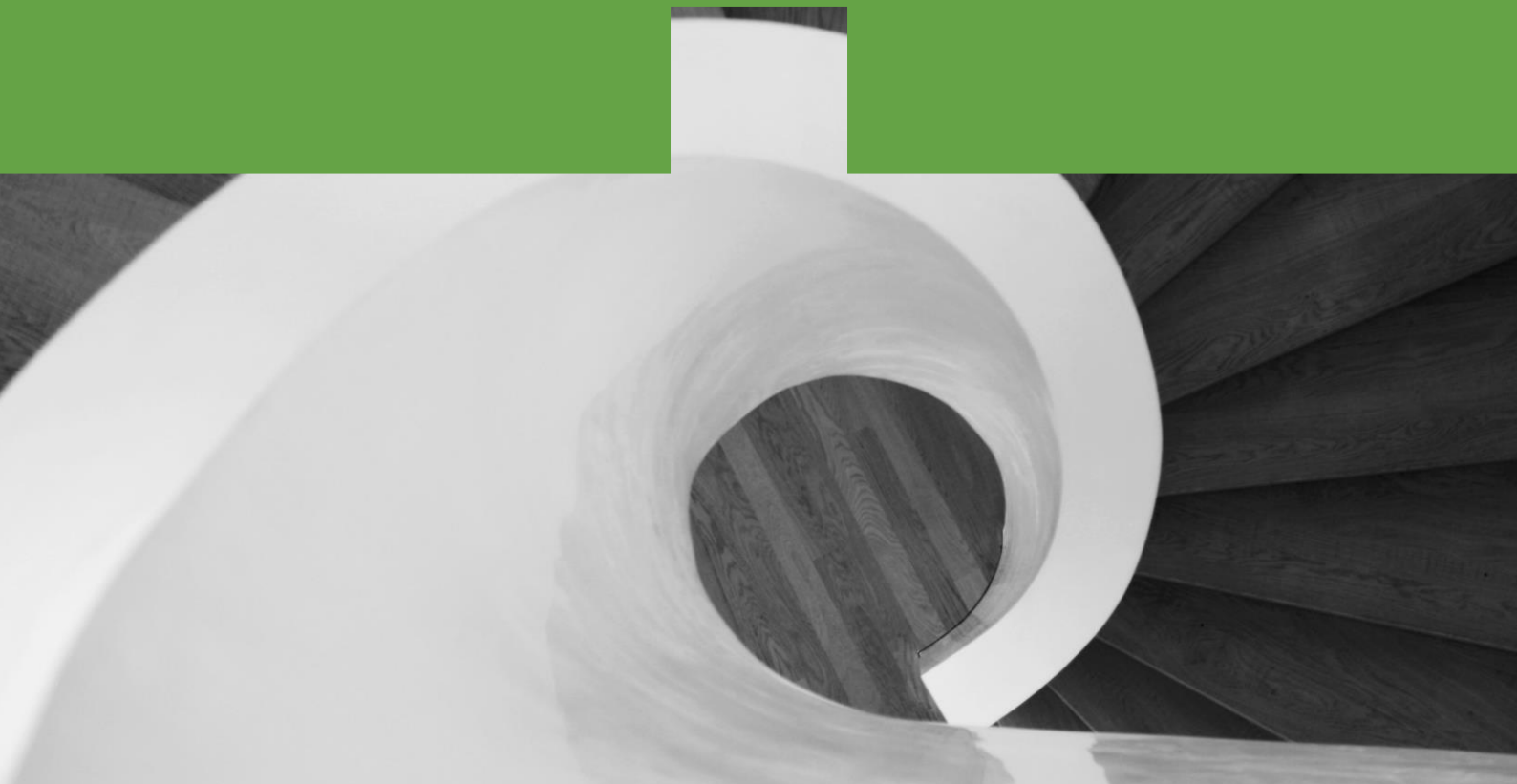


**energy**  
saving  
trust

# Ofgem Energy Redress Scheme Phase 2 evaluation report

November 2023

Energy Saving Trust



## 1. Executive summary

Energy Saving Trust has been appointed by Ofgem to distribute voluntary payments made as a result of Ofgem investigations. Under Ofgem's redress process, organisations which are found to have breached a license condition or were part of an investigation or compliance case can agree in settlement to make payments to the voluntary redress fund in lieu of, or in addition to, a financial penalty for breaches of licence conditions. This voluntary payment is to help remedy any harm to consumers in addition to compensation to those directly affected. Organisations can apply to the scheme that is set up with the money from the voluntary redress fund to seek grant funding for projects they wish to deliver, these projects are assessed and awards made on a regular basis.

The aim of the Energy Redress scheme, and Energy Saving Trust's contractual obligation, is to benefit vulnerable people, as well as developing carbon saving and innovation products. It is not intended to facilitate capacity-building in the voluntary sector. To achieve these aims, which requires Energy Saving Trust to channel the benefits of the Energy Redress scheme towards supporting vulnerable people, the application process focusses on identifying the projects and organisations with the best chance of delivering significant benefits to these people.

Energy Saving Trust provides an annual evaluation report for the Energy Redress Scheme. The purpose of this report is to evaluate the application and grant processes of the Energy Redress Scheme.

Phase 2 of the Energy Redress Scheme opened in May 2022 under a new contract. This evaluation report examines applications made under Phase 2, which covers activity relating to grants issued after 5 May 2022 until 3 October 2023.

The focus of this report is to evaluate the process and impact of the second contract period (from 5 May 2022) of the Energy Redress Scheme. The previous annual report covering Phase 2 activity has not evaluated its impact as the projects were in their infancy and therefore had not delivered many of their outputs. With Phase 2 being active for over a year at the time of this evaluation, outputs and deliverables can now be measured. Since impact was not reported in the previous evaluation report, no year-on-year comparisons can be made.

The following three areas were examined for this evaluation:

1. Project metrics – analysis of the quantitative information recorded by grantees, covering rounds 1 to 4 under Phase 2 of the Energy Redress Scheme.
2. Progressing projects – a qualitative review of a sample of ten randomly selected round 1, 2 and 3 projects which at the time of the evaluation are active in Phase 2.
3. Process evaluation – feedback from both successful and unsuccessful applicants to Phase 2 rounds 3 and 4 collected via an online survey to evaluate the process of applying to the Energy Redress Scheme.

### 1. Project metrics

The key metrics for projects funded in Phase 2 across rounds 1 to 4 include:

- **Grants worth almost £31 million** have been provided.
- Over **£8.7 million worth of activity has been delivered** and reported on to date – 28% of the total funding awarded in rounds 1 to 4.
- **81,402 households** have been provided with energy advice to date.
- **23,412 small energy and fuel saving measures** have been installed or provided to households.
- Estimated financial savings that have been reported so far by grantees as a result of activities delivered using the funding include:
  - over **10,500 MWh** of annual energy savings
  - over **£2.1 million** of annual bill savings from energy advice
- Based on the cost of activity delivered so far, the data shows that the average cost of support per household is £107. As each household averaged two interventions, this equates to an average of £53.50 per intervention.

Note that savings are expected to increase significantly. All Phase 2 Energy Redress funded projects are still underway and thus will deliver further savings before completing their work programmes. It should also be noted that where bill savings are recorded, these are annual savings rather than lifetime savings.

## 2. Qualitative successes and learnings from progressing projects

In addition to the quantifiable impacts, qualitative impacts and successes have been achieved. These were reported by grantees in their quarterly progress reports. Due to the similar nature of the project delivery methods among grantees in the Energy Redress scheme, many of the key successes highlighted in the reporting documents analysed in this evaluation are similar to those identified in the previous evaluation reports:

### Project issues and resolutions

**Complex client issues:** High energy prices, compounded by the cost-of-living crisis, has placed many vulnerable people in difficult situations. Clients face a multitude of issues, including high energy bills even in summer months, being sent incorrect energy bills from their energy supplier, and snowballing debt. These are especially difficult for grantees to resolve. They experience challenges calling busy energy supplier phone lines on behalf of their clients, clients being unsure whether the project is genuine, and clients failing to provide the correct documentation for them to receive bespoke support. Grantees have overcome these in several ways, including working with partners, promoting the project, encouraging behaviour change to reduce bills and reengaging with clients after initial support.

**Staffing issues:** Some grantees noted resourcing issues, these related to staff annual leave, resignations, recruitment, and salary increases, many of which impacted project delivery.

Although these issues were disruptive, grantees mentioned that they were temporary, and once the project had been set up and gained momentum, swift recruitment and good resource management resolved any challenges staffing problems caused.

**Low demand in summer months:** Some grantees reported that the low demand for their service in the warmer summer months was a challenge as they fell behind on their targets, in particular the numbers provided with telephone advice. Grantees have used team capacity wisely to allocate more staff time in winter months when demand is highest and work closely with a partner to exchange referrals for respective services to overcome this issue.

### Learnings

**Importance of partnerships:** Most grantees emphasised the benefits of working with external partners to provide their clients with holistic support that addressed all their complex issues. The benefits of partnerships mentioned in analysed grantees' quarterly reporting documents included identifying vulnerable people, delivering tailored advice, helping to promote the project, enhancing training and development, improving processes, increasing geographical scope, and setting up stalls at their events.

**Impact of events:** Grantees highlighted the ability of reaching new audiences and delivering bespoke advice through in-person events. These provided an opportunity to reach vulnerable people, who are typically hard to reach, and collect their contact information to deliver in-depth follow-up advice after the initial interaction.

**Summer learnings:** Grantees identified productive ways to use the typically quiet summer months when the weather is warm and demand for energy advice is low. These included delivering practical advice on how to keep properties cool to avoid homeowners resorting to costly, electric intensive air conditioning or fans. Another good use of time during the quiet summer period was to build partnerships and deliver in-house training in preparation for the busy winter months.

**Triage implementation:** By developing their working relationships with referring partners, grantees are able to perform triaged assessments<sup>1</sup> to ensure that the most vulnerable people are being prioritised for support. It was reported that the high demand for home visits have resulted in good levels of triaged follow-on support provided by grantee's community outreach workers in the home, where work can take place around more personalised energy advice, onward referrals and signposting support.

### 3. Process evaluation

#### **Methodology**

To evaluate the application and grant processes, an online survey was sent in September 2023 to 234 applicants who applied to the Energy Redress Scheme in rounds 3 or 4 (of Phase 2). Applicants from rounds 3 and 4 of Phase 2 were sent an invitation irrespective of the outcome of their application. Those who were successful in their application were also able to provide their feedback about the grant process. 59 applicants responded, achieving a response rate of 25%.

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<sup>1</sup> Process by which individuals are assessed for support and how quickly they will receive it.

## Respondent profile

Of the 59 respondents to the online survey evaluating the application process for the Energy Redress Scheme, 48% were successful in their application. The remaining 52% of respondents either applied for funding in round 4 and are still awaiting a response (15%) or were unsuccessful (36%).

Comparisons have been made with the previous evaluation (which evaluated the process for Phase 2 round 1 and 2 applicants) throughout this section to demonstrate progress. However, the sample sizes between the two evaluation datasets differ considerably (2023 evaluation sample size: 59 respondents; 2022 evaluation sample size: 102 respondents) and so they are not directly comparable. Also note that the percentage of unsuccessful applicants (36%) is higher than in the previous evaluation (11%), which may have contributed to a greater proportion of negative scores.

## Application form

Satisfaction with the application process was good:

- **49%** of respondents agreed that they **found the application process easy** (previous evaluation: 61%).
- **85% completely understand the aims** of the Energy Redress Scheme (previous evaluation: 96%).
- **87% completely understand the eligibility criteria** and rules of the Energy Redress Scheme (previous evaluation: 95%).
- **Many respondents found the project information (69%; previous evaluation: 68%), project programme (53%; previous evaluation: 68%) and risk management (49%; previous evaluation: 65%) sections easy to complete.**
- 90% of respondents stated that the application form gave them the opportunity to adequately explain their project (89% in the previous evaluation).

The areas of the application form that respondents found difficult to complete included the budget section (11 respondents), fitting their application within the word count (7) and repeating themselves throughout the application (3).

## Supporting documents and Redress website

Registered charities looking to apply to the Energy Redress Scheme can find supporting documents under the 'application pack' section of the Energy Redress Scheme website<sup>2</sup>. This webpage provides links to the guidance documents. One covers the main fund and small projects fund, while another focusses on the innovation fund and the carbon emissions reduction fund. These are the key documents that provide information on the aims of the fund, an overview of the assessment process, how to complete the application form, and links to useful information. Additional documents include spreadsheets required for projects over a value of £500,000 and those required to be completed by organisations applying to the carbon emissions reduction fund.

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<sup>2</sup> [Application pack | Energy Redress scheme](#)

Other resources in this section include links to recordings of relevant webinars on how to apply to the scheme. The 'announcements' section of the website provides essential information for each funding round as well as details of the successful projects. The 'funded projects' page also highlights all the projects that have been funded via Energy Redress in both phases alongside project case studies and resources that have been produced with Energy Redress funding.

Respondents found that the supporting documents and Redress website were useful for them when completing their application:

- **90%** of respondents found the **Redress guidance document to be very useful (27%) or useful (63%)** (95% in previous evaluation).
- **89%** of respondents thought that the **Energy Redress website was very useful (11%) or useful (78%)** (89% in previous evaluation).
- **66%** of respondents thought the **Redress Dashboard was very easy (16%) or easy (50%) to navigate** (75% in previous evaluation).

78% of respondents could find what they were looking for on the Redress website. 22% of respondents reported that they had used Energy Redress social media to find out about information on the scheme. The most common type of information looked for using Energy Redress social media was examples of successful projects (4), followed by details of rounds opening and closing (3).

### **Energy Redress Team**

58% of respondents had been in contact with one of the Energy Redress team members, while the remaining 42% had not or could not remember. Most respondents who had been in contact found the Redress team to be helpful:

- **92% of respondents found the Redress team to be very helpful (74%) or helpful (18%)** (previous evaluation: 98%).
- **95% of respondents found the communications from the Redress team**, for example, emails about rounds opening **very user friendly (24%) or user friendly (71%)** (previous evaluation: 89%).
- **76% of respondents were very satisfied (8%) or satisfied (68%) with the time it took for their application to the Energy Redress Scheme to be processed** (previous evaluation: 55%).
- 83% of all respondents attended Redress information webinars. **88% of respondents who attended an information webinar found them very helpful (35%) or helpful (53%)**.

### **Net Promoter Score**

All respondents were asked to rate their likelihood of recommending the Energy Redress Scheme to other organisations on a scale from 0 to 10, where 0 is extremely unlikely and 10 is extremely likely. 34% of respondents rated their likelihood of recommending the scheme as 10, indicating that they would be extremely likely to recommend the scheme to others.

These results to this scaled question were used to calculate a Net Promoter Score (NPS). The NPS using the scores of successful grant applicants is 31, which is considered to be "good".

The NPS for this evaluation for successful applicants is lower than that calculated in the previous evaluation in 2022, when the NPS achieved was 83. NPS is calculated as the percentage of customers who rated their likelihood of recommending as 9 or 10 (“promoters”) minus the percentage of customers that rated 6 or below (“detractors”). Those who rated 8 or 7 (“passives”) are omitted from the calculation. Of the 29 respondents who successfully applied for the scheme and responded to this evaluation survey, 45% were “promoters” (rated 10 or 9) and 14% were “detractors”. Although this is lower than the previous evaluation, the variance between evaluations is determined by the proportion of “passives”. In this evaluation, 41% of successful applicants were “passives”, while this was only 11% in the previous evaluation. While the Redress scheme has not achieved the same percentage of 10 and 9 ratings in this evaluation, it is still achieving good ratings.

One reason why there is a higher proportion of disappointed applicants in this evaluation is due to the smaller size of the funding pots in rounds 3 and 4. £3 million was made available in Round 3 (when applicants requested 853% of the available funding) and £5 million was available in Round 4 (when applicants requested 500% of the available funding). This is significantly lower than in rounds 1 and 2 when £27 million and £22 million was available to applicants, respectively. The high interest in the fund and the smaller funding pots available meant that there was a higher proportion of unsuccessful applicants in these rounds. This increased competition has impacted respondents’ experience of applying to the fund, which is reflected in the decreased NPS.

The most frequent recommendation to improve the application process related to feedback. Other suggestions included providing clearer guidelines and making improvements to application formatting. Suggestions for improvement will be assessed by the Energy Redress team and those which are achievable within the means of Energy Redress will be incorporated into the scheme’s delivery in future rounds.

# ENERGY REDRESS SCHEME

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## 2. Introduction

Energy Saving Trust has been appointed by Ofgem to distribute voluntary payments made as a result of Ofgem investigations. Under Ofgem's redress process, organisations which are found to have breached a license condition or were part of an investigation or compliance case can agree in settlement to make payments to the voluntary redress fund in lieu of, or in addition to, a financial penalty for breaches of licence conditions. This voluntary payment is to help remedy any harm to consumers (in addition to compensation to those directly affected). Organisations can apply to the scheme to seek grant funding for projects they wish to deliver, and these projects are assessed, and awards made on a regular basis.

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

- Support energy consumers in vulnerable situations.
- Deliver benefits to the types of consumers that were negatively impacted by the specific issues that triggered the redress payment.

In Phase 2 of Energy Redress Scheme, organisations could apply to four funding streams:

- main fund: awards funding of at least £50,000 to help support energy consumers in vulnerable situations
- small projects fund: awards between £20,000 and £49,999 of funding to help support energy consumers in vulnerable situations
- innovation fund: up to 15% of the total Energy Redress fund can be used to support developing products or services which are truly innovative and not currently accessible to energy consumers or certain groups of energy consumers
- carbon emissions reductions fund: up to 15% of Energy Redress funds can be used to support energy-related activities aimed at reducing carbon dioxide emissions from energy use; these projects must focus on energy generation, distribution or energy use

The Energy Redress Scheme is open to organisations that support energy customers in England, Scotland and Wales. Applications are made through an online system and closing dates for applications are determined each quarter. The minimum grant that can be requested is £20,000 and the maximum grant amount varies depending on the size of the fund available, with the largest Redress main fund single award to date being £1.3 million. The scheme funds projects lasting up to two years, can fund up to 100 per cent of the project costs and can cover revenue and capital measures.

The Energy Redress Scheme launched in June 2018 and the first project commenced in August 2018. Phase 2 of the Energy Redress Scheme opened in May 2022 under a new contract. This Evaluation report examines applications made under Phase 2, which covers activity relating to grants issued after 3 October 2023.

## 2.1. Evaluation aims

As outlined in Ofgem's Authority Guidance document regarding the allocation of Redress funds<sup>3</sup>, there are two key outcomes that Energy Saving Trust are required to deliver:

1. Deliver benefits to the types of consumers that were negatively impacted by the breach(es) that have occurred
2. Support the Authority's policy priorities, which may be updated from time to time; our current priorities are to support:
  - energy consumers in vulnerable situations
  - the development of products and/ or services, which are genuinely innovative and not currently accessible to energy consumers or certain groups of energy consumers
  - products and/or services that focus on tackling decarbonisation for the benefit of energy consumers, including those in vulnerable situations

Ofgem define consumers in vulnerable situations as when a consumer's personal circumstances and characteristics combine with aspects of the market to create situations where they are:

- significantly less able than a typical consumer to protect or represent his or her interests in the energy market; and/or
- significantly more likely than a typical consumer to suffer detriment, or that detriment is likely to be more substantial.

Energy Saving Trust provides an annual evaluation report for the Energy Redress Scheme. Energy Saving Trust were requested to design, develop and implement fit-for-purpose, effective processes and records to evaluate the overall effectiveness for end consumers of redress projects delivered by organisations who have successfully applied for funding from the scheme, to include:

- (i) Evaluating the extent to which redress awards have addressed the policy priorities set out in Authority Guidance.
- (ii) Evaluating the impacts of redress projects on end energy consumers<sup>4</sup>.
- (iii) Evaluating the value for money achieved by the redress projects<sup>2</sup>.
- (iv) Recommending how further improvements can be made to redress awards and/or redress projects following the evaluation described in this clause.

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<sup>3</sup> [Authority guidance on the allocation of redress funds | Ofgem](#)

<sup>4</sup> These aims have not been addressed in this report because projects funded under Phase 2 are yet to submit reporting documents. These aims are addressed in a separate evaluation report which assessed the impact of projects funded in Phase 1 of the Energy Redress Scheme.

- (v) Such other reasonable matters as relate to evaluating the overall effectiveness for end consumers of redress projects funded through redress awards as the Authority may request.

As outlined above, the aims of the scheme, and Energy Saving Trust's contractual obligation, is to benefit vulnerable people and develop carbon saving and innovation products. To achieve these aims, which requires Energy Saving Trust to channel the benefits of the Energy Redress scheme towards supporting vulnerable people, the application process focusses on identifying the projects and organisations with the best chance of delivering significant benefits to these people.

The purpose of this report is to evaluate the application and grant processes and impact of the Energy Redress Scheme. The evaluation is continuous and builds upon the previous evaluations of grant processes conducted in August 2021 (then Phase 1) and December 2022. Comparisons with the previous evaluation have been made throughout the report to demonstrate the improvement the scheme has made in the past year. However, note that the sample size was larger in the previous evaluation (there were 102 responses to the previous evaluation in 2022 compared to 59 responses in this evaluation), and so the two data sets are not directly comparable.

A separate evaluation report assessing the overall effectiveness for end consumers of redress projects delivered by charities which have successfully applied for funding from the scheme in Phase 1 compiled in September 2023 is available on the Energy Redress website.

## **2.2. Methodology**

The evaluation method has focussed on the following:

- Project metrics – analysis of the quantitative information recorded by grantees, covering rounds 1-4 under Phase 2 of the Energy Redress Scheme.
- Progressing projects – a qualitative review of a sample of ten randomly selected round 1, 2 and 3 projects which at the time of the evaluation are active in Phase 2.
- Process evaluation – feedback from both successful and unsuccessful applicants to Phase 2 rounds 3 and 4 collected via online survey to evaluate the process of applying to the Energy Redress Scheme.

### **2.2.1. Project metrics**

The data for the project metrics has been obtained from quarterly reporting documents, as completed and submitted by grantees. Grantees are required to provide quarterly reports on their project for its entire duration. The data has been used to present an overview of the impact the fund has had to date (from 1 September up until 3 October 2023). As the data is self-reported by grantees, the level of detail provided varies. Additionally, grantees have projects with differing aims and activities from one another, therefore not all metrics are relevant to each project.

### **2.2.2. Progressing projects analysis**

An overview of quantitative project metric data taken from grantees' quarterly reports is presented to demonstrate the impact thus far of ten randomly selected projects. Then a qualitative analysis of issues encountered and lessons learned has been included, using the most recent data from the ten grantees' quarterly reports. Ten projects from rounds 1 to 3 have been randomly selected for analysis to ensure projects in different stages of progression have been captured. Additionally, project(s) from the main, small and innovation funding streams have been selected to ensure a variety of project types are included in the analysis.

### **2.2.3. Process evaluation**

To evaluate the application and grant processes, an online survey was sent in September 2023 to 234 applicants who applied to the Energy Redress Scheme in rounds 3 and/or round 4 of Phase 2 of the fund. Applicants were sent an invitation irrespective of the outcome of their application. Applicants from rounds 3 and 4 of Phase 2 were selected as they had applied to the fund more recently and therefore their feedback would be more representative of the current application journey. Those who were successful in their application were also able to provide their feedback about the grant process. 59 applicants responded, achieving a response rate of 25%.

## 3. Energy Redress Scheme Phase 2 evaluation

### 3.1. Project metrics

This section presents an overview of the impact metrics for all projects funded by Phase 2 of the Energy Redress Scheme before 3 October 2023. Table 3-1 presents a summary of the projects in Phase 2 of the Energy Redress Scheme. Of the £30.8 million of grant funding allocated across rounds 1-4, over £8.7 million (28%) worth of activity has been delivered and reported on to date.

Table 3-1: Overview of Energy Redress Scheme-funded projects in Phase 2 (n = 115)

Round	Number of projects	Project start date <sup>5</sup>	Total allocated funding
1	35	1 September 2022	£12,711,267
2	34	1 February 2023	£10,153,200
3	19	1 April 2023	£3,089,229
4	27	1 September 2023	£4,890,601
<b>Total:</b>	<b>115</b>	<b>-</b>	<b>£30,844,296</b>

Figure 3-1 shows a map displaying the locations of Phase 2 projects by the Energy Redress Scheme. Each pin represents the location of a project.

<sup>5</sup> Note that this date is flexible, so some projects commenced up to two months later than the official round start dates.

Figure 3-1: Map of Energy Redress Scheme-funded Phase 2 project locations



### 3.1.1. Funding streams

In Phase 2 of the Energy Redress Scheme, four funding streams were available for organisations to apply for: main fund, small projects fund, innovation fund and carbon emissions reductions fund. Most successful grantees (86; 72%) received funding from the main fund, which provided funding of at least £50,000. 12 charities (10%) received funding from the small projects fund, from which each grantee could request between £20,000 and £49,999. Both the main and small fund aimed to support energy consumers in vulnerable situations.

14 charities (12%) have been awarded a grant from the innovation fund. The innovation fund can allocate up to 15% of the total fund to support developing products or services which are truly innovative and not currently accessible to energy consumers or certain groups of energy consumers. The total grant amount for all 14 projects is £3,415,160.

The Carbon Emissions Reduction Fund – which aims at reducing carbon dioxide emissions from energy use, and funded projects must focus on energy generation, distribution, or energy use, using up to 15% of the total fund – has funded seven projects in total so far in Phase 2 (6%). The total grant amount for all seven of these projects is £1,126,059.

### 3.1.2. Overview of metrics

This section summarises the impact of all Energy Redress Scheme projects in Phase 2. The data presented here represents what has been achieved to date by the 115 projects funded in rounds 1 to 4, as of 3 October 2023. The values provided were obtained from the quarterly reports, which were self-reported by each project. Note that no projects have completed and so this is not a final set of metrics for Phase 2.

