

**energy
saving
trust**

Ofgem Energy Redress Scheme evaluation report

Phase 1 legacy evaluation

August 2023

Energy Saving Trust



Executive summary

Energy Redress Scheme

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 Energy Redress Scheme 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. Charities 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.

As of 19 June 2023, the Energy Redress Scheme has funded **201 projects** over **13 funding rounds** since launching in 2018, awarding over **£35 million** to grantees delivering projects across England, Scotland and Wales.

Energy Saving Trust provides an annual evaluation report for the Energy Redress Scheme. The evaluation assesses the overall effectiveness for end consumers of redress projects delivered by charities which have successfully applied for funding from the scheme.

The following four areas were examined:

- Project success metrics – analysis of the quantitative information collected by all grantees for projects funded in rounds 1 to 13.
- Redress fund completed projects – RAG status¹ for all completed projects to date and a qualitative review of a sample of 10 projects that have completed since the last evaluation report (August 2022).
- Redress fund progressing projects – a qualitative review of a sample of 10 active projects.
- COVID-19 crisis fund and Winter Energy Fund completed and progressing projects – a qualitative review of a sample of 10 completed projects.

The focus of this report is to evaluate the impact of the first contract period from 2018 to 2022 (Phase 1) of the Energy Redress Scheme. Phase 2 of the scheme opened in May 2022 under a new

¹ Targets agreed with the Energy Redress team were given a RAG status, where targets that were met or exceeded are highlighted in green, targets highlighted in light green have been at least 90% met, cells in amber have met between 50% and 90% of their targets, and red are targets which have not been met. Note that these targets represent the latest targets for the project; some projects may have revised their targets as part of their COVID-19 mitigation plan.

contract. A separate Evaluation report will be prepared for Phase 2 covering activity relating to grants issued at the end of 2023.

Quantitative impacts

The key metrics for projects funded in Phase 1 across rounds 1 to 13 include:

- **Grants worth £35.3 million** have been provided.
- Over **£26.1 million worth of activity has been delivered** and reported on to date – 74% of the total funding awarded in rounds 1 to 13 (£5.4 million worth of activity delivered since the previous evaluation in August 2022).
- **402,066 households** have been provided with energy advice to date (an increase of 107,406 households provided with advice since the previous evaluation in August 2022).
- **118,016 capital energy and fuel saving measures have been installed or provided to households** (an increase of 33,498 capital energy and fuel saving measures installed since the previous evaluation in August 2022).
- Estimated financial savings that have been reported so far by grantees as a result of activities delivered using the funding include:
 - **almost 17,000 MWh of annual energy savings** (increased by 4,000 MWh since August 2022)
 - **over £17 million of annual bill savings from energy advice** (increased by £4.8 million since August 2022)
- Based on the cost of activity delivered so far, the data shows that the average cost of support per household is £65.12.

Note that savings are expected to increase significantly. This is because further project activity will be undertaken as some of 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.

Qualitative impacts and successes

In addition to the quantifiable impacts there are other qualitative impacts and successes that have been achieved. These were reported by grantees in their quarterly progress and end of project 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:

Vulnerable customers: redress scheme funds projects which support energy consumers in vulnerable situations. As was the case in the previous evaluation, the most frequently supported

vulnerable group was people in fuel poverty, followed by those living with a disability or long-term health condition. In total, it was identified through project reports that **17 different types of vulnerable people have been supported** by completed projects, though it is likely that more vulnerable groups are also being supported but are not reported on.

Partnerships: most grantees reported partnerships helped them deliver their projects. Benefits of working with partners included the ability to better identify those who are vulnerable and socially isolated, sharing best practice, and alleviating pressure on the service during periods of high demand by referring them to other types of support.

Holistic support: projects were able to resolve an array of their client's issues at source, rather than just providing them with surface level support, to empower those facing hardship with the tools to improve their own situation. Projects referred their clients with complex needs to external partners who may have more resource, capacity, or experience of dealing with the specific problem. Note that since non-energy related work is outside of the redress fund's scope, financial support is referred to and provided by external partner organisations only.

Improved living conditions: some grantees highlighted that their project has helped a large number of homes become warmer and drier. This impact has been reported by homeowners, who said that the advice they received had been a key factor for them to improve their homes.

Increased geographical reach: a few grantees noted that funding has allowed them to deliver a reliable service to a greater geographical area. One grantee reported that without the funding they would not have the resources to be able to access isolated residents and provide them with the support they require.

Project legacy: four grantees reported that they have secured additional funding to improve or continue their project, with three of these reporting that this was due to the success of their Energy Redress Scheme funded project. Others plan to seek additional funds or will continue the service through another channel of their organisation, online, or through a local authority. Furthermore, 290 jobs were created, and 4,172 volunteers were involved in delivering the projects. In total, 23,421 frontline workers and volunteers were trained by Redress funded projects.

Significant challenges

As in previous evaluations in 2022 and 2021, **COVID-19** was specified as the most significant barrier to project delivery in grantee's end of project reports. Covid was said to have impacted home visits and events, employees and volunteers, moving training online and ability to spend all capital costs. Some grantees had their entire project put on hold; grantees whose projects were already operational when the Covid pandemic began were offered the opportunity to submit a COVID-19 mitigation plan for their project.

Staffing issues: employees and volunteers leaving projects midway through its lifetime caused output delivery delays, causing stress among remaining staff, and recruitment to replace these

roles required much time and effort. Solutions to these issues included speedy replacement of leavers, making do with basic software until someone with the right skillset can be hired to build more advanced software, and conducting wellbeing sessions with staff to relive stress.

Rising energy costs: a volatile energy market made it difficult for grantees to support their clients, as switching them to cheaper energy providers was no longer a viable option and liaising with this energy providers became more onerous. To overcome these challenges, grantees utilised referrals and employed a proactive approach to dealing with energy suppliers by contacting them before their clients faced issues.

High demand: as energy costs and the cost of living increased, grantees became inundated with requests for support, causing capacity and administrative problems. To effectively manage high demand, grantees pooled resources into their busiest teams, for example to inbound calls to ensure no clients were made to wait or neglected.

Completing home visits: some grantees specifically cited their failure to meet their home visit target, either because they have been prioritising other types of advice, such as telephone advice or advice at in-person events, or because they do not have the capacity to deliver them. Solutions to these included substituting home visits with other equally effective types of support and working with their partners to increase their capacity to conduct home visits.

Lessons learned

How to understand complex client issues: as grantees developed their casework with clients, it became ever clearer that their cases were becoming more complex and demanding. To address this, grantees allocated more time to clients to sort through each of their problems, actively listened to them to understand their delicate needs, called on the help of partners to assist with issues that they specialised in solving, and followed-up with clients a few weeks after they received support to ensure that no lingering or reoccurring issues persisted.

Using events and workshops to reach disengaged people: grantees are learning to attend other organisations' energy or financial support related events and workshops to reach more people. At these events, grantees can set up their own stalls and engage with those who are digitally excluded or socially isolated and promote their project, as well as deliver light touch advice.

How to provide a holistic service: to ensure that all their clients' issues were being resolved at their source, rather than simply providing them with high level advice or support, many grantees provided a holistic service. To achieve this, grantees learned how to collaborate with partners to refer clients with specific needs to those who are experienced in dealing with them, to train their staff to provide an array of support and empower their clients with the knowledge to make their own sound energy saving and financial decisions.

