Centre for Sustainable Energy

National Grid Energy Affordability Fund 2023-24

By Megan Blyth

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Executive Summary

This report provides a summary of the National Grid Electricity Distribution (NGED) Energy Affordability Fund (EAF) which the Centre for Sustainable Energy (CSE) administered from May 2023 to April 2024. The fund supported not-for-profit organisations to deliver in-depth and innovative local affordable warmth and Priority Service Register related services within the NGED network areas. This is the sixth round of EAF delivered by CSE.

A funding pot of £249,965 was distributed to seven advice charities, with roughly £39,000 awarded to each:

- 361 Energy CIC, North Devon
- Age UK Lincoln & South Lincolnshire
- Cwm Arian Renewable Energy Ltd, Pembrokeshire
- Exeter Community Energy, Devon
- Groundwork Five Counties, Nottinghamshire
- Swansea Make A Difference
- YES Energy Solutions, Yorkshire

These groups provided in-depth energy advice to 3,166 households and saved the households a total of £1,151,079. The groups attended 414 outreach events to target new communities and geographical regions and spoke with 11,700 people. The groups partnered with health care settings, local authorities, social prescribers and other community organisations to deliver energy training to 483 frontline workers.

Key learnings include:

1. The twelve-month funding model successfully addressed issues of staff capacity in previous rounds which led to organisations failing to meet their targets.
2. Network meetings hosted by CSE were highly useful for sharing best practice between funded organisations and strengthened their low carbon and smart technologies advice provision.
3. Outreach events were key to organisations building their reach to new audiences, their partnerships with other organisations and the demand for their services.
4. Groups combined casework with offers for small measures, which had huge impacts on clients and was rewarding for energy advisors, although was quite time intensive.
5. There is a growing need for financial and debt advice to be embedded in energy advice. More groups are looking to be able to provide this in-house.

6. Groups are increasing their delivery of low carbon technology and smart technology advice. However, groups ranged in their confidence and knowledge to provide advice on this topic, and this topic was not always appropriate when supporting vulnerable clients.

There is evidently a huge need for this fund. EAF is unique among advice funding as it combines several essential elements for a smart and fair energy system:

- providing a framework for new energy advice groups to evidence rigorous fuel poverty support;
- fostering innovation in more experienced groups;
- ensuring groups have a legacy of strong networks to health care services, local authorities and community groups;
- encouraging groups to incorporate low carbon and smart technologies advice into their services.

CSE are therefore keen to see this funding continue, with each round building on the learnings of previous rounds to improve EAF's impact on energy advice organisations and the vulnerable communities they support.

Megan Blyth

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27th June 2024

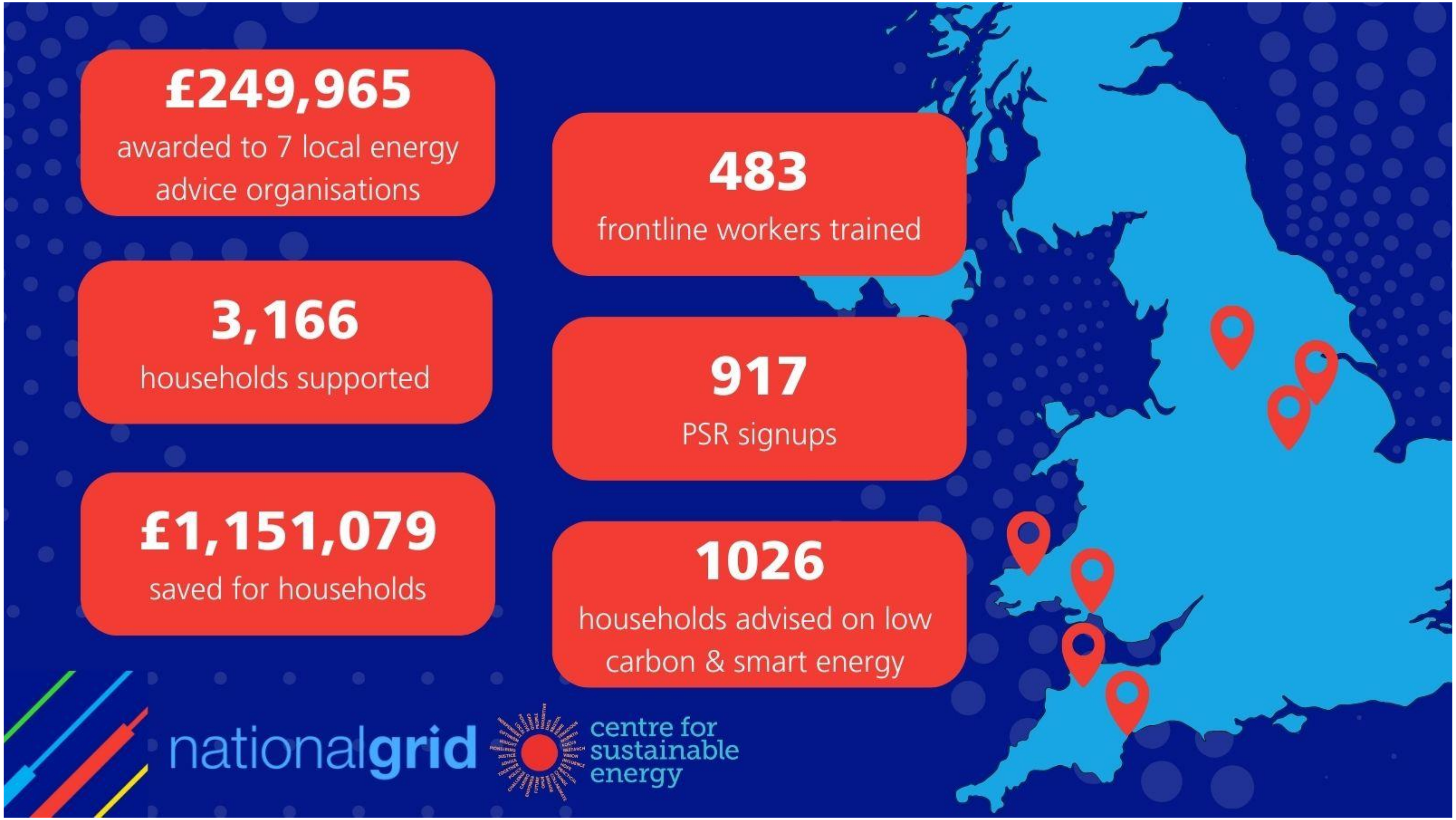

Image 1: NGED Energy Affordability Fund 2023-24 project achievements.

1 Introduction

This report provides a summary of the National Grid Electricity Distribution (NGED) Energy Affordability Fund (EAF) which the Centre for Sustainable Energy (CSE) administered from May 2023 to April 2024. The fund supported not-for-profit organisations to deliver in-depth and innovative local affordable warmth and Priority Service Register (PSR) related services within the NGED network areas. NGED funded organisations to meet one or more of the following NGED priorities:

1. Support vulnerable households to make their homes more energy efficient and take up and benefit from low carbon technologies in the smart energy transition.
2. Help vulnerable households to lower and manage their bills and maximise their income.
3. Increase the resilience of vulnerable customers to severe winter weather and power cuts.
4. Target and support households in areas of higher deprivation, at greater risk and not connected to the gas network.
5. Target and support households in rural and urban areas who have difficulty accessing support, such as communities with rural isolation, and communities for whom English is not their first language.
6. Identify new registrants for the PSR, and support households already registered who are particularly vulnerable to power outages.
7. Work with healthcare providers, other support organisations and community partners to raise awareness of links between cold, damp homes and poor health.

The fund began in 2016-17 under Western Power Distribution and became part of the National Grid Group for 2022-23 (round five). CSE has administered the fund since 2016. This is the sixth round of the EAF, and the first time the funded organisations have been supported for twelve months instead of six.

The latest round focused on supporting experienced energy advice organisations. NGED has been particularly interested in projects that provide:

- Advice services to communities often excluded from support in both rural and urban settings.
- Innovative approaches to enable benefits from access to low carbon technologies.

2 Marketing and publicity

Energy advice providers

Emails were sent to the 6 previously funded organisations and an additional 150 organisations identified as providing energy affordability and fuel poverty schemes and support services across NGED's four licence areas (following CSE's 'Horizon Scanning' work undertaken for WPD in 2014/15 and updated in 2017). These organisations were invited to apply to the fund and/or to share the opportunity with their networks and encourage others to apply.

Emails included a press pack with press release, tweets and social media graphic cards which could be shared by partners (see below), following the success of last year's press pack.

The wider public

CSE ran a series of tweets, added a revolving banner to the CSE homepage, and directed people to a project page on our website. The fund was also publicised through CSE's e-news (7267 subscribers), which reached a larger audience than the previous year (when we had 2600 subscribers).

Image 2: CSE social media graphic cards for EAF publicity.

3 Applications received

The fund was open for applications from 27 April 2023 until 27 March 2023. Fifty-six applications were received, representing a total funding request of £1,889,609. This was a very similar number of applications to the previous round's bumper intake, although this time with a much more equal spread across regions. The high volume of detailed applications again demonstrated the acute demand for funding in this area. The spread of applications can be seen from Table 1 and Image 3.

Area	No. of applications
East Midlands	10
South West	16
West Midlands	15
Wales	13
Multi-area	2
Total:	**56**

Table 1: Applications received per National Grid distribution area.

Image 3: Map of successful (red) and unsuccessful (blue) applicants.

4 Selection process

The applications were scored against their ability to demonstrate that their project would meet one or more of the following objectives:

1. Provide in-depth 1-1 advice and support to enable vulnerable households to carry out home improvements to make their homes more energy efficient and take up and benefit from low carbon technologies in the smart energy transition. This could include providing information and advice about energy efficiency, smart technologies, behaviour change and renewable/low carbon energy solutions for domestic properties or coordinating bulk buying schemes for items such as low energy light bulbs or draught-proofing materials to reduce costs and lower energy bills.
2. Help vulnerable households to lower and manage their bills, through management and clearance of debts to energy providers, accessing financial support (such as benefits, grants and vouchers), switching energy providers or tariffs, and moving away from pre-payment meters, where appropriate.
3. Provide support and advice to increase resilience of vulnerable households to severe winter weather and provide advice on what to do in a power cut.
4. Target home energy advice and support to households that are in areas of higher deprivation, at greater risk and not connected to the gas network, potentially using National Grid's social indicator map: nationalgrid.co.uk/social-indicator-mapping
5. Identify and support vulnerable or low-income households in rural and urban areas who have difficulty accessing support, to enable them to benefit from more services and take control of their bills, along with other financial, practical, and social benefits through onward referrals to other service providers.
6. Identify new registrants for the PSR and offer support to households already registered, in particular those PSR customers who may be particularly vulnerable to power outages and therefore may be at higher risk e.g. those who are dependent on oxygen, have complex health needs or are very frail.
7. Work with healthcare providers, other support organisations and community partners, to raise awareness of the links between cold, damp homes and poor physical and mental health. Improving collaboration to identify and register PSR eligible patients and increase support for tackling fuel poverty impacts.

Organisations were asked to show how they would meet these objectives through a variety of activities including: providing remote or in person advice and support, running outreach activities, extending existing referral networks, or extending their geographical reach.

Applicants who could deliver one or more of the activities outlined above were also encouraged to incorporate frontline worker (FLW) training. This targeted frontline practitioners such as GPs, midwives, firefighters and nurses, as well as volunteers in community groups. Training for energy advice staff was also encouraged. These additional activities aimed to build capacity of teams to grow their skills and confidence and allow the EAF to leave a legacy after completion.

Applications were received and marked by the CSE Local and Community Empowerment team against the scoring criteria agreed with NGED. All applications were marked once, and a selection were double marked and moderated to ensure consistency in marking. Each of the four NGED areas were marked in turn and the best applications received from each area were highlighted. These recommendations were passed to NGED who made the final decision on which groups to fund based on which applications most closely matched the fund's objectives.

Seven groups were successful and were awarded funding:

- Swansea Make A Difference
- 361 Energy CIC
- Groundwork Five Counties
- Cwm Arian Renewable Energy Ltd
- Exeter Community Energy
- Age UK Lincoln & South Lincolnshire
- YES Energy Solutions

5 Capacity-building for groups

CSE hosted a one-day EAF kick off webinar, plus three capacity building events for the funded groups. The events were a new addition to CSE's package of support for groups. This addition followed feedback from previous funded organisations requesting more opportunity for best practice sharing and networking between groups.

The purpose of each event was guided by the groups, who gave their preferences in advance via polls. Each event was attended by at least five groups.. Learning from the events is discussed in section 8.

Events

Kick-off event 2nd May 2023

Half-day online webinar to explain National Grid reporting requirements and learn from CSE on energy advice topics of: engaging the health sector, providing advice on smart and low carbon tech, supporting people in crisis and innovative outreach approaches. Groups were able to contribute their experiences, key learnings and the approaches that are working for them. In addition, the webinar covered monthly reporting requirements, contractual obligations, and details of deadlines and individual group targets.

Capacity building event 27th September 2023

One-hour morning presentation introducing the Smart Energy Action Plans (SEAPs), led by CSE staff leading NGED's pilot programme. Groups took part in a Q&A and CSE was able to implement a referral process for SEAPs for clients from the groups to speak with CSE advisors under the pilot scheme.

Capacity building event 21st November 2023

Online networking session for attendees to breakout in smaller groups to discuss highlights and challenges of their work in 2023 so far. Groups provided feedback on the financial savings estimates report requirements and sought advice from CSE about applying for other NGED funds.

Capacity building event 19th March 2024

One-hour morning of peer-to-peer learning and a recap of the Smart Energy Action Plans. Groups discussed the winter period of 2023-24 and provided feedback on the notion of innovation in energy advice.

6 Project achievements

Table 2 (below) summarises the grant each group was awarded, the financial savings achieved for their clients and how many people were given one-to-one in-depth advice.

	Grant awarded	Total money saved for clients*	Number of clients for in-depth energy advice
361 Energy CIC	£39,555	£161,623	220
Age UK Lincoln & South Lincolnshire	£35,950	£125,552	968
Cwm Arian Renewable Energy Ltd	£39,480	£190,052	468
Exeter Community Energy	£39,980	£239,443	512
Groundwork Five Counties	£30,000	£156,653	400
Swansea Make A Difference	£30,000	£43,297	198
YES Energy Solutions	£35,000	£234,459	400
TOTAL	**£249,965**	**£1,151,079**	**3166**

*Table 2: Headline project achievements. *Rounded to nearest whole number.*

Table 2 shows that the grants totalling £249,965 allowed the seven groups to achieve total financial savings of £1,151,079 for 3,166 clients. That equates to an average of £363.60 saved per client advised. This means that for every £1 awarded by NGED the groups saved an average of just over £4 per client.

This round has supported almost 50% more clients than the previous round (1,573 clients). Although the number of clients supported has almost doubled (given that this round was over 12 months instead of six), the financial savings did not proportionately double. This is expanded on in section 8.8.

Groups have also benefited from the funding by being able to test out new engagement and outreach approaches, reaching new communities who do not usually access advice services. This is through developing their capacity to give energy advice by training staff and volunteers and creating referral pathways with new community organisations and frontline workers such as healthcare professionals. Allowing the funding to be spent on training means that the projects continue to have an impact in each area after the funding has been spent and the projects have finished.

7 Project reports

7.1 Swansea Make A Difference

Swansea Make A Difference (MAD) is a grassroots, anti-poverty, pro-equality youth and community charity which offers poverty support and campaigns against structural injustice. The charity hosts an inclusive warm space where people disproportionately impacted by the cost-of-living crisis can access guidance, advocacy, creative arts, digital skills building, education and training, and a place to belong. Swansea MAD has been engaged in smart energy advice for fuel poor households since 2021, with particular focus on public understanding of smart meters and managing bills.

Project description

Swansea MAD were awarded funding to build on their experience with low-income groups taking up smart energy technology. They planned to draw on their established referral networks and expertise in digital inclusion to be an entry point for clients to smart technology plus additional financial and social benefits from referral partners.

Project activities and targets

- Provide in-depth 1:1 support for 196 clients.
- Deliver 122 outreach events, including energy workshops, drop-in sessions and community events run by partners.
- Deliver 24 training sessions for frontline workers, including youth and community workers, social care workers and housing association staff.

Award

£30,000

Targets	Achievements	Comments
196 clients supported with 1:1 in-depth advice.	198 clients supported.	Swansea MAD delivered a mix of phone calls, video calls, home visits and drop-in individual advice to their clients. They had steady engagement throughout and met their target a month earlier than anticipated.
122 outreach events. Including 24 workshops or community events and 98 drop-in sessions.	123 events delivered, reaching 537 local residents.	The regular drop-in sessions were helpful for directing people to more in-depth advice. The community events were useful for understanding public opinion and concerns about energy companies and bills. Events included community cafés, walks and talks, carers' events, disability forums and more.
24 training sessions for frontline workers.	24 events delivered, reaching 229 frontline workers.	Swansea MAD's training sessions were well attended and increased the number of referrals they received throughout the period.

Table 3: Swansea MAD achievements against targets.

Advice topics	People advised	Money saved
Income maximisation	*198*	*£23,206*
Energy Efficiency	*101*	*£7,614*
Behavioural change	*103*	*£4,041*
Smart/low carbon technology	*70*	*£8,436*
Home measures and wider support	*0*	*NA*
PSR sign up	*77*	*NA*
Power cut support	*0*	*NA*
	Total financial savings:	***£43,297***
In-depth energy advice was given to 198 people who saved an average of £219 per person. Most of the savings came from advice around income maximisation such as signing people up to receive the Warm Home Discount, fuel vouchers and referral for benefit checks and debt advice.		

Table 4: Swansea MAD advice topics and financial savings.

Swansea MAD Project Summary

Swansea MAD's energy advice service had a large impact on their community, and they met their targets at a steady pace throughout the reporting period. Outreach events increased their reach and reputation. Their digital inclusion workshops found that their clients were sceptical towards smart meters and the cost savings of low carbon technology.

Impactful outreach

Swansea MAD ran twice-weekly drop-in sessions at their hub and regular outreach events with partners. These were well-attended and served as a one-stop-shop for Swansea MAD's services and referral pathways. Swansea MAD's combination of energy advice, food poverty support and digital guidance meant they could provide huge social benefits to people with complex needs alongside financial savings. The Swansea MAD team commented that over the period they became better known locally for providing energy support, cementing the trust from their networks and expanding their reputation.

Their clients were commonly in energy debt. Many clients expressed concern that they remained in arrears even during summer, yet some still needed their heating during the cold spells in July. Additionally, there was a sentiment that the government support from previous years had disappeared despite the ongoing high cost of living.

Mixed responses to smart energy

Swansea MAD found differing opinions on smart energy in their community, especially related to energy companies and the high cost of electricity. They ran workshops helping people with low digital skills to understand their bills after energy providers moved services online, and often found clients had misconceptions about energy companies and distrusted them.

MAD reported an increase in enquiries about smart meters in the lead up to the price cap increase in 2024. However, they also reported that clients stated that smart tech, such as smart meters and electric cars, were not attractive while the cost of electricity remained high. The mixed response to smart energy tools indicates a lack of clarity around the cost savings of low carbon technology, as well as undertones of general scepticism towards energy companies. MAD reported:

"There is a clear shift in public opinion against smart technologies (e.g. SMART meters), however, the roll out is out of their control."

"As the price of energy isn't coming down, the incentives to move to smart/low carbon tech seem to have diminished as well. Some of the conversation about low carbon technology, including EV's, used to be that in the long run you would save money, but this isn't guaranteed anymore. With the cost of a new EV so high, the people we are talking to have no desire to invest in them."

7.2 361 Energy CIC

361 Energy are a North Devon based not-for-profit social enterprise which offer free home energy efficiency visits to help local residents reduce their fuel bills and lower their carbon footprint. 361 Energy have provided domestic energy advice since 2012 and their community is primarily older people living off-gas in rural-related areas with poor quality housing and high levels of fuel poverty. 361 Energy are the key retrofit advice provider for referral from North Devon Council and are well-connected to the local referral networks.

361 Energy's primary method is home visits, which enables them to provide better support for the digitally disconnected; pick up on issues beyond billing and behaviours; offer simple energy efficiency measures on the spot; carry out suitability assessments for retrofit measures and grants; and pick up on wider welfare issues which need to be referred to other agencies.

Project description

361 Energy were a new organisation to EAF this round. Their project had three goals: (1) better targeted advice using the NGED social indicator mapping tool to reach fuel poor customers; (2) plugging the gap in the deprived region of Torridge by training frontline workers and expanding reach; (3) accelerating access to retrofit through ECO4, Connected for Warmth, HUG2 and ECO+ schemes.

Project activities and targets

- Provide in-depth 1:1 support to 220 clients.
- Deliver 20 outreach events including workshops, community cafés.
- Deliver 25 training sessions for frontline workers.

Award

£39,555

Targets	Achievements	Comments
Provide in-depth 1:1 advice to 220 clients through home visits.	220 clients given 1:1 advice in home visits.	361 Energy were able to supplement their home visits with improvement measures from a local council scheme. Completed in February 2024.
Deliver 20 outreach events.	31 outreach events delivered.	This included outreach at job centres, food banks, community hubs and community hospitals. The outreach events helped build new referral pathways and improved 361 Energy's ability to support excluded communities.
Deliver 25 frontline worker training sessions.	25 sessions delivered, reaching 179 frontline workers.	Frontline workers included staff from food banks, child day care centres, the fire service, Age UK.

Table 5: 361 Energy CIC achievements against targets.

Advice topics	People advised	Money saved
Income maximisation	*71*	*£39,801*
Energy Efficiency	*167*	*£11,758*
Behavioural change	*162*	*£99,833*
Smart/low carbon technology	*110*	*£10,230*
Home measures and wider support	*69*	*NA*
PSR sign up	*45*	*NA*
Power cut support	*0*	*NA*
	Total financial savings:	***£161,623***
In-depth energy advice was given to 220 people who saved an average of £735 per person. Most of the savings came from advice around behavioural change such as having shorter showers, running clothes washing machines or dishwashers less frequently, and turning off appliances and lighting when not in use.		

Table 6: 361 Energy CIC advice topics and financial savings. Rounded to nearest whole number.

361 Energy Project Summary

361 Energy successfully expanded their reach to vulnerable customers and the region of Torridge throughout their project. They made partnerships with other service providers which will have an ongoing legacy and their home visit-based method saved an average of £732 per client.

Impactful home visits with small measures

361 Energy took a household approach, looking at what changes would be most efficient for each client. They regularly cooperated with social services and undertook important casework, such as applying for a new boiler through ECO. They combined their EAF advice offer with Household Support Funding from North Devon Council. This allowed advisors to install draught proofing, LEDs, heated blankets, air fryers, and other small measures up to £1,000. The ability to offer on-the-spot measures greatly enhanced their impact and increased referrals for EAF-funded advice. They also were able to build up a list of trusted tradespeople to continue working with. 361 Energy reported a positive impact on the advisors themselves:

"We found that practical support was a boost not only for the clients but for our advisors as well. Advisors work with people in some quite desperate situations, so being able to provide a positive and immediate solution supported their wellbeing."

Partnerships expanding reach

Through outreach events and frontline worker training, 361 Energy built stronger relationships with referral organisations like Jobcentres, Foodbanks, Community Hubs, and community hospitals in targeted areas. For instance, they developed a new relationship with Pickwell, a local charity that houses refugees. Their partnership with Pickwell's language translators demonstrated the importance of specialist energy advice for new arrivals in the UK. 361 Energy also found that partnerships with other organisations helped them reach vulnerable people via referrals rather than events, as these individuals might be unlikely to attend an outreach event or contact 361 Energy independently.

Other learnings

- A key challenge was running front line worker training sessions. 361 Energy found that organisations would often re-book or delay, despite their interest in the training. They found that a version of FLW training online had much better attendance and concluded that in future they would consider making a training video to circulate instead of in-person training events.
- In future, 361 Energy would like to partner with a debt specialist, due to the long waiting lists for debt advice for their clients.

- They found success supporting off grid households with advice for purchasing oil and are looking at the possibility of a project on energy efficiency for Park Homes.
- They found that most of their clients were already on PSR, but few were interested in power-cut support unless they had medical equipment.

7.3 Groundwork Five Counties

Groundwork Five Counties is a charity working across Derbyshire, Nottinghamshire, Leicestershire, Lincolnshire and Rutland. Groundwork gives practical, person-centred help to reduce multi-generational poverty, low educational attainment, social isolation, crime, and poor health outcomes in the most deprived areas of Nottinghamshire. Their client group includes older people, carers, long term unemployed, ex- offenders, and ethnic minorities, and almost 75% of their service users face barriers due to mental health and disability. The Groundwork 'Green Doctor Service' scheme has provided in-depth energy advice for the last three years, helping people with their energy use and bills and advocating on their behalf.

Project description

Groundwork Five Counties were funded to continue the success of the previous EAF round, as the only provider in the region offering debt support, behaviour change advice and low carbon retrofit services under one roof. They aimed to double their in-depth advice target, triple their outreach target, and extend their services to more deprived parts of Nottingham and Derbyshire, based on NGED Social Indicator mapping.

Project activities and targets

- Provide in-depth 1:1 support for 400 clients.
- Deliver 30 outreach events.
- Engage with 20 other organisations and services for referrals.

Award

£35,950

Targets	Achievements	Comments
Provide in-depth 1:1 support for 400 clients.	400 clients provided with in-depth 1:1 advice.	Groundwork started slightly behind with in-depth interactions over autumn. However, a late winter/early spring surge in advice requests was managed by calling in extra staff for support, and enabled Groundworks to complete their target perfectly to time.
Deliver 30 outreach events.	64 outreach events delivered, reaching 675 people.	For the second year in a row, Groundwork far exceeded their events target. Outreach events included community centres, churches, councils, housing associations and community groups.
Engage 20 other orgs to develop referral and advice pathways.	26 orgs and services engaged with.	Groundwork continued to expand their network with local authorities, charities and community groups. Partnerships were helpful for reaching vulnerable people who would not be able to attend an event in-person.

Table 7: Groundwork Five Counties achievements against targets.

Advice topics	People advised	Money saved
Income maximisation	*84*	*£66,025*
Energy Efficiency	*266*	*£26,692*
Behavioural change	*383*	*£61,216*
Smart/low carbon technology	*11*	*£2,720*
Home measures and wider support	*50*	*NA*
PSR sign up	*125*	*NA*
Power cut support	*46*	*NA*
	Total financial savings:	***£156,654***
In-depth energy advice was given to 400 people who saved an average of £392 per person. Most of the savings came from advice around behavioural change such as having shorter showers, running clothes washing machines or dishwashers less frequently, and turning off appliances when not in use, and support with income maximisation, for example accessing benefits or discounts they are entitled to.		

Table 8: Groundwork Five Counties advice topics and financial savings. Rounded to nearest whole number.

Groundwork Five Counties Project Summary

Groundwork Five Counties built on their reputation for combining energy advice, debt support and low carbon tech advice using a single-contact approach throughout this round. At the start of the project, Groundwork focused on building the capacity of their community coaches, with eight staff completing the Level 3 Energy Awareness Training. They used summer and autumn to deliver events and increased in-depth energy advice in late winter and early spring. Groundwork focused heavily on outreach events and partnerships, which allowed them to reach new pockets of their community and double their events target.

Partnership approach

Groundwork continued to work with organisations that referred in vulnerable beneficiaries by running workshops, attending community events, networking sessions and training front line workers. This approach helped Groundwork reach new vulnerable groups. For example, Groundwork created a strong partnership with the Hong Kong British National Organisation, supporting new migrants with little knowledge of UK heating systems and how to prepare for cold UK winters. Groundworks also worked with multiple local councils with housing units with new storage heaters, but little knowledge on appropriate use of the heaters. This was in addition to a broad range of foodbanks, schools, daycare centres, mental health support groups, job centres, faith groups, and libraries.

The training sessions for social care staff, while not a key target for Groundwork this year, were another example of their successful partnership working. Carers, NHS workers and mental health support staff then referred to Groundworks vulnerable people who had been identified as struggling with energy debt and unable to make it to community outreach events.

Income maximisation

Groundwork had a significant impact for the people they supported with income maximisation, saving an average of £762 per person for this advice. They did ongoing case work with clients to reduce their debt and reflected that people were often not aware of the benefits that they were entitled to, like the Warmer Homes Discount. The Groundwork community coaches also referred to specialist providers to support with debt management, assisted with switching tariffs to reduce bills and contacting providers to make debt repayment plans for clients.

Smart energy

Groundwork reported giving low tech carbon advice to few of their in-depth clients but found that this was not a topic of interest at their outreach events, compared to their other advice offerings. While Groundwork offered help with smart meters, they reported that *"people either already had them and seemed fine or were not interested in getting them*". They also received this reaction to solar PV.

7.4 Cwm Arian Renewable Energy Ltd

Cwm Arian Renewable Energy Ltd (CARE) are a community energy group registered as a community benefit society. They were set up to establish a low carbon local economy and prevent and relieve poverty in North-East Pembrokeshire. CARE has delivered in-depth energy advice in the previous round of EAF, Smart Energy GB and Big Energy Saving Network funds. The majority of local residents in CARE's area live without central heating in low EPC homes, and CARE partners with Citizens Advice to manage outreach and support for fuel poor households. Furthermore, in parts of the target area over 50% of residents speak Welsh as a first language. CARE works consistently to provide and promote Welsh language services.

Project description

CARE was awarded funding (making this their third EAF project) to build on their tried and tested methods from the last two rounds. CARE aimed to increase their reach in new communities, with new referral partnerships, by networking and attending cross-region outreach events. Their project included a pilot scheme for 10 households with complex energy needs to be supported over multiple home visits with longitudinal casework.

Project activities and targets

- Provide in-depth 1:1 support for 300 clients, with 40 households receiving thermal imaging surveys.
- Deliver 55 outreach events.
- Support 20 frontline workers to make informed referrals to CARE.
- Pilot in-depth longitudinal support strategy with 10 households.

Award

£39,480

Targets	Achievements	Comments
Provide in-depth 1:1 support to 300 clients. 40 households receive thermal imaging surveys.	Provided support for 468 clients, including thermal imaging surveys for 42 households.	CARE found many enquiries from households considering ECO4 works or who had works installed that were not operating efficiently. Thermal imaging surveys continued to be very popular, as CARE is one of the only providers in the region.
Deliver 55 outreach events including advice surgeries, partnership events, public outreach events and eco-home tours.	Delivered 61 outreach events.	Events included village shows, community cafés, carers' events, school eco events, and 'Warm & Well' events. Plans for 3 eco home tours were combined into 1 large event which included tours of CARE's own eco building and a Passive House and a talk on domestic solar installations.
Support 20 frontline workers (e.g. health care providers) to make informed referrals to CARE.	Supported 39 frontline workers.	Attending outreach and partnership events was a two-way process for developing relationships with other local support services. Most of CARE's referrals for households with complex energy needs came from other community support organisations.
Pilot in-depth longitudinal support strategy with 10 households with complex energy needs.	10 households supported with complex energy needs.	This was the most time-consuming and the most rewarding for CARE staff. One household was supported to seek ECOflex works which would save the household an estimated £20,000.

Table 9: CARE achievements against targets.

Advice topics	**People advised**	**Money saved**
Income maximisation	*23*	*£36,700*
Energy Efficiency	*395*	*£71,991*
Behavioural change	*338*	*£55,936*
Smart/low carbon technology	*113*	*£25,425*
Home measures and wider support	*28*	*NA*
PSR sign up	*86*	*NA*
Power cut support	*26*	*NA*
	Total financial savings:	***£190,052***
In-depth energy advice was given to 468 people who saved an average of £406 per person. Most clients benefitted from energy efficiency advice such as effective heating control use and radiator foils, and behaviour change advice such as running washing machines or dishwashers less frequently. A smaller number of clients saved significant amounts through smart & low carbon tech for example Boiler Upgrade Schemes and Eco schemes.		

Table 10: CARE advice topics and financial savings. Rounded to nearest whole number.

CARE Project Summary

CARE again had great success in their EAF project, meeting or exceeding all targets ahead of schedule. They developed partnerships with a wider range of health care providers and community services through events, which supported their pilot casework scheme. CARE found that ECO 4 installations were a key issue in the area that they were able to address through this project.

Outreach makes for successful casework pilot

CARE attended 61 outreach events across Southwest Wales (see map in Image 4 below) and attended further networking events with other providers. Becoming a regular face at community events helped with their word-of-mouth referrals from community members and increased their visibility to other providers. CARE found that partnership development was a two-way process as other agencies became familiar with the additional help CARE could offer their clients. The new partnerships were essential for CARE's pilot casework scheme, where the majority of the households referred for complex energy support came from other agencies. Partner referral was key as CARE found that the people who needed casework support were people unlikely to have attended a community outreach event.

CARE were able to make a large impact for the households they supported with multiple visits, with one householder saving up to £20,00 from CARE's advice regarding government-funded home improvement works. CARE have been doing home visits for over 3 years, but multiple visits to support the same household was new for the staff, who concluded: *"Whilst these visits are time consuming, they have been some of the most rewarding. More funding to develop this area of our support work will be included in future fund bidding."*

ECO 4 issues for vulnerable people

During the project CARE reported an influx of enquiries from people needing advice on ECO4 measures. CARE reported installation companies targeting ECO-eligible people with sales pitches: *"Cold calling and mail shots from installers are causing confusion and lack of trust. We also have concerns regarding some of the installations."* Some clients were weighing up potential ECO 4 work, but others had received ECO 4 funded heating installations but were left with little information on how to operate their new systems. CARE noted that demand for advice around low carbon heating systems (e.g. heat pumps) will only increase in the future: *"Education on this type of new technology is going to become more and more important in the coming years as installers are not providing it."* CARE have organised a discussion group with other local organisations and local authorities to share knowledge about ECO 4 experiences, address misinformation and improve service for vulnerable customers.

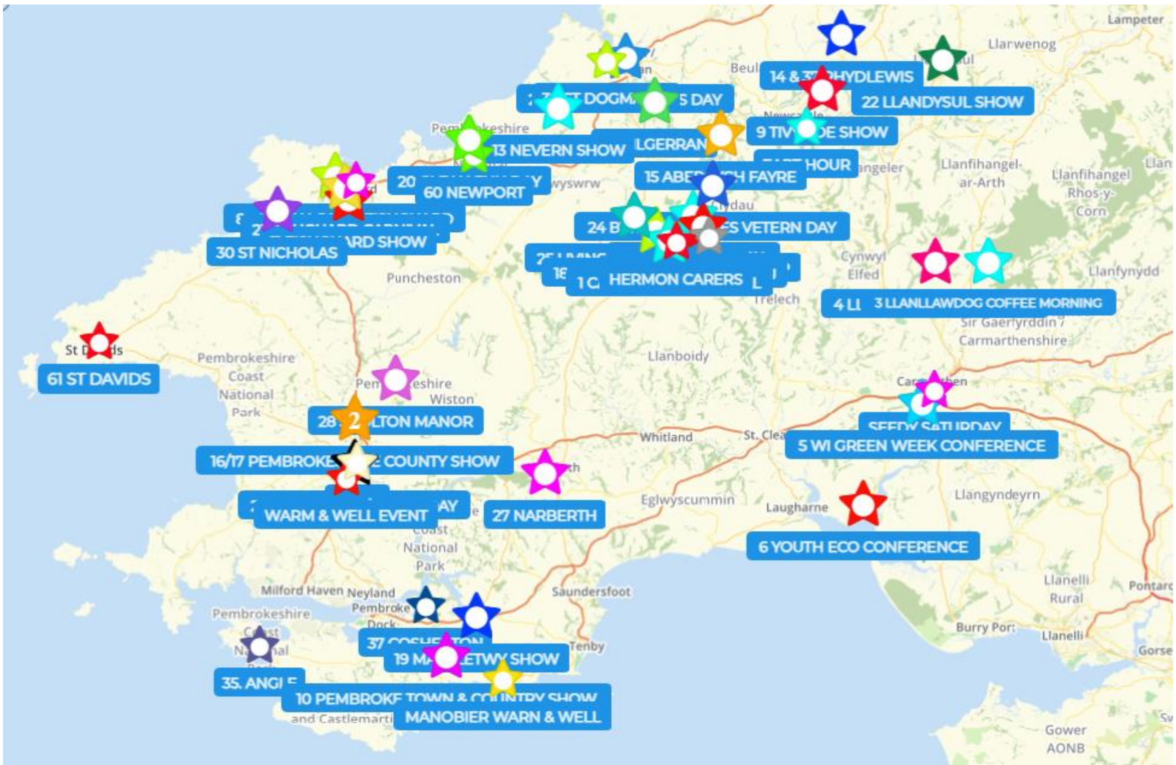

Image 4: Map of CARE outreach events for EAF 2023-24.

7.5 Exeter Community Energy

Exeter Community Energy (ECOE) is a community-owned social enterprise whose aim is to use energy projects to foster a resilient community, including addressing fuel poverty. ECOE brings together people to build a sustainable future for the community, tackle climate change and the depletion of resources, reduce fuel bills, promote energy efficiency and address fuel poverty. ECOE had a 300% increase in calls to their hotline between 2022-23 and helped 500 households per month on average.

Project description

ECOE were awarded funding for their proposed partnership with Tamar Energy Community (TEC) and South Dartmoor Community Energy (SDCE) to meet shared targets and provide support across their 5 districts plus West Devon and South Hams. The project prioritised engaging health sectors, single-parent families, and non-English speaking residents as ECOE identified these sectors as needing extra support and casework.

Project activities and targets

- Provide in-depth 1:1 support for 500 clients
- Deliver 48 outreach events
- Deliver 18 frontline worker training sessions
- 4 advisors to complete Level 2 Fuel Debt in the Community

Award

£39,980

Target	Achievements	Comments
Provide in-depth 1:1 support for 500 clients via home visit, phone or video call.	Provided in-depth support for 512 clients.	This included 440 clients supported by ECOE, 54 clients by SDCE and 18 by TEC, with advice, small measures, energy saving devices, in-house debt support and referrals to other services.
Deliver 48 outreach events including workshops, training, community cafés and other events.	Delivered 77 outreach events, reaching 700 people.	A high number of talks and drop-in clinics delivered at community centres, retirement housing, warm spaces and more. Monthly reports consistently stated that they were hugely busy with requests for events and talks.
Deliver 18 frontline worker training sessions.	Delivered 25 training sessions.	24 sessions were delivered by ECOE and 1 session was delivered by SDCE. On average, 20 people attended each session.
4 advisors to complete Level 2 Fuel Debt in the Community from National Energy Action (NEA).	4 advisors completed Level 2 Fuel Debt in the Community course.	ECOE reported that it was challenging to get slots as the NEA courses fill up so fast. 2 advisors from ECOE, 1 from SDCE and 1 from TEC were trained.

Table 11: Exeter Community Energy achievements against target

Advice topics	People advised	Money saved
Income maximisation	361	*£100,103*
Energy Efficiency	278	*£68,313*
Behavioural change	385	*£71,268*
Smart/low carbon technology	128	*£115*
Home measures and wider support	167	*NA*
PSR sign up	304	*NA*
Power cut support	36	*NA*
	Total financial savings:	***£239,799***
In-depth energy advice was given to 512 people who saved an average of £468 per person. The majority of savings came from advice about income maximisation, which included eligible benefits and assistance schemes, the Warmer Homes discount, utility bills discounts and vouchers.		

Table 12: Exeter Community Energy advice topics and financial savings. Rounded to nearest whole number.

ECOE Project Summary

This is ECOE's fifth EAF project and was just as successful as in previous rounds. They succeeded in expanding their reach to families and the health sector, providing advice to people who had not been in contact with energy advice services before. This aspect of the project exceeded ECOE's expectations. The partnership with South Dartmoor Community Energy (SDCE) and Tamar Energy Community (TEC) was effective but challenging at times. ECOE had no problems with reporting or meeting targets.

Effective but time-consuming partnership model

TEC and SDCE managed with a small number of highly complex cases. TEC focused on Ukrainian refugees in West Devon working with the local authority and SDCE focused on low income and single parent households referred from foodbanks and hospitals in South Hams. They reported that their clients were mostly people with mental or physical disabilities, poor health and small children in the household. SDCE reported: *"We're increasingly finding clients who need ongoing support due to mental health issues, language barriers, poor health or disabilities that make managing energy bills and energy within the home more difficult. Many of these clients do not magically disappear when a funding stream ends."*

The case work required for these clients was extensive, and EAF funding allowed advisors to work with overlapping social services for the clients. The case work time allowed TEC to build a word-of-mouth reputation in their community. SDCE developed their relationship with hospital staff for referrals. However, ECOE reflected that, notwithstanding the impact for clients, the project management time spent coordinating the reporting meant that they probably would not apply for a collaborative project in future.

The highlight of the project collaboration was their joint Fuel Poverty Awareness campaign, for which they also joined with 361 Energy (another EAF funded group). They delivered events at libraries and councils across the county and received great feedback.

Expanding reach to families and the health sector

ECOE reached families through new event avenues, for example at libraries and school parent evenings. They found that attending large well-organised community events, advertising their attendance in advance and doing a small talk as well was the best way to reach vulnerable clients at events. Events were also the best way to reach other service providers: *"networking events are extremely important as good relationships with our partners is key to getting referrals and the most time efficient way of producing a steady influx of new clients and events to attend".* ECOE also developed new links with job centres, health teams, and community groups they had not worked with before. They built new relationships with GP surgeries and ran training for GP staff and hospital teams. When ECOE received an influx of referrals from their new GP partners they found that 99% of people referred had never previously benefitted from their service: *"This was a great outcome and satisfied our aims to reach new previously excluded groups. We'll be doing more work with the GPs in the coming year to further develop this area."* In response to the success of events and partnerships to reach new groups, ECOE have recently hired a community outreach role to continue the legacy of this work.

ECOE made the most impact for clients on home visits, where they could combine multiple funding streams and partner offers to provide warm packs, small measures, white goods, home repair services, boiler replacements, low carbon energy sources, low carbon technology and insulation. Funding came from EAF, LEAP, HIVE heating controls pilot, Devon Council's Household Support Funding and ECOE's own small measures fund. ECOE also reflected on the success of their new debt advice service, and the increasing role that fuel vouchers play in their offering: *"Being able to provide emergency funds to keep the heating on is now a core part of our service".*

ECOE staff finished with: *"The EAF funding has really helped us to develop our reach and services over the years for which we are immensely grateful. This funding always gives us focus and targets to meet, without which we may not have been able to grow so much. So as always THANK YOU for your support, we really appreciate it!"*

7.6 Age UK Lincoln & South Lincolnshire

Age UK Lincoln & South Lincolnshire (Age UK) is local charity which supports people over 50, their families and their carers. Age UK delivers a wide range of support for the varying challenges faced during later life including help in the home, telecare, social activities, and hospital discharge support. The Information & Advice team provide guidance to older people about welfare benefits, access to health and social care, housing options, and more recently energy efficiency and choosing energy providers. The team's new Warm & Wise project has been providing in-depth energy advice since May 2022. Their service reaches clients through phone calls, home visits or office appointments, and is supplemented by installation of devices like LED lightbulbs and draught excluders.

Project description

Age UK was awarded funding to expand their presence and resources in the rural districts of South Lincolnshire. Their application demonstrated an increased number of referrals from this region and the NGED social indicator map showed a higher number of fuel poor households. Age UK aimed to go directly to their target audience by running outreach surgeries away from their main activity centres and providing follow up support to attendees.

Project activities and targets

- 800 clients given 1:1 in-depth energy advice.
- Deliver 20 outreach events.

Award

£35,950

Targets	**Achievements**	**Comments**
800 clients given 1:1 in-depth advice. *Target was revised from 983.*	968 clients were given 1:1 in-depth energy advice.	A reduced target was agreed due to slow progress caused by staff recruitment difficulties. However, huge progress was made by training an Information & Advice team member in energy advice. Age UK ended just shy of their original target.
20 outreach events including workshops, talks, and attending community groups.	58 outreach events were delivered, reaching an estimated 574 people.	Outreach events were popular and effective at recruiting people for in-depth advice. Events were key to expanding to hard-to-reach rural areas of high deprivation in South Lincolnshire.

Table 13: Age UK Lincoln & South Lincolnshire achievements against targets

Advice topics	**People advised**	**Money saved**
Income maximisation	*195*	*£28,564*
Energy Efficiency	*573*	*£40,995*
Behavioural change	*656*	*£55,993*
Smart/low carbon technology	*561*	*£0*
Home measures and wider support	*68*	*NA*
PSR sign up	*186*	*NA*
Power cut support	*47*	*NA*
	Total financial savings:	***£125,552***
In-depth energy advice was given to 968 people who saved an average of £130 per person. Most of the savings came from advice around behavioural change such as having shorter showers, running clothes washing machines or dishwashers less frequently, and turning off appliances when not in use, and energy efficiency advice, for example using LED bulbs, insulation, draughtproofing, electric throws and thermostat and radiator controls.		

Table 14: Age UK Lincoln & South Lincolnshire advice topics and financial savings. Rounded to nearest whole number.

Age UK Project Summary

This was the first EAF project for Age UK Lincoln & South Lincolnshire (Age UK). After overcoming a staffing hiccup at the beginning of the project, Age UK was able to proceed with delivering advice at the expected volume and found that their advice was very well received by their clients. In particular they extended their reach into rural communities in South Lincolnshire.

Overcoming staff capacity challenge

As part of their project, Age UK aimed to hire a new Energy Advisor to join their established Information & Advice team. However, the person hired for the role had to leave due to personal reasons, and Age UK had difficulty recruiting another person. As their in-depth interaction number was quite low at the midway point, a new revised target was agreed (800 instead of 983).

The hiring of a new Energy Advisor seemed improbable, so Age UK changed tack and reallocated capacity within the Information & Advice team instead. The whole team were trained in NEA Level 1, and one team member became primarily responsible for Energy Advice. This person was strategically placed at the charity's drop-in shopfront and took on referrals, while all the team could attend outreach events and provide advice at events. With the reallocation of staff, Age UK was able to quickly make progress against their targets. Age UK surpassed their revised target and ended just 15 clients short of their original goal.

Low financial savings

Age UK had the lowest savings per client supported of all the groups. This is likely due to this being Age UK's first experience with EAF reporting requirements and the pressure of needing to meet their target for in-depth interaction with staff who are new to providing energy advice. This highlights the need for new groups and groups with staffing issues to be better supported by CSE to understand reporting requirements and using the Energy Savings Trust (EST) savings figures.

Reaching new rural areas

Age UK expanded their advice beyond their shopfront and hotline and began delivering outreach events in rural South Lincolnshire. Attending outreach events made a huge difference to their ability to reach areas of high deprivation, especially vulnerable people who would have been unlikely to seek support on their own. Most of the events Age UK attended were in partnership with community groups, either as advice stalls or giving awareness-raising talks. Age UK staff reflected*: "Historically it can be difficult to engage with* *the vulnerable people in these rural areas due to poor transport links. Attending with community groups meant we supported those vulnerable people with energy efficiency advice and behavioural change and enabled income maximisation."* In particular, Age UK reported that many clients were totally unaware of the existence of PSR and were grateful for information about it. The Information & Advice team found it rewarding to help people with energy advice and they received quite positive responses in general.

After the success of outreach in this part of their region, Age UK reported that they would now aim to increase this outreach across all areas, urban as well as rural, as they found *everyone* needed energy advice, not only their initial target group.

The following quotes are from clients: *"What a wonderful job you all do at Age UK; we are very lucky to have the help and support that you provide."*

"I will be telling my friends all about this energy advice I have been given and recommending they come and talk to Age UK Lincoln & South Lincolnshire about saving energy."

7.7 YES Energy Solutions

YES Energy Solutions (YES Energy) is a highly experienced energy advice organisation who have been delivering advice for over 23 years. YES Energy works with local authorities, housing associations, energy companies and energy distributors across England. Their services include phone advice, retrofit home assessments, home visits and training events, depending on the project and region. In 2022-23, YES Energy supported more than 3,000 clients to save more than £46 million on their lifetime energy bills.

Project description

YES Energy were awarded funds to expand their existing delivery of LADS and HUGS schemes to vulnerable customers in the NGED regions, particularly East & West Midlands, and Derby and Walsall. YES Energy aimed to provide more holistic advice around benefits and debt management, and also to develop their new low carbon technology readiness assessment process.

Project activities and targets

- Provide in-depth 1:1 advice for 400 clients.
- Deliver 20 low carbon technology readiness (LCTR) assessments.
- Engage 7 local organisations.
- Deliver training sessions for front line workers from 7 local councils.

Award

£35,000

Targets	Achievements	Comments
Provide in-depth 1:1 advice for 400 clients.	Provided advice for 400 clients.	YES Energy struggled for the first 6 months of the project to progress this target due to long waiting lists and client referrals not being interested in energy advice. Reporting proved difficult with multiple staff changes over the project.
Deliver low carbon technology readiness (LCTR) assessments to 20 households.	Delivered to 33 households.	LCTR assessments helped clients prepare for Net Zero by identifying barriers that may prevent access to LCT, such as poor electricity infrastructure, or no external space for a heat pump.
Engage 7 local organisations.	Engaged 7 local organisations.	Relationships were built with: AGE UK Hereford, Herefordshire Green Network, Herefordshire Community Foundation, Talk Community Hub, Crossroads Together, Ledbury Foodbank and the Social Prescribing Network.
Deliver training sessions for front line workers from 7 local councils	Delivered to frontline workers from 6 local councils.	Training included in-person and online events and covered basic fuel poverty warning signs and energy efficiency advice for local residents.

Table 15: YES Energy Solutions CIC achievements against targets

Advice topics	People advised	Money saved
Income maximisation	*65*	*£5,735*
Energy Efficiency	*272*	*£96,922*
Behavioural change	*278*	*£122,137*
Smart/low carbon technology	*33*	*£9,665*
Home measures and wider support	*7*	*NA*
PSR sign up	*94*	*NA*
Power cut support	*102*	*NA*
	Total financial savings:	***£ 234,459***
In-depth energy advice was given to 400 people who saved an average of £586 per person. Most of the savings came from behavioural change advice such as having shorter showers and running clothes washing machines or dishwashers less frequently, and energy efficiency advice on insulation, draughtproofing, electric throws and thermostat and radiator controls.		

Table 13: YES Energy Solutions CIC advice topics and financial savings. Rounded to nearest whole number.

YES Energy Project Summary

This was YES Energy's first EAF project. YES Energy initially had difficulty attracting referrals, and then faced the challenge of meeting a stark increase in demand for their advice in winter. Additionally, several changeovers in staff led to miscommunication about reporting. They were given opportunity to review their targets and award in September 2023 and February 2024 in light of their slow progress. However, with concerted effort in March and April, YES Energy were able to meet almost all of their targets.

Difficult progress on targets

The project did not go to plan due to the uptake in staff resources and marketing needed to deliver the scheme. YES Energy initially had few referrals compared to other EAF groups. To address this, they applied more marketing resources through social media and letterbox drops, followed by their Winter Readiness campaign. This saw a jump in referrals. However, the capacity of their advisors meant that wait time was long and many clients dropped off or no longer wanted advice by the time they were called back.

In January (two-thirds through the project) YES Energy were still far behind targets compared to other groups. However, rather than reduce their targets, the team took a strategy of sending out basic crisis support packs to households. Following the pack send-out, households were phoned and offered 1:1 advice. Households who received crisis packs were much more likely to consent to advice over the phone, as their immediate food-or-heating concern had already been addressed. YES Energy also used more targeted social media advertising and increased staffing levels in late winter. The change in strategy meant that YES Energy met their targets in the final months of the project.

YES Energy reflected: *“We now know that our delivery profile should be projected in a hockey stick method, allowing for lower delivery targets in the summer and much higher delivery targets in the winter when householders are more willing to receive energy efficiency advice.”*

Staff changes and miscommunication

From CSE’s perspective, a main challenge was that the lead staff member for YES Energy’s project changed three times over the year, without a clear handover or explanation. This led to miscommunication about the targets which YES Energy were obligated to report on. Additionally, YES Energy’s organisational system had a different threshold for meaningful in-depth advice compared to the EAF requirements. As a result, interaction metrics varied and YES Energy made slow progress on in-depth interactions compared to basic. Reporting issues were compounded by this being YES Energy’s first experience of EAF requirements. The monthly reports regularly needed correcting by CSE and YES staff after submission, which also put pressure on staff capacity.

At the end of the project, YES Energy recorded 519 referrals, of which 400 ultimately received in-depth phone advice. The other referrals were no longer interested in advice or dropped off. YES Energy reported that this made EAF one of their most successful projects with a conversion rate of referral to advice of 77%, saving an average £586 per household.

8 Lessons learned

8.1 Long-term funding

As learned through previous rounds of EAF, staff changes and capacity issues are the main reason that funded groups struggle to meet their targets. This round was the first time that EAF groups were funded for twelve months instead of six. The extended time frame successfully addressed issues with groups having staffing capacity issues and being behind on targets.

This was the case for two groups this round, Age UK and YES Energy. Both groups were slow on progress for the first months of the EAF period. Age UK had difficulty recruiting a new advisor to run their project after their initial candidate was unable to continue in the role. YES Energy had a slow uptake in referrals and made constant reporting errors, and several lead staff changes contributed to miscommunication about their targets. In a six-month period, these groups would have been unable to hit their targets.

However, with the benefit of a longer timespan CSE worked with both groups on action plans and offered revised targets for these groups at the five-month point. Age UK revised their in-depth interaction target and YES Energy chose to keep the same target. Both groups reallocated responsibilities within their teams to increase work on EAF over winter. As a result, YES Energy met their target in a downhill rush in late winter, and Age UK went beyond their revised target to finish just shy of their original goal. This is a great outcome and we are pleased to conclude that no groups this year were unable to complete their project.

The twelve-month period also benefitted other groups. Those who had been funded before under the six-month model said the change allowed them to provide continuous service for their local communities and much needed job security for their staff. Groups used the summer period to build capacity, train staff and focus on outreach events, which ensured a steady stream of referrals into the peak winter busy months. Even longer-term funding (18-24 months) would provide organisations with more security and resource to deliver much needed services to people in need. Organisations in the energy advice sector are continuously impacted by short-term and uncertain funding streams.

8.2 Capacity-building events had a positive impact on funded groups

Another new element to this round was additional virtual networking and training opportunities. The four online capacity building events (outlined in section 5) were positively received by funded groups and well attended, with at least 5 of the 7 groups represented at each event.

The benefits of the events were as follows:

1) Opportunity to upskill groups on necessary topics, for example Smart Energy Action Plans (SEAPs).
2) A chance for groups to network with each other and share challenges and best practice.
3) Opening communications between the funded groups and CSE, so that groups could directly ask for help or give feedback.

Groups learned about SEAPs through a presentation from CSE. This included learning about how to refer their clients to CSE's team for a SEAP advice consultation. Groups also discussed the opportunities and challenges with advice around low carbon technologies, for example working with park homes or empowering clients who are being targeted by ECO installation companies.

Meetings were especially useful for new groups getting to know the programme requirements. First-time funded groups fed back that the presentations were extremely informative, helping advisors to 'tidy loose ends' they were coming across in their interactions.

Repeat-funded groups were also enthusiastic about network meetings. CARE reflected: "It was great to meet up with others involved in the project and hear how they were going". This was echoed by ECOE: "It's always good to meet new faces and hear about the other projects". The groups suggested that more meetings would allow for more time to share best practice. Suggestions for improvement included a face-to-face meeting, an end-of-project learnings meeting, and more regular meetings in general.

8.3 Casework is quality over quantity

Several groups this round conducted energy case work for households with complex energy needs. Case work could look like ongoing support for clients over the phone, or home visits, or both. Repeated home visits, as offered by CARE, can help with gaining the trust of residents and with checking the effectiveness of the support given.

Longer-term casework is also required to tackle the ever-increasing number of complex cases which reflects the long-tail of the cost-of-living crisis. It is necessary for energy advice services to overlap with other social and health services to meet the needs of households. This was often evident in the monthly case studies submitted by groups.

Casework and repeated home visits had huge impact on the thermal comfort and wellbeing of clients. This was especially evident with vulnerable, hard to reach clients, for example reaching rural elderly people, new migrants and refugees. Advisors could provide immediate savings in the form of advice, but they also helped with applications for boiler replacements, ECO installations, HUGS funding and small measures like air fryers, radiator reflector panels, draught excluders and more (especially groups in Devon, who had access to Devon Council's Household Support Funding). Repeat home visits and casework were also able to go further in-depth explaining low carbon technology and smart technology, for example helping people use their heat pumps efficiently or apply for a new heating system.

Despite the clear benefits of this approach to advice delivery, it can be time consuming for advisors and this does mean they can reach fewer clients overall. However, several groups reflected that case work was helpful for the wellbeing of their teams, especially when it included home visits and installation of small measures. Advisors could offer immediate relief for people in difficult situations and see the real impact that they were having on their client's standard of living. This work was considered rewarding and good for the wellbeing of advisors.

The EAF funding has allowed these organisations to be able to respond to high demand of complex cases with casework and repeated home visits and should continue to feature as a key part of this fund in future rounds. Longer term funding and less focus on high advice targets will be potential trade-offs to allow more case work and repeated home visits to feature in future funded projects.

8.4 More financial and debt support needed

Similarly to the demand for casework, there is a demand for financial support for households who are choosing between heating and eating. The immediacy of income maximisation and debt support needed by households means that they are not in a position to consider energy saving behaviour change or low carbon/smart technologies.

Several groups highlighted the need for debt services for their clients. Swansea MAD reflected that some of their clients remained in energy debt even in summer, and that the increasing unpredictability of weather and cold snaps were exacerbating this issue. Some groups were able to deliver debt advice in-house (ECOE, Groundworks, Age UK, Swansea MAD). ECOE created a debt advisor role because of last year's EAF learnings, which supported their project this time around. Other groups were not able to provide this support in-house. 361 Energy commented that their debt referral partners had prohibitively long waiting lists and concluded that they would seek funding to get an in-house debt specialist at 361 Energy.

It's becoming increasingly clear that energy advice providers are needing to build their capacity to provide more debt and income maximisation support to their clients. This should be considered for future rounds of funding.

8.5 Events increased partnerships and reached new audiences

This project delivered 414 events across the NGED regions, and the groups interacted with 11,700 people at these events. All groups apart from YES Energy had targets for outreach events.

Events boosted in-depth advice numbers. EAF groups used events to build their relationship with other community organisations who attended. These new partnerships led to more referred clients to the EAF groups (and will likely continue to do so after the end of the project).

Outreach events targeted a wide range of people: rural communities, elderly people, digitally excluded people, new migrants or people with English as a second language, families with small children and people with complex health needs and their carers. Events were hosted at:

- Drop-in centres (including on the groups' own premises)
- Food banks
- Job centres
- Social care events
- Community cafés
- Libraries and schools
- Community-wide fairs and shows

Groups were able to reach target audiences by attending events partnered with service providers for their respective target audience. For example:

- Age UK and CARE expanded their geographic reach in rural areas by working with other organisations already local to the area.
- Groundwork expanded their work to new migrant communities by partnering with refugee charities, translators and migrant support groups.
- ECOE began working with schools and libraries to reach young families.

361 Energy commented that events were a two-way learning process as they could learn from other partners while lifting the profile of their own organisations. Swansea MAD and Groundworks were not yet well known for providing energy advice in their areas and found that events were a way to build the reputation of their advice, cement the trust from their networks and expand their reach. Groups commented that being able to give a talk at an event (rather than just a stall) was good for increasing the visibility of their service to potential referrers. The outreach events were so successful at ECOE that they

have hired a new community engagement lead role to focus more on building reputation, relationships and referrals from outreach events after the end of this project.

Additionally, events in the summer drove referrals for some groups in the early Autumn, somewhat balancing the curve of peak busyness in wintertime. As mentioned earlier, it was a benefit of the 12-month scheme that staff could attend outreach events when energy advice provision was quieter and then focus on peak delivery in the colder months. It is worth noting that the only group which did not have an events target, YES Energy, initially had the most trouble attracting referrals.

The delivery of outreach events and partnership building has always been a key successful feature of this funding and should continue to be emphasised in future rounds.

8.6 Partnering with frontline workers continues to be essential

As with the previous round, groups have worked successfully with healthcare providers and other front-line workers to increase their reach. ECOE was able to partner with with GP surgery staff after initial awareness talks and this partnership led to direct referrals of patients from surgeries to ECOE's advice service. CARE set up bi-monthly meetings with staff from a GP surgery to review cases and offer advice to GP staff, which contributed also to the upskilling of front-line workers. Outside of GP surgeries, other frontline workers engaged included mental health services, carers' groups, refugee support groups, local authority staff, housing associations, dementia groups, health digital inclusion networks, and disability advocacy groups.

Locking in training sessions for frontline workers was a sticking point for groups, largely due to the time constraints on frontline workers. 361 Energy found it difficult to nail down dates with frontline workers, who would support the scheme but end up re-scheduling several times. They switched to offering virtual training which could be disseminated more easily. YES Energy similarly pivoted to virtual training when they were struggling to meet their front line worker target. This is similar to previous rounds of EAF and supports EAF's ongoing flexibility for groups training frontline workers.

8.7 More capacity building needed to advise on low carbon technology and smart technology

8.7.1 Limited understanding of relevance for vulnerable households

This round saw an increase in the number of interactions advising on low carbon and smart technologies and this emphasis featured heavily in CSE's promotion of the fund, scoring of applications and subsequent capacity building for funded organisations. However, the groups varied greatly in the depth of their advice and this is still a nascent and challenging area for energy advisors.

From the final reports, it appears that the groups who are perhaps new to energy advice, or do not have this as their focus, mainly referred to advice about smart meters or major interventions like solar panels or electric vehicles. This may reflect a lack of confidence from the providers about other low carbon or smart technologies which are suitable for fuel poor households. It may also reflect a belief that low carbon tech is a lesser priority compared to income maximisation and behaviour change topics for fuel poor households.

Swansea MAD reported that the people they spoke to were not interested in smart meters or did not see the point in upfront investments like EV cars when the payback period was so long, or electricity prices were not dropping. This was echoed by Age UK and Groundwork. For example, Age UK phrased their advice on smart meters as when clients "agreed" that smart meters had benefits. These groups' reports implied that clients did not see smart technology as relevant for them, and possibly also a belief from the advisors that it was a lost cause to pursue the conversation further.

Smart Energy Action Plans (SEAPs) were a focus of the capacity-building workshops for funded groups. Groups were given the opportunity to refer clients directly to CSE for SEAPs and could join their clients in the SEAP call to understand the process. However, only ECOE took up this offer. ECOE also organised SEAP training for their staff. YES Energy included low carbon readiness assessments in their project targets separately to the SEAP offer. Other groups gave positive feedback on the SEAP training but did not end up referring clients to CSE's SEAP service. Again, this may reflect a belief that low carbon tech advice is a lesser priority compared to support with income maximisation, behaviour change and health and wellbeing services.

If low carbon tech continues to be a focus of the fund, more needs to be done to support applicants to understand this topic. One way we could do this is by introducing more pre-application webinars and support to raise awareness of what is meant by this area of advice, and what good advice delivery on these topics looks like. Once funded organisations are onboarded, more ongoing training and peer-to-peer learning could be built into the programme.

8.7.2 Energy advice groups plug the gap for ECO4 installation aftercare

CARE, ECOE and 361 Energy spoke about advising clients with ECO applications. Some groups understood ECO4 measures to be part of low carbon technology advice (if including heat pump or solar panels). This was a key difference in low carbon technology advice between groups: energy-specific groups saw ECO4 as part of low carbon tech, while many other groups referenced only smart meters and solar panels.

There is a need for precare and aftercare advice for households undergoing ECO4 funded works. CARE and ECOE reported vulnerable households being left with little handover information from installers and reaching out to energy groups for basic information about how to use their new heating set up. CARE reported that installers in their area were targeting vulnerable people for sales phone calls, which left people confused and bewildered, and considering inappropriate works. CARE is taking action as part of a group of community service providers and local authority bodies in their area on this issue.

Energy groups will increasingly need to offer advice on the use of heat pump systems or solar immersion systems as more people make use of government funding streams. Energy advice groups will be picking up the slack from installers who do not provide a proper handover for clients. Energy advice organisations are well placed to deliver this in-depth support. However, this is specialised knowledge that often requires an energy advisor to become familiar with manufacturer specifications and conduct home visits to understand the needs of the household. As outlined earlier, the casework necessary to plug this advice gap will take more staff time but will have substantial impacts for clients.

8.8 Advice topics: Lower savings, more low carbon tech advice

In this round of EAF, double the number of people were supported by EAF groups. This is to be expected given that the time period was doubled from six months to twelve months. Furthermore, this is possibly better than anticipated as advice groups usually have lull periods over the warmer months, so advice provision over summer is much lower than winter. The higher number of people advised is due to the extensive outreach events hosted by groups this round, and CSE would recommend that EAF funding for spring, summer and autumn events should be considered best practice going forwards.

This round did not match the savings made in last year's exceptional round. This is probably due to a combination of:

- Groups advising more on topics which are not associated with large savings, such as smart and low carbon tech.
- CSE's requirement to use EST savings figures, which have limited estimations.
- The time-intensive nature of casework and partner relationship building.
- The tail-end of the cost-of-living and energy crisis and the end of funding and support schemes available for people might have meant that less financial savings were possible for clients in this round, particularly associated with the income maximisation advice topic.

Groups demonstrated greater focus on low carbon technology advice, increasing from 20% of interactions last round to 32% this round (see table below). However, low carbon technology had the lowest savings associated per interaction. Additionally, supporting clients with ECO applications was time-intensive, reducing time which could be spent with other quick-win clients. Casework was also time-intensive, supporting people with compounding vulnerabilities (fuel poverty, mental and physical illnesses, disability, low income).

Low carbon technology advice, ECO support and casework were examples of impactful work by groups this round, building upon advisor skills and leaving a lasting impact on clients advised, yet leading to lower financial savings reported. This relates to CSE's requirement that groups use EST figures to estimate savings for advice topics. Some topics are not included in this, for example installing heat pumps (a potential ECO measure). CSE would like to improve the template savings figures offered to groups for future iterations of EAF so that groups can more accurately record the financial impact of their advice.

It is also worth mentioning that the groups with the lowest average savings, Age UK and Swansea MAD, were newer to energy advice provision and this was their first EAF project. This implies that they were not using the full range of EST savings associated with their advice, compared to experienced EAF groups like ECOE and CARE. CSE would like to support new organisations like Age UK and Swansea MAD to report on financial savings for their interactions in future, as this may relate to their understanding of the reporting requirements.

More time was also spent this round on building partner relationships to reach new audiences. Time spent networking with other relationships was important for expanding groups' reach, professional reputation and referral pathways. Groups reported that the relationship-building would continue to have impact beyond the EAF period. Swansea MAD said that their regular drop in events had built their visibility in their community with partners and had been the most impactful element of the project for their organisation. ECOE concluded that outreach events were essential to their work and have now employed a community events lead to coordinate partner networking and outreach events. It appears that partner-building was time intensive for groups and may have contributed to the reduction in time.

Advice topic	Incidences of advice provision	% of clients advised	Financial savings/topic
Income maximisation	997	31%	£300,134
Energy Efficiency	2052	65%	£324,285
Behavioural change	2305	73%	£470,425
Low carbon technology	1026	32%	£56,591
Home measures and wider support	389	12%	Total clients: **3166** Total savings: **£1,151,435**
PSR signups	917	29%	
Power cut support	257	8%	

Table 17: Advice topics by frequency of provision and associated savings.

Another observation looking at frequency of advice topics (see table above), is that **PSR signups** were a lower proportion of clients compared to last year (29% compared to 38%). However, in real numbers an increase of 316 households were advised (917 this round compared to 601 last round). The lower proportion probably reflects organisations working through the pool of eligible clients in their local area. Some groups reported a high proportion of clients new to PSR within their project, for example Swansea MAD and ECOE. Other groups, for example CARE, reported that people were hesitant to give personal details to energy companies. There was clearly a very patchy range across the regions.

8.9 Other learnings

- **Working with previously funded groups** meant those groups were more easily able to reach and exceed targets because they had already set up capacity and reporting processes in their teams. In new groups, it seemed important that there was a key person leading the EAF project who did not change so that the organisation can could get to grips with their reporting responsibilities.
- Regarding **public opinion of energy suppliers**, Swansea MAD reported that their clients had a variety of misconceptions about energy suppliers and noted energy suppliers moving services online leading to poor reputation among digitally excluded customers. Distrust of energy suppliers appeared in references to people seeing smart meters or smart technology as not worth the hassle due to prices being controlled by energy companies, or people not wanting to sign up to PSR. However, overall the reports this year were less negative towards energy companies than last year.
- **Social Indicator mapping** was used by smaller groups new to energy advice but groups who have previously done it did not need to repeat it as they know their audiences and target areas well already.

9 Conclusion

The delivery of EAF 2023-24 has been successful in delivering low carbon technology advice, reaching new audiences, and strengthening the capacity of the funded groups. The financial savings and positive outcomes for clients are evident, and groups have been supported to grow their referral networks, reach new communities, and develop their reputation and trust in new geographical locations.

The take aways from this round are:

1. **CSE endorses increasing the funding to 18-24 months to offer more security for funded groups and deliver longer-term more impactful and innovative advice projects.** Making the funding longer-term successfully addressed issues of staff capacity which had caused groups to miss their targets in previous rounds. It also allowed for more time to develop new partnerships, deliver outreach events and offer long-term in-depth support through casework and repeated home visits.

2. **In future, network events should be a core element of the support for funded groups and should be offered more regularly including some in person events.** Capacity-building network meetings for EAF groups were highly useful for sharing best practice and supporting groups to build on their low carbon technology advice provision. CSE would also like to explore with NGED how to connect organisations across different NGED funded programmes.

3. **Outreach events increased partnerships with other service providers, which led to contact with new audiences and increased referrals from partners.** CSE supports this method for groups.

4. **In-depth advice focused on 'quick wins' should be balanced against in-depth advice delivered through casework.** Casework combined with offers for small measures had huge impacts on clients and was rewarding for energy advisors, although was quite time intensive. Consideration of this dynamic ought to be included in the criteria of future EAF rounds.

5. **There is a growing need for financial and debt advice to be embedded in energy advice.** More and more energy advice providers are looking to be able to provide this in-house. Groups should be supported to continue working with frontline workers, health services, community organisations and importantly, debt services.

6. **Future rounds need to include more support for groups to build their knowledge, as these organisations are an essential part of a smart and fair energy system.** Groups are increasing their delivery of low carbon technology and smart technology advice. However, providing advice on low carbon and smart technologies was not always appropriate when supporting vulnerable clients. CSE recommends future rounds include:
    - guidance for applicants about what constitutes low carbon technology and smart technology in the applicant pack.
    - Q&A session for applicants.
    - compulsory skills-building and practice sharing event for funded groups which focuses on engaging vulnerable people in low carbon and smart technologies.