



# Facing Fuel Poverty: Research on face-to-face actions to help consumers in fuel poverty in Scotland

A report for the Consumer Futures Unit

March 2017

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<b>Report</b>	Facing Fuel Poverty: Research on face-to-face actions to help consumers in fuel poverty in Scotland
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## **ACKNOWLEDGEMENTS**

Changeworks would like to thank all the participants who took part in this research and in particular the case study organisations: Changeworks, Citizens Advice Edinburgh, Energy Saving Trust, Fyne Futures, Grampian Housing Association, Greener Kirkcaldy, Shetland Citizens Advice Bureau, South Seeds, The Wheatley Group and The Wise Group. We would also like to thank the steering group which included representatives from The Scottish Government and the Scottish Federation of Housing Associations (SFHA) as well as the Consumer Futures Unit of Citizens Advice Scotland (CAS).

## **CONFLICT OF INTEREST STATEMENT**

Changeworks is an environmental charity and social enterprise with 30 years' experience of delivering fuel poverty advice projects. This research was undertaken by Changeworks Consultancy, a department within Changeworks specialising in the delivery of research and consultancy services around energy efficiency, fuel poverty and sustainability. All data collected as part of this research was collected and held as per Changeworks' data handling procedures: only Changeworks Consultancy has access to this data. The research methodology and findings were agreed with the Consumer Futures Unit with complete transparency to avoid any perceived bias in reporting.

# 1. EXECUTIVE SUMMARY

## Introduction

Fuel poverty persists as a problem for almost a third of Scottish households. While improvements in energy efficiency levels are the focus of a number of Government programmes, there is also recognition that the delivery of energy advice to vulnerable householders is essential to tackling fuel poverty. The Consumer Futures Unit (CFU) at Citizens Advice Scotland (CAS) commissioned Changeworks to carry out research into this area, focusing on face-to-face advice delivered in the home.

## Research aims

The project sought to identify what projects and services are currently available to consumers who require face-to-face advice on a range of fuel poverty issues. Further, it aimed to assess what the costs, benefits and quantifiable outcomes associated with these projects are.

## Methodology

The research was carried out via an online survey, desk-based research, qualitative telephone interviews and data analysis. It should be noted that full data on all projects was not available and therefore the results are unlikely to provide a comprehensive picture of all the projects and services across Scotland.

## Key findings

Key findings from the project are:

- There are estimated to be (or have recently been) 158 projects delivering in-home face-to-face fuel poverty advice in Scotland. These are delivered by a range of organisations such as housing associations, local authorities, charities, community organisations and CABx, with many being run in partnerships.
- These projects range in terms of scale, focus and advice offered, and depth of advice. Typically advice covers: fuel debt, tariffs and suppliers, energy behaviours, heating system demonstrations, other billing issues and referrals for energy efficiency measures.
- Those delivering fuel poverty advice perceive there to be a real benefit of delivering advice face-to-face over other forms of delivery, such as by telephone. Further, some householders – particularly vulnerable householders – are considered to require this additional support.
- Organisations are evaluating their projects but this can sometimes be limited with projects reporting only on outputs (i.e. number of clients advised) or case studies. Others have carried out more thorough evaluations on a range of benefits including financial savings for clients. Projects evidence savings either as 'one off', annual or lifetime and figures collected in this research indicate average savings per client of £327 for one off, £316 annual, £360 lifetime (see section 10.3). Carbon savings also ranged widely from 176 to

2,808 kg CO<sub>2</sub> per client, with an average of 882 kg CO<sub>2</sub>. However these figures must be regarded as indicative. Monitoring regimes are not consistent across projects and the sample sizes are small. There is therefore a clear need for both a greater level of monitoring and more consistent monitoring across the sector to better understand the outcomes for clients.

- Funding for these projects comes from a variety of sources, most commonly Government, charities and utilities. Obtaining funding was identified as the biggest challenge by delivery organisations and can drive how projects are delivered and monitored.
- Typically the cost of delivering fuel poverty advice was found to be around £100 - £300 per client, and an average of £194. However this is very indicative and additional research is required to provide more accurate figures, including variables impacting costs such as travel in rural areas. A better understanding of costs will enable decision-makers to compare different forms of advice delivery.
- Delivery organisations often face a challenge in maximising the number of clients they assist whilst ensuring advice is sufficiently in-depth. The competitive nature of funding could drive an increase in the targets set for numbers of clients supported.

## Recommendations

Recommendations arising from the research are:

### **The Scottish Government** should:

- Continue to fund, and look to invest further into, in-home face-to-face fuel poverty advice services with an understanding that this is an effective means of supporting vulnerable householders
- Support a pilot programme with clear monitoring and evaluation criteria to clarify and quantify the outcomes of such advice.
- Support the development of an industry-wide standard as to the savings achieved from behaviour change advice to better quantify the outcomes of face-to-face fuel poverty advice services.
- Look to support delivery organisations to carry out monitoring and evaluation, for example through resources or upskilling.

### **Funders** should:

- Require delivery organisations to carry out a minimum level of evaluation on their projects, and provide funding for these evaluation activities.
- Look to award multi-year funding to increase the efficiency of projects and services that otherwise need to commit considerable ongoing management and staff resource to project set-up and securing annual funding.
- Allow funding to be pooled so that existing projects can expand rather than be replicated, increasing efficiencies and reducing additional overheads.

### **Delivery organisations** should:

- Build in a greater level of monitoring and evaluation of projects around the benefits of advice. This includes measuring bill and carbon savings arising from different types of advice, and wider benefits to residents, such as improvements to confidence and health and wellbeing. There is scope for organisations to share resources and best practice.

## 2. INTRODUCTION

### 2.1 Introduction

With fuel poverty continuing to be a problem for almost a third of households across Scotland, action is needed to identify strategies to support fuel poor households. The provision of face-to-face advice in-home has long been recognised as essential in alleviating fuel poverty, yet the availability of advice services and their impacts is an under-researched area.

The Consumer Futures Unit (CFU) at Citizens Advice Scotland (CAS) commissioned Changeworks to carry out research into fuel poverty services across Scotland that are delivering face-to-face advice in the home. This included an assessment of the number and type of organisations delivering projects, services offered and the impacts of projects. This research was carried out in late 2016 and is presented in this report.

### 2.2 Background

The latest figures show that 31% of households in Scotland are in fuel poverty<sup>1</sup>. Despite efforts over many years to reduce this figure, the Scottish Government's target to eradicate fuel poverty by November 2016 was missed.

Fuel poverty is largely recognised to be the result of four factors:

- Energy efficiency of homes
- Household incomes
- Energy prices
- Behaviour in relation to heating usage<sup>2</sup>

Government efforts to date have focused on a number of programmes aimed at improving the energy efficiency of homes, and indeed evidence shows that the energy efficiency of Scottish homes has increased over the last few years. However there is recognition that households, particularly those who are vulnerable, need further support.

In recognition that their fuel poverty eradication target had been missed, the Scottish Government convened two groups to provide recommendations on future approaches to addressing fuel poverty: the Scottish Fuel Poverty Strategic Working Group and the Rural Fuel Poverty Task Force. Discussions in both groups have emphasised the need for fuel poor households to receive advice and bespoke support on a range of issues including switching tariffs and energy behaviours. This builds on a recognition that improving the energy efficiency of homes and providing income maximisation is inadequate to tackle fuel poverty. The groups' discussions

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<sup>1</sup> [Scottish House Condition Survey: 2015 Key Findings](#)

<sup>2</sup> Until recently it had widely been accepted that there were three causes of fuel poverty; however householder behaviour is now being recognised as a fourth factor. For example, [Changeworks' Position on Future Approaches to Tackling Fuel Poverty](#)

also highlight how changes to the sector – such as increases in the number of renewable technologies – mean that further advice and support may be needed in these cases.

The Scottish Government funds the Home Energy Scotland (HES) advice service which is delivered through the Energy Saving Trust and partner delivery organisations. There are also a number of other organisations delivering advice, and this is explored through this research.

The CFU was keen to understand what projects and services exist in Scotland, and what support is available to consumers. In addition, they sought an understanding of the associated outputs and outcomes from projects to identify best practice and value for money, which can inform future approaches in Scotland.

## **2.3 Research aims**

The research aimed to answer two questions:

1. What support is available to consumers who require face-to-face advice on a range of fuel poverty issues?
2. What are the costs, benefits and quantifiable outcomes associated with projects delivering such support?

## **2.4 About this report**

This report provides the results of this research. The methodology adopted is provided in Section 3. Results of the methodology are provided together in Sections 4 – 10. Conclusions and recommendations are provided at the end of the document in Sections 11 and 12.

### **3. METHODOLOGY**

The research was carried out using the following approach.

#### **3.1 Survey**

An online survey was created in SurveyMonkey and promoted to organisations that may be delivering relevant services. It aimed to identify as many projects/ services as possible and gain basic information on them such as location, funding, delivery costs, partnerships, advice type, client type and staffing. Organisations delivering multiple projects were requested to submit information by telephone; this was seen as an easier and more effective means of gathering information in this situation.

The survey was promoted via a targeted email campaign to Changeworks' contacts, with a reminder email as a follow up. In addition it was promoted via a range of other intermediary and representative organisations including the Scottish Federation of Housing Associations (SFHA), Energy Action Scotland (EAS) and Keep Scotland Beautiful who deliver the Climate Challenge Fund (CCF).

The survey remained live for four weeks. A £50 voucher was offered as an incentive for completion.

Nineteen organisations completed the survey (or provided the same information via phone), with a number of organisations providing details of more than one project.

A copy of the survey is in Appendix C.

#### **3.2 Internet search**

To complement the survey, an internet search was carried out to identify any further projects or services (where these organisations had not completed the survey). A search of every local authority and known housing association/ co-operatives' website was carried out and a search of community group websites from a published list of CCF projects was carried out. In addition, funders' websites were reviewed to identify any further projects. Whilst it should be noted that not all websites may contain information about services offered and some websites may have been missed in the search, the research was as thorough and comprehensive as was possible.

In most cases the internet search only obtained limited information on a project such as location and delivery organisation. Where new organisations were identified in the web-search that were not previously included in the survey distribution, they were contacted to request they complete the survey.

#### **3.3 Project review**

The list of projects obtained from the survey and internet search were combined and sent to the project steering group to identify whether any additional projects had not been identified.

It should be noted that the research attempted to identify discrete projects or services. However in some cases this was very difficult to achieve due to the limited information on organisations' websites. For example some projects may be delivered by a consortium and it was not always possible to ascertain whether this was essentially one project or two.

### **3.4 Geographical mapping**

The list of projects was mapped by local authority area to understand the geographic spread of projects. However because of only limited information available on the full project list (i.e. organisation type), the maps have not been included in this report as the data could be misconstrued. For example, some areas may have a high number of small projects and others have a small number of larger projects, yet these would appear to have less project coverage. Equally because information was only available on a local authority level, it was difficult to determine the coverage on a more local level. In large areas such as Highland, where availability of advice projects may vary across the area, this incomplete dataset limits the ability to evaluate and draw conclusions on coverage.

### **3.5 Review of monitoring and evaluation data**

Those who completed the survey were encouraged to forward any monitoring and evaluation data, such as progress or end of project reports, to Changeworks. Changeworks reviewed these to identify what outcomes were being measured and to analyse the quantitative outcomes. This was supplemented by information provided in the case studies (below).

### **3.6 Case studies**

To get a deeper understanding of a range of projects, ten case studies were selected from those organisations that completed the survey. A case study matrix was drawn up to ensure a variety of projects were chosen using a number of variables that included delivery organisation and size of project.

Telephone interviews were carried out with case study representatives. These typically lasted an hour and in some cases supplementary information was requested. These were recorded, coded and analysed. Full case studies have been written up in this report.

The interviews gained a fuller picture of projects including details of delivery, funding arrangements and monitoring regimes. Interviewees were also asked for their perspectives on the challenges of delivering their projects and the benefits of delivering fuel poverty advice face-to-face.

A copy of the topic guide is in Appendix D.

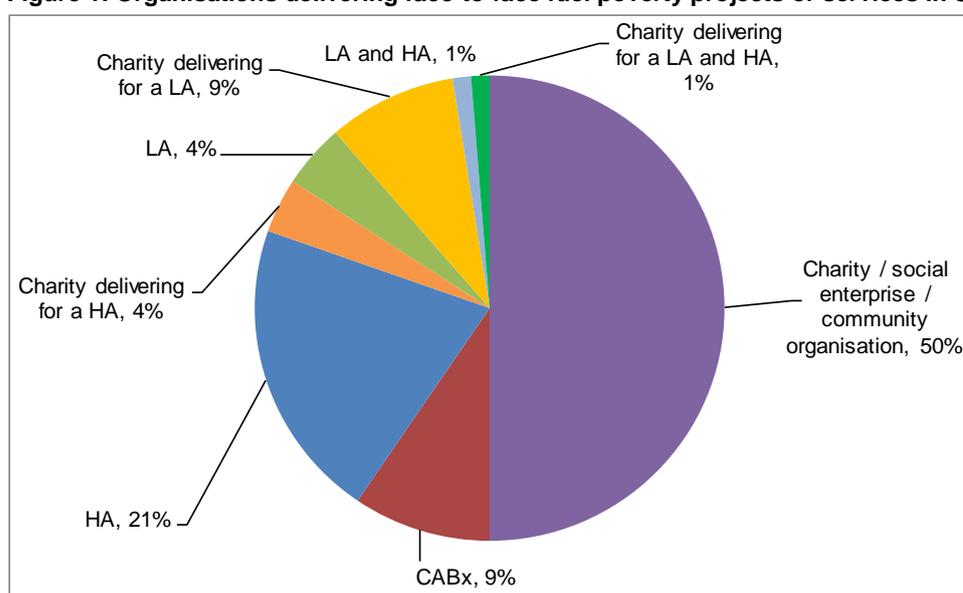
## 4. OVERVIEW OF FACE-TO-FACE FUEL POVERTY PROJECTS IN SCOTLAND

### 4.1 Overview of projects in Scotland

The research identified 158 projects or services in Scotland delivering face-to-face fuel poverty advice. This mostly includes live projects and a small number of completed projects<sup>3</sup>. It should be noted that this is the *number of discrete projects or services*. These are delivered by 108 organisations, fourteen of which are delivering multiple projects (in most cases two or three projects, but one organisation had thirty live/ recently completed projects). Conversely, some projects are delivered in partnership by multiple organisations. It should be stressed that the data does not reflect the scale of projects which varies considerably i.e. whilst there are 158 projects some of these will be much smaller than others in terms of number of staff and clients supported.

Figure 1 shows the breakdown of organisation type against these 158 projects. This shows that half are delivered by community organisations, charities or social enterprises; although a further 13% are delivered by these organisations on behalf of housing associations (HAs) and local authorities (LAs). HAs deliver 21% of projects themselves, LAs deliver 4% and 1% of projects are delivered by a partnership of HAs and LAs. Nine percent are delivered by CABx.

**Figure 1: Organisations delivering face-to-face fuel poverty projects or services in Scotland**



Base = 158 projects (delivered by 108 organisations)

### 4.2 Geographical coverage

Table 1 in Appendix B provides the number of fuel poverty projects or services broken down by local authority area. This shows the highest number of projects in large urban areas, Glasgow and Edinburgh. Relatively high numbers of projects are

<sup>3</sup> Completed in the last three years

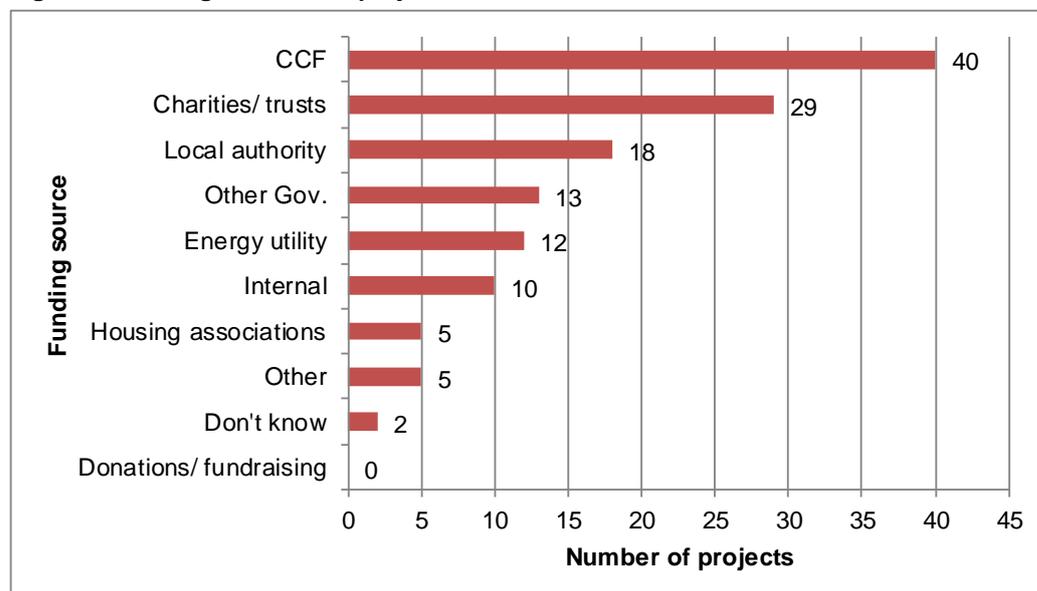
also found in East Lothian, Fife, Highland, Midlothian, North Lanarkshire and Renfrewshire. All areas contain some advice provision, although there is at least one service that is Scotland-wide (Home Energy Scotland delivered by the Energy Saving Trust via five centres run by four separate delivery organisations). As per previous data, it should be highlighted that this represents the number of projects and not the scale of each project. It may therefore be misleading. Information would also be needed on a more local level to better understand advice provision. For example, although there are ten projects in the Highland Council area, more detail would be needed to identify their coverage in that area and whether any areas are without provision of local services.

### 4.3 Funding sources

Figure 2 shows the funding source for the identified projects and services. Data was only available for 119 out of 158 projects since not all organisations completed the survey or had this information online. Most of those projects without funding data were delivered by HAs or LAs.

The figure shows that 40 out of 119 projects were Climate Challenge Fund (CCF) projects; a Scottish Government fund which supports community groups and HAs to deliver carbon reduction projects. Other common sources of funding are charities or trusts. Most commonly this was Scottish Power Energy People Trust, and also Big Lottery and British Gas Energy Trust. Other sources of funding included energy utilities, local authorities and internal funding. In figure 2, 'Other' funding included European funding, a health board and Smart Energy GB.

**Figure 2: Funding sources for projects**



Base = 119

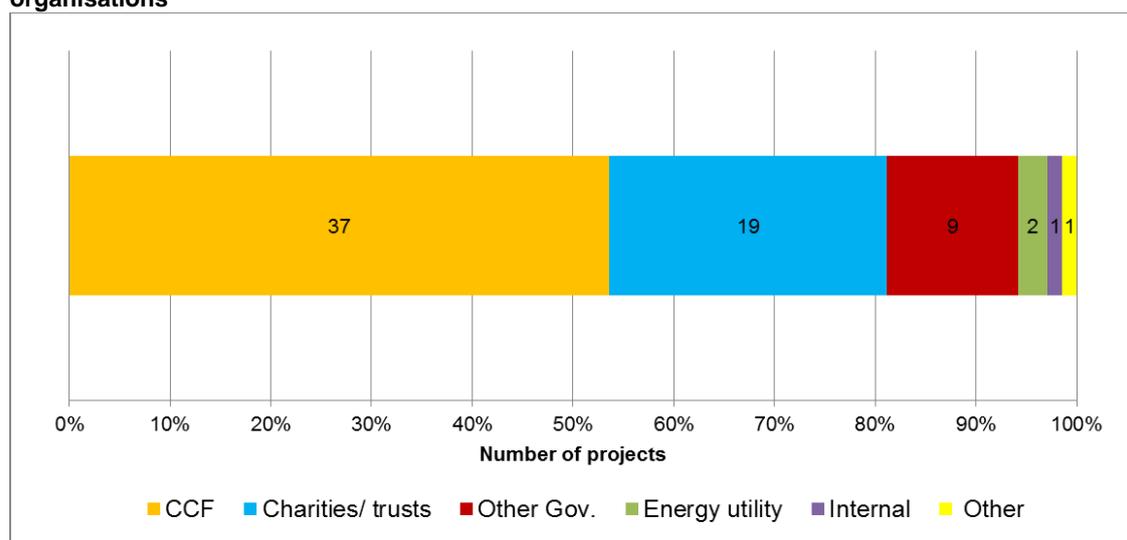
As highlighted above it should be noted that these figures represent the number of projects rather than the scale of these projects in terms of funding and number of clients visited. Home Energy Scotland is a large national programme which was

allocated £4.6 million in core funding by The Scottish Government for 2016/17<sup>4</sup> - although the majority of this is not focused on home visits which currently number about 900 a year. Similarly, the most recent round of CCF funding was £9 million<sup>5</sup> although this was awarded to projects other than those with a fuel poverty focus. More information about the scale of projects is in Section 4.3.

It should be noted that obtaining funding was identified as the most prevalent challenge by those project representatives interviewed as part of this research (Section 8.2).

The data on funding sources was also broken down into organisational type. The funding source for all types of delivery organisation varied, except for 'charities delivering for a local authority' whom all receive funding from LAs. However the sample sizes are too small to identify robust findings across organisation type. The only exception was 'charities, social enterprises or community organisations'; these results are shown in Figure 3. For this type of organisation, CCF funding is most predominant (37 out of 69) with charities/ trusts (19) and other Government funding (9) also being reasonably common.

**Figure 3: Funding sources for projects delivered by charities, social enterprises or community organisations<sup>6</sup>**



Base = 69

#### 4.4 Overview of fuel poverty projects and services

Based on the data available, projects can be loosely categorised as follows:

- Around a quarter of projects are CCF funded, the vast majority of which are delivered by community organisations, social enterprises or charities. A small number are delivered by HAs.

<sup>4</sup> Figure provided by The Scottish Government, March 2017.

<sup>5</sup> <http://www.gov.scot/Topics/Environment/climatechange/ccf/projects/CCF22>

<sup>6</sup> This does not include charities delivering for LAs or HAs which are predominantly funded by the relevant HA or LA.

- Around a quarter of projects are housing association projects, most of which are delivered internally but there are some projects delivered by charities on behalf of HAs or a consortium of HAs are delivering the project in partnership. There is a lack of data on how these projects are funded but the data obtained suggests a mix.
- Almost a quarter of projects are other charity/ social enterprise/ community group projects. These are funded by a mix of charitable trusts, utilities and Government funding.
- 9% are CABx projects. These are funded a variety of ways, most commonly internal funding or from an energy utility.
- Around 14% are local authority projects; around a third of these are delivered in-house and the remaining projects are delivered by charities.

However, as highlighted in this section, this data should be taken with caution for a number of reasons. Detailed data on projects was only collected from organisations that completed the online survey or had data available on their website. It is likely that those organisations who responded to the survey were not wholly representative of all delivery organisations. The main respondents (with some exceptions) tended to be from the well-known, larger organisations that have operated in this field for some time. It is also possible that the research did not identify *all* current/ previous projects in Scotland as information could not be found online. Furthermore, data on funding sources could not be obtained for 39 out of 158 projects.

## 5. DETAILS OF PROJECTS BEING DELIVERED

This section contains delivery details of projects and services presented in Section 4. This information was obtained from the survey and is therefore limited in sample size. It is also skewed by the prevalence of larger, more established charities that completed the survey and provided data on multiple projects.

### 5.1 Size of projects

Figure 4 provides some indication about the scale of these projects, with the number of staff per project. Caution should be taken with these figures since some projects will not just focus on fuel poverty and may have staff time dedicated to other project elements (e.g. waste projects), or their fuel poverty activities may involve other aspects (e.g. events). However it is clear that most projects are reasonably small, with fewer than four members of full-time equivalent (FTE) staff and most having only one. Further, the survey did not give an option for less than one FTE member of staff but the interviews with case studies indicated that many projects would have less than one FTE member of staff.

Figure 4: Number of FTE staff dedicated to project or service

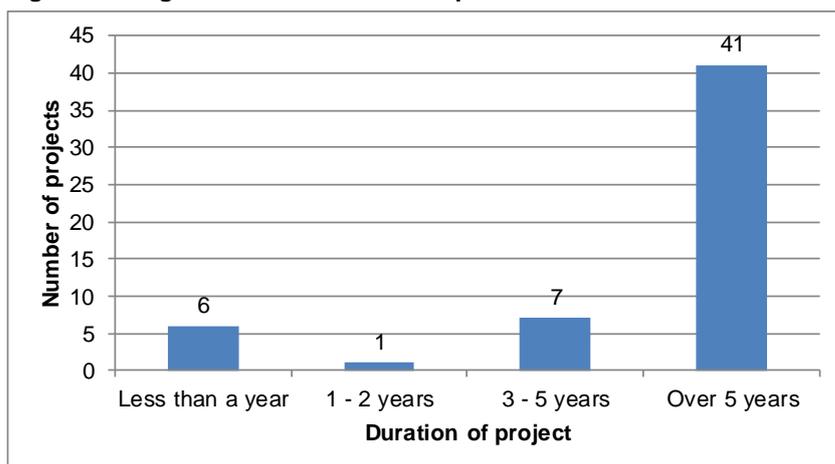


Base = 30

### 5.2 Length of service delivery

Figure 5 shows how long these fuel poverty advice services have been running for. However it is likely that some respondents interpreted this question as the length of time their organisation had been delivering a service, not that specific project (since they may not consider the delivery of each individual service to be that discrete). The results, which show a heavy majority towards 'over 5 years', therefore reflects the well-established charities and community groups that completed the survey. There are also a small number of organisations who have only more recently started providing advice services; this includes CABx, HAs and one charity.

**Figure 5: Length that service has been provided**



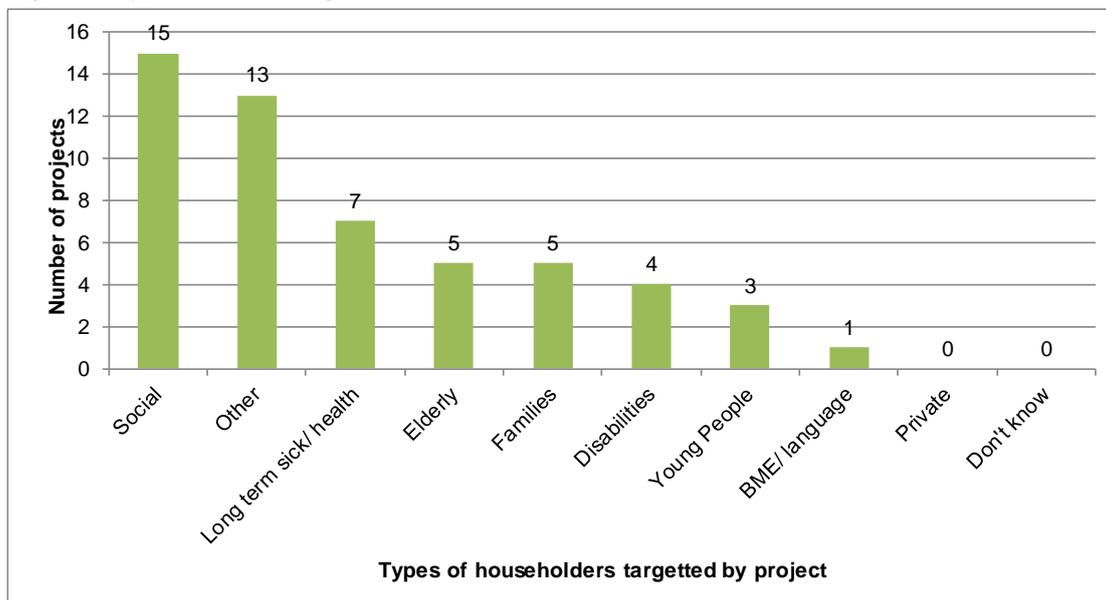
Base = 55

### 5.3 Client type

Around 60% of projects (34 out of 55) are targeted at specific client types (figure 6), which means that only 40% of projects (21 out of 55) are available to anyone requiring support. These projects are often constrained to a specific geographic area.

Of the projects which do target specific groups, the most commonly targeted clients are social housing tenants, long term sick or with health problems, elderly and families. 'Other' was the second largest category and included first time tenants, those at risk of homelessness, carers and people who are housebound.

**Figure 6: Type of clients targeted**

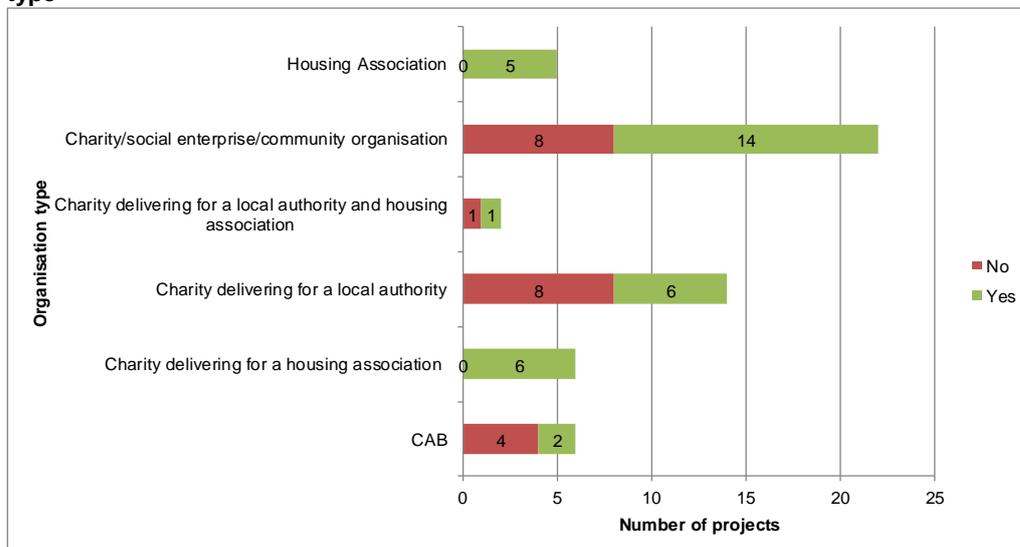


Base = 34 projects

This data was cross-referenced with other project delivery data to identify whether any particular types of projects were targeting or not targeting certain groups. Figure 7 shows this data by organisational delivery type. This does not appear to show a pattern i.e. it does not suggest that certain sorts of projects are or are not targeting specific households. The only exception is housing association projects (delivered

either by HAs or charities); which for obvious reasons are targeted at the housing association's tenants. The data was also cross-referenced against funding source but again no pattern was found.

**Figure 7: Whether projects are targeted at specific householder types by delivery organisational type**



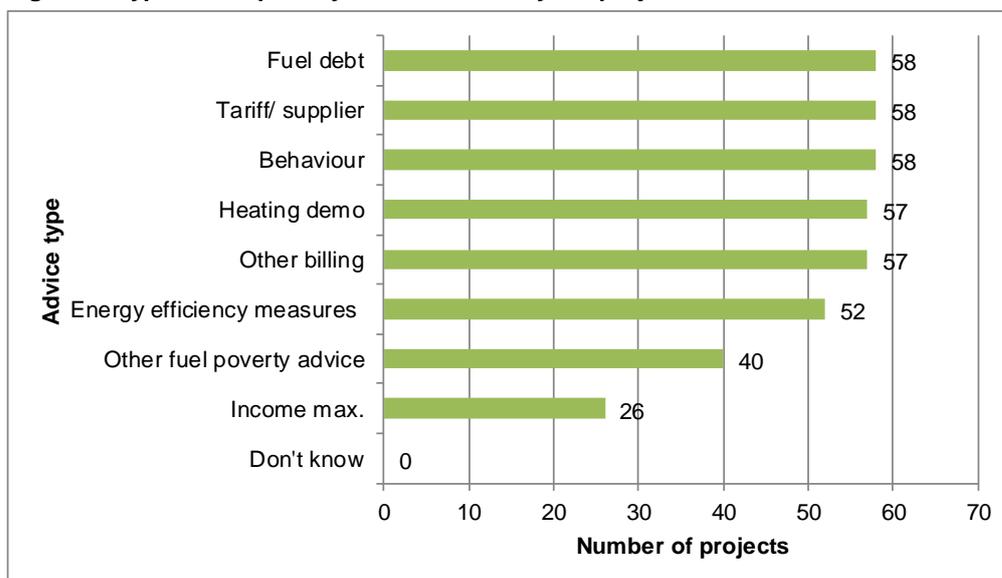
Base = no: 21, yes: 34

## 5.4 Type of advice being provided

Survey respondents were asked what type of fuel poverty advice they offered to clients. As shown in Figure 8, almost all projects provided advice on:

- Fuel debt
- Tariffs and suppliers
- Energy behaviours
- Heating systems (demonstrations)
- Other billing issues
- Referrals for energy efficiency measures

**Figure 8: Type of fuel poverty advice offered by the project / service**



Base = 59

‘Other billing issues’ contained a range of topics such as: applications for Warm Homes Discount and emergency loans, smart meters and explaining energy monitors. ‘Other fuel poverty advice’ included mainly advice on damp and condensation.

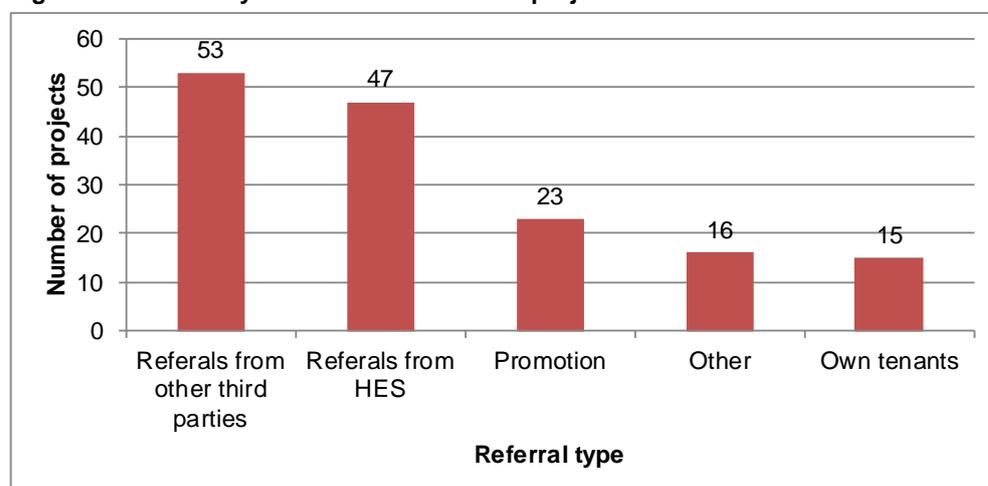
Twenty projects also provided other types of advice, other than fuel poverty. Types of advice included: water use, food waste, household budgeting and welfare and benefits advice.

## 5.5 Reaching clients

In terms of how clients heard about the advice service/ projects, the most common route was through third party referral organisations, including Home Energy Scotland. The case studies illustrated in this report highlight the range of referral mechanisms and close working relationships many delivery organisations have to partner organisations. This includes referrals from HAs, LAs (such as social work), CABx, NHS and other local partners. Organisations may work with other energy advice delivery organisations; for example if an organisation covers a particular geographic area and receives enquiries outwith this area, they can refer to other organisations. Some interviewees mentioned online referral systems that operate to monitor referrals.

Other routes to reaching clients included promotions such as events and training, outreach work including through medical practices, word of mouth and networks of referrals for charities.

**Figure 9: Methods by which clients reach the project or service**

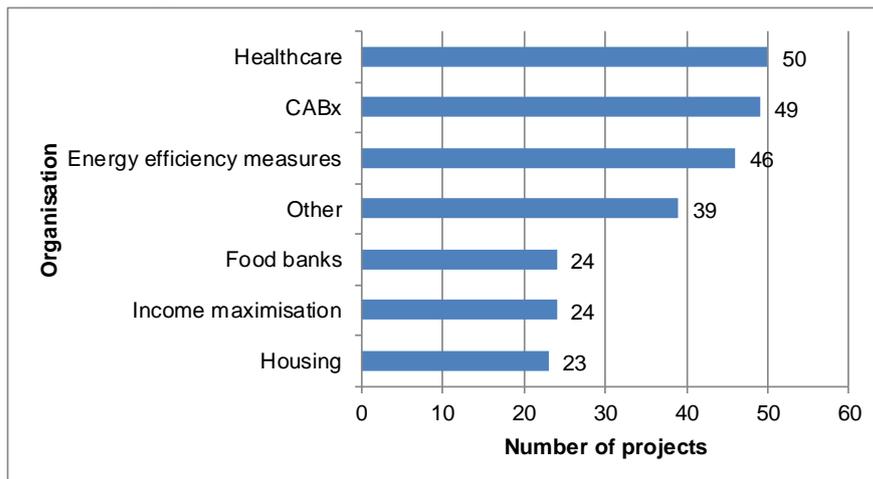


Base = 58

## 5.6 Referrals to partner organisations

Survey respondents were also asked whether they referred clients on to other advice or support services. Most stated that they did. The most common referrals were to healthcare organisations, CABx or for energy efficiency measures (Figure 10). Other common referrals were to food banks, for income maximisation services and housing support. The ‘Other’ category included social work departments, other charities and for money advice.

**Figure 10: Organisations that clients are referred to**



Base = 56

Information obtained from the case study interviewees reiterated the range of referral organisations. Most commonly, clients are referred for services out with the remit of the fuel poverty advice service and most commonly this included income maximisation, health or social care issues. One fuel poverty service delivered by a CABx stated that they would refer clients to Home Energy Scotland if the client required further energy advice or support. Further, the case studies highlighted that HAs delivering fuel poverty advice can refer clients internally to other services within the housing association, with one stating that they did not tend to refer to external services. Another commented that advisors have a directory of referral organisations but that this could be hard to ‘keep track of’ due to the volume of different organisations and the changing nature of many services.

## 5.7 Delivery partners

Half of projects stated that they worked in partnership. Common partners included CABx, LAs, HAs, community organisations, networks of fuel poverty/ energy/ support services, and Care and Repair. Examples of how these partnerships work in practice are provided in the case study projects in the grey boxes throughout the report.

Delivery organisations who were interviewed as part of this research commonly mentioned the benefits of partnership work as an aspect of their project that worked particularly well. It was noted that building a good relationship with partner organisations can help to generate more referrals into the project, create a more holistic advice service for householders and reduce travel costs by referring to similar services operating in closer proximity. Further, establishing networks can create a more joined up service in the area. For example, in Moray, a group called Warmer Moray has been set up with a range of stakeholders including the local authority and HAs; this provides a forum to share ideas about tackling fuel poverty.

## 6. CASE STUDIES

### 6.1 Introduction

Representatives from ten fuel poverty projects were interviewed as part of this research to act as case studies for the report. These are outlined in Table 1. Full descriptions of four of the case studies are outlined in this section (Sections 6.2 – 6.5) to illustrate the kinds of projects that are operating in Scotland. The remaining six descriptions are in Appendix A. Interviews with these case studies, and data collected from them, have also been used to inform the remaining sections of this report.

**Table 1: Case study projects interviewed for this research**

Organisation	Organisation type	Project
Changeworks	Charity and social enterprise	Almond Energy Advice (delivered in partnership with Almond Housing Association)
Citizens Advice Edinburgh	Citizens Advice Bureau	Fuel Bills Advice Service
Fyne Homes Ltd	Charitable Registered Social Landlord	Fyne Heat
Grampian Housing Association	Housing association	Community Energy Challenge
Greener Kirkcaldy	Community organisation and charity	Cosy Kingdom
Energy Saving Trust Scotland	Government funded service	Home Energy Scotland
Shetland Citizens Advice Bureau	Citizens Advice Bureau	Affordable Warmth Advice Project
South Seeds	Community organisation	Energy Advice Service
The Wheatley Group	Property management group including housing associations and others <sup>7</sup>	Fuel Advisory Project
The Wise Group	Social enterprise	G.HEAT

The following provides an overview of four examples of these case studies: G.HEAT (The Wise Group), Community Energy Challenge (Grampian Housing Association), Cosy Kingdom (Greener Kirkcaldy) and Home Energy Scotland (Energy Saving Trust).

<sup>7</sup> Comprises of six Registered Social Landlords (RSLs), a care organisation, three commercial subsidiaries and a charitable foundation

## 6.2 Case Study: The Wise Group - G.HEAT

### Project background

The Wise Group is a social enterprise delivering services throughout Scotland and North East England to tackle social, economic and environmental problems experienced by people and communities. It provides in-home energy advice in the Glasgow area through the Glasgow Home Energy Advice Team (G.HEAT) service. Funding for G.HEAT is sourced annually, with current funders including Glasgow City Council, local housing associations and an energy utility. Last year G.HEAT provided 2,500 householders with energy advice in their homes.

### Service delivery

The G.HEAT service is delivered exclusively by The Wise Group, picking up where advice provided to clients over the phone by Home Energy Scotland leaves off. All types of poverty advice are offered by G.HEAT, with a particular emphasis on helping people to manage their spending on energy on an ongoing basis. G.HEAT energy advisors are trained to identify problems relating to energy use when visiting clients' homes and to sensitively engage with clients with complex needs (e.g. chronic physical and/ or mental health issues). The Wise Group is part of an extensive Glasgow-based network of social enterprises, charities and other agencies that provide support to individuals and communities. G.HEAT energy advisors are therefore able to utilise this network to signpost and refer clients to organisations that provide other services and support (e.g. benefits checks, health and wellbeing support).

Clients are provided with as much support as they need. This can sometimes require several home visits and additional office-based activities (e.g. energy bill advocacy, funding application support). G.HEAT energy advisors are able to utilise The Wise Group's extensive network of charities and other agencies that provide support to individuals and communities.

The Wise Group works strategically with Glasgow City Council to ensure that G.HEAT is aligned with delivering Scottish Government initiatives such as the Home Energy Efficiency Programmes for Scotland- Area Based Schemes. This ensures that householders are supported in line with the work being carried out and that value is added to these schemes.

### Impact of the project

The Wise Group use a series of actual and estimated measures to determine the impact and effectiveness of the G.HEAT service. The Wise Group reported that in 2014 that the G.HEAT service reduced energy bill arrears for clients by £74,233, obtained £16,445 of energy bill rebates and saved clients £126,236 through referrals to social tariffs and the Warm Homes Discount. Assumed savings from face-to-face advice delivered by G.HEAT in 2014 were £208,560, based on an estimated saving of £110 per annum per client. Total savings made by G.HEAT in its first 5 years of operation were estimated to be in excess of £3.4m.

In addition, The Wise Group is working to develop 'softer' outcome measures from energy advice delivery. These would enhance for example the identification and quantification of health and wellbeing improvements amongst clients as a result of living in warmer, more comfortable homes.

### **6.3 Case Study: Grampian Housing Association – Community Energy Challenge Project background**

#### **Project background**

Grampian Housing Association has approximately 3,000 properties across Aberdeen, Aberdeenshire and Moray. The Community Energy Challenge started in June 2012 with funding from the Climate Challenge Fund (CCF) which ended in April 2015. The service continued after this date with internal funding and support from Energy Action Scotland; although the project is continuing to look for extra external funding.

The project has a target of 300 visits per annum, per adviser as agreed with their funder, although the team aim to help as many households as possible. From an internal perspective the service is viewed as two projects, one project for built up Aberdeen and the other for more rural areas. This is largely for funding purposes as the two areas are geographically quite different, for example in the number of off-gas properties. From a customer facing perspective the projects run as one service.

#### **Project delivery**

Advice visits are delivered across the regions by two members of part-time staff, one based at the head office in Aberdeen and the other at the Moray area office. The visits are available to all Grampian Housing Association residents and advice is offered on anything surrounding affordable warmth that residents need help with. Residents are mainly referred into the service by Housing Officers so there is always an initial indication of their situation. Other referrals stem from Moray Council, Langstane Housing Association, Home Energy Scotland and SCARF (when they receive requests to visit Grampian residents).

An initial questionnaire is completed at the start of the visit which helps to assess the householders' needs and ensure that the advisors cover all relevant areas of advice. Common topics of advice include support with heating system controls, accessing Warm Homes Discount, debt checks and supplier compensation claims.

Word of mouth also generates a large number of referrals and with demand growing quickly for the service, clients are prioritised based on their situation, e.g. have they self-disconnected. There is also a focus on liaising with new tenancies in order to encourage prevention of fuel poverty. Whilst information on energy efficiency is provided in the residents pack, the project recognises this is not necessarily engaged with for a number of reasons. These include residents being overwhelmed by the amount of information in the pack, or by the time residents realise they are struggling with their energy costs, they have forgotten that there was advice in the pack.

Outside of fuel poverty support, where a renewable technology has been installed,

the project has helped deliver face-to-face advice to support the householder to make the most of the system. It was reported that these visits often resulted in the identification of other affordable warmth related issues which resulted in follow on appointments.

Where appropriate residents are referred onto other services including an income maximisation and budgeting service (SMART service - which began as an internal service), Credit Unions, social workers, encouragement to seek health visits, addiction charities and referrals for food parcels.

In addition to the home visits, work was undertaken internally to establish standardised advice for controls of air source heat pumps which had been recently installed. Training was then delivered to staff and a laminated advice sheet giving clear and consistent advice produced and provided to residents. In Moray, the project along with other partners helped to establish Warmer Moray, a fuel poverty forum to share ideas amongst organisations. It includes representatives from the Council, other housing associations, Rural Environmental Action Project (REAP) and a 'handy man' service.

The time spent with each client varies. For example, if the home visit is focused around the installation of a new renewable technology it may only take half an hour but clients with more complex problems may require more than one visit. Homes in more rural areas can also take longer to travel to.

The visits also help the housing association to sustain a tenancy and benefit from building a relationship with residents who have previously been dis-engaged. In addition, the visits help to identify potential energy efficiency measures. For example, if an advisor visits a home which records show to have had insulation installed, but the property still feels cold, a survey of the property can be arranged to identify any deficiencies or problem areas.

### **Impact of the project**

Feedback from Grampian Housing Association highlights that the advice delivered through face-to-face visits helps to improve clients' confidence and knowledge and empowers them to make changes. They have found that residents can be mistrustful of institutions, but the home visits build trust and a relationship. Being in a person's home allows the advisors to pick up on residents' body language and the residents can see that the advisors are genuinely empathising with them. The project reported that quite often the biggest savings are achieved by encouraging people to switch supplier. Whilst some people are wary of this kind of change, if a relationship has been established they are more likely to make the change.

Total householder savings from the project are reported to have increased from £21,537 between 2015-16 to £36,238 between April 2016 and December 2016. These have arisen from Warm Homes Discount, billing errors, grants and tariff checks.

Because the project has received funding from multiple sources, there has been a requirement to evaluate different outcomes. Grampian Housing Association had to

calculate carbon savings for their CCF funding over 3 years. For this they were monitoring a small group of people to record fuel and carbon savings using energy bills; however it was difficult to obtain this information from clients over a sustained period. Reporting to Energy Action Scotland focused more on how any assistance had affected the tenants' life, including how small actions could have a disproportionate effect. This is work which the project feels is invaluable at a time of continued rising energy prices and pressure on the lowest incomes.

## 6.4 Case Study: Greener Kirkcaldy - Cosy Kingdom

### Project background

Greener Kirkcaldy is a community led charity working on a local scale to benefit the community and the environment. The charity works to support individual householders and organisations, running a number of projects including workshops in healthy eating, cooking, waste reduction and energy efficiency. They also have a high-street hub which operates as a drop-in advice centre.

Cosy Kingdom is an energy advice project open to all households in the Fife local authority area. The project is delivered in partnership with St Andrews Environment Network (StAndEN) and Citizens Advice & Rights Fife (CARF). It is funded by a number of different parties, the largest of which are People and Communities Fund and Fife Council.

### Project delivery

There are currently eight energy advisors working on the project, split equally between StAndEN and Greener Kirkcaldy. The advice visits are available to everyone in the Fife local authority area and deliver support with behaviour change, impartial tariff/ supplier switching, fuel debt, energy efficiency measures, other billing advice, heating control demonstrations and how to use controls efficiently. These services are delivered by StAndEN and Greener Kirkcaldy and then CARF offer income maximisation support, including literacy help and support to quickly assess potential financial gains.

At the beginning of the visit, householder needs are assessed using a questionnaire, which is used as a basis to tailor the advice. The advice delivered to residents is recorded so that following the advice visit, participants are given a three month follow-up call to check on their progress and to see whether they have acted upon the advice given to them. This allows the service to explore what types of advice are useful and enables the project to tweak their delivery methods. If required, residents are offered as many follow-on visits as necessary to help, which in some cases has been as many as five.

A high proportion of referrals into the project are via word of mouth and partnership organisations, such as welfare reform groups and the NHS. There is a referral portal for Fife used by approximately 250 partners, which enables referrals to be received and made quickly and securely. This also provides the option to search for services and track the progress of referrals which assists with monitoring and reporting. Referrals are made to a number of different types of organisations including Citrus, for switching support, Citizens Advice, Rights Fife and food banks.

A secondary part of the project sees home visit participants who meet certain criteria referred into the Cosy Kingdom handy service to install low-cost energy efficiency measures such as light-bulbs, hot water tank jackets and draught proofing. The service currently employs three handy-people and is looking to expand. The Cosy Kingdom project also delivers advice through presentations and stalls at community

events.

### **Impact of the project**

Evaluation of the project was carried out via a client survey and recording of advice by the energy advice team. The participant survey highlighted that 95% of respondents had made energy saving changes in their home following the advice, 61% had made physical changes to their home and 19% had switched supplier or tariff. The evaluation also records levels of satisfaction around cutting energy costs and improving clients' financial situation.

Greener Kirkcaldy also record their activities and impacts in terms of number of energy-saving gadgets given out, people provided with advice at events, referrals for Warm Homes Discount and referrals to the handy service.

## 6.5 Case Study: Energy Saving Trust - Home Energy Scotland

### Project background

Home Energy Scotland is an energy advice service, managed by the Energy Saving Trust and funded by Scottish Government. This Scotland wide service provides advice through a regional network delivered by four advice centre contractors: Changeworks (South East and Highlands and Islands areas), SCARF (North East), Wise Group (Strathclyde and Central) and the Energy Agency (South West).

Home Energy Scotland provides advice via telephone, by post and email, face to face at events and in the home, supporting around 100,000 households a year. In 2013 the service began to offer home visits where there is no other organisation able to provide this and in 2015/16 the project delivered 900 home visits. The number of advisors delivering home visits for the service varies between advice centre areas depending on the geography of the area (to ensure remote and rural areas' needs are met), number of fuel poor households and the number and capacity of other energy advice home visit services in the area. Community Liaison Officers (CLOs) deliver the majority of home visits, as well as carrying out partnership work to build referral pathways. There are currently ten full-time equivalent CLOs and in some areas visits are also carried out by energy advisors.

### Project delivery

Home Energy Scotland (HES) advisors determine who to offer home visits based on the needs of each individual. Typically, the resident is initially spoken to over the phone by an advisor and if advice cannot be adequately delivered over the phone, and there is no other organisation able to offer an energy advice home visit, then a home visit is arranged. This can be for a number of reasons, including householders with a number of complex advice issues, those with mental health problems, hearing impairments or where English is not their first language. If there is another energy advice service in the area that offers home visits, the client will be referred onto this service rather than being offered a visit by Home Energy Scotland. In cases where English is not a householder's first language HES either work in partnership with community groups such as ELREC who are able to offer interpretation and also deliver their project whilst they were there, use internal advisors who are bilingual or bring in interpreters. BSL interpreters are also used where needed.

During the visit the advisor will first focus on addressing the issue raised by the householder. Following this they will look to identify other areas where they can offer support. Advice is delivered on a range of affordable warmth topics including behaviour change energy efficiency advice, tips to reduce condensation, assistance with reading bills and operating heating systems. Non-affordable warmth topics including renewables advice can be delivered during visits where appropriate, and householders may be referred to Home Energy Scotland renewables specialist if more detailed advice is required. Home Energy Scotland advisors make direct

referrals to Scottish Government programmes such as Warmer Homes Scotland, to the Department for Work and Pensions for benefit checks, to energy suppliers for Warm Homes Discounts and to Citrus Energy for fuel supplier switching support. If advocacy work or advice on non-energy efficiency related topics is required, advisors refer clients on to an appropriate local service, for example to organisations such as Citizens Advice Bureaux.

Through the partnership work of the CLOs, HES has managed to establish a wide range of partner organisations that refer householders into the service, including partners such as the fire and rescue service, elderly care, carers' support, NHS and early years groups. HES continues to expand these partnerships and build relationships with key partners such as the health service. A number of referral pathways are available to organisations so that referrals can be made as quickly and easily as possible. These include a recently launched referral portal. The referral portal has a reporting function which allows the organisation referring the client to check in on the progress of the referral. It also allows the referral details to go straight into the Home Energy Scotland customer database for immediate action, which reduces administration time and flags the referral to an advisor. This prompts the advisor to get in touch so that the client is spoken to quickly and is therefore more likely to remember a referral being made. Referrals can also be made by telephone, email or post.

### **Impact of the project**

The project has been successful in that it enables advice to be delivered to those who might find it difficult to access support via a telephone service. The service fills any gap in the local projects that exist across Scotland, ensuring all households can access energy advice in the home and no householder is seen as being too remote to receive a visit.

Strong partnership work with organisations such as community connector organisations (who build links between GP practices and the third sector) have enabled Home Energy Scotland to extend their reach and maximise support for householders.

## 7. BENEFITS OF DELIVERING FACE-TO-FACE ADVICE

This section details the benefits of delivering fuel poverty advice face-to-face (as opposed to other delivery mechanisms), and in what circumstances face-to-face advice is deemed most necessary. These results are based on interviews with project representatives delivering face-to-face fuel poverty advice in Scotland and therefore represent their opinions. The research did not seek to explore the views of other types of fuel poverty advice projects, although many of the projects included in the interviews also delivered advice through other methods such as over the phone.

### 7.1 The benefits of delivering face-to-face advice

For organisations offering affordable warmth advice, home visits are just one of a range of different methods of delivery. Other forms include advice delivered remotely via telephone, email, instant messaging or sharing of information and articles online or via post. There are also other methods of face-to-face advice such as drop in surgeries and stalls or presentations at community events.

A number of the interviewees felt strongly about the benefits of face-to-face advice over alternatives with one advisor remarking *“I wouldn’t have done the job if I couldn’t visit them”* and another explaining *“we pride-ourselves on offering a face-to-face service”*. Different benefits were highlighted.

Interviewees described how being in a person’s home enables you to identify issues outside of the residents’ initial enquiry making it easier to tailor advice to the householder. It also offers an opportunity to provide solutions to issues which the householder may not know or feel comfortable raising themselves, such as experiencing the temperature of the person’s home.

In terms of the practicalities of delivering advice, home visits allow the advisor to deliver demonstrations of technology such as heating controls and also allows the opportunity to make references to and explain residents’ energy bills. Being in-situ with the householder also enables quicker resolution of issues, as they are able to give verbal confirmation of the mandate enabling direct liaison with the fuel supplier.

It was also reported that at a home visit, householders are more likely to open up about sensitive issues as they are in an environment in which they feel more comfortable. A large number of the interviewees also described the significance of both parties being able to read one another’s body language. This allows the advisor to gain instant feedback on whether the householder understands what is being explained to them and notice stress or disinterest. One interviewee described how the improvement in body language between visits often shows the impact the advisor has had on someone’s life. It also gives the opportunity for the householder to read the advisors body language meaning that they can convey genuine empathy which prevents misunderstandings that could take place; for example, the tone of an email could be misread. Having direct contact with the householder enables the advisor to build trust which interviewees reported can encourage householders to make changes such as switching supplier, a significant change for some people.

For the social landlords interviewed, building trust and delivering advice in a way which residents are more likely to take on board helps to promote tenancy sustainment through the reduction of fuel bills, and builds a more established relationship between residents and their landlord.

One interviewee explained that they felt home visits are not necessarily better than alternative forms of advice. They noted that in some cases people do not like to have someone in their home, or do not feel they have time to have someone visit them and may prefer information via other means. Their evaluation shows that householders respond to telephone advice as well but acknowledged that they had not done any work to compare whether one is more effective than the other.

## **7.2 When face-to-face advice is a necessity**

Organisations interviewed in this research largely carry out home visits as a matter of course and use other means of communication such as telephone contact to offer on-going support. However other services delivered advice over the phone unless a visit was necessary; in particular where clients' needs are more straightforward. This decision appeared to be partially funding dependent.

Interviewees indicated that fuel poverty advice is best delivered face-to-face in particular where householders are:

- Hard of hearing
- Unable to leave their home
- Vulnerable
- Experiencing mental health problems
- Do not have English as a first language
- Have one complex issue or a number of issues
- Most at risk of failing their tenancy (applicable to housing associations) i.e. first-time tenants, recently in-debt or homeless residents, or those experiencing mental health or family issues.

However it was acknowledged that home visits were not the answer for all vulnerable clients, as despite needing face-to-face advice, some householders do not feel comfortable having an advisor in their home. In this case interviewees' explained that surgeries are particularly helpful as it still allows the opportunity for residents to bring along bills. One interviewee explained that this is often the case with people in fuel poverty as a common cause is social exclusion; but remarked that trust can be built by dealing with one issue and visiting later to tackle other problems which aren't immediately visible.

## 8. KEY CHALLENGES AND SUCCESSES OF DELIVERING FACE-TO-FACE ADVICE

This section provides detail on the successes and challenges of delivering face-to-face advice from the perspectives of organisations delivering projects. This data was obtained from interviews with the case study organisations.

### 8.1 Successes

Interviewees were asked what the key successes of their projects were. Some of the social landlords interviewed stated a successful aspect of their project was identifying the most effective times to deliver advice. Explaining that they feel the provision of preventative advice at the beginning of a tenancy is particularly beneficial.

Another interviewee suggested that the success of their project was based upon them being able to deliver higher total savings for residents through advice and support than the service cost to run.

### 8.2 Challenges

#### Funding

One of the most prevalent challenges mentioned by those interviewed was gaining access to funding. One interviewee compared the competitive nature between similar organisations and the small number of available funding sources to a “wrestling match”.

A number of interviewees explained that it can be difficult to persuade funders that face-to-face advice is worthwhile. One interviewee highlighted that this is particularly challenging in rural areas where costs can be higher per visit, as there are fewer people to engage and greater travel costs. Some organisations are finding that in order to access funding they have to run projects separately so that they can try to fulfil different funding criteria, which adds to administration requirements.

Interviewees mentioned that once funding has been obtained it is often only available for a short period of time, a couple of interviewees highlighted that this was causing significant staff retention problems. Some interviewees remarked that it is challenging to find a suitable candidate for the job and they often don't stay long due to a lack of job security caused by the funding, explaining that this is particularly challenging as training requires time and financial investment.

#### Engagement

Interviewees identified that engaging people can be particularly difficult, especially at the beginning of a project when householders and community organisations are unaware of the service. This also aligns with the point that referrals often come from partners, internal staff and word of mouth; a process which can take time to establish but will build momentum throughout the course of the project. However, interviewees also highlighted that those who are most difficult to engage are often those who need the most help.

It was mentioned that advice services are often reactive as opposed to proactive and that it is challenging to know who to engage with and when to engage them in order to put preventative measures in place. A number of the projects interviewed are trying to adapt their service to become more proactive, for example the social landlords interviewed were arranging energy efficiency visits for all new tenancies.

Engagement can also pose the opposite problem in that once residents have been engaged they are at risk of too many visits after being referred onto partner organisations. It was reported by interviewees that while a number of services believe that face-to-face advice is the most effective way to deliver information, this risks clients who need to access a number of services being overloaded with visits. One interview explained that in some cases, a follow-up phone call is better than a follow-up visit for this reason.

### **Capacity**

Once a service has an established referral process, interviewees explained that they can often have more visit requests than they have advisor capacity, forcing services to prioritise households based on their level of need. Interviewees mentioned that there is a balance to be achieved in trying to see as many people as possible without compromising the quality of the service.

### **Advisor experience**

Concerns were raised by one interviewee that creating a safe environment for advisors can be difficult, particularly for those operating in remote rural areas, where telephone signal is often unavailable. They felt that housing associations are better equipped to deal with this as they have structures in place and background information on residents, whereas services operating without this could be more at risk.

Another interviewee spoke of the emotional impact of some of the cases on the advisor, particularly those with multiple issues which are often outside of the project focus. However this becomes part of the advisors duty of care to ensure that they access support from other organisation, which can take a considerable amount of advisor time.

### **Costs**

The cost of operating a face-to-face service was also raised as a considerable challenge, including both the time spent delivering advice and non-staff costs including travel, and office overheads. This is explored further in Section 9.

## 9. COSTS OF DELIVERING PROJECTS

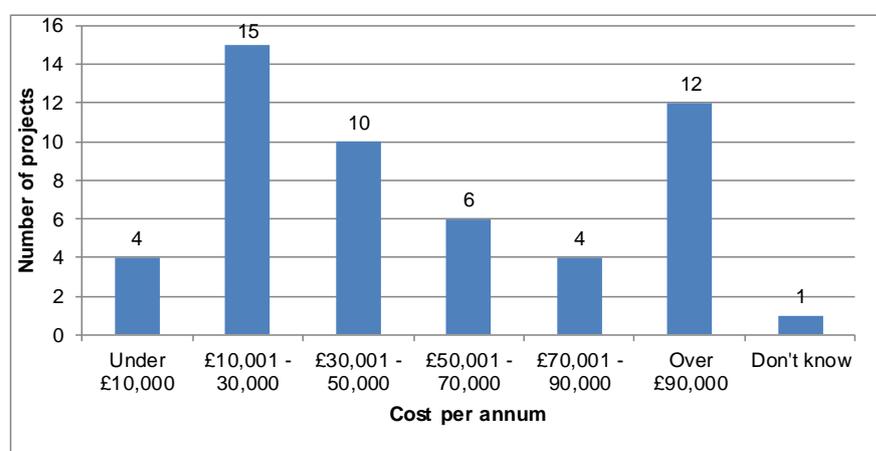
### 9.1 Costs of delivery

#### Overall project costs

Organisations were asked how much their projects cost to run per year (Figure 11). This highlights that the majority of projects (60%) are between £10,000 and £70,000 but that most of the others are a lot higher, over £90,000. This provides an indication of the size of projects but must be taken with caution since many of the projects include non-fuel poverty aspects or contain other fuel poverty advice activities, such as the delivery of advice.

Case study organisations were asked for actual cost data and this indicates that the largest projects cost around £290,000 per year.

**Figure 11: Cost of projects**



Base = 52

The sum of the projects above represents almost £3 million of annual funding. As this represents data from 52 projects – around a third of projects identified in this research (158) – the data could crudely be used to indicate the overall scale of funding in Scotland. A basic extrapolation would suggest a figure of around £9 million per year, although the projects which provided cost data had a higher proportion of larger organisations. This would mean that the overall figure is likely to be less than £9 million.

#### Costs per client

The overall project costs were divided by the number of clients to identify the cost of delivering projects per client. This is indicative only as the data is based on a range of data (such as 101 – 250 clients; in which case the midpoint value was taken). In addition, as highlighted above, some project costs will be allocated to activities other than the delivery of face-to-face fuel poverty advice such as events and workshops. It was difficult for organisations to breakdown the budget to isolate funding for home visits alone.

Figure 13 shows that the cost of delivering advice per client varied widely but for the majority of projects, the cost of delivering a project was between £100 - £300 per client. In calculating an average of all data contained in this chart, the data suggests that face-to-face fuel poverty advice costs around £194 per client to deliver<sup>8</sup>. It is apparent that costs are higher for projects in rural areas where there is a greater requirement for travel, and costs are less where there are volunteers involved in the delivery of advice.

As discussed in the section below there are a great number of variations in costs between different projects based on project type, activities and details. The data above provides some indication on what typical costs might be but more research is needed to refine this, particularly with more detailed data on costs and from a greater number and variation in organisations. It is anticipated that different types of organisations may have different costs but insufficient levels of data were obtained to be able to comment on this.

**Figure 12: Cost per client**



Base = 51

### Industry wide costs

There are no industry-wide costs on the delivery of face-to-face advice. An Ofgem report on its Industry Initiatives highlights the costs of different activities, although there is no detail on how this advice is delivered. This, for example, highlights the delivery of energy advice as £28 per client, which is presumably not delivered face-to-face, and benefits checks as £77 per client.

**Table 2: Spending on each activity through Ofgem’s Industry Initiatives<sup>9</sup>**

Industry Initiative type	Spend attributed (£)	%	No. consumers helped	%	Cost per client
Referrals	2,000	0.01	105	0.08	£19.05
Benefit checks	802,763	3.77	10,365	7.80	£77.45

<sup>8</sup> More accurate cost and client data was obtained from a number of case studies. This resulted in a very similar average figure for cost per client.

<sup>9</sup> [https://www.ofgem.gov.uk/sites/default/files/docs/2015/11/whd\\_annual\\_report\\_publish.pdf](https://www.ofgem.gov.uk/sites/default/files/docs/2015/11/whd_annual_report_publish.pdf)

Energy efficiency	2,016,833	9.46	4,991	3.76	£404.09
Energy advice	2,348,148	11.01	83,890	63.15	£27.99
Training	855,232	4.01	n/a	4.19	n/a
Debt assistance	15,295,403	71.74	27,918	21.02	£547.87
<b>Total</b>					<b>£1,076.45</b>

Information was also obtained from Scottish Power Energy People Trust (SPEPT). However costs were programme wide and therefore difficult to identify for specific activities since projects will have involved different activities<sup>10</sup>.

An academic research study that looked at twelve home energy advice projects across the UK cited home visits in two of the projects to cost £120 each. However it was not clear whether this covered the additional costs of delivering the service, such as administration<sup>11</sup>.

### Variation in costs

The costs cited above from Scottish projects are indicative only, for a number of reasons:

- The figures used in the calculations are not accurate since overall project costs may include activities other than the delivery of face-to-face advice e.g. non-fuel poverty tasks or advice delivered through different forms, such as events.
- Similarly, projects may not include all costs required to carry out the project if, for example, it is delivered in partnership or if some of the 'funding' for the project comes as in-kind funding (i.e. office space). For example, some organisations may only need sufficient funding to cover the advisors' salary and related costs, whereas others will have higher overheads such as office costs.
- It is difficult to compare the costs of different projects since they will be providing different levels of service, such as depth of advice provided.
- Some projects will be more expensive to run due to their nature. For example, as discussed below, it will cost more to deliver a project in a rural area because of the additional travel time required to carry out home visits.

## 9.2 Time required for project delivery

The following feedback was given around the lengths of time required to carry out in-home advice visits and associated tasks.

### Overall

One organisation estimated they spend around three hours with each client, including home visits, travel time and desk-based case work. They aim to keep to this target of three hours to ensure that the maximum number of people can be reached.

<sup>10</sup> The information obtained showed that £14.5 million was awarded to 327 projects which has helped 1,370,455 households (and 1,677,999 people).

<sup>11</sup> Reeves, A. (2016) Exploring Local and Community Capacity to Reduce Fuel Poverty: The Case of Home Energy Advice Visits in the UK, *Energies*, 9, 276

Feedback from a number of organisations highlighted that there is a balance to be struck between depth and breadth of advice i.e. maximising the number of clients advised whilst ensuring a sufficient level of depth is provided to meet their needs.

### **Home visits**

Typically, projects provide a home visit to clients with a follow-up either by phone or a further home visit. Some interviewees stated that they were funded only to provide one home visit and therefore were limited to that. Others however were able to provide up to five home visits. In some cases projects offered a visit every six months to vulnerable clients.

The duration of home visits ranged from 30 to 90 minutes. One organisation stated that they do not go over 1.5 hours as they believe this would be providing too much information. Instead they plan to re-visit the client at another time.

One interviewee cited that they had to limit the number of hours spent per client. Otherwise advisors could spend a great deal of time with one client when there is a high demand for the service and other clients to be seen.

### **Administration tasks**

Many interviewees also highlighted the time required to carry out administration necessary for the delivery of face-to-face advice. This includes, for example, calling energy suppliers, making referrals, typing up notes and scheduling follow-up call or visits. One interviewee estimated that this took one day a week for an administrator carrying out administration for a full time worker. They also cited examples of trying to reduce administration time; for example, by giving advisors a tablet computer to record information immediately.

### **Travel time**

All advisors have to spend time travelling to clients' homes to deliver home visits. Interviewees delivering locally-based services or partnership work cited that travel time was not burdensome. However, travel time can be a significant issue for projects in rural and remote areas where, for example, in the worst case scenario a home visit may include a two hour round trip. Similarly, travel could be quite complex if it required ferry travel, or where advisors do not have access to their own vehicle. Even a case study based in a central urban area cited that travel time for an advisor was typically six hours per week and they were therefore exploring avenues to reduce the need for travel such as providing follow-up advice over the phone. However they also acknowledged that this could compromise the quality of the service offered and therefore would only do this where appropriate.

### **Other factors influencing costs**

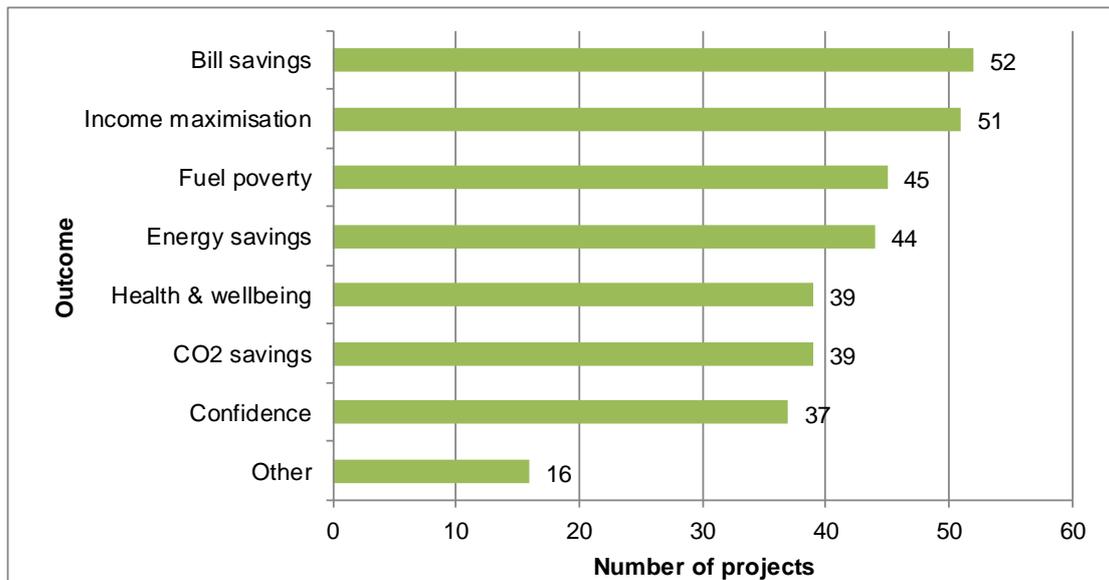
A series of other factors were also reported to influence how much time was required to deliver projects. This includes: management, funding applications, office overheads, core costs and provision of equipment such as laptops.

## 10. MONITORING & EVALUATING OUTCOMES

### 10.1 Monitoring activities

Survey respondents were asked which outcomes they were monitoring and evaluating for their projects (Figure 13). This shows that almost all projects stated they were monitoring both bill savings and increases in household income. Most projects were also monitoring fuel poverty, energy savings, health and wellbeing impacts, CO<sub>2</sub> savings and improvements in confidence. 'Other' included resolving damp problems, credit meters installed, debt arrears and where small energy efficiency measures have been installed.

**Figure 13: Outcomes being monitored by projects**



Base = 56

However these results should be taken with caution as the level of monitoring of data is likely to vary and understanding/perceptions of the above categories of outcomes is also likely to vary. In addition, when asked to provide the data related to this monitoring, many projects were unable to do so.

Variability in monitoring criteria is highlighted by the data collected for 'bill savings'. Collected data highlighted the different forms this can take, including:

- Savings arising from behaviour changes
- Debt
- Fuel switching
- Fuel bill errors
- Tariff and supplier switching
- Warm Homes Discount

This has therefore made it very difficult to compare data collected from different projects.

## 10.2 Reasons for monitoring

The main reason interviewees stated that they carried out monitoring was the need to report to funders. Interestingly a number of interviewees felt that the reporting required by their current funders was relatively easy to provide with a number of funders comfortable with or actively requesting softer reporting such as case studies and quotes. However, some interviewed organisations had more challenging funder relationships in the past, with some reporting monitoring requirements which were challenging and not relevant. A number of interviewees appeared to see this more as a box ticking exercise stating that they felt that they were forced to spend more time justifying the funding than they were delivering advice. Another interviewee mentioned that they didn't know why they reported explaining that it is just the 'done thing'.

Others valued the reporting process, explaining that it gave the opportunity to demonstrate the worth of the project by highlighting to funders the types of issues that householders were experiencing and the significant positive impact the project could have. This could also be shared with advisors as a good news story to further encourage them in their work. In assessing which topics and method of advice were or were not working, they were able to make improvements to the service. One interviewee also mentioned that being able to demonstrate the benefits of their work would put them in a stronger position to be able to apply for future funding.

## 10.3 Monitoring data and challenges of collection

Within this research, monitoring and evaluation data was collected from a number of organisations (those who had responded to the survey or case studies). The data was provided in a number of different formats and as highlighted above, projects were collecting data on different outcomes. This therefore makes a summary of the outcomes problematic. The following provides an overview of the data collected along with the approaches taken to calculation and challenges in measuring each outcome.

### Bill savings

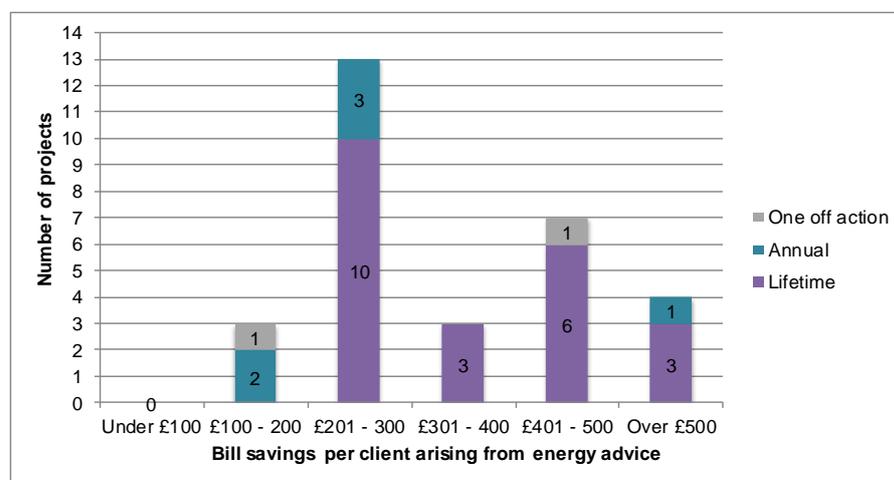
Most organisations record the bill savings estimated from the delivery of advice to clients. However the data provided shows a wide variation in savings (figure 14). This is because projects have different objectives, are measuring different outcomes over different timescales, the calculations have different assumptions, and as highlighted earlier, projects may include additional activities aside from the delivery of face-to-face fuel poverty advice. It should also be noted that although this data shows the results from 30 projects, this only represents nine organisations. Even projects within one organisation can result in markedly different savings due to the reasons listed above.

### Timescales

Projects most commonly cited an average saving per client ranging from £201 to £300 as a result of their advice (Figure 14). However this alone does not give a true representation of the savings being reported, as organisations were reporting their savings on a variety of timescales. The majority of organisations who made data

available (six) reported their savings as annual savings. Based on the figures provided, the average annual saving per client was £316. Two organisations stated their average savings were ‘one off’ for one year only, averaging £317 across the projects. Whereas one organisation reported their savings as a lifetime saving; this averaged £387 per client. Interestingly different organisations were reporting the same outcomes to occur on both a one off and annual timescale. For example, receipt of Warm Home Discount requires the householder to be in receipt of qualifying benefits, apply to the fuel supplier on an annual basis and have their qualifying criteria remain unchanged. It should also be noted that the Warm Home Discount is a finite allocation of funding and therefore qualifying householders could still miss out. This suggests that in some cases further consideration needs to be given as to the likelihood of an outcome reoccurring.

**Figure 14: Bill savings achieved per client**



Base = 30

### Outcomes measured

As noted above, the way in which bill savings are calculated and what they constitute differs. Below are some examples of how bill savings are calculated:

- A charity reported bill savings of £227 per client. This consists of 38% on behavioural advice, 23% from the Warm Homes Discount, 12% from payment reductions, 10% from fuel switching and 3% on rebates.
- A housing association reported savings of £290 per client. 36% is from the Warm Homes Discount, 31% from cancelled fuel debt, 16% from changes to supplier or tariffs, 8% on low-cost energy gadgets and 8% on other.

These examples highlight both the differences in project focus and the variations in calculating savings between organisations and projects. This makes collating all savings from projects difficult. It is also likely that many projects are not calculating all savings achieved from projects; for example, many are not including savings from behaviour changes (although it is possible that this is because behaviour change is not covered in the advice).

### Actual versus estimated

It should be noted that some bill savings are assumed or estimated, whereas others are actual; this is partly dependent on the approach taken by organisations and also

dependent on where the saving is arising from. For example, savings from behaviour changes (below) are largely assumed whereas the savings attributable to writing off debt or tariff/ supplier changes can be measured for each client. Feedback from interviewees highlighted that gaining access to actual fuel bill data was difficult in terms of both the time it takes to collect information and reliance on the client to provide information. Some interviewees were hopeful that smart meters will resolve this issue in the near future.

### **Behaviour change savings**

The majority of organisations reporting bill savings from behaviour changes are doing so with an estimated average figure they use for reporting. These varied between organisations (£54, £106 and £110), yet were all cited as stemming from Energy Saving Trust figures, apart from one organisation that had also drawn on data from Energy Action Scotland. Organisations were not able to provide further detail on the assumptions or calculations behind these figures, or a specific reference. Interestingly a report from the British Gas Energy Trust<sup>12</sup> cites a figure of £130/ year from behaviour change savings, which is referenced from the Energy Saving Trust.

Some organisations have measured the extent of behaviour changes, for example by recording advice given and conducting follow-up calls to record which behaviours the householder had implemented. However no figures were obtained from the projects to quantify these changes and one interviewee in particular mentioned that they were experiencing issues with this aspect of evaluation.

### **Carbon savings**

Few organisations provided data on carbon savings achieved from projects. From the data obtained, carbon savings varied from 176 to 2,808 kg CO<sub>2</sub> per client, with an average of 882 kg CO<sub>2</sub>. These are all reported as 'lifetime' figures i.e. the expected saving over a number of years over the 'lifetime' of the measure.

The CO<sub>2</sub> savings appear to consist of behaviour change advice savings (where normally an average figure is applied, as cited above), and the savings achieved from energy efficiency measures installed. The latter depends on a number of factors, most notably the presence of Government grants. For example, organisations reported a drop in the number of referrals for cavity wall and loft insulation over the previous years due to decreasing grants in this area. In addition projects delivered by the same organisation can have dramatically different carbon savings achieved. This is likely due to the housing stock in that area; for example if the project is focused on one geographic area or with a certain householder type, they may find more or less opportunity for energy efficiency measures installation.

A number of interviewees mentioned that carbon accounting was a challenge to monitor and most did not include this unless it was a funding requirement. Further some interviewees mentioned that fuel poverty advice and carbon savings were largely not related as in many cases householders are not using their heating systems or electricity as they are concerned about running costs. Thus many

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<sup>12</sup> Oxford Economics (2015) [The economic and social impact of British Gas Energy Trust](#)

householders have a higher carbon footprint following affordable warmth advice as they start to use their energy.

### **‘Softer’ outcomes**

A number of projects have reported on ‘softer’ outcomes from projects such as:

- Perceived improvements in warmth and comfort
- Improvements in ability and confidence to carry out activities such as using heating controls, getting the best tariff, reducing condensation or reading meters
- Health and wellbeing improvements such as reduced stress

On the whole it appears that this evaluation is being carried out via surveys. In addition, many organisations provide case studies to illustrate the impact of their advice on individuals.

The impacts being reported in this respect are generally very positive. For example, one project reported that 80% of their clients had increased confidence in managing their fuel bills. Another organisation carries out before and after surveys to identify the ‘step change’ in their clients’ ability and satisfaction with a number of factors. Examples of their results include 43% more people reporting being ‘happy or very happy’ with the warmth and comfort in their home after having received advice and 49% similarly feeling they were ‘happy or very happy’ about being able to save money on their fuel bills, following advice. Because all the surveys and evaluation criteria used in this part of the project differed, it was not possible to collate all the findings together.

Feedback from interviewees highlighted that monitoring these wider benefits of fuel poverty advice is challenging; for example, improvements to confidence, empowerment, and health and wellbeing changes (including reduction in stress and social isolation). Capturing the cumulative benefits that make a difference to householders’ lives was also described as challenging. Examples given included householders sleeping better as they were no longer worried about their bills, which they felt had improved their health and wellbeing. In another example a householder reported that after receiving support to tackle a fuel supplier issue they felt more empowered to tackle issues in other aspects of their lives such as their children not being able to access free school transport. One of the social landlords interviewed explained they had plans to capture the resident experience using a new software application which created a personal plan for their residents and is updated by either the resident or housing officer to track progress.

### **Social return on investment**

Citrus Energy has calculated the Social Return on Investment (SROI) to measure the monetary value on the impacts of their energy advice. This has identified an average lifetime<sup>13</sup> social value of £2,910 for customers receiving home energy advice<sup>14</sup> which

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<sup>13</sup> capped value at a maximum of 3 years

is largely attributable to helping clients to be better able to deal with issues in the future, reduced anxiety and having a more secure tenancy. They have also identified a monetary value attached to the wider benefits to stakeholders including Government e.g. reduced health and benefits cost.

Similarly, the British Gas Energy Trust, who funds fuel poverty advice projects, commissioned research to calculate the economic and social impact of their programme<sup>15</sup>. This also used an SROI approach to monetise economic, social and health impacts of activities. The results showed that in 2014 the programme had resulted in £14 million of benefits to individuals, which were largely attributable to improvements in mental and physical health. A calculation was also performed on the benefits to stakeholders and wider society, such as benefits to the NHS of improved health, reduction in welfare benefits for increased employment and benefits to local authorities of increased housing stability. Overall the report showed that for the past ten years the Trust has delivered £121 million in positive impacts; 66% of which are direct benefits to individuals and 34% of which are benefits to other stakeholders.

## 10.4 Bench-marking

This research aimed to identify benchmarks in terms of what projects delivering face-to-face fuel poverty advice may expect to cost and their impact. Due to the challenges in obtaining data from projects, variations in project activities and delivery, and calculation methodologies, this is evidently difficult to do. However, the largely indicative figures collected in the research provide some guidance.

As explained in Section 9, the costs of delivering face-to-face fuel poverty advice is expected to be around £100 - £300 per client, with an average of around £194. As discussed earlier in this section, projects most commonly cited an average saving per client ranging from £201 to £300 as a result of their advice, although this can vary widely. The average project saving per client was £327 one off, £316 annual and £360 lifetime (see section 10.3). However there are evidently much wider impacts of fuel poverty advice but these are not commonly measured and therefore the figures are likely to undervalue the overall benefits to the client.

The project also sought to identify the number of clients per advisor per year. Most organisations did not have a specific figure they used for this, but as discussed the depth of advice they provided to different clients varied and therefore this could be difficult to quantify. The target number of visits made available by six of the case studies varied from 137 up to 960 visits per full time equivalent per annum. However organisations were not able to differentiate in detail between full advice visits and more 'light touch' engagements with some including advice delivered at events. For example one organisation cited an average figure of 300 – 350 clients per year per advisor, although around 100 of these clients would be in receipt of more 'light touch' advice such as that given at events or workshops. Interestingly, the

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<sup>14</sup> Social Value Lab for Citrus Energy (September 2015) – Social return on Investment of Lemon Aid Fuel Poverty Initiative

<sup>15</sup> Oxford Economics (2015) [The economic and social impact of British Gas Energy Trust](#)

organisation had previously used a figure of around 200 clients per year but due to funding pressures had looked to increase this number through improving efficiencies on staff time. They however stated that this was the maximum number of clients that could be dealt with by one advisor; to increase it further would be to compromise on the quality of advice provision.

## 11. CONCLUSIONS

### Face-to-face fuel poverty projects in Scotland

This research has highlighted the range of projects and services delivering in-home face-to-face fuel poverty advice in Scotland. It is estimated that there are (or have recently been) 158 projects delivered by a range of organisations such as housing associations, local authorities, charities, community organisations and CABx, with many being run in partnership. These projects vary in terms of:

- Scale: from projects employing multiple staff to those employing fewer than one full time member of staff.
- Focus and advice offered: whilst most projects include advice on a number of key topics such as fuel billing, some projects focus on specific issues whereas others are more holistic.
- Depth of advice: as a result of the above and because of funding availability, the level of advice differs between projects.

The picture of advice provision across Scotland is therefore a complex one and due to funding cycles, ever-changing. It is therefore difficult to build an accurate picture of the services available to consumers across Scotland as the precise nature of which organisations are providing advice, and the services they offer, is likely to be different across different localities. Due to the lack of data available on many of the projects, it is also difficult to understand the scale of these services in sum.

### The need for fuel poverty advice to be delivered face to face

There is a strong sense amongst organisations delivering these services that in-home face-to-face advice is essential to tackling fuel poverty. It is seen as more effective than other forms of advice (e.g. telephone) because it allows advice to be tailored, other issues to be identified and practical demonstrations to be made (such as use of heating controls). It was also reported that being in someone's home allows advisors to build trust, which in turn gives the householder more confidence to make changes, as well as feeling more at ease and therefore open to sharing their concerns.

Vulnerable householders are those considered most in need of receiving this level and type of service e.g. householders where English is not a first language, those who have previously been homeless or suffering from poor mental health. It was, however, considered that not all householders need to receive face to face advice. Telephone advice or light touch intervention through events may suffice. There may also be situations in which vulnerable householders would prefer to receive advice through a different format, such as those who are deliberately excluding themselves socially due to concerns about the comfort of their home. The complexity of problems householders face with their energy use or fuel billing can also merit the need for in-depth advice. For example problems such as billing errors or debt may be difficult to resolve over the telephone.

## **Fuel poverty issues addressed**

As highlighted, these projects are offering advice to households on a range of issues including: tariffs and suppliers, fuel debt, energy behaviours, billing issues and referrals for energy efficiency measures. Referrals to other organisations that provide services such as income maximisation are common. Thus, where all these topics are covered, these advice services can tackle all four causes of fuel poverty: energy efficiency of homes, household incomes, energy prices and behaviour in relation to heating usage. However, it appears that many services need to focus on emergency situations around debt and billing issues, and whilst behaviour change advice was seen as critical, it is not clear how much focus other topics receive when there are more urgent issues at hand. Further, many of these issues, such as billing errors, may be due to a poorly performing energy market.

## **Funding challenges**

The availability of funding was cited as the biggest challenge facing delivery organisations. Issues included the competitive nature of funding, persuading funders face-to-face advice is worthwhile and the short term nature of funding.

A particular tension was apparent between depth and breadth of advice projects. There appears to be a pressure from some funders to maximise the number of clients supported, yet this can reduce the time spent with each household. Delivery organisations therefore, were conscious of the need to balance this so as not to compromise on quality of service.

It was also evident that funders often drive the extent and type of evaluation carried out by delivery organisations. In some cases this was leading to 'light touch' evaluation.

## **The impacts of face-to-face fuel poverty advice**

Feedback from delivery organisations suggests that face-to-face fuel poverty advice results in a range of benefits to householders. These include fuel bill savings, carbon savings (in some cases) and a range of 'softer' outcomes such as increased health and wellbeing. This might be evidenced by a reduction in stress and anxiety. On average the projects were recording a lifetime savings per client of £327 one off, £316 annual and £360 lifetime (see section 10.3) attributable to fuel bill savings.

Whilst all projects are monitoring and evaluating their projects to some extent, some are only recording project activities (i.e. number of clients advised) or evaluating a limited number of outcomes. Further, the evaluation being carried out is inconsistent across projects. For example, reported bill savings from different projects can arise from a variety of sources (e.g. Warm Homes Discount, tariff switching or behaviour change savings) and assumptions used for these calculations, such as behaviour change savings, vary. There is therefore a real lack of evidence across the sector of the outcomes of this type of advice.

There are of course inherent problems in evaluating these projects, such as:

- The same type of advice will have a different impact depending on the householder's circumstances (e.g. fuel type, level of fuel debt) making it difficult to determine average savings.
- Organisations may lack the expertise or resources to carry out evaluation (especially in smaller projects) which in turn is hampered by the lack of appropriate industry-averages or calculation methodologies.
- Softer outcomes such as health and wellbeing impacts are difficult to measure.

However, a greater level and more consistent monitoring would enable a better picture to be obtained of the impact of face-to-face fuel poverty advice. It is likely that the current evaluations are undervaluing the benefits of services to householders and therefore this is likely to make a stronger case for investment into this type of advice service. Projects of course should not be deterred from their key focus of delivering high quality and effective advice services and evaluation activities must be proportionate to the scale of the project. However, it is clear from this research that some organisations are carrying out thorough evaluations of their projects and there is therefore scope for best practice and information sharing with organisations that are less experienced.

### **Costs of delivering advice**

Another area that requires further understanding is the cost of delivering face-to-face advice. Typically the cost of delivering fuel poverty advice was around £100 - £300 per client, and an average of around £194. However this varies considerably between and within projects based on the depth of service provided or required and other factors such as advisor travel time. Clearly this is only an indicative figure and more research would be needed to build a more accurate picture of costs and variables impacting costs. Coupled with a greater understanding of the impacts and outcomes of advice services, this would enable policy makers and funders to make more informed decisions about different delivery mechanisms.

## 12. RECOMMENDATIONS

This section provides recommendations for key stakeholders.

### 12.1 Recommendations for The Scottish Government

Recommendations for The Scottish Government are:

- To continue to invest, and look to invest further, in face-to-face fuel poverty advice services as an essential service to support vulnerable households.
- Commission a pilot project programme delivering face-to-face fuel poverty advice with clear monitoring and evaluation goals and criteria. This would provide greater clarity on both the scope and scale of outcomes achieved from this type of project as well as the associated costs.
- Develop an industry-wide standard regarding the savings achieved from behaviour changes from in-depth energy advice. A standard could have different savings dependent on level of advice, type of advice and fuel type. This would provide consistency across projects and organisations, and also support organisations to evaluate their own services. This should be carried out in consultation with other key stakeholders<sup>16</sup>.
- In line with the above, look to support delivery organisations to carry out monitoring and evaluation, for example through resources or upskilling.

### 12.2 Recommendations for funders

Recommendations for organisations that fund fuel poverty advice projects are:

- Require projects to carry out a minimum level of evaluation. This should include quantifiable outcomes, such as bill savings, as well as qualitative outcomes. It is recognised that the scale of projects may restrict the depth of evaluation which can be achieved and that funders will have different priorities (e.g. health, environmental).
- Allocate funding to projects specifically to carry out monitoring and evaluation.
- Look to award multi-year funding to increase the efficiency of projects and services that otherwise need to commit considerable ongoing management and staff resource to project set-up, securing annual funding and training staff (due to issues of retention).
- Be more flexible in allowing funding to be pooled so that projects can expand rather than be replicated, increasing efficiencies and reducing additional overheads.

### 12.3 Recommendations for delivery organisations

It is recommended that organisations delivering fuel poverty advice:

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<sup>16</sup> It is worth highlighting that there is a [range of resources](#) available from the Climate Challenge Fund (CCF) on monitoring and evaluating the impacts of projects.

- Start thinking about monitoring and evaluation of projects before delivery commences and create a suitable monitoring plan.
- Build in as much monitoring and evaluation as possible. It will help to identify what the project has achieved, areas for improvement and build the case for further funding applications. It also contributes towards sector-wide learning in regards to what projects can and do achieve.
- Share best practice with other delivery organisations.

In terms of how to carry out monitoring and evaluation, it is recommended that projects should measure the following:

## **1. Financial and carbon savings**

Fuel bill savings should be measured, as applicable, from:

- 'Emergency advice' i.e. fuel debt recovery or emergency loans
- Non-emergency advice:
  - Behaviour change (averages applied across the sector – see recommendation above)
  - Changing supplier, tariff and/ or fuel
  - Other billing issues, such as fuel bill errors
  - Warm Homes Discount
  - The installation of energy efficiency measures or low-cost equipment.

Some of these savings can be calculated accurately based on specific client data i.e. debt recovery and other billing issues. However those savings arising from behaviour changes and installation of energy efficiency measures are more challenging to accurately measure per client. Average savings can be applied, and where possible, verified or refined through actual bill monitoring of a small sample of households. This may become easier with the introduction of smart metering.

In addition, carbon savings from behaviour changes and installation of measures can be measured in the same way using carbon conversion factors from fuel type (electricity, gas, etc).

## **2. Wider benefits from advice**

It is recommended that organisations also measure the wider benefits to households resulting from this type of advice, such as:

- Increased confidence and ability to manage energy bills and energy usage (encompassing a wide range of skills including using heating controls, speaking to energy suppliers, handling debt, etc).
- Improvements in the home, such as warmth, comfort and reduction of damp/condensation.
- Improvements in health and wellbeing as a result of the above.

A qualitative (i.e. interviews or case studies) and/ or quantitative (i.e. surveys) approach could be taken to evaluate these outcomes. The most relevant approach is proportionate to the project in terms of level of advice provided and resources to

carry out the evaluation; larger projects should therefore include a quantitative element.

## APPENDICES

### Appendix A: Case study descriptions

This section provides a description of the other six case studies used as part of this research (see Section 6).

#### Case Study: Changeworks - Almond Energy Advice

##### Project background

Changeworks is one of Scotland's largest environmental charities – a social enterprise with 30 years' experience of delivering sustainability solutions. Working in conjunction with Almond Housing Association, Changeworks delivers face-to-face energy advice to fuel poor households in Whitburn and the Craigshill and Ladywell areas of Livingston through the Almond Energy Advice (AEA) service. This service, which also provides clients with advice on how to prevent food waste and energy advice training to local community groups, is funded through the Scottish Government's People and Communities Fund. Now in its third year, the AEA service provided in-home energy advice to 240 clients during its 2015-16 funded period.

##### Service delivery

Energy advice is provided by a Changeworks Affordable Warmth advisor. This advisor works part-time on the project and is based in Almond Housing Association's office for three days a week. The service is mostly provided to tenants of the housing association. However, other householders in fuel poverty within the target areas are encouraged to engage with the service through outreach events and promotional materials. Referrals are made to the AEA through CABx, voluntary organisations and West Lothian Council services, such as social work and The Advice Shop.

The in-home energy advice provided is comprehensive and bespoke to each client. It is sensitive to the needs of vulnerable clients and those clients with complex issues and/ or mixed cognitive abilities. Although imparting behaviour change advice is important, the primary aim of the service is to resolve client issues with energy billing and fuel debt. In Changeworks' experience, when such issues are resolved householders are more able to use their energy affordably, and therefore likely to use their heating, which can lead to improvements in health and wellbeing. Where clients are not comfortable engaging with the service in their own homes, the energy advice is delivered in a neutral location. However, delivering energy advice in the home is more effective and efficient; for example, the advisor can speak immediately to an energy supplier through a verbal rather than written mandate from a client, demonstrate heating system controls and review any issues of damp.

Almond Housing Association facilitates the delivery of the service through providing the energy advisor with access to housing association services and tenant data. It also promotes the service through housing association events and newsletters, and it recruits volunteer energy champions to assist in promoting the project. The service

refers clients to other organisations for support, including those providing more general income maximisation advice and groups running social welfare events (e.g. lunch clubs for elderly people).

### **Impact of the service**

Over the course of the year so far, the project was estimated to have saved £13,780 on savings from energy advice and £7,500 from fuel billing related savings. This includes Warm Home Discount savings, changes to payment methods and tariffs, compensation and discounts from energy suppliers and an average saving assumed from behaviour changes. Savings per client varied between £54 and £683 per year, depending on the advice they received and their circumstances. In addition a total of 19.52 tonnes of CO<sub>2</sub> was estimated to have been saved (lifetime figure).

A survey is used to evaluate wider benefits of the service including clients' improvements in using heating controls, talking to their supplier and reducing condensations. This highlighted for example, that prior to the advice, only 46% of clients were happy or very happy they knew how to use their heating controls. This rose to 87% following the advice. The same format of survey is used across Changeworks' fuel poverty projects. It allows a greater insight into the full range of outcomes being delivered whilst allowing service performance to be compared and benchmarked against other similar services that Changeworks and other organisations are currently delivering and have delivered in the past.

### **Case Study: Citizens Advice Edinburgh – Fuel Bills Advice Service**

#### **Project background**

Citizens Advice Edinburgh (CAE) operates five Advice Bureaux across Edinburgh. Since 2014 they have been running the Fuel Bills Advice Service, previously known as Energy Matters. The project currently employs one energy advisor on a 21 hour/week contract.

Funding for the project was allocated by Citizens Advice Scotland who received funding from various energy supplier penalties. The current allocation of funding will end in September 2017. The target for this allocation of funding was to support 155 clients over 1.5 years. This target was set to ensure that as many people as possible were seen, without compromising the quality of the service.

#### **Project delivery**

A full range of advice is offered including: behaviour change, tariffs and suppliers, fuel debt, energy efficiency measures, income maximisation and heating control demonstrations. There is a particular focus and expertise on advocacy and energy ombudsmen submissions.

Citizens Advice Edinburgh is a non-discriminatory organisation who offer support to anyone who approaches them for help. The clients' initial enquiry is tackled primarily, followed by any related issues that are established during conversation.

Referrals into the scheme come from CAE themselves and a number of other public and third-sector organisations including: Shelter Scotland, City of Edinburgh Council

neighbourhood support services, the Royal Scottish Agricultural Benevolent Institution (RSABI), Edinburgh and Lothians Regional Equality Council (ELREC), Warmworks, Care and Repair Edinburgh and CRISIS.

Whilst face-to-face advice helps support a number of householder types, it is considered to be particularly helpful for specific groups. For example, those who experience literacy challenges, are unable to leave their home, are visually impaired and/ or have encountered problems with their fuel supplier and need support to empower them through the ombudsman process.

Citizens Advice Edinburgh also runs a surgery which is helpful to those who want to clarify some information and have something they need to physically bring, such as a fuel bill. Alternatively, for householders who are not comfortable having someone in their home, advice is also available via the [Citizens Advice website](#).

The energy advisor is supported by CAE volunteers who are trained as part of the project to give basic initial advice and signpost into the service. Training is also delivered to frontline staff at external organisations who liaise with vulnerable customers, such as CRISIS and City of Edinburgh Council neighbourhood team. Training is provided to help identify fuel poverty issues as well as more specific advice such as how to structure an informed argument with fuel suppliers on behalf of the householder.

Householders in need of additional non-energy related assistance are referred back into the CAE for other services and to external organisations (including those who refer in to the service), to access support for energy efficiency measures, advice on income maximisation and housing support.

### **Impact of the project**

In the first six months of the current round of funding, the project managed to achieve a total saving for householders of £23,155<sup>17</sup>. This was the result of: billing error correction, debt eradication, Warm Homes Discounts, other financial awards, reduced payments and householders switching supplier. The project did at first seek to identify how many people they had lifted out of fuel poverty; however this was deemed difficult to do. Some aspects, such as debt write-off, are easier to record for each client.

In addition to the financial benefits achieved, the impact of the project is also anecdotally reported through client case studies. These detail improvements in the comfort of clients' homes and impacts on reducing clients' stress and anxiety, enhancing the ability of internal and external advisers to support clients with energy issues, and challenging negative practices within the energy sector to improve the experience of consumers.

### **Case Study: Fyne Homes Ltd - FyneHEAT**

#### **Project background**

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<sup>17</sup> Savings were achieved by one advisor working 21 hours per week.

Fyne Homes Ltd is a recognised Scottish Charity and Registered Social Landlord based on the Isle of Bute serving the communities of Bute, Cowal, Mid Argyll and Kintyre. Their head office is located in Rothesay, Isle of Bute with three local offices in Campbeltown, Dunoon and Lochgilphead. Fyne Homes have approximately 1,500 social housing properties across Bute, Cowal, Mid Argyll and Kintyre.

Fyne Homes operates in a rural area where tenants rely on the services provided by their landlord and for many, they may be the only contact they have on a regular basis. In April 2015 Fyne Homes initiated an energy efficiency advice project called Fyne Homes Energy Action for Tenants (FyneHEAT) which offered home visits to Fyne Homes' residents. The aim was to provide a holistic, and importantly, local, trusted point of contact to support tenants to reduce their energy bills, their carbon emission and to alleviate fuel poverty. The project was funded by the CCF, employed one full-time and three part-time advisors and ran for one year.

### **Project delivery**

It is Fyne Homes' policy to install renewable/ efficient heating systems with the addition of behaviour change and energy advice, as part of their ongoing commitment to reduce both fuel poverty and carbon emissions. To do this they aim to take a whole house approach including tenant awareness in relation to energy efficiency, to provide tenants with homes they can afford to heat; assisting them to change or adapt their behaviour to achieve this.

Home visits offered a full range of affordable warmth advice as well as support with more complex issues such as debt write off and meter problems. A follow-up visit was offered as standard in order to check on residents' progress. The vast majority of referrals into the project were via Fyne Homes staff or self-referrals from residents.

Additional non-affordable warmth advice was delivered during the home visits, including recycling and waste reduction information and conversations surrounding how both this and reducing energy consumption can have a positive effect on the environment. Residents were issued with an LED light bulb and offered an electricity monitor to help them to see what savings they could make on their fuel bills by being more energy efficient.

Following the home visits, residents were referred internally for income maximisation advice with the housing association, where appropriate. Others were referred elsewhere such as, transport funding to help with access to NHS services.

As well as home visits, the project ran 12 drop-in coffee mornings across the area to address specific energy efficiency and income issues, which often led to referrals into the home visit aspect of the project in order to provide more detailed support and help for residents. A project newsletter was issued to residents on a quarterly basis to provide advice and tips on reducing energy consumption and to prompt people to seek an advice visit.

The project also delivered training to eight Fyne Homes staff members including Technical and Housing Officers, to support them to identify signs of fuel poverty and prompt them to refer into the home visits service.

### **Impact of the project**

The vast majority of residents were reported to benefit from their home visit through a variety of ways: reducing bills, increasing energy efficiency, changing behaviour and income maximisation (either through access to benefits or bill savings through switching). The advisors often found that by supporting residents with certain issues they were empowered to go on and do other things themselves.

A total of £100,896 was saved by the project through: savings from billing errors, benefits checks, tariff changes, grants and the Warm Homes Discount. These are recorded per client and an online carbon calculator was used to calculate carbon savings.

### **Case Study: Shetland Citizens Advice Bureaux – Affordable Warmth Advice**

#### **Project background**

Shetland Citizens Advice Bureaux (CAB) began their affordable warmth advice project in April 2015. The project is funded from two sources, with one part funded by the European Social Fund (ESF) and the local authority, and the other by Citizens Advice Scotland (CAS) who have been allocated funding from fuel supplier penalties. The ESF funding runs until December 2018, whereas the CAS funding finishes in September 2017.

To the public the project appears as one; however, the terms of the allocated funding require one of the projects to target vulnerable clients (in particular those who are homeless, unemployed, single parents or on a low income) and the other the needs of any householder. Therefore, collectively the service is available to anyone in Shetland. The project operates with two part-time staff delivering advice on topics including: behaviour change, tariff/ supplier, fuel debt, energy efficiency measures, income maximisation, heating demonstration and other billing advice. Home visits are offered as required.

#### **Project delivery**

Clients typically approach the CAB with a specific query or a CAB advisor will go through a series of questions which will help them to identify the most appropriate service to refer the client on to. The service offers varying levels of support based on the householder's needs. Some people are given information over the telephone; others receive visits, whereas some need further support and hand holding which may require ongoing support.

Clients access the service by self-referral and via referrals from other services including health staff, the local authority and internally through clients accessing the

debt advice and benefits service. They can also access the service through regular outreach sessions at rural and island doctors' surgeries.

The project is delivered separately but in conjunction with other partner projects, namely the local authority, the local housing association, Home Energy Scotland and the multi-agency, Fuel Poverty Action Group. If it is identified that the client needs more in-depth energy efficiency or renewables advice, they are referred onto Home Energy Scotland, Shetland Islands Council or their social landlord. Where advice is required outside of energy efficiency, clients are referred back to internal CAB services, or to external services if required.

Since the start of the project, Shetland CAB have worked with the Fuel Poverty Action Group to encourage a more joined up approach with the available services. This involved mapping out the customer journey based on the support available, in order to maximise access and efficiencies of the projects. In addition, Shetland CAB advisors have shadowed Home Energy Scotland and local authority advisors to help increase their knowledge.

CAB are aware of the rise in winter deaths and are hoping to increase referrals into the service from health staff by offering training to third party organisations on how to identify and refer householders who may be experiencing issues. As part of this, the project plans to deliver training to groups of local staff such as "home helps" to raise awareness of how to recognise the signs of fuel poverty.

### **Impact of the project**

Clients have responded well to the service and are grateful to find out about services which they were not previously aware of such as the Priority Service Register, which keeps people informed during power cuts. Many have been able to reduce their energy costs through learning how to operate and pay for their heating in the most efficient manner. There have also been significant financial gains for clients as a result of successful benefit applications.

The partnership work delivered as part of the project has helped to bring together the various services to form a more structured approach to benefit clients and enable organisations to learn from one another.

The nature of fuel poverty in a remote island area has been the biggest challenge of the project. Shetland is an off gas area with many households dependent on restricted tariff electric heating. Many households are therefore not able to reduce their bills through switching. Accessing longer term funding will also be crucial to maintain the momentum from the engagement work, particularly as there are greater costs associated with delivering the service per householder.

In line with funders' requirements, Shetland CAB record the number of households offered tailored support, the nature of advice and support given, and the stage they have reached in the advice process in addition to income maximisation (e.g. benefits successfully applied for). The funders do not require quantitative information on savings achieved through energy efficiency measures but they do record qualitative case studies to illustrate the impact of the advice.

## Case Study: South Seeds

### Project background

South Seeds is a community-led organisation working to enhance the lives of residents throughout the south side of Glasgow by improving the sustainability of communities. The energy advice service they provide has been running for more than five years. Most recently it has been funded by the Climate Challenge Fund. Over its first five years of operation this service has delivered 587 home visits and energy audits.

### Project delivery

Energy advice is provided through a range of methods to all residents of the Govanhill, Crosshill, Queen's Park, Strathbungo and Pollokshields East neighbourhoods on the Southside of Glasgow. These methods include engagement at community events and walk-ins to South Seeds base which is on a main high street.

Residents are booked in for a home energy audit which consists of a home visit followed by a detailed action plan which includes a check list of energy saving actions. South Seeds also produce information leaflets, how to guides and research reports which are taken to engagement opportunities or included in the bespoke home energy action plan. Energy advice is currently delivered in residents' homes by two full-time energy advisors. One of these advisors is a native Romanian speaker, recently employed in order to engage with Govanhill's Romanian migrant community which includes 3,500 people.

All types of energy advice are offered, including information on how to reduce energy consumption through simple changes in behaviour, energy bill advocacy and how to apply for funding (e.g. Warm Homes Discount). Providing advice on how to use heating system controls correctly and how to switch energy tariff or supplier were found by South Seeds to be the most effective types of support required by clients. Also, there is a particular emphasis on providing advice on energy efficiency measures suitable to the area's most common housing type – Victorian solid stone tenement flats with high ceilings and large windows. This advice was informed by external research commissioned by South Seeds, to understand typical energy efficiency improvements to traditional buildings (e.g. closing off chimney flues with a chimney balloon) and consents required where measures are applied to buildings that are listed and/ or in conservation areas. South Seeds provides an energy saving handyman service to draught-proof homes and secured funding to replace existing single-glazed windows with new double glazed units in a small number of tenement flats. The handyman is a paid for service but can be deployed for free in some cases.

Referrals for energy efficiency advice mostly come through word of mouth through local residents who have already engaged with the service. Where energy advisors identify non energy related issues and needs during home visits, they are able to refer clients to other support organisations through South Seed's membership of an extensive network of community groups and agencies. For example, householders with money problems are referred to Money Matters, a Glasgow-based charity who offer a financial advice service. South Seeds also refer clients to Home Energy

Scotland or Warmworks (if residents are eligible for a heating system) and to organisations who provide housing services and are able to issue food bank voucher.

## **Impact of the project**

South Seeds provides solutions for those who are struggling with their energy use or experiencing fuel debt by finding ways to reschedule debt, claim payments they are eligible for and use energy more efficiently in the home.

As a result of the advice and support provided by South Seeds, local residents have secured up to £4,000 per month of Warm Home Discount rebates on their electricity accounts. Also, South Seeds estimate that the energy advice together with their other activities and services (e.g. diverting waste from landfill, community food growing and composting) have achieved an 11,000 tonne reduction in carbon equivalent emissions over the five year period.

Furthermore, through helping those in fuel poverty, South Seeds have seen many residents with challenging personal circumstances become less isolated, engage more with their communities and become more motivated to take better control of other areas of their lives, such as general household management.

## **Case Study: Wheatley Group – Fuel Advisory Project**

### **Project background**

The Wheatley Group are a Scottish based property-management group, comprising six Registered Social Landlords (RSLs), a care organisation, three commercial subsidiaries and a charitable foundation. This case study focuses on the Fuel Advisory Project undertaken across the RSL subsidiaries which include: Cube, Glasgow Housing Association, Loretto, West Lothian Partnership, Your Place, Barony and Dunedin Canmore. The group has 44,000 properties across 14 local authority areas.

The Fuel Advisory Project is an internally funded service which was set up in 2012. The project delivers a range of affordable warmth advice through home visits and drop in services in order to support residents to tackle fuel poverty and sustain their tenancy, for the benefit of both the tenants and their landlord.

### **Project delivery**

There are currently ten full time equivalent staff working on the project (six in West/ Glasgow and four covering East/ Edinburgh area) and operating across the registered social landlord subsidiaries.

The project is not operated in conjunction with any external organisations but sits alongside an internal advice project, 'My Great Start', which offers new tenants advice on a wide range of topics such as income maximisation and financial

capability support which includes a brief advice visit from a Fuel Advisory Project advisor, offering top-level advice on a range of topics including how to register with their supplier.

Referrals into the project are largely internal. Tenants do not refer themselves directly into the service, instead they are assessed through their Housing Officer who arranges support from the Fuel Advisory Project, if required or as a direct referral as part of the My Great Start advice project. Some referrals are received from external projects such as G.HEAT (an energy efficiency project operating in the Glasgow area), who may be supporting Wheatley Group tenants.

At the start of each visit the advisor uses a questionnaire as an assessment tool to understand residents' needs and ensure that all areas of relevant advice are covered. The project acts as a conduit to other services; if required tenants are often referred onto other in-house services and external organisations for further advice, for example Eat Well, Home Comforts, Welfare Benefit Advisory Service and also third sector agencies i.e. Action for Children, Age Concern. The advisors all have a 'tool bag of services' to refer to which is different for each of the communities.

### **Impact of the project**

The Fuel Advisory Project feels that tenants value face-to-face advice and that they have a successful model which works with customers, understand their needs and delivers advice at specific trigger points.

Pressures on the time required to deliver face-to-face advice, compounded further by the number of tenants who do not keep their appointments, means that the Fuel Advisory Project are looking to deliver online advice to more and more tenants in the future and reserve face to face support for vulnerable tenants.

To improve the model for both customers and staff, the Wheatley Group have plans to use an online referral and case management system to improve service delivery. This will include advisors using a tablet to type up notes whilst they are with the customer, allowing real-time data capture, which others within the organisation can access instantly. This will reduce the need for follow-up administration and allow the option to show customers information such as the different tariff options available to them. The new system will also include an appointment system which will automatically issue reminders including what the resident can expect of the visit and what information the residents need to prepare.

In terms of recorded savings, The Wheatley Group assume an average saving per client of £106 from behavioural changes (a figure identified from an Energy Saving Trust source).

## Appendix B: Geographical distribution of projects

**Table 3: Number of projects or services providing face-to-face in-home fuel poverty advice by local authority area**

<b>Local authority area</b>	<b>No. of projects</b>
Aberdeen City	7
Aberdeenshire	6
Angus	6
Argyll & Bute	5
Scottish Borders	8
Clackmannanshire	6
West Dunbartonshire	7
Dumfries & Galloway	2
Dundee City	4
East Ayrshire	6
East Dunbartonshire	8
East Lothian	13
East Renfrewshire	7
Edinburgh, City of	31
Falkirk	4
Fife	10
Glasgow City	32
Highland	10
Inverclyde	6
Midlothian	11
Moray	6
North Ayrshire	7
North Lanarkshire	10
Orkney Islands	3
Perth & Kinross	6
Renfrewshire	12
Shetland Islands	5
South Ayrshire	5
South Lanarkshire	9
Stirling	5
West Lothian	9
Western Isles / Eilean Siar	7

## Appendix C: Survey questions

### Organisation's details

1. What is the name of your organisation?
2. Is your organisation a:
  - Housing association
  - Local authority
  - Community group
  - Charity or social enterprise
  - Other (please specify)
3. Is your organisation currently delivering face to face fuel poverty advice services in people's homes?
  - Yes / No - our project(s) are finished
4. If 'YES', approximately how long has your organisation been delivering this type of service?
  - Less than a year
  - 1 - 2 years
  - 3 - 5 years
  - Over 5 years
  - Don't know
5. Does/did your organisation provide one advice service/project or multiple projects? For example, we expect that a housing association may be running one service for their tenants whilst charities may be running several projects funded by different sources. (This question is required to be answered so we can determine the best way for you to provide this information to us).
  - One advice service/project
  - Multiple projects

### Multiple projects *(directed from question 5)*

6. The next pages ask you specific questions about your face to face fuel poverty advice service/project. As you are/were delivering multiple projects and we need information for each project, it would be easier to provide information to one of our researchers over the phone. Please leave your contact details below and we will be in touch with you shortly.
  - Name / Email address / Phone number

### Project details

7. What is/was the name of the project/service? If the service doesn't have a name, please leave this blank.
8. How many staff (full time equivalents) work/worked on the advice project?
  - 1 – 3
  - 4 – 6
  - 7 – 10
  - Over 10
  - Don't know
9. How is/was your project funded? Tick all that apply.
  - Internal investment (organisation's own funding)
  - Climate Challenge Fund (CCF)
  - Other Government funding
  - Charitable trusts or charities

- Energy utility funding
- Donations or fundraising
- Don't know
- Other (please specify)

10. Approximately how much does/did your project cost per year?

- Under £10,000
- £10,001 - 30,000
- £30,001 - 50,000
- £50,001 - 70,000
- £70,001 - 90,000
- Over £90,000
- Don't know

11. What is the postcode of your organisation's office where your fuel poverty advisors are/were based? This will enable us to map locations across Scotland.

12. In which local authority areas does/did your project you deliver advice in? Tick all that apply.

- |                       |                      |                     |
|-----------------------|----------------------|---------------------|
| • ALL                 | • East Lothian       | • Orkney Islands    |
| • Aberdeen City       | • East Renfrewshire  | • Perth & Kinross   |
| • Aberdeenshire       | • Edinburgh, City of | • Renfrewshire      |
| • Angus               | • Falkirk            | • Shetland Islands  |
| • Argyll & Bute       | • Fife               | • South Ayrshire    |
| • Scottish Borders    | • Glasgow City       | • South Lanarkshire |
| • Clackmannanshire    | • Highland           | • Stirling          |
| • West Dunbartonshire | • Inverclyde         | • West Lothian      |
| • Dumfries & Galloway | • Midlothian         | • Western Isles /   |
| • Dundee City         | • Moray              | Eilean Siar         |
| • East Ayrshire       | • North Ayrshire     | • Don't know        |
| • East Dunbartonshire | • North Lanarkshire  |                     |

### Project details

13. Does/did your project target specific types of householders?

- Yes
- No - we help anyone in our area who needs fuel poverty advice
- Don't know

14. If you answered 'YES' to Q12, what types of householders does/did your project target its fuel poverty advice at? Tick that all apply.

- Social housing tenants
- Private tenants
- Elderly people
- Families
- Young people
- People with disabilities
- People with long term sickness or health problems
- Black and minority ethnic groups or those whose first language is not English
- Don't know
- Other (please specify)

15. How many clients does/did your project help per year? Please only include the number of clients receiving home visits.
- Fewer than 50
  - 50 - 100
  - 101 - 250
  - 251 - 500
  - 501 - 1,000
  - 1,001 - 2,000
  - More than 2,000
  - Don't know
16. What type of fuel poverty advice does/did your project offer to clients? Tick all that apply.
- Reducing energy use through behaviours
  - Changing tariff or supplier
  - Fuel debt advice
  - Energy efficiency measures (such as upgrading heating controls, insulation)
  - Income maximisation
  - Demonstrations on how to use heating controls
  - Other billing issues
  - Don't know
  - Other (please specify)
17. Does/did your project provide any other types of advice, aside from fuel poverty advice? If so, please specify here:

### **Partnerships**

18. Do/did you work in partnership with any other organisations to deliver this project?
- Yes
  - No
  - Don't know
- If 'YES', please give the name(s) of these organisation(s):
19. How do/did your clients find out about your project? Tick all that apply.
- Clients are our tenants - we promote directly to them
  - Referrals through Home Energy Scotland
  - Referrals through other third party organisations
  - Promotion such as websites, newspaper articles, social media
  - Don't know
  - Other (please specify)
20. As part of your project, do/did you ever refer clients to other advice services or for other support?
- Yes
  - No
  - Don't know
21. If you answered 'YES' to Q19, what sort of organisations do/did you refer clients to? Tick all that apply.
- Citizens Advice Bureaux
  - Healthcare organisations/services
  - Referral for energy efficiency measures (e.g. through Warmer Homes Scotland)
  - Money or income maximisation service
  - Housing services
  - Food banks
  - Don't know
  - Other (please specify)

## Monitoring and evaluation

22. Which of the following project outcomes do/did you measure or assess? Tick all that apply.

- Energy savings (as kWh or similar)
- Bill savings
- Increases in household income (income maximisation)
- Carbon savings
- Improvements in health and wellbeing
- Improvements in householders' confidence and ability to deal with energy issues in the future
- Number of people taken out of fuel poverty
- None
- Don't know
- Other (please specify)

23. We would be grateful for any monitoring or evaluation data you can share with us. For example, the total energy savings your project has achieved or typical savings per year. Please provide details in the box below. Alternatively if you have data or reports you can share with us, please contact Tessa Clark, Senior Consultant at Changeworks at [tclark@changeworks.org.uk](mailto:tclark@changeworks.org.uk) or 0131 538 7954.

24. If you would like to provide any further details or comments please do so here:

25. Would you be willing to be contacted for further information if required?

- Yes
- No

26. Are you interested in being a case study for our research? This will involve a phone interview with one of our researchers to provide further details on your project and your opinions on the benefits and challenges of face to face fuel poverty advice. Your project will be featured in the final report. Please note we will only be able to contact a small number of projects to be case studies and will select these to represent a range of different projects.

- Yes
- No

27. Would you like to be entered in our prize draw for £50? The winner can choose a shopping voucher, donation towards their local community group or charity of their choice. See our Terms and Conditions.

- Yes
- No

28. If you have ticked YES to any of the questions above please provide your contact details:

- Name / Email / Phone number

Thank you very much for completing this survey.

## Appendix D: Interview topic guide

### Introduction

- Introduce
  - Yourself
  - Changeworks
    - *I work for Changeworks, an environmental charity*
  - Project
    - *Changeworks is working with Citizens Advice Scotland to identify all projects/ services across Scotland that are delivering (or have delivered within the last three years) face-to-face fuel poverty advice in people's homes. You completed the survey and now we'd like to get some more detail on your project.*
- About the interview
  - *In the first part of the interview we will ask some questions about the fuel poverty project you run/ ran. This will be written up into a case study in the final report, but it will be sent to you for approval before being published. In the second part of the interview we will ask you for your perspectives on the benefits of face to face advice, its outcomes and challenges in evaluating these outcomes. This will not be written up into your case study but will form part of our findings. This part of the interview is anonymous and confidential – there is no right or wrong answer – we are simply interested in your opinions and views*
  - *The interview will last about one hour.*
- Confirm interview permission [**Interviewee to confirm**]
- Recording the interview
  - *Finally, are you OK for me for me to record this interview? [**Interviewee to confirm**] This is to ensure that Changeworks have an account of what you said. The recording will only be used internally and will not be shared with anyone else.*

### You and your organisation

1. To confirm, what is the name of your organisation?
2. What is your role within the organisation?
  - a. How long have you worked in that role?
3. To confirm, does your organisation *currently* provide a face-to-face advice fuel poverty advice service in people's homes?
  - a. If yes:
    - i. [See survey response] Can we confirm that you deliver one fuel poverty service, or do you deliver multiple projects?
      - NB: we should have identified one project to focus this interview on.
    - ii. How long has your organisation delivered this service?
    - iii. What is your role in the delivery of the service?
    - iv. Does your organisation deliver the service itself and/ or through another party?
      - If yes, why? What are the names of the partners?
  - b. If no:

- i. Have you delivered a similar project or projects within the last three years?
  - If yes, how many?

### Service details

4. [See survey response] Who funds the project?
  - a. Can you give a breakdown of the different funds you have received? (NB: we can keep this data confidential and not publish it)
5. [See survey response] How much does the project cost to fund per year?
6. [See survey response] How many staff (full-time equivalent) work on the project?
7. [See survey response] What area does the project cover?
  - a. Local/ neighbourhood, city, local authority area, region?
8. [See survey response] What types of fuel poverty advice does your organisation (or a third party) offer through the project?
  - a. E.g. behaviour change, energy billing & advocacy, heating controls demo etc?
  - b. Does your advice tend to focus on certain types of heating systems?
  - c. How do you determine what sort of advice to provide?
  - d. Why this advice?
  - e. What do you think is the most important type of advice?
  - f. Is there any other fuel poverty advice that your organisation would like to give but doesn't?
    - i. If yes, why do you not/ can you not provide it?
9. [See survey response] Does your organisation (or a third party) offer any other/ non fuel poverty types of advice or support through the project?
  - a. If yes, what types (eg renewable energy installations, training of others to give fuel poverty advice)?
10. [See survey response] Does your organisation's service target specific types of householder?
  - a. If yes:
    - i. Social, private, vulnerable (elderly, families, young people), BME groups?
    - ii. Why these types?
    - iii. Are their particularly challenges associated with these types of householder?
      - If yes, how has your organisation overcome these challenges?
11. How do you assess what your clients' needs are?
12. Does the project provide different levels of support to difference householder types?
  - a. If yes, why/what?
  - b.
13. [See survey response] Do you take referrals from other organisations?
  - a. If yes, which organisations?
14. [See survey response] Do you refer householders to other organisations?
  - a. If yes, which organisations?
15. How else do clients hear about your service?
16. What do you think is most successful about your project?
17. What do you think is most challenging?

18. Before we go on to talk about monitoring and evaluation, is there anything else you'd like to tell us about your project?

### **Costs of delivering advice**

19. Typically how much support would you provide for a householder? For example:
- a. How many home visits do they have?
  - b. How long does a home visit typically last?
  - c. How much additional time would you spend for each client? Eg how much time of desk-based work.
20. Do you have to spend a lot of time travelling to visit clients?
21. How in-depth is your advice able to go in terms of the advice you provide?
22. We are looking at the costs of different fuel poverty projects across Scotland. Is there anything about your project which you think has a factor on the costs of running it? For example we know that in rural areas there is a cost implication of travel time to a dispersed population.

### **Measuring/ assessing outcomes**

23. [See survey response] Have you measured/ assessed the outcomes of your project?
- a. If yes:
    - i. Why have you carried out this monitoring (e.g. improving service delivery)?
      - Was it a requirement of the funding? How much detail did they want?
    - ii. What outcomes did you measure/ assess?
      - Number of households engaged with
        - No. of initial visits, no. of follow-up visits
      - Energy/ bill/ carbon savings
      - Fuel poverty alleviation
      - Arrears and debt reductions/ cancellations
      - Household income maximisation
      - Improvements to health, wellbeing, confidence etc
      - Amount of funding (eg Warm Homes Discount) applied for/ achieved for households
      - Referrals in/ out
      - £s spent per outcome achieved
      - Other
    - iii. Can you tell me how you've measured these? For example, do you measure actual savings or do you use averages / assumptions for each household?
      - Do you carry out any evaluation with clients to assess their satisfaction?
    - iv. Why did you select these outcomes and not others?
      - E.g. relevance/ importance to service delivery, ease of measurement/ assessment, funder requirement
      - Are there other outcomes of your project which you would like to measure?
    - v. What challenges do you experience measuring/ assessing these outcomes?

- Getting clients to provide feedback
  - Getting data (e.g. energy savings/ fuel bill savings)
  - Calculating impact (e.g. carbon reductions)
  - Determining improvements to less quantifiable benefits such as health, wellbeing, confidence etc
  - Other
- vi. How did your organisation overcome these challenges?
- b. If no, why not?
- i. E.g. not a funding requirement, too difficult, never considered
  - ii. (Also, see challenges above)
24. Are there any project benefits that are not being assessed/ measured?
- c. If yes:
- i. Which benefits?
    - Improvements to clients' confidence, knowledge or empowering them to make changes
    - E.g. changing mind-sets generally, exposing householders to other sustainability issues/ benefits, developing local partnerships
    - (Also, measured/ assessed outcome above)
  - ii. Why? How could these be measured?
  - iii. What are the impacts to the project of not being able to measure/ assess these benefits (e.g. difficulty securing follow-on funding, difficulty making service improvements)?
- d. Have you changed the way you monitor your project or services since you started the project or similar services?
- i. If yes, how?

### **The benefits of face-to-face advice**

25. Do you provide fuel poverty advice by other means (e.g. via an advice shop/ drop-in centre, leaflets, information on websites)?
26. What do you see as the benefits of delivering advice face-to-face rather than by other methods (e.g. over the phone, via leaflets)?
27. In what situations or for what type of householder do you think face-to-face advice is most needed?
28. Do you think face-to-face advice more effective than other types of advice?
- a. Why? / Why not?
  - b. What are the benefits it brings over other types?
29. What do you see as the main challenges of delivering face to face fuel poverty advice?

### **Other comments**

30. Do you have anything else to say about the topics we've discussed?
31. Is there something else you would like to say that we have not covered?

### **Close**

32. Thank the interviewee for their time
33. We will send you your written up case study for you to approve before inclusion into the final report. We would be grateful if you could send us any comments as soon as possible.