COVID-19 crisis fund and Winter Energy Fund

The COVID-19 crisis fund is an emergency fund launched in May 2020 to support households in vulnerable situations during the COVID-19 pandemic, to maintain adequate energy supplies for health and wellbeing and to avoid self-disconnection. The fund was only open to charities that have registered with the Energy Redress Scheme and have passed the due diligence assessment. These charities could apply to deliver emergency fuel vouchers to residents who use prepayment meters and are facing crisis situations. The last grants were issued under this fund in May 2021.

In October 2021, the Winter Energy Fund launched to support pre-payment meter customers at risk of self-disconnection by providing them with emergency fuel vouchers. The fund is distributing up to £10 million through eligible charities that have registered with the Energy Redress Scheme and have passed the due diligence assessment.

As of 19 June 2023, **137 grantees have been successful** in applying for the COVID-19 crisis fund. These grantees funded over seven rounds have utilised over **£9.63 million** to distribute **200,270 vouchers** to **144,853 households**.

To date, **66 grantees have successfully applied** for the Winter Energy Fund. These grantees have been funded in three rounds and have utilised over **£8.4 million** to date to distribute **176,436 vouchers** to **121,524 households** thus far.

To evaluate the COVID-19 crisis fund and the Winter Energy Fund, a review of 10 projects was undertaken to understand the impact of the funds. Seven projects from rounds 1-7 of the COVID-19 crisis fund and three from rounds 1-3 of the Winter Energy Fund were randomly selected to have their reporting documents analysed. Note that Round 3 grant agreements actually began under Phase 2 of Energy Redress but are included here for completeness.

Best practices

Best practices shared by grantees in their reporting documents highlighted successful methods of delivering vouchers. Two of these best practices were also identified in the previous evaluation report in August 2022:

- Grantees reported **working with referral partners** as a key reason for success. By working with other organisations in their local community, grantees were able to easily identify their target recipients and therefore distribute their vouchers faster than they would have been able to otherwise. Some benefits associated with working with referral partners included being able to distribute more vouchers, ensuring vouchers reached vulnerable users and strengthening new and existing relationships.
- **Acknowledging the impact that weather has on demand.** Grantees reported that formulating a plan to deliver as many vouchers as possible during the high demand

caused by the cold winter months and expecting low uptake of vouchers in the warmer summer months allowed them to manage their voucher distribution accordingly.

Since the previous evaluation, grantees have adopted and built on two key strategies to effectively distribute their vouchers:

- Implementing an internal process to **quickly identify suspected instances of fraudulent activity**. Examples of these internal processes included requiring ID to redeem vouchers and conducting stringent checks on names, addresses and phone numbers before issuing the voucher. However, it was reported that these processes require additional support and can create barriers for some vulnerable applicants.
- **Referring** applications to further support or advice services to address the underlying causes of fuel poverty including but not limited to energy efficiency grants, debt advice and back to work training.

Challenges

The two main challenges that grantees faced when distributing vouchers, identified through the review of grantee reports, were:

- **High demand** for vouchers with particular challenges in winter when demand was highest and staff resources were impacted by illness or availability.
- **Clients experiencing issues when redeeming vouchers**. These issues are related to vendor awareness of the scheme and understanding of how to process vouchers.

As well as providing the vouchers, grantees provided additional support to households including energy advice, referrals to grant schemes for home energy measures and debt and financial advice.

Contents

1.	Introduction	9
2.	Evaluation aims	11
3.	Methodology	12
4.	Energy Redress Scheme evaluation	14
5.	COVID-19 crisis fund and Winter Energy Fund evaluation	48
6.	Conclusion	55

1. 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 who are found to have breached a license condition or were part of an investigation or compliance case can agree in settlement to make payments to the voluntary Energy Redress Scheme 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). Charities 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 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.

It can allocate up to 15% of funding to support innovation to benefit energy consumers and up to 15% of funding to support carbon emissions reduction projects for energy consumers.

The Energy Redress Scheme is open to charitable organisations that support energy customers in England, Scotland and Wales. Applications are made through an online system and closing dates for applications are determined each quarter. The minimum grant that can be requested is £20,000 and the maximum grant amount varies depending on the size of the fund available, with the largest single award to date being £0.9 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.

1.1. COVID-19 crisis fund and Winter Energy Fund

The COVID-19 crisis fund is an emergency fund launched in May 2020 to support households in vulnerable situations during the COVID-19 pandemic to maintain adequate energy supplies for health and wellbeing and to avoid self-disconnection. The fund is only open to charities that have registered with the Energy Redress Scheme and have passed the due diligence assessment. These charities can apply to deliver emergency fuel vouchers to residents who use prepayment meters and are facing crisis situations. The last funding round of the scheme was awarded in April 2021.

In October 2021, the Winter Energy Fund launched to support pre-payment meter customers at risk of self-disconnection by providing them with emergency fuel vouchers. The fund has

distributed over £8.4 million through eligible charities that have registered with the Energy Redress Scheme and have passed the due diligence assessment. As of 19 June 2023, three rounds of funding have issued 66 charities with vouchers since the first round began in December 2021, with each round lasting six months.

2. Evaluation aims

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 charities 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 the Authority Guidance
- (ii) evaluating the impacts of redress projects on end energy consumers
- (iii) evaluating the value for money achieved by the redress projects
- (iv) recommending how further improvements can be made to redress awards and/or redress projects following the evaluation described in this clause
- (v) such other reasonable matters as relate to evaluating the overall effectiveness for end consumers of redress projects funded through redress awards as the Authority may request

This evaluation report provides information to date on the 201 projects that have been funded through the 13 rounds delivered in Phase 1. In total, 128 projects have been completed, while the remainder are in progress. The evaluation is continuous and builds upon previous evaluations.

In addition, the evaluation of the COVID-19 crisis fund and Winter Energy Fund aims to evaluate these fund's effectiveness, including:

1. learning from projects to understand how the funds could be improved
2. evaluating the impacts on end energy consumers

3. Methodology

The evaluation method has focused on the following:

- Project metrics – analysis of the quantitative information recorded by grantees, covering rounds 1-13 of the Energy Redress Scheme.
- Completed projects – RAG status for all completed projects to date and a qualitative review of a sample of ten projects that have completed since the last evaluation report.
- Progressing projects – a qualitative review of a sample of ten projects which are currently active.

Project metrics

The data for the project metrics has been obtained from quarterly and final (where applicable) 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 (up until 19 June 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.

Completed projects

An overview of quantitative project metric data taken from grantees' final reports in rounds 9 to 13 is presented to demonstrate the impact of the selected ten projects, and factors which have contributed to targets being met, exceeded, or not met are discussed. Targets were set by grantees at the time of application, unless subsequently amended through agreement with Energy Saving Trust. The qualitative analysis utilises information grantees have included in their final report concerning the following themes: achievement of project aim(s), most significant deliverables, issues and resolutions and project legacy.

Projects in progress

An overview of quantitative project metric data taken from grantees' quarterly reports is presented to demonstrate the impact thus far of the selected ten projects. Then a qualitative analysis of issues encountered and lessons learned has been included, using most recent data from the grantees' quarterly reports. Ten projects from rounds 9 to 13 have been 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.

3.1. COVID-19 crisis fund and Winter Energy Fund

An overview of the vouchers and funding distributed to date is presented to demonstrate the fund's impact. Ten projects from each of rounds 1 to 7 of the COVID-19 crisis fund and 1 to 3² of the Winter Energy Fund have been selected for analysis, to ensure projects in different stages of progression have been captured. An overview of quantitative project metric data taken from grantees' monthly reports is presented to demonstrate the impact thus far of the ten selected projects. A qualitative analysis of best practices and key challenges has also been included, using data from the grantees' monthly reports.

² The third round is included under the new contract but has been included within this report for completeness in order to cover activity that has taken place so far.

4. Energy Redress Scheme evaluation

This section evaluates the impact of Phase 1 of the Energy Redress Scheme by:

1. Reporting project impact metrics for all grantees in Phase 1 (4.1 Overview of metrics)
2. RAG status for all completed projects to date and comprehensive analysis of 10 completed projects (4.2 Completed projects analysis)
3. Examining the progress of 10 grantees that have not yet completed their projects (4.3 Progressing project analysis)

Table 4-1 presents a summary of the projects in Phase 1 of the Energy Redress Scheme. Of the £35.3 million of grant funding allocated across rounds 1-13, over £26.1 million (74%) worth of activity has been delivered and reported on to date.

Table 4-1: Overview of Energy Redress Scheme-funded projects in rounds 1-13 (n = 201)

Round	Number of projects	Project start date	Number of projects completed	Total allocated funding
1	6	August 2018	6	£244,567
2	15	January 2019	15	£2,103,479
3	7	April 2019	7	£470,255
4	6	September 2019	6	£291,796
5	30	January 2020	30	£4,374,103
6	28	June 2020	28	£5,079,862
7	11	August 2020	10	£2,981,599
8	17	October 2020	11	£3,543,340
9	10	February 2021	4	£2,014,397
10	32	April 2021	10	£6,087,557
11	12	June 2021	1	£2,207,978
12	7	September 2021	6	£1,972,715
13	20	January 2022	15	£3,913,619
Total:	201	-	128	£35,285,268

Figure 4-1 shows a map displaying the locations of projects funded by the Energy Redress Scheme. Each pin represents the location of a project.

Figure 4-1: Map of Energy Redress Scheme-funded project locations



4.1. Overview of metrics

This section summarises the impact of all Energy Redress Scheme projects in Phase 1. The data presented here represents what has been achieved to date by the 201 projects funded in rounds 1 to 13, as of 19 June 2023. The values provided were obtained from the quarterly reports, which were self-reported by each project. Note that not all projects have completed and so this is not a final set of metrics for Phase 1.

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 402,066 distinct households through their advice work (increased by 107,406 since August 2022).

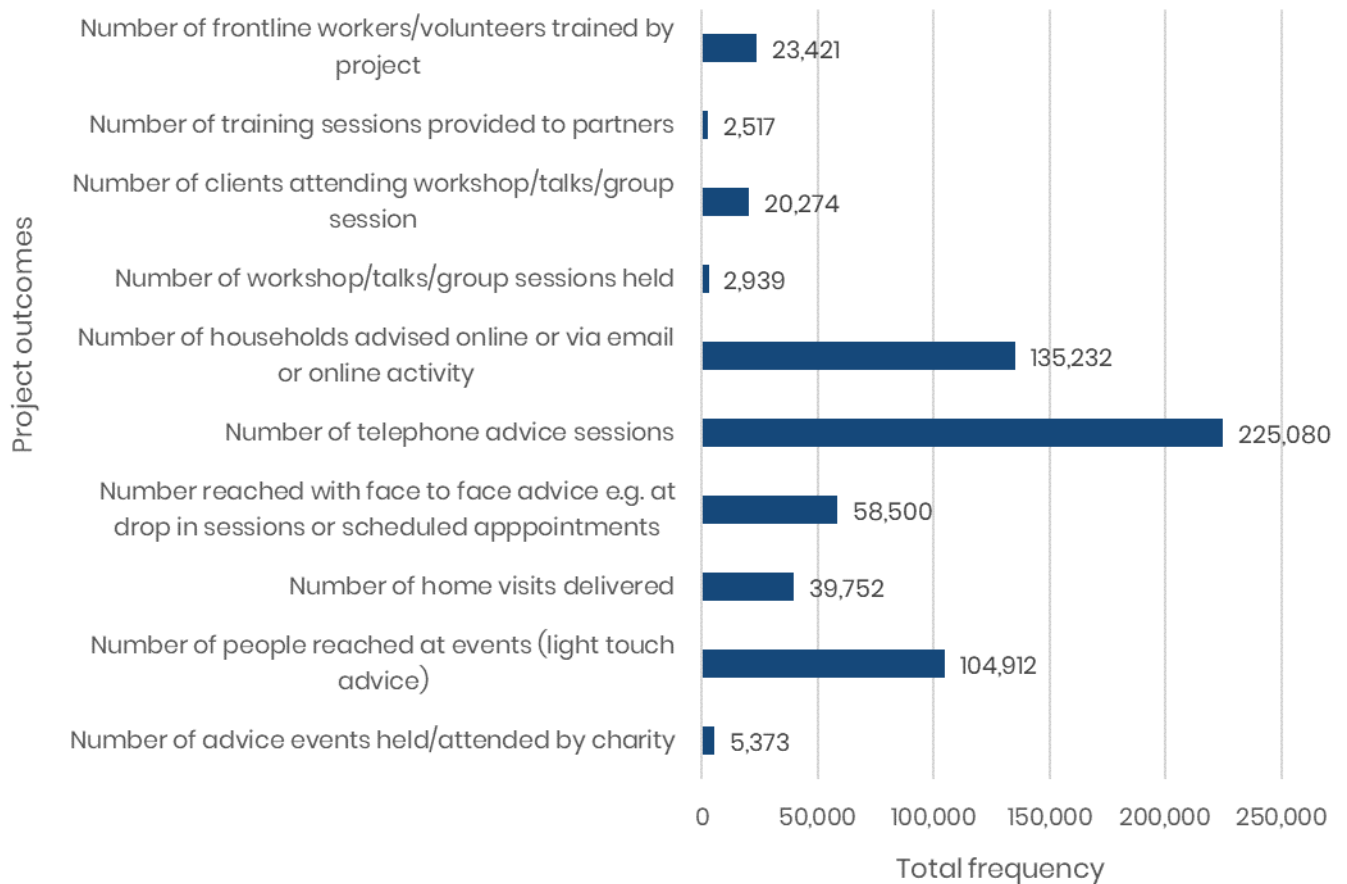
As shown in Figure 4-2, householders have been advised in several different ways:

- 225,080 telephone advice sessions have been delivered³ (an increase of 60,156 telephone advice sessions since August 2022)
- 135,232 households have been advised online or via email or online activity (an increase of 22,236 households advised since August 2022)
- 104,912 people have been reached at events (an increase of 37,169 people reached at events since August 2022)
- 39,752 home visits have been completed (an increase of 15,555 home visits completed since August 2022)
- 58,500 people have received face to face advice (an increase of 26,833 people receiving face to face advice since August 2022)

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

³ 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.

Figure 4-2: Deliverables achieved to date as reported by Energy Redress Scheme projects (n = 201)



4.1.1. Overall impact of the fund

Throughout the entirety of Phase 1 of the Energy Redress Scheme, a total of 402,066 distinct households have been reached with advice. 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 distributed⁴ to date, the amount of grant money distributed equates to an average cost of £65.12 per household reached with advice⁵.

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 therefore each project does not report a quantifiable gain against every project metric included

⁴ The value of funding distributed represents the value of money claimed to date, not allocated in grant offers.

⁵ 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.

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 4-2 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 19 June 2023. The table also shows the increase in savings since the previous evaluation report in August 2022. 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
- 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)

118,016 small energy efficient measures were installed with Redress funding, with 35,088 distinct households being provided with at least one small measure⁶. The most implemented small energy efficient measure so far is LED bulbs, which constitute 68,119 (58%) of these measures, although many other measures have been installed, such as radiator foils (21,017), draught proofing (9,336) and heating controls (567).

There has been a total of 12,147 measures installed as a result of Energy Redress Scheme grantee referrals⁷. Boiler repair or replacement has been the most frequently referred measure thus far (2,783), followed by draught proofing (1,197), new heating system (1,197) and loft insulation (948). The projects have also achieved social benefits, with 4,172 volunteers involved in delivering the projects and 290 new jobs being created as a result of the projects commencing.

⁶ Note that the total number of households provided with at least one small measure was not recorded in Round 1, and the true number of distinct households is therefore likely to be higher than the figure provided in the text.

⁷ 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.

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

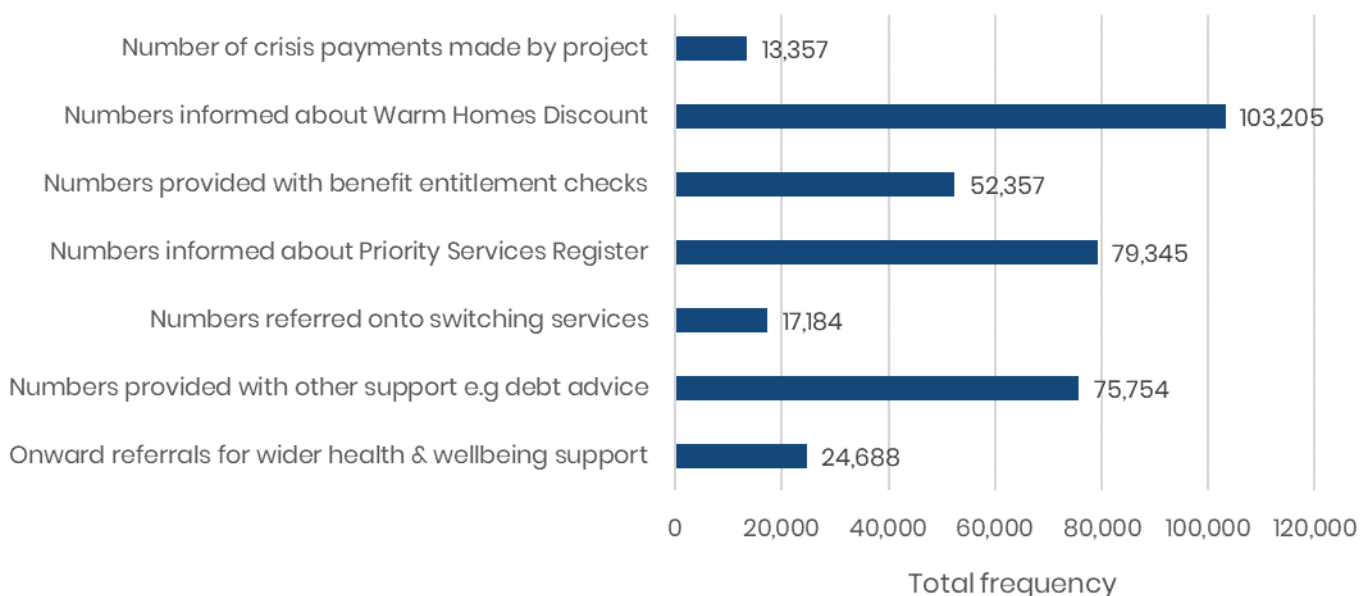
Table 4-2: Estimated measured and actual lifetime energy and bill savings from quantifiable sources (eg switching supplier and measures) self-reported by Energy Redress Scheme projects to date (n = 201)

Estimated savings	Total as of June 2023	Increase since August 2022
Measured annual energy savings achieved (kWh) through advice and measures installed	416,220	31,916
Estimated annual energy savings achieved (kWh) through advice and measures installed	16,909,773	4,086,039
Actual annual energy bill savings (£) from advice	£2,022,322	£691,898
Estimated annual bill savings (£) from advice	£17,381,664	£4,877,965
Estimated annual bill savings (£) from small measures (LEDs etc)	£2,466,272	£1,218,407
Actual financial gains (£) from benefits advice, debt write off etc that can be attributed to the project	£41,928,047	£15,722,967
Capital measures installed		
Total number of small energy efficient measures installed or provided to households (such as LED bulbs, draught proofing, power down devices and radiator foils)	118,016	33,498
Other measures installed as a result of advice referrals to other funding sources (this includes insulation and boiler replacements)	12,147	3,658
Social benefits		
Number of volunteers involved in delivering the project	4,172	757
Number of new jobs created	290	29
Number of well-being surveys completed	12,310	6,899

Through the Redress projects, households have been informed about, or referred to, other schemes. Figure 4-3 shows these schemes and the number of people that have been informed of each service. In total, 365,890 people have been informed about, or referred for, additional

support. 28% of people were informed about the Warm Home Discount, and 22% were informed about the Priority Services Register⁸.

Figure 4-3: Schemes that Energy Redress Scheme-funded grantees have informed, or referred, their clients to (n = 201)



4.1.1.1. Funding streams

In Phase 1 of the Energy Redress Scheme, four funding streams were available for charities to apply for: main fund, small projects fund, innovation fund and carbon emissions reductions fund. Most successful grantees (148; 74%) received funding from the main fund, which provided funding of at least £50,000. 31 charities (15%) in rounds 5 to 13 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 have been awarded a grant from the innovation fund. The innovation fund is aimed at developing products or services which are truly innovative and not currently accessible to energy consumers or certain groups of energy consumers. Seven projects in rounds 1, 2, 5, 6 and 10 have been completed, and seven projects awarded under rounds 10, 11, 12 and 13 are still in progress. The total grant amount for all 14 projects is £3,108,250.

From round 10 onwards the Carbon Emissions Reduction Fund was added to the list of funds and eight projects in total were awarded funding from it. This fund aimed at reducing carbon dioxide emissions from energy use, and projects must focus on energy generation, distribution or energy

⁸ The percentage of those informed about the Priority Services Register is likely higher than 22% as most projects are supporting vulnerable people but few grantees are reporting this metric.

use. One project in round 10 has completed, while the other seven projects in rounds 10 and 13 are still ongoing. The total grant amount for all eight projects is £1,624,845.

4.2. Completed projects analysis

4.2.1. Completed project metrics

As of 19 June 2022, 128 projects have been completed under Phase 1 of the Energy Redress Scheme; see Table 4-3 for completed breakdown by round.

Table 4-3: Completed projects to date by funding round (n = 128)

Round	Number of completed projects
Round 1	6
Round 2	15
Round 3	7
Round 4	6
Round 5	30
Round 6	28
Round 7	10
Round 8	11
Round 9	4
Round 10	10
Round 11	1

To illustrate the types of vulnerable people that the completed projects have supported during their delivery, the 128 completed projects' (as of 19 June 2023) final reporting documents were analysed to understand the types of vulnerable groups that they had been helping. Figure 4-4 displays completed project's target population for support. Note that this analysis only captures the primary group which they have reported they are aiming to support; many of the completed grantees are also targeting other vulnerable groups (see Figure 4-5). Some grantees did not provide a primary target vulnerable group, hence the sample size for this chart is lower than the total number of completed projects. More than half of the completed grantees who shared a primary target vulnerable population said that they were predominately seeking to help those in fuel poverty (53%).

Figure 4-4: Grantee's primary target vulnerable group they aimed to support through their project (n = 111)

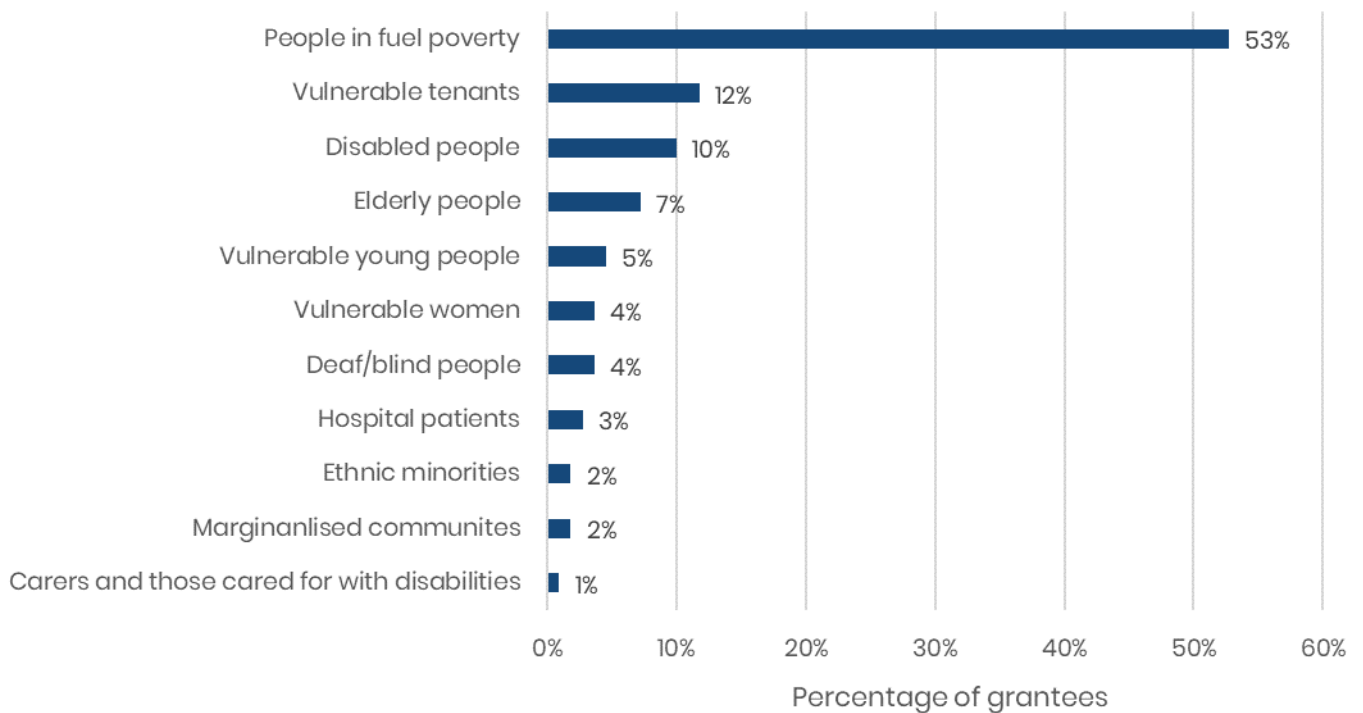
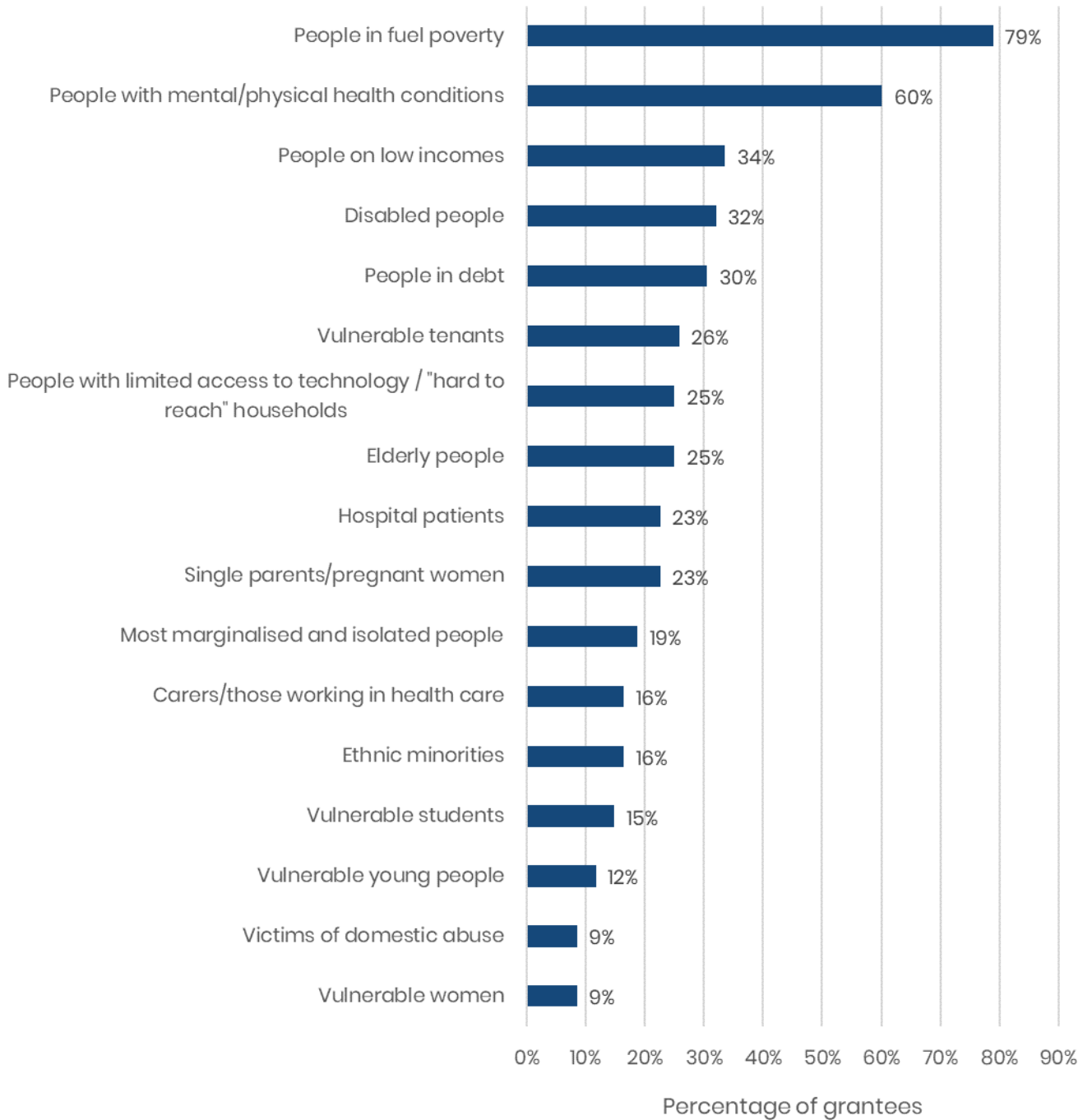


Figure 4-5 shows the percentage of completed grantees supporting different types of vulnerable groups. The chart shows that 17 different types of vulnerable groups have been supported, with vulnerable people in fuel poverty being the most supported group across all completed grantees to date (79%), followed by vulnerable people with mental/physical health conditions (60%). Note that respondents were not specifically asked to report the vulnerable groups that they have supported through their projects, and therefore the actual percentage of vulnerable groups supported by all completed projects is likely far higher.

Figure 4-5: Percentage of completed projects supporting different types of vulnerable groups (n = 128, multiple responses)



Tables Table 4-4 and Table 4-5 show the quantitative outputs for completed projects in rounds 1 to 4 and rounds 5 to 8, respectively. Targets which have been met or exceeded are highlighted in green, targets highlighted in light green have been at least 90% met, cells in amber have met between 50% and 90% of their targets, and red are targets which have not been met. All projects have completed in rounds 1 to 8 aside from one project in Round 7 and five projects in Round 8; the outputs and targets from these projects still progressing have been excluded from these

tables. Note that the targets 'number of households attending workshop/talk/group session' and 'number of email/online advice interactions' were introduced as key deliverables after Round 5 and therefore are only included in Table 4-4 when a project has specifically set out to deliver these outputs.

Most of the targets in rounds 1 to 8 were achieved (69%), with many rounds achieving their training sessions, frontline workers/volunteer training, email/online interaction, and telephone advice targets. However, none of the rounds achieved their home visits targets, only one round achieved its face-to-face advice sessions, and events related targets were not met in many rounds. This is chiefly due to the COVID-19 pandemic, which impacted projects from February 2020, when rounds 1 to 5 had already agreed their targets and begun their projects and when the remaining rounds had established their projects. The restrictions put in place to prevent the spread of the virus made in-person contact illegal and therefore meant that projects could not visit homes or host events.

Mitigation plans agreed with the Redress team allowed some projects to replace home visits with other deliverables, such as telephone energy advice calls, email and online advice and other means, such as leaflets, hence why these targets are greatly exceeded. Most rounds were able to achieve their training sessions and frontline workers/volunteers trained despite Covid restrictions as these were delivered online or after restrictions were lifted.

Table 4-4: Quantitative metrics for completed projects in rounds 1 to 4

Metric	Round 1		Round 2		Round 3		Round 4	
	Total	% target	Total	% target	Total	% target	Total	% target
No. of advice events	172	189%	482	93%	48	178%	114	115%
No. of households reached at events	1,368	124%	6,592	112%	2,022	153%	1,151	20%
No. of home visits	1,155	92%	2,741	73%	512	80%	1,015	91%
No. of face-to-face advice sessions	-	-	3,127	96%	1,984	91%	1,720	149%
No. of households attending workshop/talk/group session	-	-	-	-	20	400%	12	-
No. of telephone energy advice calls ⁹	986	548%	6,969	213%	3,478	211%	2,862	254%
No. of email/online advice interactions	-	-	-	-	689	125%	740	-
No. of training sessions (for partners)	3	75%	3,286	581%	10	77%	38	211%
No. of frontline workers/volunteers trained	517	245%	2,821	135%	434	104%	202	155%
No. reached by other means	985	-	4,180	308%	9,313	1,863%	76,771	-
Total distinct households reached with advice	5,013	189%	18,003	161%	15,118	240%	6,823	112%

⁹ 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 4-5: Quantitative metrics for completed projects in rounds 5 to 8

Metric	Round 5		Round 6		Round 7		Round 8	
	Total	% target	Total	% target	Total	% target	Total	% target
No. of advice events	366	90%	701	182%	394	163%	438	342%
No. of households reached at events	12,333	66%	23,191	130%	5,579	105%	15,008	177%
No. of home visits	6,588	32%	4,202	37%	2,150	32%	7,145	70%
No. of face-to-face advice sessions	5,408	23%	8,551	52%	2,058	55%	4,896	98%
No. of households attending workshop/talk/group session	2,263	87%	3,631	430%	2,106	259%	941	102%
No. of telephone energy advice calls ¹⁰	36,806	434%	16,916	233%	38,082	122%	26,733	140%
No. of email/online advice interactions	2,337	349%	6,870	110%	5,780	303%	8,282	144%
No. of training sessions (for partners)	609	142%	274	356%	346	692%	424	66%
No. of frontline workers/volunteers trained	4,807	148%	3,194	273%	3,330	278%	2,974	274%
No. reached by other means	1,232,905	4,652%	886,173	2,064%	60,488	-	272,205	4,253%
Total distinct households reached with advice	57,910	115%	69,396	124%	48,903	149%	51,128	161%

¹⁰ 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.

4.2.2. Completed projects quantitative analysis

Qualitative and quantitative data obtained from end of project reports, completed by each of the grantees selected for analysis, has been used to inform this section. Ten projects from rounds 9 to 13 have been selected for analysis. Since the cumulative outputs of all projects in rounds 1 to 6 have been presented in tables Table 4-4 and Table 4-5, they have featured in previous evaluation reports and have finished as far back as three years before the writing of this report, only completed projects from rounds 7 to 11 have been chosen for analysis. No projects in rounds 12 or 13 have been completed as of 19 June 2023.

Projects from the main and small funding streams have been selected to ensure a variety of project types are included in the analysis, as well as ensuring that selection does not discriminate against a project's capital costs or performance. Grantees have been assigned a letter to maintain anonymity within this report.

Tables Table 4-6 and

Table 4-7 show the final project outputs, self-reported by the grantees. Targets which have been met or exceeded are highlighted in green, targets highlighted in light green have been at least 90% met, cells in amber have met between 50% and 90% of their targets, and red are targets which have not been met. Note that these targets represent the latest targets for the project; some projects may have revised their targets as part of their COVID-19 mitigation plan. Additionally, some grantees have voluntarily reported outputs against metrics where they had no target to report against.

Table 4-6: Quantitative metrics for 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	26	-	89	51%	192	-	6	-	56	280%
No. of households reached at events	360	-	1,282	73%	4,811	481%	-	-	456	304%
No. of home visits	34	3%	1,090	84%	1,243	138%	36	18%	14	5%
No. of face-to-face advice sessions	11	3%	-	-	176	-	202	101%	1,353	146%
No. of households attending workshop/talk/group session	154	31%	70	-	-	-	-	-	128	-
No. of telephone energy advice calls ¹¹	17,040	95%	2,501	354%	8,833	147%	780	98%	1,114	844%
No. of email/online advice interactions	555	555%	196	55%	3,974	265%	-	-	24,470	1,631%
No. of training sessions (for partners)	19	-	61	122%	144	-	-	-	8	-
No. of frontline workers/volunteers trained	136	-	886	177%	1,343	-	82	205%	246	-
No. reached by other means	2,591	-	370	-	3,679	-	-	-	3	-
Total distinct households reached with advice	16,804	280%	4,873	129%	19,037	254%	1,000	100%	3,029	108%

¹¹ 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 4-7: Quantitative metrics for 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	90	-	277	277%	11	-	169	352%	-	-
No. of households reached at events	2,043	341%	3,619	145%	202	101%	1,222	339%	-	-
No. of home visits	2	10%	170	170%	70	140%	675	236%	-	-
No. of face-to-face advice sessions	1,091	273%	251	50%	206	103%	292	108%	-	-
No. of households attending workshop/talk/group session	1,489	-	441	-	-	-	-	-	-	-
No. of telephone energy advice calls ¹²	584	58%	67	67%	911	130%	409	249%	9,531	104%
No. of email/online advice interactions	6,088	609%	3,442	69%	514	129%	-	-	426	133%
No. of training sessions (for partners)	10	13%	11	-	-	-	32	133%	-	-
No. of frontline workers/volunteers trained	54	7%	7	-	-	-	349	233%	-	-
No. reached by other means	26,881	-	6,670	-	32,110	-	-	-	-	-
Total distinct households reached with advice	2,465	247%	7,990	133%	874	162%	805	114%	9,957	108%

¹² 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.

As the project aims and activities differ between each grantee, not every grantee has reported against each metric in the above table. Additionally, grantees have self-reported on further deliverables relevant to their project, not included in tables Table 4-6 and

Table 4-7, falling under the remit of:

- additional support provided to clients
- wider social benefits
- reports and evaluation
- capital measures installed with Redress funding
- measures installed through referrals to other schemes/organisations
- measured savings

A few examples of further project outputs recorded by each grantee have been included in Table 4-8 below – please note, however, that these examples are included to illustrate the wider impacts of the funded projects; they are not an exhaustive list of all the wider impacts delivered through each project.

Table 4-8: Examples of further quantitative deliverables reported by grantees

Grantee	Wider outputs
Grantee A	<ul style="list-style-type: none"> • Informed 15,229 about Warm Homes Discount and 4,082 about Priority Services Register, and referred 1,042 onto switching services
Grantee B	<ul style="list-style-type: none"> • Distributed 9,338 small measures, including 4,156 draught proofing measures and 3,104 LED bulbs
Grantee C	<ul style="list-style-type: none"> • Provided 643 people with benefit entitlement checks • Created nine full time jobs and secured an additional three full time jobs
Grantee D	<ul style="list-style-type: none"> • Informed or referred 236 around switching services and provided 540 with other support such as debt advice
Grantee E	<ul style="list-style-type: none"> • 111 new partnerships formed with other organisations and 660 referred on for additional support
Grantee F	<ul style="list-style-type: none"> • 96 workshop/talks/group sessions held and 947 referrals for wider health and wellbeing support
Grantee G	<ul style="list-style-type: none"> • Eight of the project team gained new qualifications and the project had 15 volunteers involved
Grantee H	<ul style="list-style-type: none"> • Distributed 1,018 small measures, including 703 LED bulbs and 154 radiator foils

Grantee	Wider outputs
Grantee I	<ul style="list-style-type: none"> 168 crisis payments made by the project and an additional 224 onward referrals for additional support
Grantee J	<ul style="list-style-type: none"> 3,804 informed about Priority Service Register, 3,146 provided with benefit entitlement checks, and 8,059 referred for other financial support, such as debt advice and crisis funding

4.2.3. Completed projects qualitative analysis

4.2.3.1. Achieving quantitative outcomes

As shown in tables Table 4-6 and

Table 4-7 above, the ten completed projects analysed did well to achieve their original project targets. 71% of all targets were met by the ten grantees, and in many cases, these were exceeded. This is similar to the 69% of targets met or exceeded by completed grantees in the previous evaluation in 2022. As was the case in last year's evaluation, grantees also delivered several other outputs in addition to those which they had aimed to achieve. The most salient example of this is the 72,304 individuals reached by other means, such as leaflet drops and social media.

All grantees met their target of reaching a distinct number of households with advice, and in many cases this target was greatly exceeded. In total, the ten grantees provided advice to 66,834 distinct households. Another success was most grantees meeting or exceeding their event related targets. Despite the disruption caused by the Covid pandemic, some grantees held online events to reach people and held in-person events at the latter stages of their project when restrictions had been lifted. Many grantees also learned to provide light touch advice by setting up a stall and reaching large numbers at well attended partner events.

As the completed projects delivered most of their home visits during periods of strict Covid restrictions, less than half of the grantees (44%) who set themselves home visit targets achieved them. Even after restrictions were removed, many of their vulnerable clients were hesitant to allow them to visit their home out of fear of catching the virus. To address the low number of home visits conducted, other equally effective methods of advice provision were utilised. This included face-to-face advice sessions, which provided clients with the opportunity to explain their issues in detail and ask any questions they had. Three grantees who had not met their home visit target exceeded their face-to-face target to counteract this, in one instance by up to 273%.

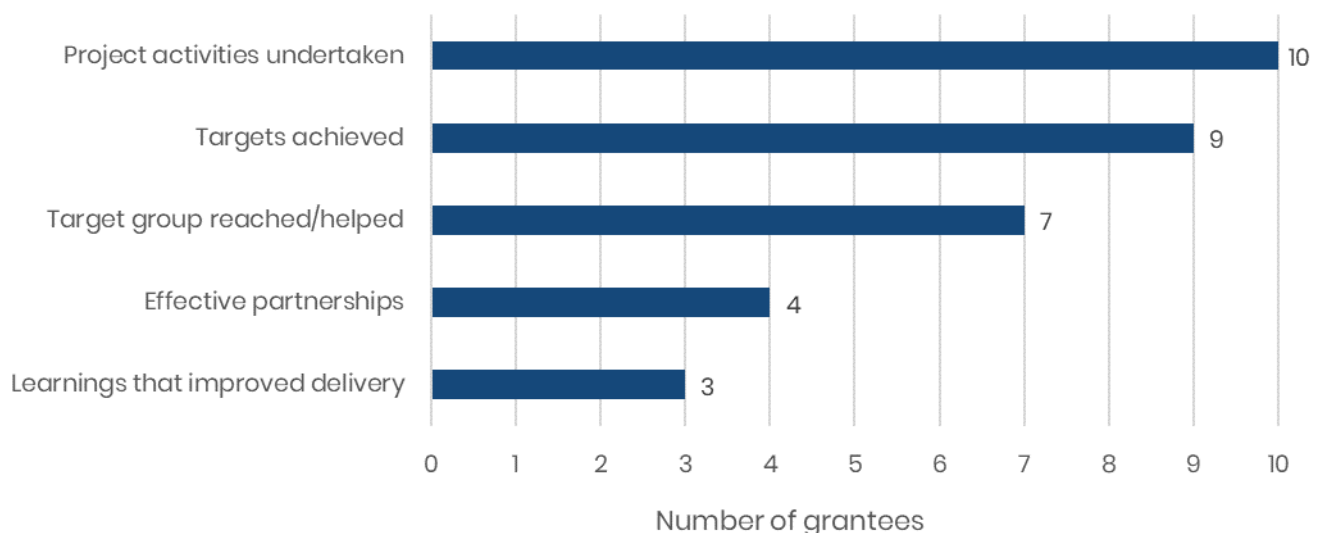
Other outputs delivered in the absence of home visits included telephone energy advice, although this target was not met by all grantees. Some grantees advocated the benefits of telephone advice, reporting that they were impactful in increasing client’s knowledge and were used as a first port of call where they could also be referred to other services being delivered by the project or other types of support being provided by external organisations. Email or online advice was also successful, with only two grantees failing to hit their target for these and many grantees greatly exceeding them.

Training frontline workers and volunteers was also a great success among these completed projects. 3,103 individuals were trained by eight of the projects, and three of the four projects who specifically targeted training were able to greatly exceed their metric. One grantee noted that the fuel poverty training was particularly successful at addressing their client’s issues, and also recognised that those who have received the training will pass on their skills to others.

4.2.3.2. Achieving project aims

Grantees were asked to define to what extent they believed they had achieved the original aims of their project. Nine (90%) believed that they had achieved their aim, while the remaining grantee (10%) believed that they had partially achieved their original project aim. This is slightly higher than the previous evaluation when eight grantees believed that they had achieved their aim, and two believed that they had partially achieved the original project aim. Figure 4-6 shows the reasons why grantees believed that they had achieved or partially achieved their aim. All grantees thought that they had achieved their project aim by delivering project activities, 90% reported achieving their original project aims by hitting their targets, and 70% stated that they had done this by reaching/helping their target groups, which included fuel poor, disabled people, those on low incomes, and other vulnerable groups.

Figure 4-6: Reasons for achieving or partially achieving project aim (n = 10, multiple responses coded)



Although only four grantees achieved all their project targets, nine believed that their project completely achieved its aims. Grantees noted that, although they were unable to deliver the specific outputs they intended, by reaching and helping their vulnerable target groups in innovative, risk-free ways, such as via telephone advice and online events and training, they have in fact exceeded their aims of advising distinct households and supporting those most in need.

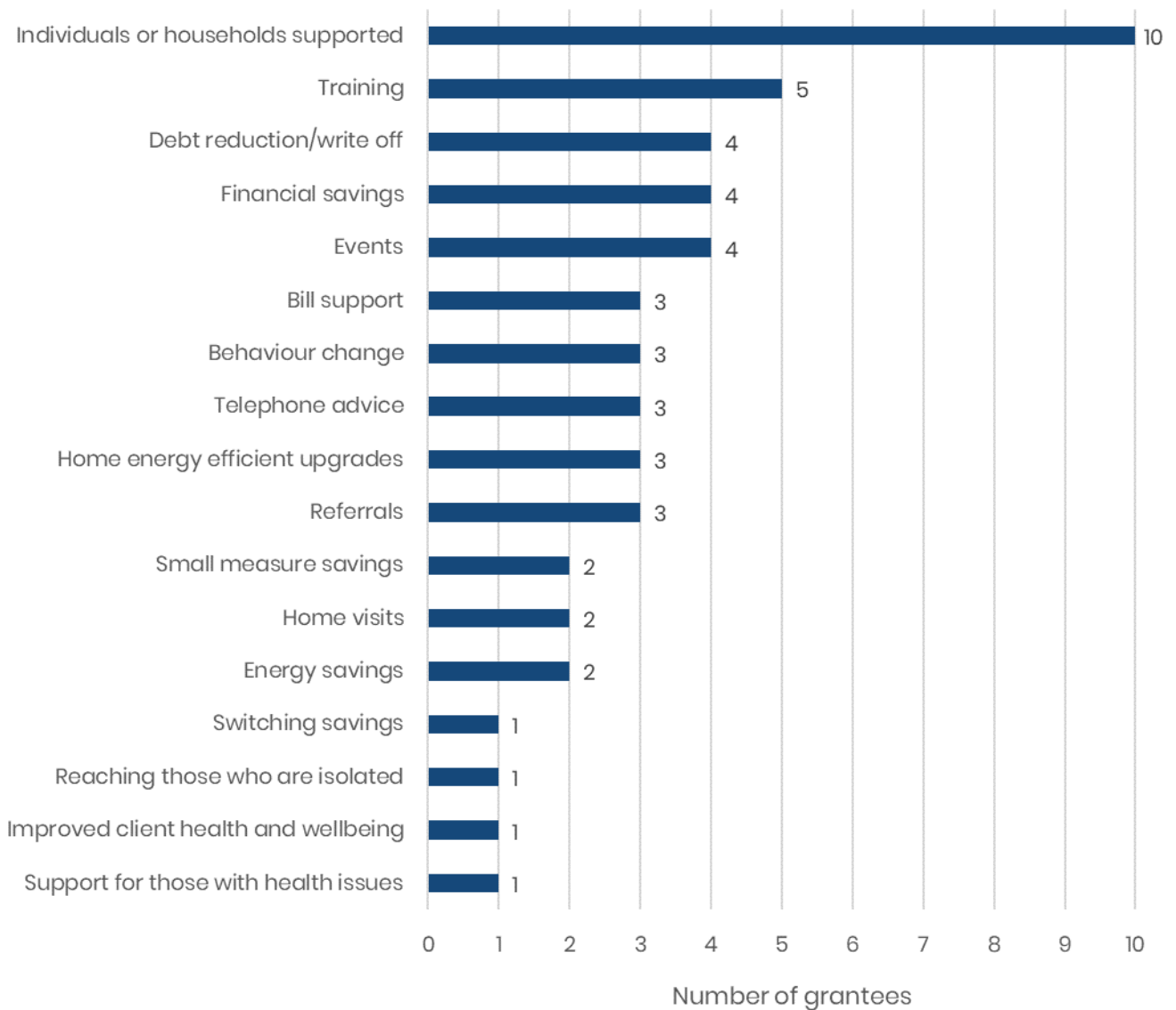
One grantee reported that they had only partially achieved their project aims. They explained that, due to the Covid pandemic, cost-of-living crisis and energy prices rises, they have not always been able to save householders energy through energy switching, installing draught proofing measures, and encouraging behavioural change. Despite this, they have still been able to hold draught proofing events and distribute energy saving measures such as LED lightbulbs, radiator panels and remote-control plugs, which have supported the initial aim of helping households save energy.

4.2.3.3. Significant deliverables

Grantees reported on what they felt were their most significant quantitative and qualitative deliverables achieved through their project, many grantees reported more than one significant deliverable. A summary of the most significant quantitative deliverables is presented in Figure 4-7. The most frequently reported deliverable, mentioned by all grantees, was the number of individuals/households supported, followed by training, which was mentioned by half of the grantees.

Many of the significant quantitative deliverables were mentioned by grantees analysed in the previous evaluation in August 2022. Individuals or households supported was also the most frequently reported quantitative deliverable last year, although this increased from 60% to all grantees. Only one grantee mentioned training in the previous evaluation, while half mentioned training in this evaluation, demonstrating the value that grantees see in having a skilled workforce to better support their clients. Furthermore, three grantees cited behaviour change as a significant deliverable, highlighting the effort that grantees are applying to not only fix surface level issues, but instil new behaviours that resolve energy and financial issues at their source. One reason why behavioural advice became more prominent was due to the fact that energy bills were high among all energy suppliers and therefore switching energy supplier to access a cheaper tariff was no longer viable.

Figure 4-7: Significant quantitative deliverables (n = 10, multiple responses coded)



Qualitative deliverables were also identified in grantees' reporting documents. The following types of qualitative deliverables achieved were reported by more than one grantee:

- partnerships (7)
- improved mental or physical health (6)
- holistic support (4)
- accessing further funding (3)
- improved living conditions (2)
- increased geographical reach (2)
- upskilled workers (2)

Partnerships, improved mental or physical health and upskilled workers were all reported by grantees as successful qualitative deliverables in the previous evaluation report, while holistic support, accessing further funding, improved living conditions and increased geographical reach were cited in this year's grantee reporting documents but not in last year's. An insight into each of the newly cited qualitative deliverables mentioned by more than one grantee is provided below; for more information on the deliverables mentioned last year, please see section 5.2.2.3 of the Evaluation Report 1 (Phase 1) published in January 2023¹³.

Holistic support

Four grantees reported that the delivery of holistic support, which aims to address all the client's problems rather than focussing on single issues, as a qualitative success. These grantees explained that they can tackle several of the energy and financial related challenges, which are often linked, with a variety of information, advice and guidance. