult to get people to ring back for evaluations, but also that clients stay ‘live’ with us for ongoing contact to help resolve issues. Might need to look at how we gather feedback info for our records of measures taken/ results for clients.”*
- **Demand for home visits:** *“We are taking less calls than anticipated, but demand for home visits is high. Those who are calling the service really do need the help and advice it offers – as the case studies we have gathered show.”*
- **Wider social benefits:** *“The results from the well-being surveys indicate benefits beyond financial gains and is a potentially important contributor to social gain. If our interventions can facilitate improvements in confidence in dealing with problems, these clients are more likely to implement suggested measures and deal with future issues themselves. This includes clients managing their own tariff switches, applying for grants and discounts.”*
- **Overcoming language barriers:** *“Many of our clients have very limited or non-existent ability to read and write in English, even if they can speak English. This is because their first language is Mirpuri, which has no written form. This means we can give them verbal advice only, but we are not able to reinforce verbal advice with written advice. We are looking at ways that we can overcome this by providing written prompts that can be understood by people with very little or no written English.”*

5.3.3. Project issues and resolutions

All nine grantees in the sample have reported on the issues they encountered as they progressed through their project and explained how they resolved them. This section

provides an analysis of this data. Figure 7 shows that all grantees with projects still underway that were evaluated in this research noted that COVID-19 was an issue. As COVID-19 has had such a substantial impact on the grantees of the Energy Redress Scheme, it has been analysed in its own sub-section (section 5.4).

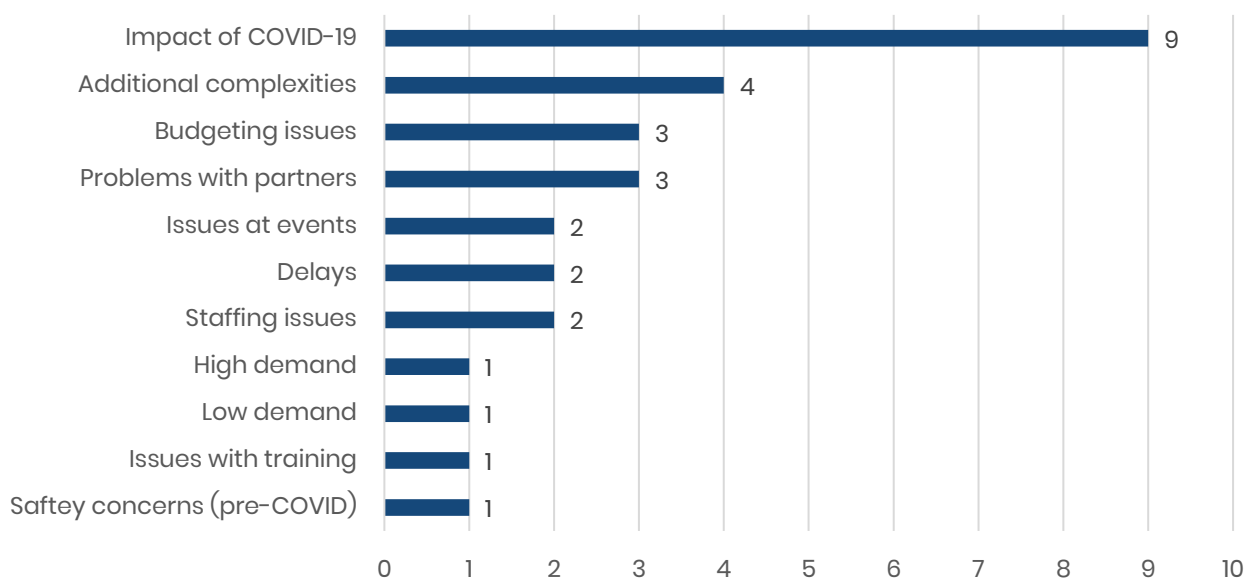


Figure 7: Issues identified by grantees whose projects are still progressing (N=9)

Discounting the impact of COVID-19, the most frequently mentioned issue identified by grantees was the additional complexities that clients faced. 44% of the grantees in the evaluation explained the problems associated with clients who are struggling in a multitude of ways, not just the issue(s) that the project originally identified. These vulnerable people need further support, which requires more time and resources. To address this issue, grantees reported that working with partners, prioritising vulnerable people with multiple problems, face-to-face home visits and referrals can be of benefit. This is explained by grantees in more detail below:

- *“Clients have very complex cases. We are seeing some very complex cases where clients have no income and no gas and electricity living in very serious conditions.”* **Solution:** *“As a matter of priority we are working with local authorities and energy providers to rectify these cases and in some circumstances this means that it is very time consuming and we will not always be able to meet our high targets as our advice work is very complex and involves a lot of navigating on behalf of the client.”*

- *“Multiple issues with clients proving difficult to resolve some situations. Many new organisations now helping people with different funds across our local area – co-ordination is needed.” **Solution:** “Prioritising anxious clients to ring back straight away. Referring on to other agencies and increased signposting. Robust and effective referral systems developed with organisations within our project – making a distinction between those in fuel poverty/ self-isolators etc, safe recording systems, staying with clients. Keeping to our message of energy advice, referring prepayment meter clients in difficulties for extra help, advising credit meter clients to keep warm and safe and keep in touch for help down the line as restrictions ease, to tackle debt/ problems then.”*
- *“We are finding a greater complexity around many of the calls than expected. It is proving difficult to support many callers just on the phone.” **Solution:** “They would really benefit from a face-to-face home visit. But, given that we could easily exceed our current home visit target, we are becoming concerned that we don’t have enough funding for home visits.”*
- *“Many of the Energy Champions have commented on the increasing complexity of client cases and that it is taking a lot longer to resolve all issues than anticipated, particularly billing related. In one case the client has had 43 interactions in less than three months.” **Solution:** “Where relevant, clients are being referred to other organisations who can help. However, it is felt that in most cases these particularly vulnerable clients need the additional time to get a successful resolution.”*

Issues relating to project budget was another frequently mentioned problem that grantees encountered. 33% of the grantees in the sample reported that that they did not allocate sufficient budget to certain aspects of their projects. Solutions to this problem included applying for more funding, making the most of the available budget and utilising partnerships to share their resources. Specific comments from grantees are as follows:

- *“Lack of budget to provide insulation measures and a handy man service.” **Solution:** “Although we have some basic measures, we can put into place for the project i.e. energy efficient light bulbs and water saving measures we feel that we have under budgeted for this service and we would like to open up a conversation with the funders to speak about this. In the short fall to help cover*

this we have been using a partner who already provides this provision across our local area and we have seen some successful outcomes already.”

- *“We had budgeted to print 1500 cardboard thermometers. However, when we came to purchase them, the type we wanted was no longer available and the closest replacement was more expensive.” **Solution:** “We printed 1000 instead to keep within budget. If we feel there is a need to print more later on in the project we will look to see if there is spare budget in other budget lines. We also have fliers to advertise the project.”*
- *“We had under budgeted for the cost of training the Energy Champions as specified in the bid and have had to look at many alternative solutions.” **Solution:** “We negotiated with the training provider to put on a local course that all champions could attend, and to help with costs, invited members of local energy advice providers to put delegates on the course in a paid capacity. This has helped build links between local energy advice providers.”*

Another key issue mentioned by a third of the grantees in the sample, whose projects are still progressing, regarded difficulties with partners. These grantees noted that certain snags that their partners have encountered have impeded their own project’s progress. The three grantees who reported this issue all decided that the only solution was to be patient and wait for their partner to work through their own problems before moving forward. Although this can be frustrating for the grantee, this seems to be the only option when working with a partner who comes under new management or a local authority who has many other responsibilities. This was not felt to have an impact on their likelihood of them meeting their overall targets as projects run for two years, it has just meant that progress has not been as fast as hoped. Specific comments on some of the issues with partners included:

- *“There has only been one small issue with partners. Another organisation took over our partner and it took some time to re-establish connections.” **Solution:** “We have now had a very good training session with two of their volunteers who were very enthusiastic about the project and commented that the resources would not just be suitable for people with learning disabilities and autism, but all vulnerable groups and also the elderly where memory is slipping. We agree with this and we work next door to another potential partner, so during this next*

quarter, we will let them borrow one of our houses to see what they feel about using it with this cohort of individuals.”

- *“Delay from our local council confirming enforcement and incentives for landlords, due to team restructuring, personnel change and purdah for the election. This delay has limited the amount of outreach, training and promotion we have been able to begin, as we need this information to engage target groups.” **Solution:** “We are anticipating that this will be resolved in January when the council have sorted through their workload.”*
- *“Our local council are still not accessing Eco Flex. While this is not directly relevant to the project as Energy Redress is not for promoting the uptake of Eco, we were nevertheless hoping to be able to help clients to access Eco Flex, although not funded by this project.” **Solution:** “Our local council have finally written a Statement of Intent on Eco Flex. They hope that Eco Flex will become available soon, although the council’s own Statement of Intent acknowledges that there are significant risks.”*

Other issues identified by grantees and their resolutions included:

- **“Mixed ability audience in training sessions.” **Solution:**** *“This was expected and is not a barrier however is a learning curve as we train. We thought we would share with Energy Redress here. Some groups contain delegates with learning disabilities and autism or both who are relatively independent and able to think through energy issues well together. However, there are others within the cohorts who do not have this ability and need a trusted circle to enable them to understand energy. We have resolved this by developing very flexible training resources to enable all abilities to benefit from the training and we have thought through with our researcher, how to further promote understanding when the delegate audience is of very mixed abilities.”*
- **Low attendance at events:** *“Turn out at the community energy advice sessions has so far been lower than expected. If this trend continues it may be challenging to reach the target number of families.” **Solution:** “Whilst attendance levels are beyond our control, we are working with partners to maximise attendance at sessions. Efforts are also being made to engage larger groups where possible.”*
- **Delays:** *“Delays in obtaining paperwork.” **Solution:** “We were experiencing issues with obtaining the relevant paperwork from the clients in order for us to act on*

the client's behalf. Project staff are now sending the paperwork to the clients and asking the clients where they can sign the paperwork and take a photo then send this via email or WhatsApp as this means now we don't have to wait for them to send it back to us this has resulted in us being able to start supporting them in a more effective way and is less time consuming.

- **Staffing:** *"We recruited an energy adviser for the post and unfortunately this individual has left the organisation." **Solution:** "We have a member of staff picking up some additional hours on the project and are managing the active caseload and we are interviewing imminently for the position. In order to address the slippage and ensure the project stays on track going forwards, we have used the underspend from the vacant energy advisor post to introduce an additional role of a trainee energy adviser to work on the project 25 hours per week. The post holder will work alongside both the full-time adviser and part time energy trainer and in order to provide an additional face to face delivery resource. We have successfully recruited to both positions with post holders due to commence employment shortly. In the meantime, we have devised a schedule of outreach and training sessions."*
- **Pre-COVID safety concerns:** *"Some champions have raised concerns about safeguarding issues, in terms of their own personal safety." **Solution:** "Where there are concerns, additional support is being offered by shadowing the team leader. Other solutions are being explored including:

 - *Asking a volunteer to accompany a champion*
 - *Meeting the client first at an office face to face.**Best practice is also being shared between offices.**
- **Low demand:** *"Based on the number of calls we have taken so far; we expect to take around 350 calls by the time the first year of this project ends (if we don't do any extra promoting above what we originally planned). This is significantly below our target of 650." **Solution:** "With the agreement of Energy Redress Scheme, during quarter four of the first year of the project we reallocated some of the funding so that we have delivered less phone calls and more home visits. This has reduced the number of people helped overall but has allowed us to provide the more in-depth support that we are finding people need."*
- **Initial low client interaction:** *"A considerable amount of time and effort has been dedicated to project set up in the first quarter. As a result, numbers of clients*

helped is much lower than might have been expected. However, we are pleased that the project has started to varying degrees in different parts of Devon and is starting to have an impact on local people.”

5.4. Impact of COVID-19

Since the impact of COVID-19 has been a major barrier reported by the grantees, this section specifically outlines the challenges, learnings and issue resolution related to the pandemic. This section includes data from grantees that have completed their projects and those whose projects are still ongoing. Note that this data is drawn from those grantees who we analysed earlier in this section of the report. However, some of the grantees completed their projects before the COVID-19 lockdown and restrictions, therefore COVID-19 did not impact their projects.

5.4.1. COVID-19 related issues and resolutions

This section analyses the project issues caused by the COVID-19 pandemic and the solutions implemented by grantees to reduce its impact. Grantees have worked with the Energy Redress Scheme Development Officers to agree changes to their activity in light of the restrictions due to the pandemic. This flexibility has helped many projects to continue with their work albeit through amended delivery activities – this section highlights some of the changes that have been made to ensure that the projects can continue where possible.

Figure 8 displays the key project issues related to COVID-19 that were mentioned in quarterly reports by the grantees for whom data has been analysed as part of this evaluation. The most frequent issue noted by grantees was that they were unable to deliver any face-to-face advice due to the COVID-19 pandemic.

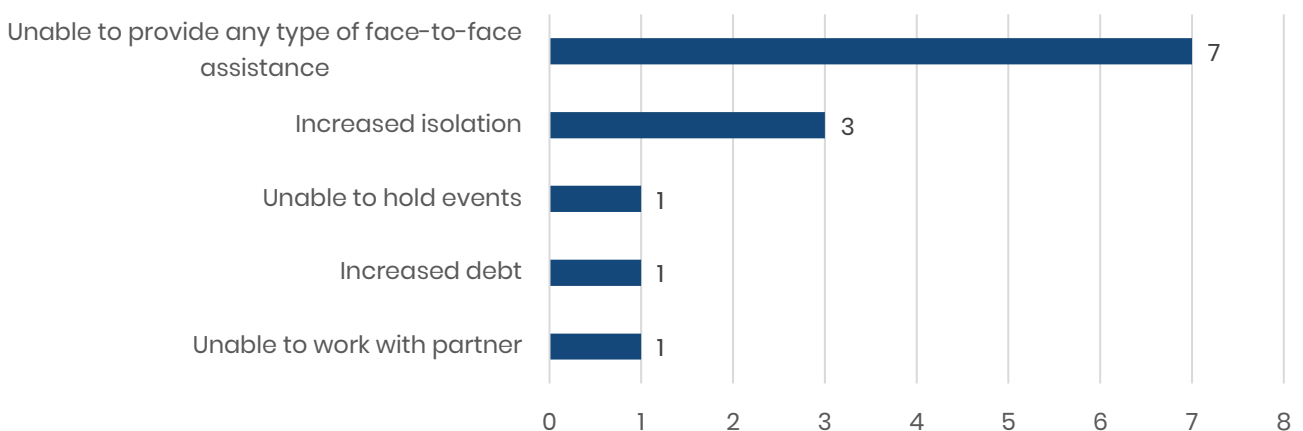


Figure 8: Key project issues related to COVID-19 identified by grantees (N= 10)

Unable to provide any type of face-to-face assistance

The majority of grantees reported that COVID-19 inhibited them from delivering face-to-face assistance. 70% of the grantees who provided information on the impact that COVID-19 was having on their project said that they were unable to conduct house visits, events, training and workshops. Solutions to the barrier of not being able to carry out face-to-face advice included:

- Online support (4) via:
 - Virtual technologies (3)
 - eLearning (2)
 - Email (2)
 - Social media (2).
- Telephone support (3).
- Leaflets (2).
- Increased marketing (2) via:
 - Social media (1)
 - Videos (1)
 - Press release (1).
- Returning to home visits once possible (2).

Specific comments from grantees regarding the restrictions on face-to-face advice caused by COVID-19 included:

- *“The COVID-19 pandemic and the resulting restrictions on face-to-face activities had a major impact on our ability to deliver training events.” **Solution:** “Our training team immediately adapted the training course to be delivered via e-learning and the take up of this was high, with 23 candidates completing the course during April.”*
- *“COVID-19 has impacted home visits.” **Solution:** “Home visits will be replaced by a mixture of telephone appointments and email advice. People will also be directed to our eLearning modules and our Facebook or website where appropriate. We will continue to form links with community services already operating support services so that they are aware that we are open and taking referrals. This will help us to continue to receive new referrals. We are continuing to provide advice over the phone, via email and, if applicable, using video calling if clients have the technology. We will be issuing self-addressed envelopes to clients to*

communicate with ourselves and providers accordingly. This will help with proof of ID and consent forms allowing us to act on their behalf. We are still accessing the office for our post and this will be dealt with accordingly. Where clients cannot do this, we are asking for three-way call backs using Why Pay conference calling. We will review the effectiveness of this to establish if this way of working is effective and well received. The difficulty we will have is that each provider is setting its own priorities in which it deals with calls and how it assesses the urgency of a case.”

- *“New situation with COVID-19 means all face-to-face events cancelled and new ways to contact people needed to meet our targets.” **Solution:** “Online information devised and promoted through sharing on partners’ Facebook pages etc. Logging engagement on website and Facebook for future fixtures Virtual ‘coffee mornings’ and information sessions booked to promote our service.”*
- *“Unable to visit homes so delay to delivery of key objective due to COVID-19 Lockdown.” **Solution:** “As per Mitigation plan, we will also regularly review home visits, delivery and fitting of small measures in accordance with Government Guidelines and will deliver events once the situation resolves.”*
- *“Face-to-face community events and workshops not possible due to COVID-19 restrictions.” **Solution:** “Increase both our social media presence, through Facebook especially, and the creation of short videos that are tailored to a particular group, replicating a community network as much as possible. We will also make these interactive where possible. We will also focus more on traditional media channels such as press releases and town and parish magazine articles and letters, as well as via local radio stations – both traditional and digital.”*
- *“No home visits or face-to-face appointments possible currently in accordance with Government guidelines.” **Solution:** “All interactions will now be done by non-face-to-face means and been in operation successfully for about two weeks. These include telephone assessments, email advice, letters, future home visits and virtual technologies.”*
- *“When the lockdown was announced we ceased our face-to-face engagement, which meant we were unable to knock on every door in the micro-areas.” **Solution:** “We have delivered leaflets and letters to every residential address within the wider area, meaning every resident has received an opportunity to learn about the advice and support available through our project. They have also been provided with the phone number for our energy advice line, that they can call free of charge.”*

Increased isolation

Another frequently mentioned issue created by COVID-19 relates to issues with self-isolation. 30% of these grantees noted that COVID-19 has forced vulnerable people to self-isolate to protect themselves from the virus, which has consequently heightened the impact of alternative risks by shutting themselves away from support. These are poverty, debt and energy related issues. Grantees explained that to solve these issues they have put pressure on the government to provide clarity, created new leaflets to reach out to isolated people, provided food parcels to those most in need and developed a crisis fund. Specific comments from the three grantees reporting this issue are as follows:

- *“The vulnerable cohorts that we serve are likely to remain more shielded until a vaccine is available post-lockdown. This is due to known health inequalities regarding disability and other vulnerabilities.”* **Solution:** *“The government has not released data to show if our cohort have been put at greater risk of dying than other groups; pressure is currently being put on the government to release this data.”*
- *“New situation with COVID-19 means needing to distinguish between vulnerable self-isolators who may have funds, and those in fuel poverty due to job loss, energy efficiency measures on hold etc.”* **Solution:** *“New leaflets devised for COVID-19 situation to be displayed at pay points for top up meters across our local area, plus food parcels sent to groups helping those in poverty. Different approaches needed to help all groups.”*
- *“Increased range of barriers to householders to tackle energy related issues. Energy companies have furloughed staff and are accepting only emergency enquiries. This is coupled with self-isolation and anxiety, and our inability to assist practically, face-to-face.”* **Solution:** *“We have therefore created a crisis fund within the existing budget to give us additional flexibility in supporting householders. Costs could include data top-up so householders can engage with outside world, prepayment meter debt clearance, oil/ LPG top up, b-warm seat covers, other items to help keep people warm and safe at home.”*

Other issues

Other issues related to debt, events and the restrictions on working with partners included:

- *“We’re behind on target for energy literacy workshops and other targets impacted.” **Solution:** “Reduce the numbers of tenants, landlords and frontline workers we aim to reach via events, workshops and training during COVID-19 restrictions, as well as numbers of events etc. we aim to attend or organise, but hopefully not overall targets. Offer workshops to vulnerable energy consumers of other tenures, where there is a need.”*
- *“Clients may accumulate greater energy debt. This is in part due to disrupted income, but also as a result of more relaxed debt collection measures by suppliers.” **Solution:** “General advice to warn clients to be careful about building up unmanageable debts in the future and where possible to put money aside. Offer client future contact if they find themselves unable to pay back energy debt.”*
- *“We have been unable to work with pharmacists because (of) social distancing and because they are over-stretched by COVID-19.” **Solution:** “We will reassess the possibility of working with pharmacies as social distancing eases.”*

5.4.2. Learnings gained from the impact of COVID-19

This section examines the lessons learned by grantees who have dealt with the impact of COVID-19. Two key lessons identified by grantees centred around:

- Benefits of partnerships.
- Improved methods of engaging with clients.

Benefits of partnerships

67% of grantees who discussed the learnings gained from the impact of COVID-19 on their projects mentioned that partnerships are key to achieving their project deliverables. The benefits of working with partners during this time of uncertainty include learning more about the vulnerable people they are trying to help, recognising

that demand for the project is still high and improving training tools. Specific comments from these four grantees included:

- *“Good communications and partnership working are still vital, especially as we connect with new partners and work in different ways with existing partners. Phone calls to explain fuel poverty, the distinction between those self-isolating with ok finances and those in or moving into fuel poverty – and how to help each group – have been helpful for new groups to learn from us.”*
- *“Although the coronavirus pandemic has impacted us this quarter, the response to our resources online has been very favourable, with key people in organisations saying that they are sharing the resources and they can see that they will be very useful. Family carers had expressed a good deal of interest in the project. Although we were unable to deliver this training at this time, both key members of staff from these organisations have told us the resources are very informative.”*
- *“We know that use of our website has been busy since we sent emails about these resources to our target groups and large organisations have shared the resources –which is a fantastic response. Over this next quarter, it will become clearer as to whether there is capacity from organisations to use these resources as a training tool, or if we will need to extend the project to complete further face to face training, following a resolution to the coronavirus.”*
- *“In response to the impacts COVID-19 we aim to:*
 - *Re-engage all our existing partners including Local Authorities, Housing Associations, health care (if possible), benefits, debt advice agencies, community groups and mental health charities to say we are still here, and what we can offer, and to do this via written material and videoconferencing.*
 - *Use this engagement to explore and strengthen collaborative working. Emerging ideas around Mutual Aid and the resilience planning work of Local Authorities, social care and voluntary organisations are all crucial areas where we need to be providing a fuel poverty voice and trying to embed this as an issue.*
 - *Work with new partners who are leading on the community level response such as food banks and health care organisations (if they have the capacity).”*

Improved methods of engaging with clients

Two-thirds of grantees reported that they had utilised different methods of engaging with their clients from those they had used before the pandemic. These replaced the prohibited face-to-face visits and included routine ways of contacting the client, such as telephone calls, emails and social media posts, but also included new virtual meetings or regular COVID-19 wellbeing calls. One grantee also noted that smaller community initiatives had become more popular as more isolated people had begun to reach out. The grantees explained that these methods of interacting with the client had become more effective as their staff improved their communication skills. Specific comments included:

- *“Different ways of working with participants have been devised – sharing Facebook posts, logging engagement, working with new groups, booking up to attend virtual meets to give talks.”*
- *“Numbers of home visits and fitting energy equipment have been impacted by the COVID-19 lockdown; however, we have discussed energy issues in all of our COVID wellbeing calls. As a result of one of these we identified that a customer had a potentially unsafe boiler that was not working and had not been serviced. We provided a carbon monoxide alarm on the same day and organised an emergency tradesperson to visit the property.”*
- *“Appreciation of the importance of social support networks in the face of COVID-19 has grown dramatically and led to a mushrooming of smaller community support initiatives.”*
- *“As we come to terms with delivering energy advice primarily via telephone and email during the COVID-19 situation, it is clear that we can still provide effective advice for clients struggling with energy costs. Indeed, the vulnerable are more exposed to some of the related issues, such as topping up prepayment meters or facing increased household energy use due to the lockdown. Our services are therefore more important than ever, and our general advisors are now better able to identify where fuel poverty might be a potential issue and refer to our Energy Champions.”*

Other learnings gained

Other learnings gained by grantees who explained how they adapted to work under the difficult circumstances that COVID-19 created included:

- *“We are proud of the way we have taken on the challenges posed by the COVID-19 lockdown measures. Managing staff workload, devising creative and effective new ways of working and delivering in new ways to those in fuel poverty, especially those new to this through restrictions etc. has been delivered well. Our team has been strengthened through this roller coaster crisis building on the good basis we’ve developed.”*
- *“The crisis fund ran out before the delivery of sessions ended, and applications continued to be made for help for other clients. These had to be declined or requested via other potential sources of funding which we had access to. The main proportion of applications came via a partner we worked with on a large deprived housing estate and health visitors.”*
- *“We were unable to deliver our final, accredited training session due to the lockdown. However, we were able to create an unaccredited eLearning package providing frontline workers with an overview of the four causes of fuel poverty, the four effects of fuel poverty, and the four solutions to fuel poverty. 17 frontline workers from within the area have completed this training course.”*

6. COVID-19 crisis fund reporting

To evaluate the COVID-19 crisis fund, an online survey was sent out to both successful and unsuccessful Round 1 and 2 applicants in August 2020. The survey consisted of questions exploring applicants' opinions on the application process and impact of the fund. The survey was sent out to 102 charities. The survey received 24 responses, achieving a response rate of 23%.

Figure 9 shows the respondent breakdown by round and whether they successfully applied to the fund. 11 of the respondents applied in Round 1 and 13 applied in Round 2. 21 of the respondents were successful with their application to the COVID-19 crisis fund, whilst the remaining three were not.

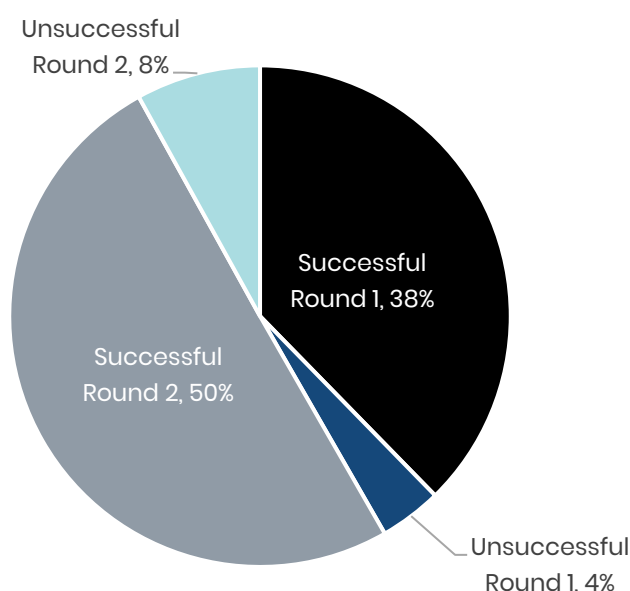


Figure 9: Respondent breakdown by round and successful application (N= 24)

6.1. COVID-19 crisis fund application process

Respondents reported the extent to which they agreed or disagreed with a series of statements regarding the crisis fund application process. Figure 10 displays these results and shows that respondents rated the application process positively. All respondents either strongly agreed (75%) or agreed (25%) that they completely understood the aims of the fund. Note that on the three occasions when a respondent

did not strongly agree or agree with a statement it was answered by an unsuccessful applicant.

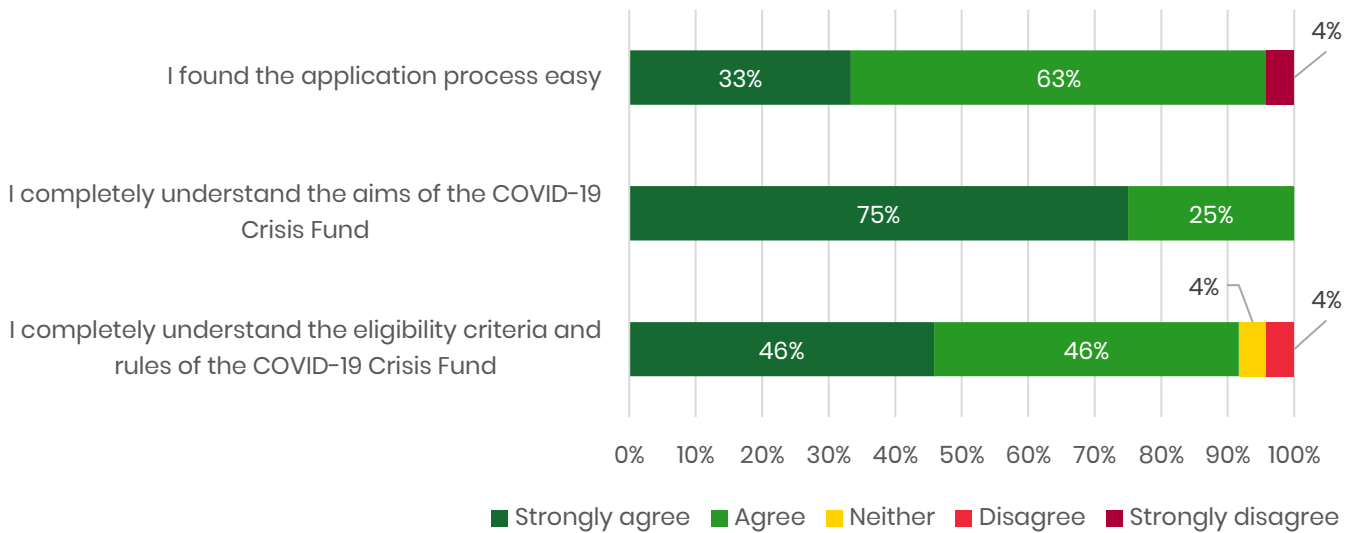


Figure 10: The extent to which respondents agreed or disagreed with a series of statements regarding the crisis fund application process (N= 24)

Respondents rated how easy or difficult they believed it was to complete various parts of the application form. Figure 11 shows that on the whole respondents found the application form easy to complete. The project activities section was the section which respondents thought was the easiest to complete, with 96% strongly agreeing (42%) or agreeing (54%).

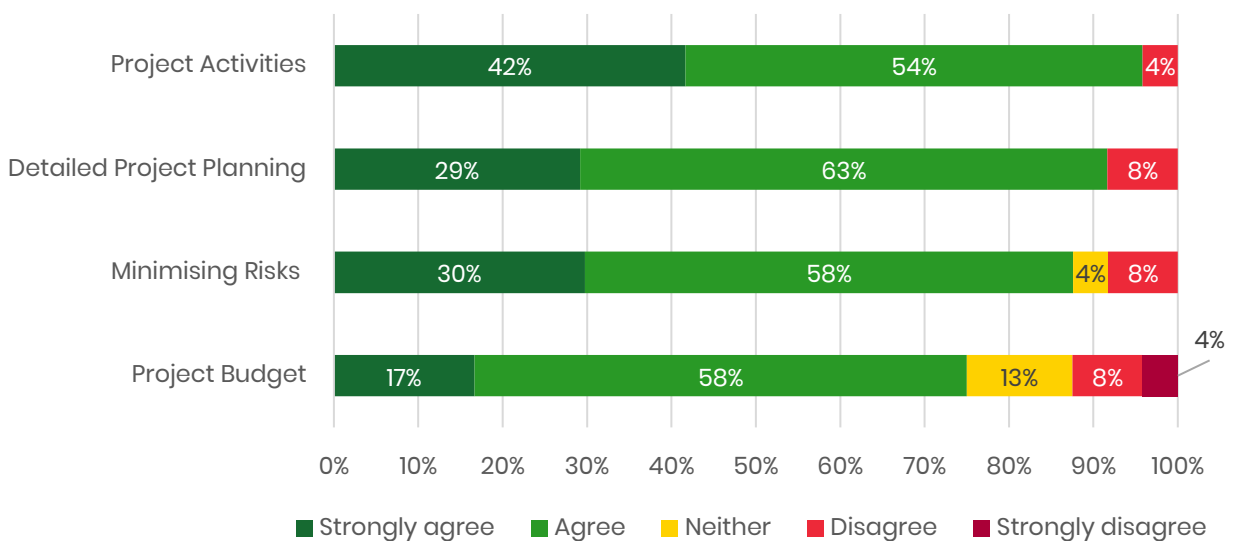


Figure 11: How easy or difficult respondents believed it was to complete various parts of the application form (N= 24)

Respondents were asked to describe any areas of the application form which they found particularly difficult. Useful feedback from successful applicants was as follows:

- *“I made a mistake on the costing for the application which I was kindly offered an opportunity to correct. However, when I referred back to the original application, I found that there was a lack of clarity/some ambiguity that had led to my misinterpretation of what was required. Apart from that the costing was a simple process.”*
- *“I found the budget section confusing.”*
- *“It is very challenging in the current climate to accurately identify risks and ways to minimise them, mainly due to the constantly changing circumstances. This is constantly being revised and updated to ensure we have covered all possible risks.”*
- *“The difficulty was not with the form but choosing what information to include to fully strengthen the application. The number of words allowed always adds an extra concise dimension.”*

Feedback from unsuccessful applicants regarding the application form included:

- *“Project budget guidance for Energy Redress Scheme. Webinar useful and guide useful, but a bit of trawling around, especially for staff who were not inputting data but did not have the time to review the webinar and guidance document. Perhaps a matrix type of approach with key indicators that need to be included would be helpful overall, not just for costings.”*
- *“When assessing the risks, we took the approach it was more to do with ensuring financial processes were in place. We did not state how staff delivered the project safely, we obviously have safe working practices, especially during COVID but thought this question would relate more to the financial risk.”*
- *“Regarding project budget, we assumed that we would make the maximum payment of £49 to every tenant who met the criteria, but our feedback states we shouldn't have done this. Also, it was not clear if licence fees for the voucher provider would count as a Charity administration cost. We also had to make assumptions about the voucher provider fees, we were waiting on getting a copy of the costs after the first meeting with the voucher provider. We didn't get them in time from the provider prior to submitting the application. It would be good to*

get the opportunity to update any cost change with the original application prior to any offers of funding being made. I understand this may be an extra stage in the process, but it doesn't have to be time consuming - more a verification step that costs haven't changed."

Respondents were asked to state how useful they found the guidance and FAQs documents. Figure 12 shows that all respondents found both the guidance documents and FAQs document very useful or useful. Note that the FAQs document was introduced after Round 1 applications had closed, therefore only Round 2 respondents answered this question.

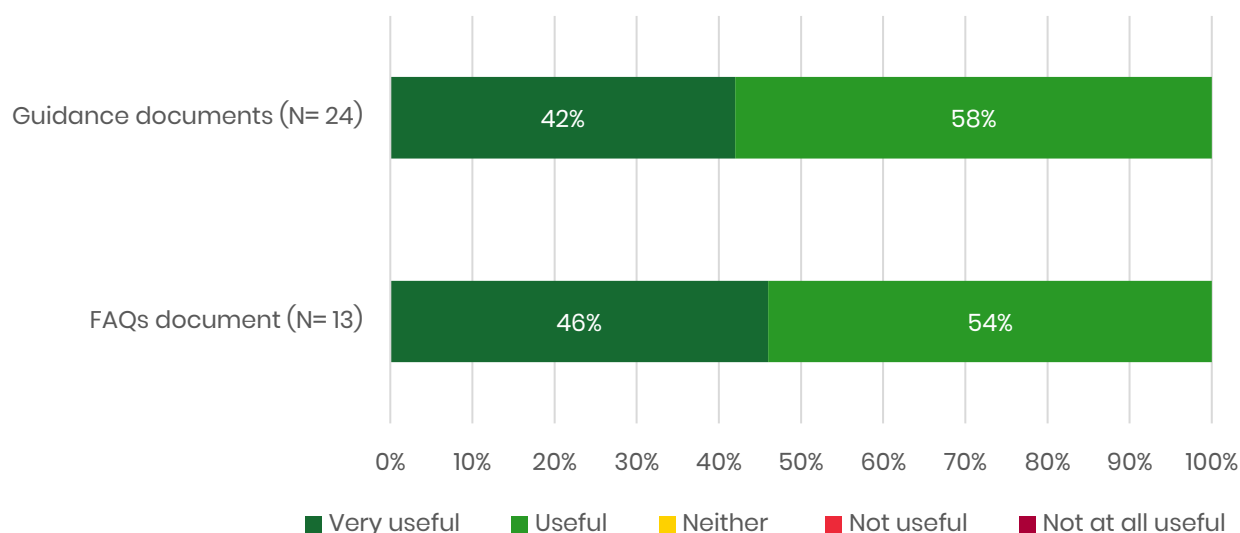


Figure 12: How useful respondents found the guidance and FAQs documents

96% of respondents found that the communications from the Energy Redress team were either very user friendly (61%) or user friendly (35%). The one respondent who answered neither was unsuccessful in their bid to the crisis fund. All respondents were either very satisfied (71%) or satisfied (29%) with the time that it took the Energy Redress team to process their applications.

Of the three respondents who were unsuccessful with their application to the crisis fund, two asked for feedback from the Energy Redress team after being notified that their application was unsuccessful. Both stated that the feedback was very useful. They left these comments explaining why this was the case:

- *“The feedback explained where we could have made improvements in the application. I also feel that smaller organisations who may wish to use just one voucher provider are being penalised due to British Gas customers having to use Payzone. We should be allowed to help British Gas customers via other methods.”*
- *“Specific feedback helps with understanding better areas that aren't always clear.”*

All respondents were asked whether they had any general feedback about the application process or suggestions that could improve the process. Many respondents said that they had no ideas for improvements and took this opportunity to provide positive comments, which are as follows:

- *“Good information was provided to support the completion of the application. There was a fast turn around and we were informed of the decision quickly.”*
- *“I thought it was very straight forward.”*
- *“Not really; it was all pretty straightforward, and the guidance was good; accurate and apt. We'd all like quicker responses, but we know that it's difficult at present.”*
- *“Excellent, straightforward and quick.”*
- *“One of the easiest funds to apply for, and one that has been very successful so far, and had a massive impact on the clients we have helped.”*
- *“Very clear & easy to follow.”*
- *“We were unsuccessful in our first application and we sought some feedback. The second application was successful. I also asked for some help about the Voucher Providers. The help given was friendly, quick and totally unbiased.”*
- *“The team were able to answer our clarification questions quickly and satisfactorily.”*

Those who did leave constructive recommendations on how to improve the application process stated that a longer project time, tips on how to locate qualifying suppliers and more information on avoiding fraudsters would be beneficial. Specific comments included:

- *“The project should be run over more than three months.”*

- *“The biggest challenge was in identifying a provider for the voucher scheme... some further advice/information on where/how to locate qualifying suppliers would help.”*
- *“It could be improved if the information about potential fraud and not advertising the service is made clearer.”*

6.2. Impact of the COVID-19 crisis fund

This section provides feedback on the impact of the crisis fund voucher scheme established to address the impact of COVID-19. Of the 24 respondents who completed this survey, 21 were successful applicants to Rounds 1 and 2. In total, 62 grantees have been awarded funding through the crisis fund; this survey therefore represents 39% of them. Note that Round 1 projects began on the 15th of June and Round 2 projects started on the 20th of July.

The **total number of vouchers reported to have been distributed by COVID-19 crisis fund grantees is 20,224** as of 1st September 2020.

18 of the successful applicants who participated in this survey (86%) have distributed vouchers as of the 20th of August 2020. Figure 13 shows groupings of the number of vouchers distributed by respondents. 10–30 (4), 31–60 (4) and over 100 (4) were the most popular groupings. The total number of vouchers distributed so far by respondents to this survey was 3,308. The smallest number of vouchers distributed by a respondent was three, whilst the highest was 2,115.

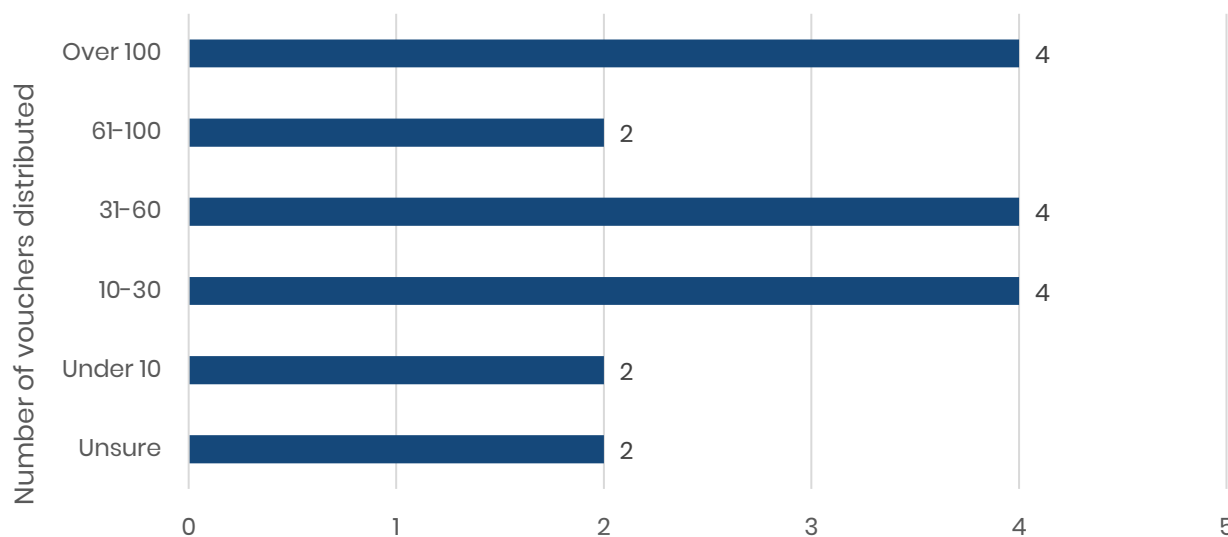


Figure 13: Groupings of the number of vouchers distributed by respondents as of the 20th of August 2020 (N=18)

All respondents stated that the initial reaction from those that have received vouchers was either very positive (83%) and positive (17%). Respondents explained their answer. Many explained that the recipients were very grateful for the support. Specific comments included:

- *“People in difficult circumstances and financial hardship have been very appreciative of the support.”*
- *“We have had people who are really struggling and for them the voucher has made a big difference.”*
- *“The vouchers have managed to ‘reset’ the account back into credit so that any top ups being paid out of UC payments are now being spent on fuel rather than debt repayment.”*
- *“Our beneficiaries are very grateful for the support and relieved that their energy is not being cut off.”*
- *“When you haven’t got any money or food & you are in the middle of a pandemic, access to crisis support is vital.”*
- *“We had a few issues to start with – which meant delays (our end) in getting vouchers to individuals – otherwise, recipients have been very appreciative.”*
- *“We are seeing large numbers of eligible clients contact us about these vouchers. The clients are extremely grateful to receive the vouchers with many reporting how much it will help them financially through the next couple of months.”*
- *“People ask for vouchers because they are in a critical situation and the voucher enables them to have peace of mind in a moment when anxiety and mental health issues are rising. It also allows them to explain their situation and us to explore any underlying issues and advise of options available for them to address these and prevent a future crisis.”*

Respondents noted how easy or difficult it has been to distribute vouchers. Figure 14 shows that 78% of respondents have found it very easy (39%) or easy (39%) to distribute vouchers.

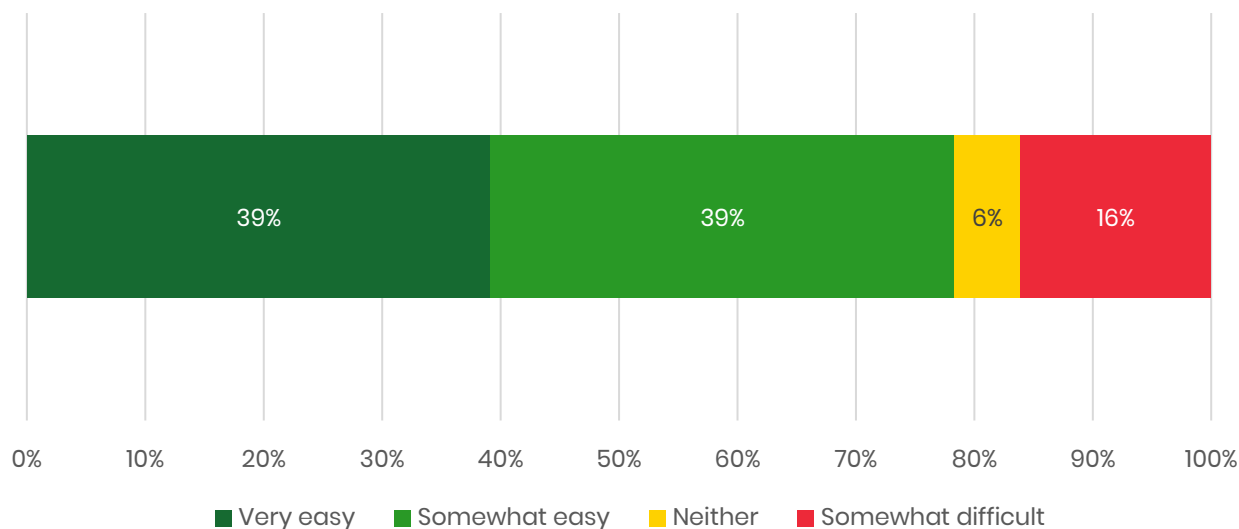


Figure 14: The extent to which respondents found it easy or difficult to distribute vouchers (N=18)

All respondents who had distributed vouchers were asked why they found it easy or difficult to issue them to people. Those that found it very easy or easy explained that demand is high, and their system of handing vouchers out was effective. Specific comments from those that found it easy to issue vouchers is as follows:

- *“The voucher provider has been very helpful in providing templates and other information for vouchers.”*
- *“The people we're working with did some great training on their systems and pushed everything through quickly for us. Their communication and support have been excellent, making the entire process simple, quick and efficient.”*
- *“Once it was set up the voucher portals are easy to use. However, the set-up process with one of the providers was very challenging and took longer than originally planned.”*
- *“The information needed to authorise the vouchers is simple and quick. The PayPoints and Post Offices are easily accessible to all our clients, even from the remotest areas. Every issue of a voucher is supported by help and advice in many different areas so that we can help the clients as much as possible.”*
- *“We have a budget sheet to go through with clients, which does take some time, and requires clients to think / know about their budget - this can be challenging sometimes for vulnerable clients, as some have memory or cognitive issues, and some are unaware of their spending before contacting us. But the actual process for issuing the vouchers from our supplier is very straightforward.”*

Respondents who stated that they found issuing vouchers neither easy nor difficult said that it was “*too early in the project to say*”. Those who stated it was somewhat difficult to distribute vouchers cited the challenges of working with prepayment meters, including at the point of voucher redemption, and the fact that some of their customers were not on prepayment plans, which limited the number of vulnerable customers they could support. One respondent believed that the demand had reduced. The specific comments included:

- *“Its new to us – we’re finding our feet. There have been some issues with PayPoint/PO issuing the vouchers.”*
- *“Prepayment meters only made it harder. Many people are not on prepayment meters but other payment plans (especially if they had had our advice before) so this scheme could not help all those who needed help”*
- *“The immediate crisis for people following COVID has calmed due to furlough, etc. However, over the next few months, furlough ends, as does self-employed support plus, support for people facing eviction ends, mortgage holiday ends and we are going into the autumn so costs for people will rise. Unfortunately, this round of vouchers needs to be distributed by mid-September, ideally this period will be extended. As an organisation, we recognise that many people are still in a protective bubble, but with measures ending and redundancy and job losses increasing pressure will grow on people.”*

Challenges and solutions

All respondents who successfully applied to the crisis fund were asked to state the greatest challenges associated with distributing the vouchers. Figure 15 depicts these results. The most frequently mentioned barrier to issuing vouchers was identifying people.

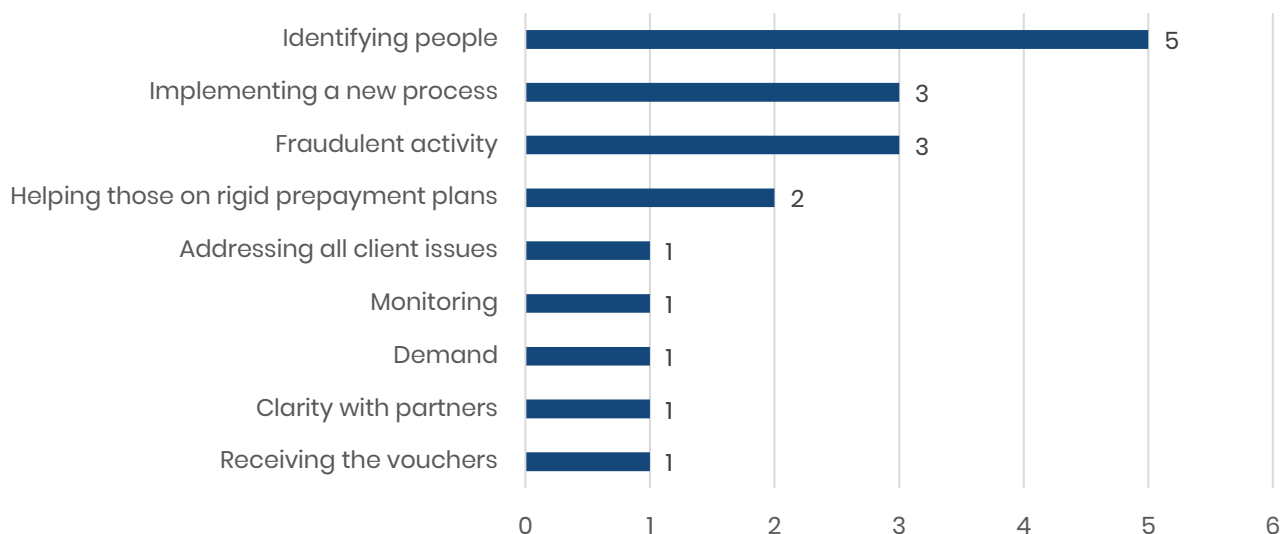


Figure 15: Greatest challenges associated with distributing the vouchers (N=18)

28% of respondents reported that identifying suitable individuals was the greatest challenge to distributing vouchers. These grantees have found it difficult to identify those who are most in need of the vouchers as these people do not actively seek support themselves. To overcome this challenge, all respondents found that working with partners helped to find and engage with vulnerable people. Specific comments on this included:

- *“Finding those with the greatest need. There is a stigma associated with asking for help especially from those we have not helped before. Making sure that we cover all of our local area.”* **Solution:** *“We are working together with health professionals, fuel experts, and white goods suppliers to supplement our own benefit knowledge to make sure that we give as much (of) a total service as possible. The vouchers allow us to build up a working relationship with the clients to help them plan for the future.”*
- *“Identifying people who meet the criteria, without advertising they are available.”* **Solution:** *“Spoken to partner organisations about referrals, asking all those who need food vouchers or who are in debt or have lost employment.”*
- *“Finding the people! The advice against using social media, whilst understandable from a ‘preventing fraud’ point of view, actually make it harder to find the people you want to help. Yes, we have partners advertising it, but they can only talk to their existing clients. Often, the most desperate people don’t engage with support agencies, so I think the need to help far outweighs the*

threat of fraud.” **Solution:** *“We’re looking at other means of getting the message out there and keeping partners fully informed. I have arranged several Zoom meetings with other organisations too.”*

- *“Logistical issues are now resolved, and our processes are working well. The main issue is workers identifying eligibility and proactively offering the support.”*
Solution: *“We are working on a system on casebook (our CRM) to actively flag potential entitlement – otherwise it has just been about cascading and reminding across our local network – who are all in turn, variously effectively at doing so with their staff and volunteers.”*
- *“We had a history of providing vouchers and our stakeholders were already on board with us, so we did not find it much of a challenge. However, when we initially started distributing vouchers it was a challenge for our advisers to identify who potentially may be in a situation that required a voucher and for other organisations to refer or signpost.”* **Solution:** *“Training, marketing and stakeholders’ events allowed us to learn and develop as did our advisers and stakeholders.”*

Three respondents noted that implementing a new process was challenging. These respondents explained that it was difficult to initiate a new system that their clients could easily access. Respondents solved this by having one person oversee the system and creating a pipeline of customers who are ready to receive vouchers once their system becomes active. Quotes from these respondents are as follows:

- *“Initially it was navigating around the system and learning new processes.”*
Solution: *“Responsibility has been designated to one person.”*
- *“Getting the account with the voucher supplier set up and ready to go.”* **Solution:** *“Staff have been identifying qualifying customers ahead of the vouchers being made available to us, so we have a pipeline ready to go once we’ve gone ‘live’.”*
- *“The only issue we have had is the inconvenience for clients who top up online usually but are having to go into shops instead.”*

17% of respondents identified fraudulent activity as an obstacle that hindered them from issuing vouchers. These respondents noted that they had been actively undertaking measures to prevent fraudulent claims. To mitigate against fraudulent activity, grantees have been asking for proof of name and address, checking ID and utilising

their own databases to ensure that people are not committing fraud. Specific comments from respondents included:

- *“Fraudulent activity.”* **Solution:** *“We monitor reports and look for patterns of repeat mobile numbers or addresses etc. This identifies them quite quickly. We are also working with the other centres to ensure consistency across the network and are considering increased security such as asking for ID.”*
- *“To prevent fraudulent claims and the communication challenges of the pandemic.”* **Solution:** *“ID verification & proof of address is required before crisis voucher is considered.”*
- *“Ensuring that the vouchers are administered correctly, and that people are not using the system fraudulently.”* **Solution:** *“Using our extensive internal database to track details of people who have been issued with vouchers and robust admin processes.”*

Other challenges and the measures implemented to solve them reported by respondents included:

- **Ensuring sufficient stock of vouchers:** *“It is very important to check names, addresses and number of vouchers issued. We Monitor to ensure there is sufficient stock of vouchers without over purchasing.”* **Solution:** *“We have established a searchable database and check the name and address against vouchers issued. We also check some postcodes where we do not immediately recognise the address.”*
- **Demand:** *“We are issuing them in the summer whilst there is a need, there is not as much need as there will be in September/October so it would be good if we can continue to issue them in the early Autumn.”* **Solution:** *“We have continued to highlight these vouchers are available and ensure we are capturing anyone who may be entitled to do a full assessment.”*
- **Clarity to referring partners about the scheme – clarifying questions.** **Solution:** *“We have refined our guidance notes to partners and spoken directly with them.”*
- **Addressing all client issues:** *“Ensuring that our clients access all the assistance we can offer to address their ongoing financial / advice needs – to assist them in increasing their income / reducing their outgoings / ongoing budgeting.”* **Solution:** *“The initial assessment we undertake with them on their budget means we can understand their needs and make the appropriate referrals on, either internally to*

our other specialist advisers, or externally to other agencies more suited to assist them.”

- **Receiving the vouchers:** *“Getting the vouchers in the first place!”* **Solution:** *“We have escalated this issue to the Energy Redress team.”*
- **Difficulties in helping some people:** *“Many people are not on prepayment meters but other payment plans (especially if they had had our advice before) so this scheme could not help all those who needed help.”*
- **Client issues when redeeming vouchers:** *“The greatest challenge with issuing the vouchers has been around problems with clients redeeming the vouchers at Post Offices and PayPoint locations. Often the issue is that the individual store, or sometimes a chain of stores, will not accept the vouchers. We are finding this occurs in more rural areas where it is likely the shop assistant has not seen these types of vouchers before. The other challenge has been around issuing vouchers to clients with smart prepayment meters.”* **Solution:** *“To overcome this challenge, we have put a robust procedure in place for dealing with any stores that refuse to redeem PayPoint vouchers. We have a PayPoint helpline number for clients to call while in store if they encounter any problems. This number is on the text/email that we send out to clients, along with their voucher codes, and our advisors also relay this information to clients over the phone when allocating the vouchers highlighting the importance of calling this number when they are still in store to resolve any issues there and then.”*

Successful respondents to the crisis fund survey were asked if there was anything that they would like to feedback on in terms of how they are progressing with the distribution of vouchers or the support that they have been provided with. Some respondents thought that the service should be offered over a longer time period, not just for three months. They mentioned that this would be particularly beneficial as they would be able to issue vouchers in the winter months. Specific comments included:

- *“It’s an excellent scheme but I feel that offering it over a longer period than three months will mean that we get to those people who are in need.”*
- *“This is an excellent scheme to support people with prepayment meters who are at risk of disconnection. I think it would be improved if the three-month timescale was extended for any future phases. People will be affected financially longer*

term and any future rounds of funding, particularly in the winter months would be of interest. Thank you.”

- *“The main issue was how long it took to set up, which has reduced the amount of time available to issue them (although this has already been fed back through the monthly reports and will be looked at) It would be better if the fund was open ended with no time limit to spend.”*
- *“Whilst we are continuing to distribute them to those in need, we are likely to see a surge in demand in September/October so would like to be able to continue to distribute if we have vouchers remaining at the end of the three months. We do have families in dire need, but the influx of tourists is seeing the most vulnerable hiding away to keep away from potential infection and therefore making their situation worse. We need to be in a position to provide them with help when they emerge in the late summer/early autumn when the tourists have gone away.”*

Other general comments included:

- *“We have been somewhat hampered with launching the scheme locally as our area went into a second lockdown and resources were expended elsewhere to deal with this. Also identified partner referral agencies were side-tracked with the developments – settling down now.”*
- *“We have seen a marked ramping up in demand as we have been promoting the scheme to our referral partners. The first month we only issue(d) about 15% of our allocation of vouchers, so far in the second month we have issue(d)s appx 35% of our vouchers. It demonstrates a gap in provision of support for low income / vulnerable prepayment clients that we were mainly unaware of (exacerbated by COVID-19).”*
- *“I had to reach out for clarification on use of LinkedIn – it would be good to flag this up as acceptable from the get-go. Otherwise, without actively promoting vouchers – maybe something creative and acceptable that reaches vulnerable consumers but doesn’t advertise vouchers per se would be useful. Something produced centrally and which is acceptable to the funder?”*
- *“These funds that allow us to distribute the vouchers have proved crucial in our plans to help as many clients as possible even though we have just started we have a list of people needing help. Help such as this has so many benefits in helping those in need. It reduces the worry caused by fuel poverty and returns a*

dignity to so many families. There are always those not on prepayment meter that will need help as well.”

- *“I think that you are doing a great thing by providing these funds in such a difficult time. However, the percentage funding that goes towards the administration should be relooked at as it does not cover all costs.”*

7. Conclusion

In order to determine whether the Energy Redress Scheme has achieved its aims, the overall impact on end consumers of projects funded through redress payments has been evaluated. This section outlines the key evaluation requirements provided by Ofgem and highlights the findings from this evaluation to indicate the extent to which these specifications have been fulfilled.

1. Evaluating the extent to which redress awards have addressed the policy priorities set out in Authority Guidance

The core priority of the Energy Redress Scheme is to support energy consumers. The key policy priorities set out by Ofgem in the Authority Guidance are to:

- Support energy consumers in vulnerable situations.
- The development of products and/ or services, which are genuinely innovative and not currently accessible to energy consumers or certain groups of energy consumers.

The Energy Redress Scheme has achieved this in the following ways:

- (i) **All grantees have supported energy consumers in vulnerable situations.** Grantees reported that clients were in vulnerable situations due to their age, disabilities, low income and fuel poverty. Support included advice in the form of home visits, telephone advice and face-to-face advice at events, and installations of energy saving measures, either through the project or via referral to another funded service.
- (ii) As of the 20th of August 2020, **five charities have been awarded a grant from the Energy Redress Scheme for projects focused on Innovation.** The total grant amount for all five projects is £675,178. The Innovation Fund is aimed at developing products or services which are truly innovative and not currently accessible to energy consumers or certain groups of energy consumers. Two of these projects are from Round 1 and have now completed, whilst the other three are from rounds 2, 5 and 6 and are still progressing.

2. Evaluating the impacts of redress projects on end energy consumers

The Energy Redress Scheme funds projects which support energy consumers in vulnerable situations. All grantees provide information to demonstrate that they are targeting people in vulnerable situations in their grant applications and in subsequent reporting.

Key deliverables from projects funded in rounds 1 to 5 include:

- 38,254 distinct households have received advice.
- 10,613 were advised at events.
- 10,522 have received telephone advice.
- 5,786 have received advice through home visits.
- 4,763 have received advice face-to-face at drop-in sessions.

End consumers have seen a reduction in energy bills as a result of advice provided by Energy Redress-funded projects. This includes by changing their behaviour towards energy use, having small measures installed such as LED bulbs, radiator foils and power-down devices, switching energy providers or being referred to other schemes for larger energy efficiency measures.

Capital measures installed from projects funded in rounds 1 to 5 include:

- 4,618 capital measures installed or provided to households (such as LED bulbs, draught proofing, power down devices and radiator foils).
- 601 other measures installed as a result of advice referrals to other funding sources (including insulation and boiler replacements).

As a result of these changes, quantifiable estimated savings from activity delivered by projects funded in rounds 1 to 5 so far are:

- 341,032 kWh estimated energy savings.
- £1,047,824 actual energy bill savings from switching.
- £308,244 estimated bill savings from energy advice.

3. Evaluating the value for money achieved by the redress projects

The following points provide a breakdown of the costs and quantifiable outcomes associated with the Energy Redress Scheme and the total support that projects from rounds 1 to 5 have delivered using this funding:

- **Seven rounds of funding** since launching in 2018 up to the 20th of August 2020.
- **103 projects** funded to date.
- Over **£15.4 million awarded** to grantees delivering projects across England, Scotland and Wales.

Projects funded in rounds 1 to 5 are the focus of this evaluation as these grantees have commenced their projects and have started reporting on their activity and outcomes:

Of the £7.48million grant for work funded across rounds 1 to 5, **£1.9million worth of activity has been delivered** and reported on to date – 25% of total funding awarded in rounds 1 to 5. The following key metrics demonstrate what has been delivered for the £1.9million of grant spend to date:

- **38,254 households** have been provided with energy advice to date by projects funded in rounds 1 to 5.
- **5,219 measures have been installed or provided to households directly and via advice referrals to other funding sourced.**
- Estimated lifetime savings that have been reported so far by grantees as a result of activities delivered using the funding include:
 - 341 MWh of energy savings.
 - £1m of energy bill savings from switching.
 - £0.3m of bill savings from energy advice.

Note that grantees are unable to track all energy and cost savings achieved, so these figures are the savings that these grantees were able to reasonably quantify. It is likely that the actual savings will be higher.

4. Recommending how further improvements can be made to redress awards and/or redress projects following the evaluation described in this clause

The **key lessons** learnt by grantees so far are:

- **The importance of home visits** which allow grantees to get into the property and understand the real issues that vulnerable people are facing.
- **The importance of good partnership working.** Beneficial for a number of reasons, such as sharing best practice and services, acquiring funding, introducing each other to clients and helping deliver targets.
- **Promotional activities.** Word of mouth within a small community has often been found to be the most effective way to promote projects.

- **The benefits of simple energy saving measures.** Smaller, cheaper and easier to install energy saving measures are effective at engaging people initially.

The most **significant barriers** and **solutions** identified so far are:

- **Public engagement** – difficulties connecting or engaging with the vulnerable people that they are seeking to help. These grantees noted how they overcame the issue of community engagement through project marketing which was best achieved via word of mouth.
- **Project delays** – Difficulties with partners had also caused some delays; certain snags that their partners have encountered have impeded their own project's progress. These grantees all decided that the best solution was to be patient and wait for their partner to work through their own problems, such as issues with recruitment and training, before moving forward.
- **Staffing** – Loss of staff and retaining staff resources (including volunteers) was a major project challenge for some grantees. Ensuring that the volunteer opportunities were structured with clear responsibilities has helped some projects to retain volunteers where they had previously encountered difficulties.

5. COVID-19 crisis fund

The evaluation of the COVID-19 crisis fund aims to:

- (i) Evaluate satisfaction with the application process.
- (ii) Recommend how the fund could be improved.
- (iii) Evaluate the impacts on end energy consumers.

Key findings from the evaluation are as follows:

- (i) Feedback from grantees was, on the whole, very positive:
 - 100% agreed that they completely understood the aims of the fund.
 - 96% found the application process easy.
 - 92% understood the eligibility criteria and rules of the fund (those that disagreed were charities that were unsuccessful in their application).
 - 100% found the guidance and FAQ documents useful.

- (ii) Most respondents did not have any recommendations on how to improve the fund. Those that did recommended:
 - Longer project time.
 - Provide tips on how to locate qualifying suppliers.
 - Provide more information on how to prevent fraudulent activity.

- (iii) Key impacts on end energy consumers:
 - **£4,748,955 of funding** has been provided to these charities for voucher schemes.
 - As of the 1st September 2020, **20,224 vouchers** have been issued to vulnerable consumers to help them with their energy bills.
 - All respondents stated that the initial reaction from those that have received vouchers was either very positive (83%) and positive (17%).

Appendix 1 Case studies

Appendix 1 presents cases studies which were provided by grantees who have completed their Energy Redress Scheme-funded projects. These case studies demonstrate how their projects have supported their clients, who are energy consumers in vulnerable situations.

Grantee A – Maria

Maria received a leaflet that one of our staff posted through her door. The leaflet provided a brief overview of the advice and support available from our project and advised the reader that we would be in the area over the next couple of days, knocking on doors to speak to residents and see what help we might be able to offer. The leaflet also promoted that week's free community drop-in advice session. As Maria wasn't home when we knocked, she attended the advice session that was held at her local library. There she advised us that she felt cold at home and thought she probably needed some additional loft insulation in order to keep the heat in. We took Maria's details and advised her that she was being referred to our project.

Maria was visited by an assessor, who went upstairs and identified the fact that there was an attic room in the roof space, making it unsuitable for loft insulation. As the assessor continued their property survey, they noticed a lot of the light bulbs in the property were old and inefficient. The assessor offered Maria LED replacements for these, free of charge, which she accepted. The assessor also noticed that there was no central heating present in the property as Maria was relying on her downstairs gas fires as her only heat source.

The assessor advised Maria about a scheme offering first time central heating installations to residents who are in fuel poverty. If eligible, the installation is wholly free of charge. Maria expressed an interest in pursuing this. The assessor referred Maria back to us so another home visit could be offered to help Maria complete the paperwork.

The new central heating system was installed just before Christmas. The total benefit to the client through energy bill reduction and cost savings was £4,271.60. This includes £131.60 annual reduction in lighting bill through the replacement of inefficient light bulbs with LED equivalents.

Grantee B – Mark

“My boiler was old and broken and costed me a fortune. I was referred for a replacement boiler which is great, and I now have proper heat. I was also referred to Citizens Advice for help to appeal my PIP benefit. They came out again to help me order the benefits form. Since completing the form, I am now getting PIP which gets me an extra £200 a month. If I hadn’t heard of them, I would have struggled a lot more as you are limited to what you can do on your own. They have been able to help me massively.”

Grantee C – Dorothy

A blind user who took part in the workshop tests provided a quote for our press release which we edited. Her full quote is:

“The heating controls research was very rewarding. It provided me an opportunity to test as well as learn more about the various heating control devices and thermostats currently available in the market. While some thermostats have been designed with great imagination, they were unfortunately not sufficiently inclusive in their design. Manufacturers of some of the thermostats that were tested included braille markings on their products. If correctly integrated into the design of the product, braille markings could be very useful. The research also helped me choose a heating control device for my home, based on recommendations from fellow panellists as well as by watching the device in action. Although the thermostat of the said device is not sufficiently tactile to be accessible to a blind person, it has been well-integrated with Amazon’s Alexa. Also, the app associated with the device is very accessible.”

The research was looking at the ‘hardware’ and didn’t test the smartphone apps related to the central heating controls. A number of testers stated that “it would have been better if they could have tested the accompanying app as well. In fact, Dorothy wrote in her email:

“I would have written a full-length article if we were able to also test the apps associated with some of the devices”.

Grantee D – Catherine

Catherine, who is a self-employed landscape gardener, contacted us because her son had just turned five and she had recently been switched from a legacy benefit to Universal Credit and was struggling to manage waiting six weeks for her first payment. I was able to signpost her to Welfare Support where she successfully received a food parcel and fuel vouchers which made things a bit easier at home. Catherine also mentioned that she was unable to cook healthy meals for the family because her cooker was broken, and she could not afford to replace it. Through our programme I was able to make a successful application for a new cooker and Catherine was delighted that she was able to make her son's favourite meals again!

I also supported Catherine to join a local community shop where she is able to visit twice a week for a small charge and choose from a selection of produce available. Catherine was also supported to search for a better deal for her gas and electric because she was currently with a more expensive supplier and she was able to save over £210 a year by switching which she was thrilled about.

Grantee E – Amy

Amy attended an event in which we were promoting the project and getting householders to sign up for an energy advice visit. After talking to us, Amy was very interested, and signed up to be part of the project. We then visited Amy in December 2018.

Amy had recently purchased the property through a private shared equity scheme and only had second hand inefficient appliances in the property. During the home visit we identified that she was eligible for a scheme where she could get two new kitchen appliances. We supported Amy in applying for a washing machine and a fridge and she was delighted to hear shortly afterwards that her application was successful. In addition to this, Amy was able to purchase a third appliance with a voucher which allowed her to part-fund a new dishwasher. Amy runs a childcare business from home, so receiving more efficient and reliable appliances not only lowers electricity bills but gave her peace of mind.

While also at the home visit we applied for the Warm Home Discount for Amy, and once again she was successful in receiving her £140 rebate from her utility company, bringing

a massive and welcoming boost to her, particularly at a time of year where a lot of electric is being used.