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

Grantees have reported reaching a total of 81,402 distinct households through their advice work. Grantees are encouraged to include every intervention within this figure, the number of interventions is therefore higher than the number of distinct households reached. In total, there have been 134,003 interventions, which is an average of 2 interventions per household. As shown in Figure 3-2, householders have been advised in several different ways:

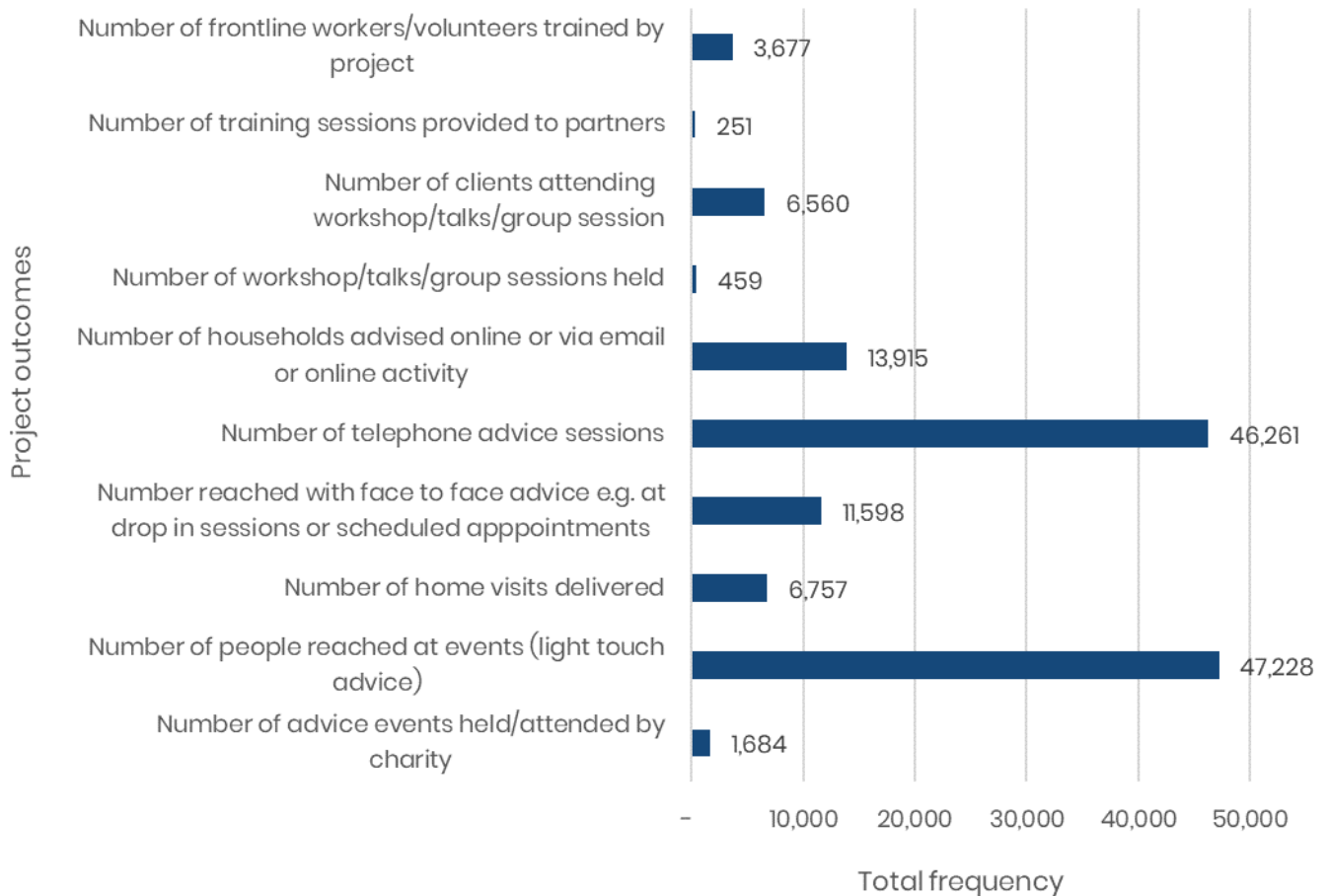
- 46,261 telephone advice sessions have been delivered<sup>6</sup>
- 13,915 households have been advised online or via email or online activity
- 47,228 people have been reached at events
- 6,757 home visits have been completed
- 11,598 people have received face to face advice

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<sup>6</sup> Some grantees record the number of households receiving telephone advice, rather than the total number of calls made. Therefore, the number of telephone energy advice calls is likely to be higher than the reported figures, due to households often requiring multiple advice calls to resolve complex issues.

The remaining interventions are a mixture of channels, including online platforms and training<sup>7</sup>. Some households may have received more than one form of intervention.

Figure 3-2: Deliverables achieved to date as reported by Energy Redress Scheme projects (n = 115)



### 3.1.2.1. Overall impact of Phase 2

Thus far, a total of 81,402 distinct households have been reached with advice by projects funded under Phase 2 of the Energy Redress Scheme. This figure includes households which have received in depth energy advice eg through home visits, and it also includes some households who have received 'light-touch' energy advice eg at an event. When considered against the funding distributed<sup>8</sup> to date, the amount of grant money distributed equates to an average cost of £107 per household reached with advice<sup>9</sup>. As mentioned above, each household receives an average of two interventions. Based on this, each intervention equates to a cost of £53.50.

This section explores the impact of the fund to date through project metric data which is self-reported by grantees. It should be noted that projects have different aims, activities and targets

<sup>7</sup> Grantees are not permitted to count the number of frontline staff or volunteers trained as part of their distinct household figure.

<sup>8</sup> The value of funding distributed represents the value of money claimed to date, not allocated in grant offers.

<sup>9</sup> It should be noted that not every project delivers energy advice to households, and many projects include other activities such as research or capital projects, therefore this figure is likely to be lower than estimated.



therefore each project does not report a quantifiable gain against every project metric included below. Some grantees have quantified some of the money savings achieved by households they have supported. However, not all savings have been captured due to the difficulty of reliably tracking these savings and the timing at which this data can be collected.

Table 3-2 lists the savings that have been reported and highlights that energy and bill savings have been made as a result of the projects being supported through the Energy Redress Scheme, as of 3 October 2023. Note that savings are expected to increase significantly as further project activity is undertaken.

The savings reported have been achieved through:

- switching suppliers
- income maximisation<sup>10</sup>
- capital measures
- behavioural changes

Savings have been categorised in two ways:

- measured and actual savings, which have been monitored and recorded by grantees after they have delivered them
- estimated energy savings, which have not been measured but are the savings that are expected to be made after providing a certain deliverable (eg average savings per LED bulb)

23,412 small energy efficient measures were installed with Redress funding, with 7,258 distinct households being provided with at least one small measure. The most implemented small energy efficient measure so far is LED bulbs, which constitute 11,387 (49%) of these measures, although many other measures have been installed, such as radiator foils (5,144), draught proofing (2,565) and winter warmth comfort packs<sup>11</sup> (2,382).

There has been a total of 802 measures installed as a result of Energy Redress Scheme grantee referrals<sup>12</sup>. Draught proofing has been the most frequently referred measure thus far (191), followed by loft insulation (178), boiler repair or replacement (132) and cavity wall insulation installation or extraction (37). The projects have also achieved social benefits, with grantees self-reporting that 497 volunteers have been involved in delivering the projects, and 126 new jobs have been created as a result of the projects commencing.

It is clear in the table that the largest proportion of measures delivered by Energy Redress-funded projects are smaller measures such as LED bulbs. This is because most of the larger

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<sup>10</sup> In the reporting guidance notes, grantees are informed that an increase in benefits can only be included for a 12-months period.

<sup>11</sup> Winter warmth comfort packs include items such as hats, gloves and blankets that have been provided to alleviate suffering and provide comfort to individuals and are not a measure that has been installed.

<sup>12</sup> This figure is likely to be higher as many projects reported difficulties when receiving information back from their referrals. There were also significant delays in installing measures during the Covid pandemic and so many measures would have been installed after the projects had completed and finished reporting.

measures are captured within the scope of the Energy Company Obligation (ECO) scheme and therefore cannot be financed using Energy Redress funding.

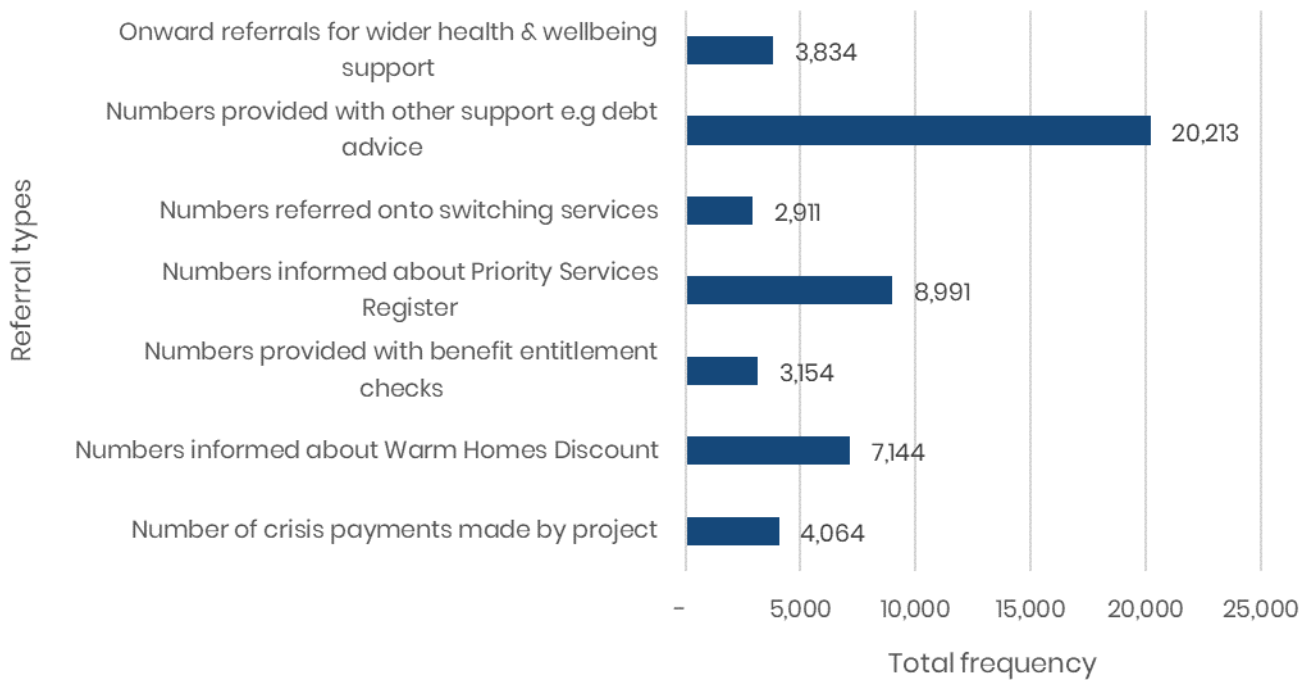
Table 3-2: Estimated measured and actual lifetime energy and bill savings from quantifiable sources (eg switching supplier and measures) self-reported by Phase 2 Energy Redress Scheme projects to date (n = 115)

	Estimated savings	Total as of October 2023
Measured annual energy savings achieved (kWh) through advice and measures installed		6,067
Estimated annual energy savings achieved (kWh) through advice and measures installed		10,547,599
Actual annual energy bill savings (£) from advice		£90,820
Estimated annual bill savings (£) from advice		£2,120,238
Estimated annual bill savings (£) from small measures (LEDs etc)		£634,049
Actual financial gains (£) from benefits advice, debt write off etc that can be attributed to the project		£10,882,074
<b>Capital measures installed</b>		
Total number of small energy efficient measures installed or provided to households (such as LED bulbs, draught proofing, power down devices and radiator foils)		23,412
Other measures installed as a result of advice referrals to other funding sources (this includes insulation and boiler replacements)		802
<b>Social benefits</b>		
Number of volunteers involved in delivering the project		497
Number of new jobs created		126
Number of well-being surveys completed		2,450

In addition to the above energy and bill savings, projects funded by the carbon emissions reduction fund – which focus on energy generation, distribution or energy use to reduce carbon dioxide emissions – made further savings through the installation of renewable technologies. These projects installed four solar PV systems, one air source heat pump and one energy storage battery, which together will save an estimated 1,482 tonnes of CO<sub>2</sub> over their lifetime. Note that only seven projects have been awarded with carbon emission reduction funding so far in Phase 2, and these projects are still in progress, so the number of renewable systems will increase before the end of Phase 2.

Through the Redress projects, households have been informed about, or referred to, other schemes. Figure 3-3 shows these schemes and the number of people that have been informed of each service. In total, 50,311 people have been informed about, or referred for, additional support. 18% of people were informed about the Priority Services Register<sup>13</sup> and 14% were informed about the Warm Home Discount.

Figure 3-3: Schemes that Phase 2 Energy Redress Scheme-funded grantees have informed, or referred, their clients to (n = 115)



### 3.2. Progressing project analysis

Qualitative and quantitative data obtained from quarterly reports, completed by each of the grantees selected for analysis, has been used to inform this section. Ten projects from rounds 1 to 3 have been selected for analysis to ensure projects in different stages of progression have been captured. Additionally, projects from the main fund, small projects fund, carbon emissions reduction fund and innovation funding streams have been selected as part of the ten projects to ensure a variety of project types are included in the analysis. No projects from round 4 have been included in the progressing projects analysis as this round opened in August 2023 and so none of these had yet submitted their first quarterly report, as of 3 October 2023.

Grantees have been assigned a letter for anonymity purposes within this report. Additionally, grantee names, partner organisations and place names have been omitted for this purpose. The aims of each of the analysed projects are presented in Table 3-3.

<sup>13</sup> The percentage of those informed about the Priority Services Register is likely higher than 18% as most projects are supporting vulnerable people but few grantees are reporting this metric.

Table 3-3: Aims of analysed progressing projects

Grantee	Project aim
Grantee A	To help those impacted by the cost-of-living crisis by expanding and enhancing their domestic energy advice programme, to help an additional 4,300 of the most vulnerable households to reduce their costs.
Grantee B	To alleviate energy-related hardship to 10,000 vulnerable consumers directly with high-quality support, by providing expert advice through a free helpline.
Grantee C	To build the business case for retrofitting solar and complementary technologies in social housing, aiming to install solar PV in homes with different electric heating technologies and show which produce most savings.
Grantee D	To provide essential home energy advice and support to households at risk of fuel poverty. Working in collaboration with local supporting agencies, the project will enable participants to use energy more efficiently thus saving money on their energy bills.
Grantee E	To provide comprehensive research into the impacts of smart thermostat adoption by supporting those in lower incomes, digitally excluded and in vulnerable situations with the installation and adoption of these energy saving technologies.
Grantee F	To deliver significant and replicable carbon emission reduction in homes through a community-led approach, which will dramatically increase householder confidence in retrofit and access to local vetted installers.
Grantee G	To engage with vulnerable people attending warm hubs by providing advice on how to stay warm and avoid excessive energy bills. It aims to promote and provide home energy saving packs to enable vulnerable people to make changes in their home.
Grantee H	To deliver a person-centred service to households who are in known vulnerable energy situations often affected by energy market failures. As a result, fuel poor households will become more confident and independent and fuel poverty rates will be reduced.
Grantee I	To address the economic and social impacts of fuel poverty on the most vulnerable residents in the local community, helping them sustain a heating regime at an affordable cost and removing the stigma of fuel poverty.
Grantee J	Deliver energy saving benefits to vulnerable consumers who need it the most in the local community through a weekly free energy advice clinic.

### 3.2.1. Progression against quantitative targets

Tables Table 3-4 and Table 3-5 show the progress of selected grantees' projects towards their targets. Colour-coding has been selected based on how far a project is through its delivery period eg a project that has reported on six out of eight quarters is considered 75% complete, thus metrics equal to or above 75% of the target value are shaded green, and those below 75% are shaded orange. Almost two-thirds of targets (63%) are green, meaning that most are on track, and no projects selected were a cause for concern.

It should be noted that this approach assumes progress made towards targets should be evenly distributed amongst each reporting quarter: in reality, projects often put resources into the setting up and recruitment of a project in the first quarter, and seasonal variations can significantly impact on the number and form of advice interactions undertaken.

In addition to the energy advice interventions in tables Table 3-4 and Table 3-5, the analysed projects have delivered many other outputs thus far. Note that these figures are not final as projects are continuing to deliver these as of 3 October 2023, and many of these metrics are being delivered in line with their overall target. The ten progressing projects analysed have delivered the following:

- 1,252 households informed about Priority Services Register; 1,095 households informed about Warm Homes Discount; 994 households informed or supported with switching tariffs/energy companies.
- 20 full time jobs created; 20 full time jobs secured; 61 volunteers involved in delivering the projects; 1,492 well-being surveys completed.
- 4,467 LED light bulbs installed; 2,427 radiator foils installed; 880 draft proofing measures installed; 209 winter warmth/comfort packs distributed.
- 44 loft insulation measures have been installed; 38 boilers have been upgraded/repaired; 8 properties have had cavity wall insulation measures installed.
- Estimated annual energy savings of 5,562,441 kWh achieved through advice and measures installed; £402,917 of estimated annual energy bill savings from all capital measures; £261,881 of actual annual financial gains from benefits advice, debt write off and other referrals that can be attributed to the project.

Table 3-4: Quantitative metrics for energy advice interventions grantees A to E

Metric	Grantee A		Grantee B		Grantee C		Grantee D		Grantee E	
	Total	% target	Total	% target	Total	% target	Total	% target	Total	% target
No. of advice events	-	-	42	-	-	-	21	44%	19	10%
No. of households reached at events	-	-	3,210	32%	-	-	151	50%	275	28%
No. of home visits	891	20%	119	24%	31	57%	61	51%	200	50%
No. of face-to-face advice sessions	-	-	-	-	-	-	85	53%	-	-
Number of workshop/talks/group sessions held	146	65%	-	-	-	-	-	-	-	-
No. of households attending workshop/talk/group session	2,785	124%	-	-	-	-	-	-	-	-
No. of telephone energy advice calls <sup>14</sup>	724	13%	2,662	27%	4	-	-	-	210	53%
No. of email/online advice interactions	-	-	-	-	27	-	-	-	-	-
No. of training sessions (for partners)	-	-	52	130%	-	-	-	-	-	-
No. of frontline workers/volunteers trained	-	-	547	109%	-	-	-	-	-	-
No. reached by other means	-	-	295,824	296%	-	-	-	-	-	-
Total distinct households reached with advice	1,329	31%	5,872	29%	18	100%	121	48%	709	51%

<sup>14</sup> Some grantees record the number of households receiving telephone advice, rather than the total number of calls made. Therefore, the number of telephone energy advice calls may be higher than the reported figures, due to households often requiring multiple advice calls to resolve complex issues.

Table 3-5: Quantitative metrics for energy advice interventions grantees F to J

Metric	Grantee F		Grantee G		Grantee H		Grantee I		Grantee J	
	Total	% target	Total	% target	Total	% target	Total	% target	Total	% target
No. of advice events	4	-	12	40%	-	-	36	19%	18	-
No. of households reached at events	133	19%	85	-	-	-	180	94%	562	38%
No. of home visits	10	10%	13	26%	55	7%	183	29%	34	34%
No. of face-to-face advice sessions	-	-	111	31%	47	13%	36	19%	314	24%
Number of workshop/talks/group sessions held	-	-	-	-	-	-	-	-	10	-
No. of households attending workshop/talk/group session	-	-	-	-	-	-	-	-	176	-
No. of telephone energy advice calls <sup>15</sup>	11	12%	14	9%	145	7%	2,985	78%	713	125%
No. of email/online advice interactions	-	-	-	-	-	-	-	-	78	-
No. of training sessions (for partners)	-	-	4	16%	-	-	-	-	1	-
No. of frontline workers/volunteers trained	-	-	16	32%	-	-	-	-	14	-
No. reached by other means	-	-	3,653	507%	-	-	-	-	17,294	69%
Total distinct households reached with advice	156	22%	111	31%	192	8%	3,330	72%	742	41%

<sup>15</sup> Some grantees record the number of households receiving telephone advice, rather than the total number of calls made. Therefore, the number of telephone energy advice calls may be higher than the reported figures, due to households often requiring multiple advice calls to resolve complex issues.

### 3.2.2. Analysis of quarterly reports

This section presents an analysis of 10 quarterly reporting documents compiled by the 10 analysed projects. Within the reports, grantees are requested to summarise the previous quarter, report their progress against their targets (grantees also report their outputs in an auxiliary Excel spreadsheet), highlight any issues and how they resolved them, and provide their project learnings. The number in brackets refers to the number of grantees who reported the issue/solution; some grantees mentioned more than one point per issue.

Note that the time of year has influenced the issues and learnings outlined in the reporting documents. Since many of the reports were submitted in the summer of 2023, the evaluation findings relate to challenges and learnings experienced in warmer months.

#### 3.2.2.1. Project issues and resolutions

Grantees are requested to report on any issues which may affect project delivery, by causing delays, reducing the outcomes expected, or leading to a significant change in the way the project is delivered. Below are some of the key issues highlighted by the grantees in their quarterly reporting documents followed by their proposed solutions.

##### Staffing issues (4)

Four grantees mentioned resourcing issues within their reporting documents:

- Compressed timescale between the project being awarded the funding and the project commencing. **Solution:** Existing staff were deployed to work on the project for the first two months while new staff were recruited to ensure that the project was not delayed.
- New hire decided close to their start date not to take up the position. **Solution:** Speedy recruitment has replaced this person and the home visit programme was only delayed for a few days.
- Salary increases due to high rates of inflation means that day rates are now higher than those included in the original project budget. **Solution:** Accommodate increases by reprofiling the budget.
- Staff annual leave during the summer. **Solution:** Managers ensured this was managed appropriately and all referrals were dealt with in a timely manner. Annual leave will return to normal now that school holidays are complete.
- Staff resignation. **Solution:** Although this has impacted the number of home visits being delivered, quick recruitment has meant that the project is not too far behind.

##### Complex client issues (4)

Four grantees cited complicated client issues as a project challenge:



- Client scepticism of project legitimacy. One grantee reported that contacts in their database have been suspicious of incoming calls due to them suspecting them to be sales calls or organisations attempting to capture their personal data to gain their financial details. **Solution:** Grantees have worked hard to promote the project through various media channels to make themselves better known. Partners have also been helpful in reassuring clients that the project is genuine.
- Clients still receive high energy bills during the warmer summer months, during which they are struggling to pay off large amounts of debt that they accrued in the winter. This challenge was reported as particularly difficult to resolve during a period of increased cost-of-living. **Solution:** Provide clients with energy efficiency advice, support willing participants to install smart meters at their home and refer them to organisations who can provide financial advice and signpost them to debt relief.
- Issues such as incorrect energy bills being issued by energy suppliers are best dealt by project advisors calling suppliers on their customer' behalf. However, calls with energy suppliers require a lot of staff resource. As there is no dedicated telephone line for advisors to contact energy suppliers on, they must join the public queue, which can occupy up to two hours of waiting time. This impacts on productivity and reduced the number of people that can be supported in a day. **Solution:** One grantee has requested a dedicated line with suppliers to fast-track their calls on behalf of vulnerable persons. However, this had not yet been approved.
- Slow completion of home visit evaluation forms, due to reasons such as several follow-up actions required beforehand or the form needing to be translated or completed over the phone with an interpreter, which requires more time and resource. **Solution:** Although the process of completing these forms is slower initially anticipated, the target is still under control, and the grantee is confident that they will be able to collect an evaluation form for all service users.
- Some clients failed to provide the required documentation that enables the project to support them. **Solution:** Active reengagement with clients to ensure that they complete the necessary documents correctly.

### Low demand in summer months (3)

Three grantees reported that the low demand for their service in the warmer summer months was a challenge as they fell behind on their targets, in particular the numbers provided with telephone advice. **Solutions:** Use team capacity wisely to allocate more staff time in winter months when demand is highest and work closely with a partner to exchange referrals for respective services.

### Budgeting (2)

Two grantees mentioned project budgeting as an issue, though for contrasting reasons:

- One project initially set out a budget allowance to provide retrofit designs for 36 homes, however, it may emerge that some homes require a larger retrofit exceeding the planned cost and will therefore need additional retrofit design support. **Solution:** The grantee will monitor the emerging retrofit plans to assess whether additional design work is required. If there are properties which require additional resource, the project may adapt to deliver fewer retrofit designs overall. The grantee will keep the Energy Redress team informed and will obtain their approval before making any changes to their commitments.
- One grantee has been distributing small measures (lightbulbs and electric blankets) at a value lower than anticipated, and so have more money remaining in the capital fund pot than expected. **Solution:** The grantee suggested offering more support for insulation for residents, which may include part funding the install of these measures. They are also exploring the possibility of providing boiler services and repairs.

Other project issues and resolutions mentioned by one grantee each included:

- As the grantee is no longer providing Emergency Fuel Vouchers (EFV), some engagement areas that they have previously had good traction in have fallen off. They were an effective way of introducing vulnerable people to the service, meaning they could offer services to the residents that show interest in an EFV. The grantee will now focus on marketing to reach vulnerable people and build relationships with other organisations and local authorities to engage with residents in need of support.
- Delays in Wondrwall installations due to National Grid not having approved the grid connection agreement. A pre-start site meeting has been set up with installers to address this, and Wondrwall will follow-up with National Grid to move things forward.
- Fewer home visits delivered than forecasted thus far, chiefly due to recruitment issues but also owing to low demand in warmer summer months. Now that the staff shortage has been addressed, the grantee has been working with a partner to catch-up on this target.
- Issues with battery current CT clamp sensor after smart meters have been fitted meant that the system was not recording the correct household load. This was resolved remotely by the battery manufacturer who were able to switch the polarity on the battery CT clamp.
- Installers are cautious about stating any average figures provided by their solar PV monitor systems due to their high variability and the way in which people consume electricity in their homes. The grantee has a meeting planned with installers to discuss what level of information they can confidently provide and how to ensure that they give consistent messages.
- The impact of financial support being provided by external organisations and local governments is diminished by the high cost of energy bills. One grantee reported that the value of a fuel voucher is £30 in the summer and £49 in the winter, and this will be consumed by households in a matter of days. To ensure financial support is utilised effectively, the grantee is promoting energy behavioural change so that clients reduce or eliminate unnecessary or wasteful energy consumption to reduce energy bills.

### 3.2.2.2. Learnings to date

As part of the reporting process grantees are asked to share any lessons learned thus far in their project. Key learnings included:

- **Importance of partnerships (7):** Most grantees emphasised the benefits of working with external partners to provide their clients with holistic support that addressed all their complex issues. The benefits of partnerships mentioned in analysed grantees' quarterly reporting documents included identifying vulnerable people, delivering tailored advice, helping to promote the project, enhancing training and development, improving processes, increasing geographical scope, and setting up stalls at their events.
- **Demand for home visits (2):** One grantee mentioned that there had been an increased demand for home visits now that Covid-19 restrictions have been fully removed and homeowners are less worried about contracting the virus. Another grantee concurred that demand for home visits had increased, and also noted that they are an effective way of distributing small measures and delivering bespoke advice.
- **Impact of events (2):** Two grantees highlighted the importance of events in reaching new audiences and delivering bespoke face-to-face advice. One grantee explained how they engaged with vulnerable people who are typically hard to reach at events and collected their contact information to deliver in-depth follow-up advice after the initial interaction.
- **Summer learnings (2):** Two grantees reported different learnings that they had acquired in the warm summer months. One grantee said that, due to heat waves in May and June 2023, they had been delivering practical advice on how to keep properties cool to avoid homeowners resorting to costly, electric intensive air conditioning or fans. The other noted that they had been using the quiet summer period to build partnerships and deliver in-house training in preparation for the busy winter months.
- **Triage<sup>16</sup> implementation (2):** Two grantees stated that by developing their working relationships with referring partners they are able to perform triaged assessments to ensure that the most vulnerable people are being prioritised for support. One grantee noted that the high demand for home visits have resulted in good levels of triaged follow-on support provided by community outreach workers in the home, where work can take place around more personalised energy advice, onward referrals and signposting support.

Other learnings cited by one grantee each included:

- Education is required to empower households with the ability to adjust the temperature of their boilers, depending on the time of year. This project strives to achieve this through an adult education/participatory approach, ensuring that householders understand and feel comfortable themselves with the controls. However, they found that many people do not know how to use their boiler temperature controls, nor even know that it is possible to change them. They leave them on what the gas engineer has left them on, which

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<sup>16</sup> Process by which individuals are assessed for support and how quickly they will receive it.

typically is the highest temperature setting. The grantee recommends that there is a role for boiler engineers to teach homeowners how to turn their boiler temperature up and down to maximise energy and financial savings.

- Homeowners are keen to receive definitive advice about payback times with regards to their renewable systems. However, they typically lack the understanding of how to maximise the benefit from their systems, for example, by seeking the most favourable electricity tariffs for Smart Export Guarantee payments and by changing their electricity consumption patterns to better match the availability of electricity generated from their systems. There is now a drive to work with installers to decide how to best provide this advice.
- Project initiation can be slow as staff need to be recruited and trained and partnerships need to be developed, meaning that deliverables can fall behind target during the project's early stages. However, once everything is in place, learnings are made, outputs gain momentum and targets can be reached and, in many cases, exceeded.
- Prompted by an increase in users with mental health issues threatening suicide, one grantee arranged further training for staff on how best to interact and deal with users in this position. Staff also attended training with the health and social care partnerships to learn more about the health effects of people living in fuel poverty and have also met with local organisations advising on debt management and specialising in helping people classed as being 'in-work' poverty.
- To cope with high demand, one grantee has had to adapt their caseload management and learn to prioritise those most in need: those off supply, those with high energy debt and those with disabilities and medical conditions requiring a warm home or power for equipment.
- There is quite a high drop off rate in numbers, between the number of people who attend an event and those who actually place an order for solar PV panels. This is being investigated through feedback surveys. Anecdotally, the grantee found that some people have been put off by plans to move house, or having a roof which would need reinforcing or re-roofing.

### 3.3. Process evaluation

This section presents the results from the online survey which evaluated the application and grant processes. The survey was distributed in September 2023 to 234 applicants who applied to the Energy Redress Scheme in rounds 3 or 4 (of Phase 2). Applicants were sent an invitation irrespective of the outcome of their application. Those who were successful in their application were also able to provide their feedback about the grant process. 59 applicants responded, achieving a response rate of 25%.

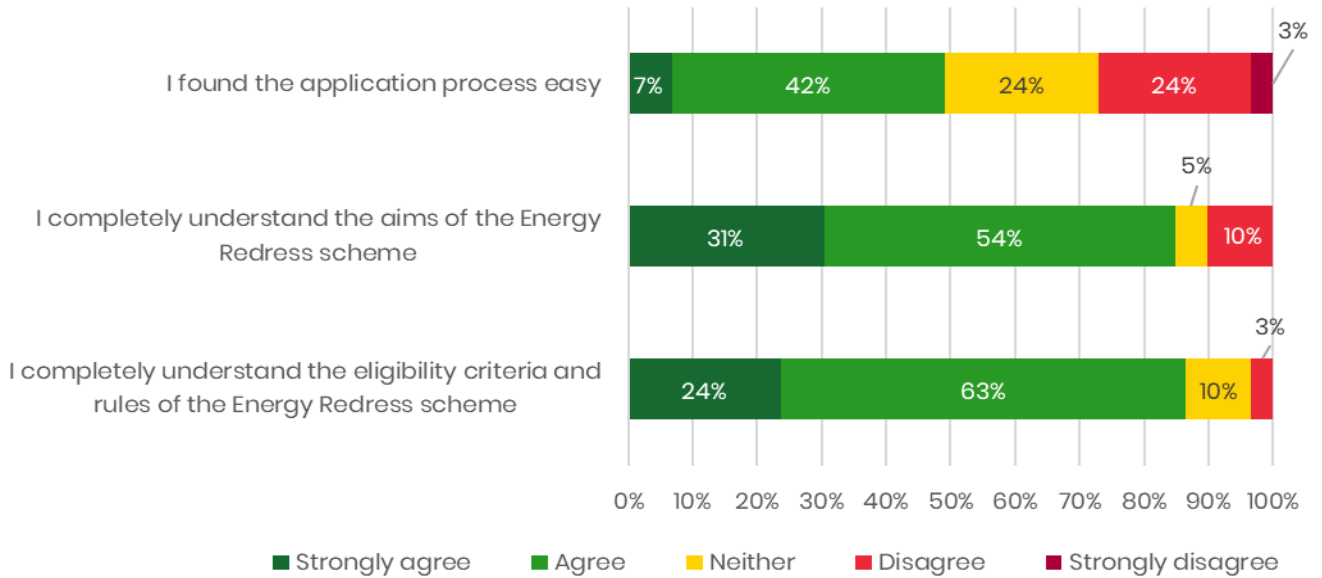
Overall, satisfaction with the Energy Redress Scheme is high and, although in many areas scored lower than in the previous evaluation conducted in 2022, is similar to the results in the 2021 evaluation when the sample sizes are more comparable. Comparisons have been made with the previous evaluation throughout this section to demonstrate progress. However, the sample sizes between the two evaluation datasets differ considerably (2023 evaluation sample size: 59 respondents; 2022 evaluation sample size: 102 respondents) and so they are not directly comparable. Also note that the percentage of unsuccessful applicants (36%) is higher than in the previous evaluation (11%), which may have contributed to a greater proportion of negative scores.

#### 3.3.1. Application process

Of the 59 respondents to the online survey evaluating the application process for the Energy Redress Scheme, 49% were successful in their application. The remaining 51% of respondents either applied for funding in round 4 and are still awaiting a response (15%) or were unsuccessful (36%).

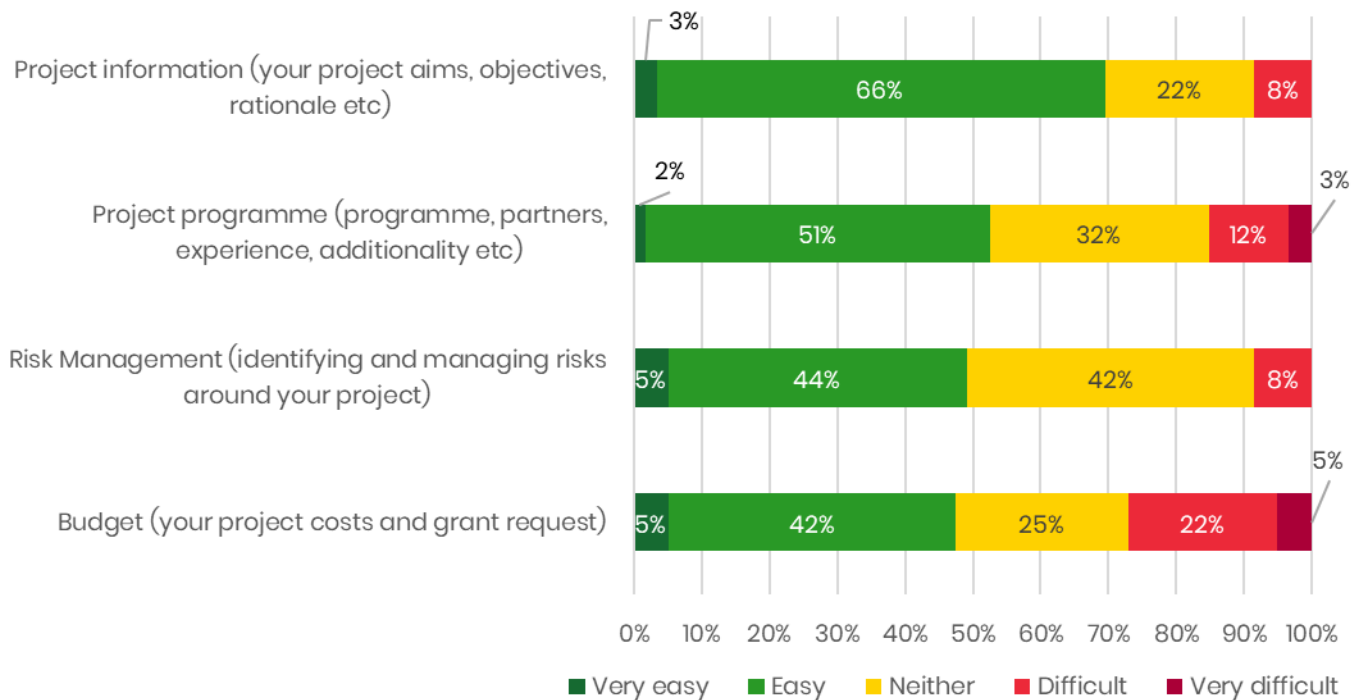
Respondents were asked to state the extent to which they agreed or disagreed with three statements regarding their application to the Energy Redress Scheme. Figure 3-4 shows that most respondents agreed that they found the application process easy (49%; previous evaluation: 61%), completely understand the aims of the Energy Redress Scheme (85%; previous evaluation: 96%) and completely understand the eligibility criteria and rules of the Energy Redress Scheme (87%; previous evaluation: 95%).

Figure 3-4: Respondents' experience with the Energy Redress Scheme application process (n = 59)



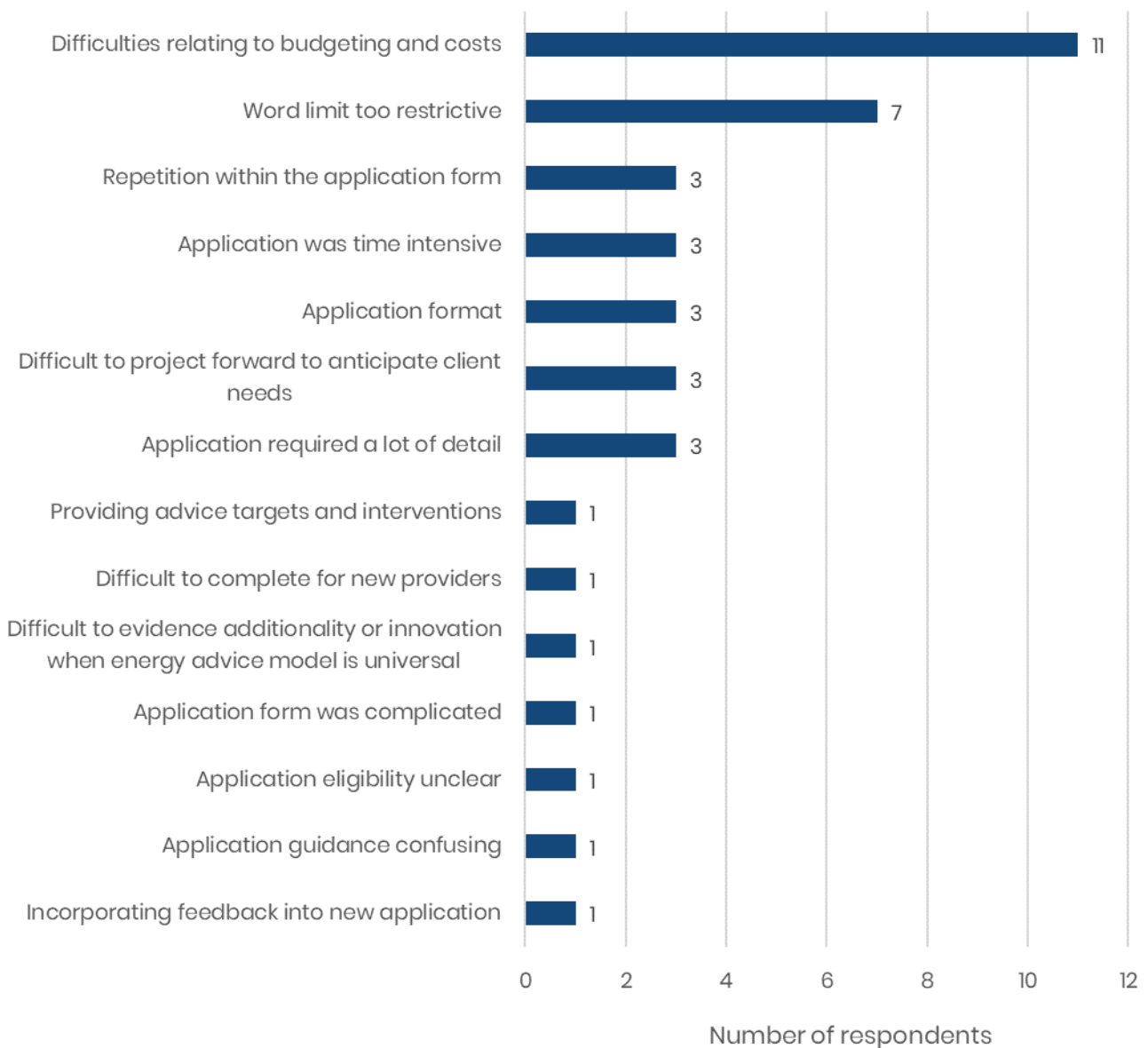
Respondents reported how easy or difficult their experience was when completing the four sections of the application form. Figure 3-5 displays these results. The chart shows that most respondents found the project information (69%; previous evaluation: 68%), project programme (53%; previous evaluation: 68%) and risk management (49%; previous evaluation: 65%) sections easy to complete. 47% of respondents thought that the budget section was easy to populate (previous evaluation: 41%).

Figure 3-5: How easy respondents found different sections of the application form (n = 59)



Respondents were asked whether there were any particular areas of the application form that they found difficult to complete. 26 respondents (44%) reported that they found a particular area of the application form difficult to complete. As shown in Figure 3-6, the most frequently mentioned area of the application form that respondents found difficult to complete was difficulties relating to budgeting and costs (11; 42%). Note that some respondents found more than one area of the application form difficult to complete.

Figure 3-6: Areas of the application form which respondents found difficult to complete (n = 26)



42% of respondents who found a specific area of the application form difficult to complete stated that they had trouble completing the budgeting and costs section. This was also the most frequently reported area of difficulty in the previous evaluation in 2021 and 2022. Difficulties with budgeting were caused by applicants' uncertainty around how to accurately cost advice intervention, calculate costs relating to salaries, and calculate costs per household. Specific comments on these included:

- *“I found it very difficult to determine realistic targets and cost per intervention.”*
- *“The form is easy to complete except for the budget section and mapping to hours of staff time.”*
- *“Some of the detail being asked for, particularly about staff, is very operationally detailed, and likely to change quickly in any real-world project. Understand the need to ensure capacity but there needs to be a better balance of detail about strategic and senior roles, but more general for others.”*
- *“The budget was difficult to ensure that we account for everything to ensure the project success. Some applications were made when fuel advice around switching was non-existent, so we had to be more imaginative. Some sections needed more words than the limit and some less.”*

Three respondents reported that they encountered issues with the format of the application and provided the following recommendations to address these:

- *“If I remember correctly the application was linear, ie if I had to make a change to a later section, I had to click through all the proceeding sections. A modular format whereby each section can be jumped to would help form completion.”*
- *“The way the page was structured made it difficult to accurately reflect the total staff hours as there weren’t sufficient lines to do this. The form automatically capped the number of working days to 365 so I couldn’t show the total number of days worked in a year, ie ‘X staff multiplied by Y days’, as this exceeded the number of days allowed in the form.”*
- *“It would have been easier for us to have to complete one 2,000/3,000-word answer with guidance about what to include, rather than several questions requiring 300/500-word answers. It was difficult sometimes to avoid repeating ourselves (or conversely, omitting something because we thought we had covered it in another answer).”*

90% of respondents stated that the application form gave them the opportunity to adequately explain their project (89% in the previous evaluation). Comments from these respondents regarding the application form included:

- *“The process is easy to complete, and the information and guidance provided is clear and easy to follow.”*
- *“It [the application form] has clear criteria, aims and outcomes that it wants to achieve.”*
- *“The funding itself is incredibly useful, and the application process is helpful and supportive relative to most funders.”*

Of the six respondents who did not believe that the application form allowed them to explain their project in enough detail, four provided a suggestion as to how the application form could be improved. These related to extending the word count or allowing attachments to be uploaded alongside the information submitted in the online application form.

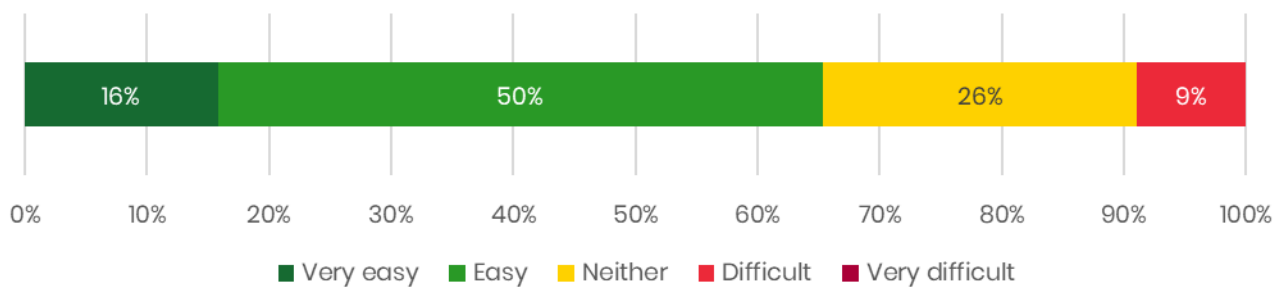


### 3.3.2. Supporting documents and Redress website

Respondents were asked to rate how useful they found the Redress guidance documents. 90% of respondents found the Redress guidance document to be very useful (27%) or useful (63%). This is similar to the previous evaluation in 2022 when 95% of respondents found the Redress guidance document to be very useful (48%) or useful (47%). In this evaluation, 7% thought they were neither useful nor not useful, while two respondents thought they were not very useful (2%) or not at all useful (2%). Both these respondents were unsuccessful in their application.

Respondents were asked to rate how easy or difficult they found it to navigate the Redress Dashboard (the online system where applicants manage their applications to Energy Redress). Figure 3-7 shows that 66% of respondents thought the Redress Dashboard was very easy (16%) or easy (50%) to navigate. This is a decrease on the 75% of respondents who thought that it was very easy (23%) or easy (52%) to navigate in the previous evaluation.

Figure 3-7: How easy or difficult respondents thought the Redress Dashboard was to navigate (n = 58)



95% of respondents said that they have visited the Energy Redress website, while the remaining three (5%) could not remember. As was the case in the previous evaluation, 89% of those who visited the website thought that it was very useful (11%) or useful (78%). 4% found it neither useful nor not useful, and 7% thought it was not very useful.

Over three-quarters of respondents (78%) were able to find everything they were looking for on the Redress website, while the remaining 22% said that there was information that they could not easily find on the website. This included:

- “Details of when we could expect to hear the outcome of the application.”
- “Guidance to auditing and insurance cover.”
- “When funding decisions were expected to be made.”

22% of respondents reported that they had used Energy Redress social media to find out about information on the scheme. The social media platforms they used included X (formerly Twitter) (7), Facebook (4), LinkedIn (3) and Instagram (2). The specific information that respondents looked for using Energy Redress social media included:

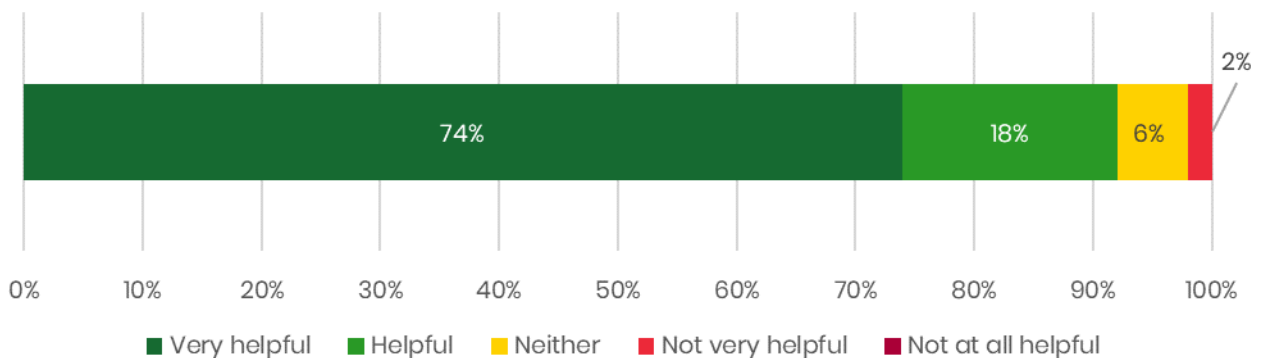
- Examples of successful projects (4)

- Updates on when funding is opening/closing (3)
- Information on schemes, programmes, and support (3)
- Eligibility (1)

### 3.3.3. Energy Redress team

58% of respondents had been in contact with one of the Energy Redress team members for any reason, while the remaining 42% had not (34%) or could not remember (8%). Figure 3-8 shows that 92% of respondents who had contact found the Redress team to be very helpful (74%) or helpful (18%). This is similar to the previous evaluation when 98% of respondents thought that the Energy Redress team was very helpful (73%) or helpful (25%).

Figure 3-8: How helpful respondents who had contact found the Energy Redress team (n = 34)

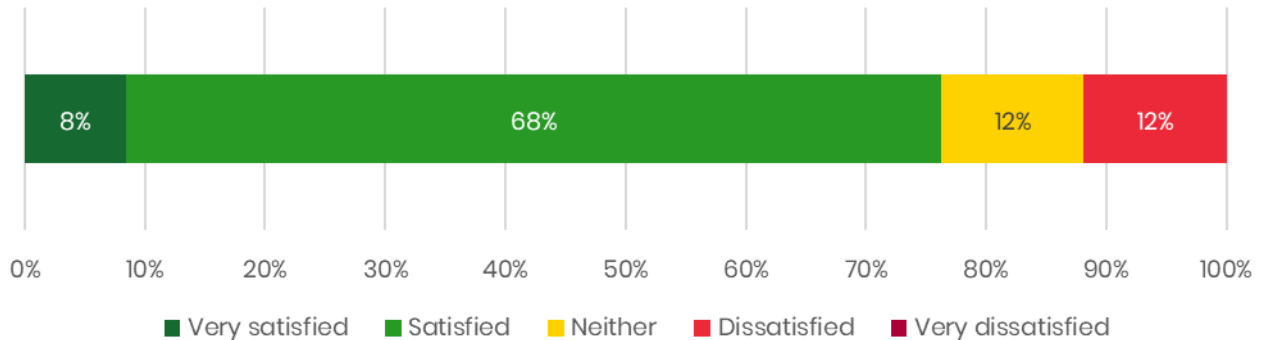


95% of respondents found the communications from the Redress team, for example, emails about rounds opening, very user friendly (24%) or user friendly (71%), while 5% found it neither user friendly nor not user friendly. This is slightly higher than in the previous evaluation when 89% found the communications from the Redress team to be very user friendly (48%) or user friendly (50%).

83% of respondents attended information webinars delivered by the Energy Redress team. 88% of those who attended the webinars found them very helpful (35%) or helpful (53%), while 12% said that they were neither helpful nor unhelpful.

As illustrated in Figure 3-9, 76% of respondents were very satisfied (8%) or satisfied (68%) with the time it took for their application to the Energy Redress Scheme to be processed. This demonstrates a good improvement on the 55% of respondents who were very satisfied (15%) or satisfied (40%) with the time it took for their application to the Energy Redress Scheme to be processed in the previous evaluation.

Figure 3-9: Respondents' satisfaction with the time it took for their application to the Energy Redress Scheme to be processed (n = 59)

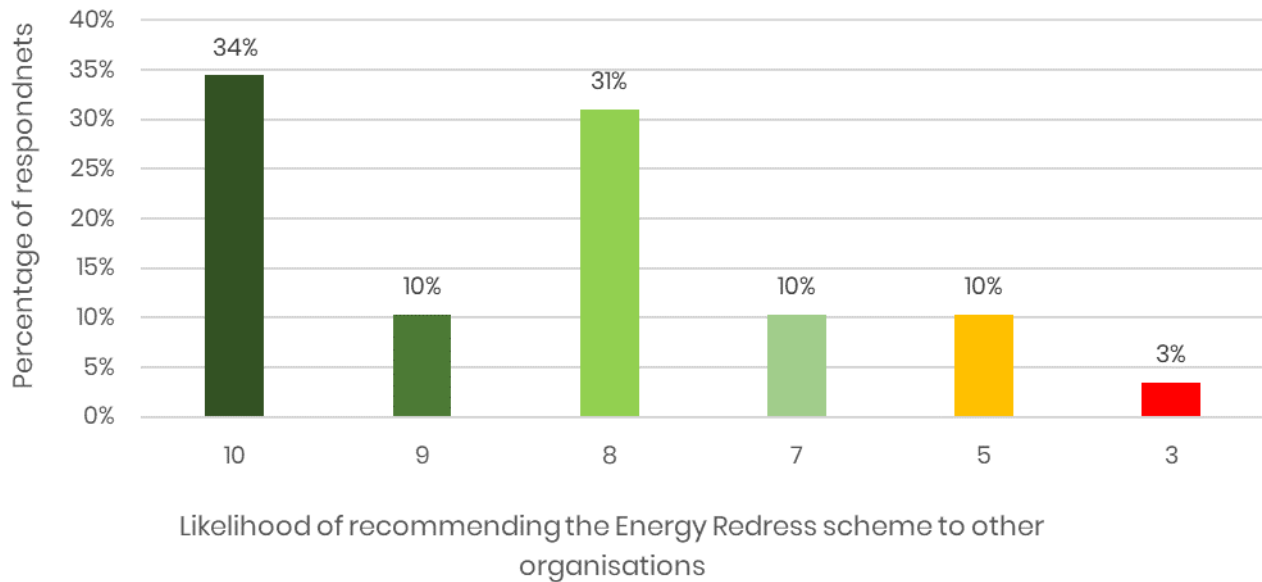


### 3.3.4. Net Promoter Score

Successful grantees were asked to rate their likelihood of recommending the Energy Redress Scheme to other organisations on a scale from 0 to 10, where 0 is extremely unlikely and 10 is extremely likely. As shown in Figure 3-10, 34% of respondents rated their likelihood of recommending the scheme as 10, indicating that they would be extremely likely to recommend the scheme to others. These results were used to calculate a Net Promoter Score (NPS). The NPS for the Energy Redress Scheme is 31, which is considered to be “good”.

The NPS for this evaluation is lower than that calculated in the previous evaluation in 2022, when the NPS achieved was 83. NPS is calculated as the percentage of customers who rated their likelihood of recommending as 9 or 10 (“promoters”) minus the percentage of customers that rated 6 or below (“detractors”). Those who rated 8 or 7 (“passives”) are omitted from the calculation. Of the 29 respondents who successfully applied for the scheme and responded to this evaluation survey, 45% were “promoters” (rated 10 or 9) and 14% were “detractors”. Although this is lower than the previous evaluation, the variance between evaluations is determined by the proportion of “passives”. In this evaluation, 41% of successful applicants were “passives”, while this was only 11% in the previous evaluation. While the Redress scheme has not achieved the same percentage of 10 and 9 ratings in this evaluation, it is still achieving good ratings.

Figure 3-10: Successful respondents' likelihood of recommending the Energy Redress Scheme to other organisations (n = 29)



One reason why there is a higher proportion of disappointed applicants in this evaluation is due to the smaller size of the funding pots in rounds 3 and 4. Table 3-6 shows that £3 million was made available in Round 3 (when applicants requested 853% of the available funding) and £5 million was available in Round 4 (when applicants requested 500% of the available funding). This is significantly lower than in rounds 1 and 2 when £27 million and £22 million was available to applicants, respectively. The high interest in the fund and the smaller funding pots available meant that there was a higher proportion of unsuccessful applicants in these rounds. This increased competition has impacted respondents' experience of applying to the fund, which is reflected in the decreased NPS.

Table 3-6: Pot sizes and number of applicants to rounds 3 and 4

Funding stream	Round Three			Round Four		
	Number of applications	Funding available	Total funding requested	Number of applications	Funding available	Total funding requested
Main Fund	100	£1.9m	£16.2m	82	£3m	£15m
Small Projects Fund	26	£200k	£988k	30	£500k	£1.1m
Innovation Fund	8	£450k	£1.2m	11	£750k	£1.7m
Carbon Emissions Reduction Fund	10	£450k	£1.4m	10	£750k	£1.6m
<b>Total</b>	<b>144</b>	<b>£3m</b>	<b>19.9m</b>	<b>133</b>	<b>£5m</b>	<b>£19.6m</b>

Respondents were asked to explain why they provided the score that they did. Respondents who rated their likelihood of recommending the Energy Redress Scheme as either 10 or 9 explained that they did so because the funding has a great impact on supporting vulnerable people. Specific comments included:

- *“The fund provides large grants that can make a real difference when delivering support to local people, where other funders provide smaller amounts that are not always that effective.”*
- *“Fantastic support available in terms of amount and length of funding – so often we rely on very short-term grants and struggle to gain enough momentum and learning towards sustainability. Also great to know where this money comes from.”*
- *“I would recommend as this fund is needed now more than it ever has been with the energy increases and cost-of-living crisis.”*
- *“Though we weren’t successful, the scheme is incredibly useful and has made a lot of difference to other organisations.”*

Respondents who rated their likelihood of recommending the Energy Redress Scheme to others as 8 or 7 provided the following comments explaining why they did so. Many comments focussed on their experience of achieving funding being difficult because of the competition for funds, and some mentioned that they found the application process to be time consuming and resource intensive:

- *“Seems as a good a process as any other, so if your project meets the aims it’s worth a go. However, be aware that there is very high demand.”*
- *“The first time we applied, the process was easy. The next round was more difficult. You don’t expect to always be funded and we understand this is competitive.”*
- *“The application is very lengthy, and the odds of success are not high. It is therefore a lot of work for what is likely to be no gain.”*
- *“I’ve applied twice, each application takes a few days. The scheme seems to favour larger projects. It’s too expensive in staff time to apply.”*

Respondents who rated their likelihood of recommending the Energy Redress Scheme to other organisations as 6 or below explained why they provided this score. Some of their comments are listed below, as well as the rating that they scored in brackets:

- *“It’s inflexible and clunky, but there’s a good pot of money available and the aims are very good. The reporting requirements are onerous, but the branding and acknowledgement requirements aren’t.” (5)*
- *“Too time consuming to make an application.” (4)*
- *“It’s a fabulous fund if you receive funding – however, it can be really disappointing when the funding ‘pot’ is so tight and only a few projects get awarded.” (3)*

Respondents were asked whether they had any general feedback about the application process or suggestions on how the process could be improved. 49% of respondents provided suggestions on how to improve the application process. The most frequent recommendation related to feedback. It is important to note here that a new automated system to provide tailored feedback to all unsuccessful applicants was implemented in Round 3. The new system provides an indicative rating between 1 (low) and 4 (high) for specific sections of the application: Project Concept, Project Team & Plan, Strategic Value and Value for Money which correspond with the sections in the scheme guidance documents. The benefits of the new system are as follows:

- Every organisation receives feedback, rather than just those that request it, to ensure greater fairness.
- It was hoped that more timely feedback would help improve the quality of applications.
- Development Officer time could be targeted at better supporting current grantees.

The key recommendations from respondents are listed below:

- **More helpful feedback with clarity around scoring (9):**
  - *“Previously we had been unsuccessful and scored the top marks in all but one category. I think you should give more specific feedback as to why an application was not successful.”*
  - *“The process is fine, it's the scoring and feedback that leaves me puzzled. Each time I've acted on the feedback, beefing up 'weak' (poorly scored) answers, and each time the following feedback has indicated a weakness somewhere else.”*
  - *“Feedback should be meaningful enough to help improve the application to submit again. It should say how the application could be improved not just give scores.”*
- **Clearer guidelines (6):**
  - *“I think there should be clearer guidelines about what you mean by innovative. Innovative is a subjective term.”*
  - *“Perhaps make it clearer about your priorities when allocating funds.”*
  - *“Be clear whether you are trying to reduce national carbon emissions or to achieve a degree of north-south levelling up, or both and in what proportion, so those in the south can decide whether or not to apply<sup>17</sup>.”*
- **Make improvements to application formatting (5):**
  - *“Modular (rather than linear) application forms and larger boxes for tabulated text with clearly defined word limits. And add a warning showing if text has been clipped.”*
  - *“It would be helpful to be able to resubmit applications before the deadline.”*
  - *“It would be good to have a shorter application form for smaller projects.”*
- **Have an initial screening phase to immediately rule out any ineligible applications (2):**

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<sup>17</sup> Geographical spread is not part of the Redress criteria and is only monitored across applications to ensure fair distribution in underrepresented areas.

- *“A stage 1 screening process would have been nicer, to give an indicative budget and idea on the concept of the project idea so we could have saved all the of the time on the full application.”*
- *“Could have a 2-stage application process where firstly you submit a short summary of your project idea and then you’re only invited to the longer second stage of the application if it is really of interest. That would save a lot of work for the applicant organisation if the project didn’t really fit with what the scheme is looking for. Also save the assessment team a lot of work reviewing such long applications.”*
- **Make improvements to budgeting section of application form (2):**
  - *“The key area for me is the advice targets table and costs of interventions. This was the most time-consuming element of the process.”*
  - *“Don’t require wages to be (effectively) broken down into three components.”*
- **Simplify the application process (2):**
  - *“Shorter application form that is easier to complete with lots of dates etc to put in for project management.”*
  - *“The application is very detailed and long, and we found there were a few questions which repeated themselves to some extent.”*

Other suggestions for improving the Redress scheme that were each mentioned by one respondent included:

- *“More case studies of organisations that have applied and projects so people can relate their own potential projects to the funding.”*
- *“We would like to see 3- to 5-year grants rather than 2-year grants.”*
- *“When using the application both to justify past performance and set goals for a new project, the word limits are a little tight.”*
- *“Give a larger number of smaller grants, so that more organisations benefit from funding. This spreads the benefits of the Redress scheme round the country better.”*

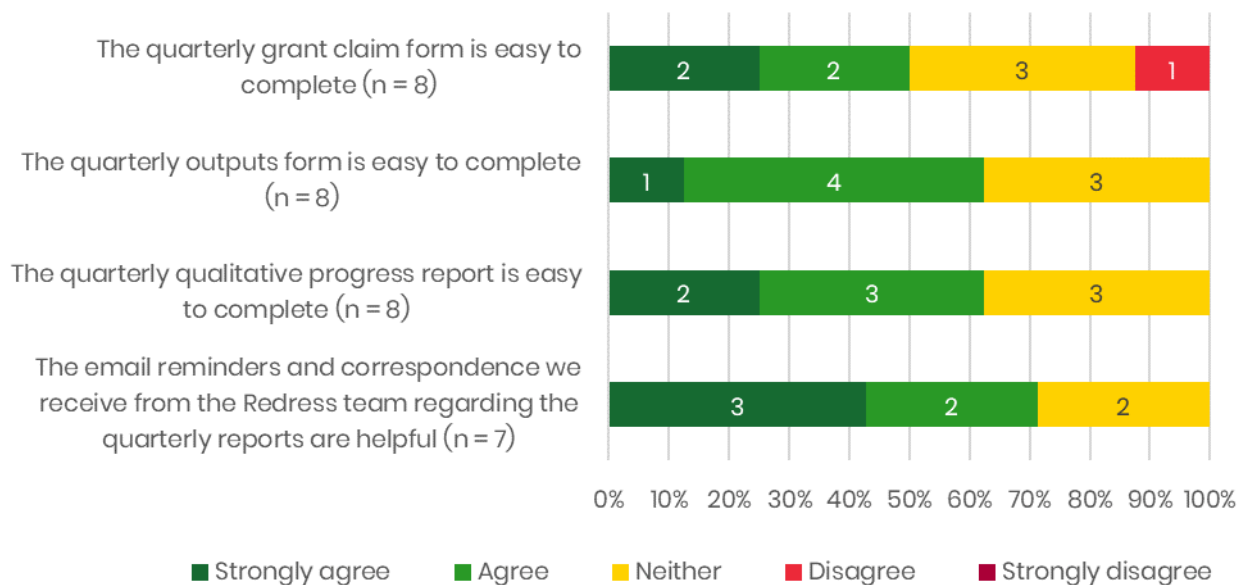
### 3.3.5. Grant process

29 respondents were successful in applying for the Energy Redress Scheme. 79% of the successful respondents had been successful in Phase 2, while 21% had only been successful in Phase 1 and had unsuccessfully applied for rounds in Phase 2. Of those who successfully applied in Phase 2, 65% had been successful in Round 4, 22% were most recently successful in Round 3, and 13% were most recently successful in Round 2.

The successful respondents who were funded in Phase 2 of the scheme were asked to state the extent to which they agreed or disagreed with a number of statements regarding project progress. Only respondents who were funded in rounds 1, 2 or 3 of Phase 2 were asked these questions as they are far along enough with their projects to have completed any quarterly reporting documents, as of 3 October 2023.

Figure 3-11 shows that respondents thought that the quarterly grant claim (50%), the quarterly outputs form (63%) and the quarterly reports (63%) were easy to complete. It is important to note here that the sample size of respondents who answered these questions is small, meaning that a small number of those who disagree are shown as a larger percentage of the sample. 71% of respondents thought that the email reminders and correspondence from the Redress team were helpful, which is lower than the previous evaluation when all thought that the email reminders and correspondence from the Redress team were helpful. One possible reason for this decrease and several respondents neither agreeing nor disagreeing to the other statements is that the Redress team have made parts of the reporting process more thorough, which is part of their continued improvement programme.

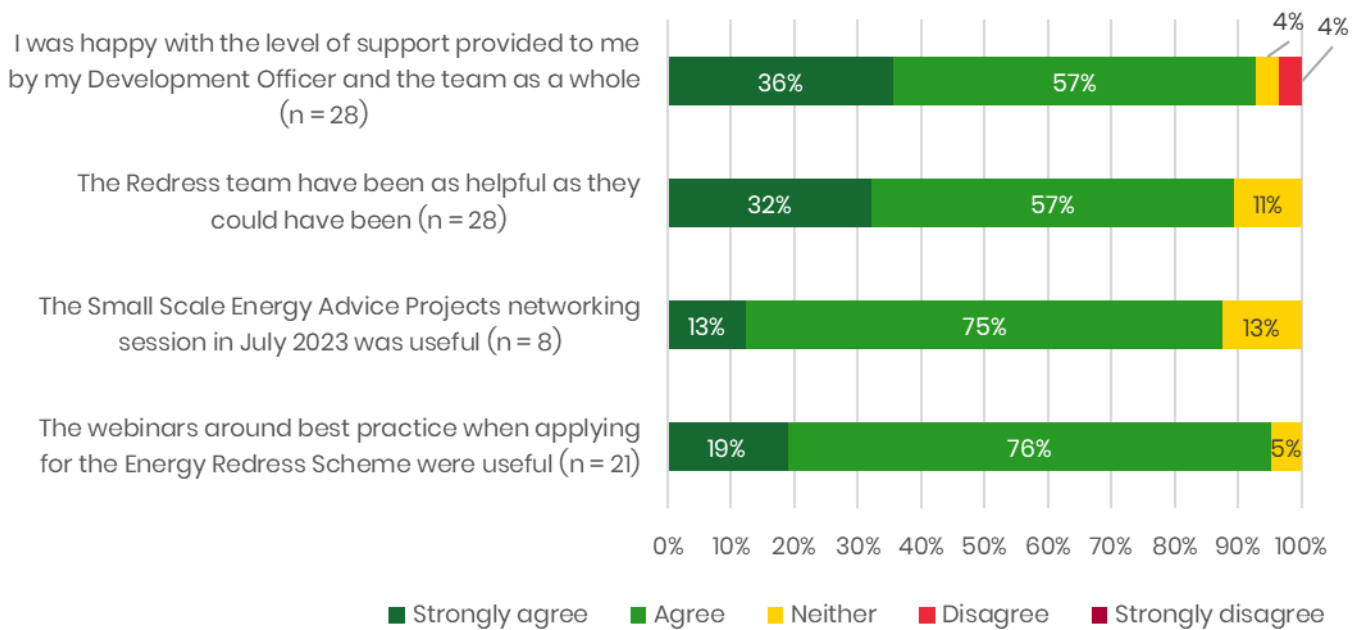
Figure 3-11: Respondents' impression of the monitoring and reporting process (n = see chart)



All respondents who were successful applicants to the scheme were asked to state the extent to which they agreed or disagreed with a number of statements relating to the Energy Redress team. As depicted in Figure 3-12, 92% of respondents agreed that they were happy with the level of support provided by their Development Officer and the team as a whole, and 89% agreed that the Redress team were as helpful as they could have been. Moreover, 88% and 95% of those who attended the Small Scale Energy Advice Project networking session and best practice webinars were satisfied with the sessions, respectfully.



Figure 3-12: Respondents' opinion of the Redress team (n = see chart)



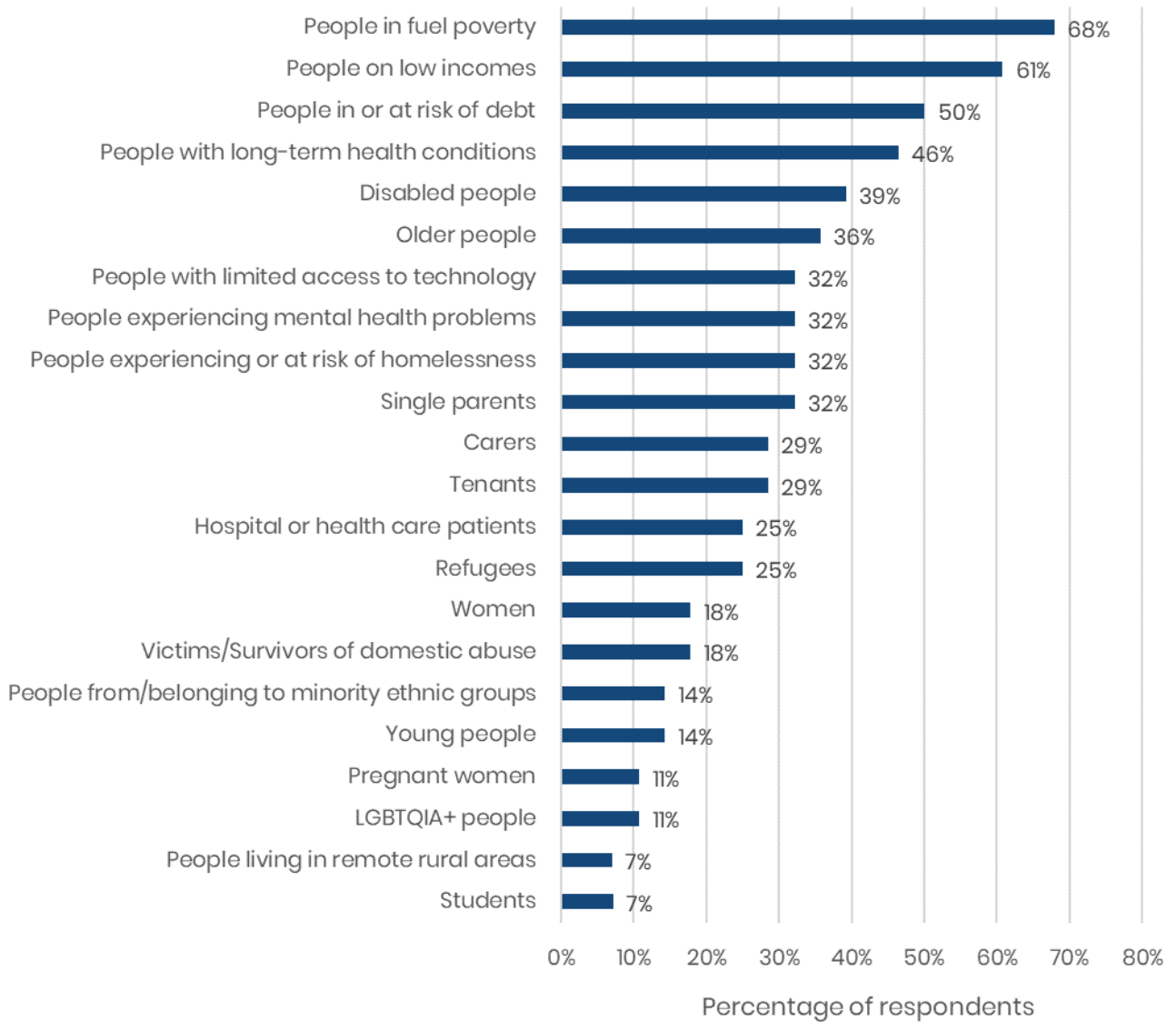
Respondents were invited to provide additional information regarding their experience with their Development Officer and the Energy Redress team. Specific comments included:

- “Our Development Officer has been extremely helpful in managing our project.”
- “The team was supportive and understood our issues.”
- “Communications with our Development Officer have been very clear, and I feel the door is open for us to ask any questions we need to.”

Successful applicants were asked whether they were specifically targeting any energy consumers who could be vulnerable, marginalised and/or disadvantaged, or whether they were focussing their support on specific vulnerable, marginalised and/or disadvantaged groups. 71% reported that they were targeting any energy consumers who could be vulnerable, marginalised and/or disadvantaged.

Figure 3-13 shows the specific types of vulnerable, marginalised and/or disadvantaged groups being supported by respondents' projects. The chart shows that 22 different types of vulnerable people have been supported through Energy Redress funded projects. Note that certain people can be in more than one vulnerable group. As was the case in the previous evaluation, the most common type of vulnerable group supported was those in fuel poverty (68%), followed by people on low incomes (61%).

Figure 3-13: Specific types of vulnerable, marginalised and/or disadvantaged groups being supported by respondents' projects (n = 28)



The support which projects provide vulnerable households includes home visits (when feasible), telephone, email and posted advice, installation of capital measures (either through the fund or referrals made to third parties) and referrals to other support mechanisms available.

### 3.3.6. Unsuccessful applicants

21 respondents (36%) were unsuccessful in their application for the Energy Redress Scheme. 17 respondents (81%) asked for feedback on their application or project idea. As noted above, a new automated system that provides tailored feedback to all unsuccessful applicants was implemented in Round 3 (for further details, see page 38). Those who did not request feedback after their unsuccessful application were asked why they did not do so. Three of the four respondents explained that they did not think that feedback was available:

- *“Can't remember it [feedback] being offered.”*
- *“We haven't asked, as we didn't realise that we could. We would really like feedback.”*
- *“The webinar made it clear that feedback would not be given beyond the scoring of the sections.”*

Of those who received feedback, 33% said that this feedback was helpful. The 67% who did not find the feedback helpful explained why this was the case:

- **More clarity regarding the scoring is needed (5):**
  - *“Only received the scores that the proposal received but no further explanation. I find it difficult to understand why the proposal scored so low and therefore how it might be improved. As a result I'm unsure whether we would apply to the main scheme again.”*
  - *“It was the score system. We could have understood better if there were some examples of successful projects.”*
  - *“We only got scores out of 4 with no hint as to why the scores are low etc.”*
- **Feedback not constructive (3):**
  - *“We scored very low, but we still struggle to see why the project doesn't match the aims of the programme - it was all around providing the most vulnerable communities that we work with an opportunity to get support, gain knowledge and insight.”*
  - *“The most troublesome part is that you said you wanted applications that were likely to achieve results, yet when we submitted an application very carefully crafted both to achieve results and deliver value for money, we were told that it wasn't good value for money.”*
- **Inconsistent feedback given across different rounds (3):**
  - *“I feel we received different grading for a similar project over two applications and didn't get much detail from the scaling feedback. After the second application we were more confused.”*
  - *“Simply because it's inconsistent from round to round. It feels like a bit of a guessing game as to what information you need and what's being scored.”*
  - *“The feedback identified where we hadn't received adequate points and we improved on this in the next application but only to be told the same.”*

## 4. Conclusion

In order to determine whether the Energy Redress Scheme has achieved its aims, the overall impact on end consumers of projects delivered by organisations who have successfully applied for funding from the scheme has been evaluated. This section outlines the key evaluation requirements provided by Ofgem and highlights the findings from this evaluation to indicate the extent to which these specifications have been fulfilled.

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

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

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

It is evident in the online survey results that the Energy Redress Scheme has achieved this. All respondents in some way supported energy consumers who could be vulnerable, marginalised and/or disadvantaged. 71% reported that they were targeting any energy consumers who could be vulnerable, marginalised and/or disadvantaged, while the remaining projects were focussing their support on specific vulnerable, marginalised and/or disadvantaged groups.

22 different types of vulnerable people have been supported through Energy Redress funded projects. The most common type of vulnerable group supported was those in fuel poverty (68%), followed by people on low incomes (61%), people in risk of debt (50%), people with long-term physical or mental health conditions (46%), disabled people (39%) and older people (36%). The support which projects provide vulnerable households includes home visits (when feasible), telephone, email and posted advice, installation of capital measures (either through the fund or referrals made to third parties) and referrals to other support mechanisms available.

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

Grantees provided feedback on how to improve the Energy Redress Scheme based on their experience of applying for the scheme. This feedback is listed below, with the number of respondents reporting the feedback provided in brackets:

- 49% of respondents provided suggestions to improve the application process when asked if they had any general feedback. The most frequently mentioned recommendations included:
  - Clearer guidelines (6).
  - Make improvements to application formatting (5).

- Have an initial screening phase to immediately rule out any ineligible applications (2).
- Make improvements to budgeting section of application form (2).
- Simplify the application process (2).
- 67% of unsuccessful applicants who received feedback on their application did not think that it was helpful. Key reasons why feedback was found to be unhelpful included the lack of explanation given alongside the application scores, unconstructive feedback, and inconsistent feedback given across rounds.

To address the key feedback outlined above, the following potential amendments have been identified:

- Review scheme guidelines, requirements and aims to identify improvements to clarity of message.
- Make improvements to the application form by:
  - enabling applicants to make changes to separate parts of their application without having to go through the whole form
  - warn applicants if text has been shortened by text boxes
  - allow resubmissions before the deadline
  - when applying for the small projects fund, provide a shorter application
- Conduct preliminary assessments of applications to immediately rule out any ineligible or unsuitable projects.
- Remove any repetition in the application form.
- Make amendments to the budget section of the application where possible to improve clarity and ease of completion.
- Improve feedback by providing more detailed reasons why scores were given, ensuring it can be used to improve future applications, and review the scoring system to ensure it remains consistent between rounds. Make clear to applicants where changes have been made.

The above suggestions for improvement will be assessed by the Energy Redress team and those which are achievable within the means of Energy Redress will be incorporated into the scheme's delivery in future rounds.

The key aims of the Energy Redress scheme, and Energy Saving Trust's contractual obligation, are to benefit vulnerable people and develop carbon saving and innovation products, rather than facilitating capacity-building in the voluntary sector. The Energy Redress team will therefore only implement recommendations to the application process that will not compromise its ability to achieve these aims.

3. Such other reasonable matters as relate to evaluating the overall effectiveness for end consumers of redress projects funded through redress awards as the Authority may request

Satisfaction with the Energy Redress Scheme is high and, although in many areas scored lower than in the previous evaluation conducted in 2022, is similar to the results in the 2021 evaluation when the sample sizes are more comparable<sup>18</sup>:

- 85% completely understand the aims of the Energy Redress Scheme (previous evaluation: 96%; evaluation in 2021: 85%).
- 87% completely understand the eligibility criteria and rules of the Energy Redress Scheme (previous evaluation: 95%; evaluation in 2021: 87%).
- The majority of respondents found the project information (69%; previous evaluation: 68%; evaluation in 2021: 65%), project programme (53%; previous evaluation: 68%; evaluation in 2021: 53%) and risk management (49%; previous evaluation: 65%; evaluation in 2021: 53%) sections easy to complete.
- 90% of respondents found the Redress guidance document to be very useful (27%) or useful (63%) (95% in previous evaluation; 80% in evaluation in 2021).
- 92% of respondents found the Redress team to be very helpful (74%) or helpful (18%) (previous evaluation: 98%; evaluation in 2021: 97%).
- 88% and 95% of those who attended the Small Scale Energy Advice Project networking session and best practice webinars were satisfied with the sessions (not specifically asked in previous evaluation).

All respondents were asked to rate their likelihood of recommending the Energy Redress Scheme to other organisations on a scale from 0 to 10, where 0 is extremely unlikely and 10 is extremely likely. 34% of respondents rated their likelihood of recommending the scheme as 10, indicating that they would be extremely likely to recommend the scheme to others. These results were used to calculate a Net Promoter Score (NPS).

The NPS for the Energy Redress Scheme calculated using the scores of successful grant applicants is 31, which is considered to be “good”.

The NPS for this evaluation for successful applicants is lower than that calculated in the previous evaluation in 2022, when the NPS achieved was 83. NPS is calculated as the percentage of customers who rated their likelihood of recommending as 9 or 10 (“promoters”) minus the percentage of customers that rated 6 or below (“detractors”). Those who rated 8 or 7 (“passives”) are omitted from the calculation. Of the 29 respondents who successfully applied for the scheme and responded to this evaluation survey, 45% were “promoters” (rated 10 or 9) and 14% were “detractors”. Although this is lower than the previous evaluation, the variance between evaluations is determined by the proportion of “passives”. In this evaluation, 41% of successful applicants were “passives”, while this was only 11% in the previous evaluation. While the Redress

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<sup>18</sup> Respondent sample sizes were 59 in the 2023 evaluation, 102 in the 2022 evaluation, and 40 in the 2021 evaluation.

scheme has not achieved the same percentage of 10 and 9 ratings in this evaluation, it is still achieving good ratings.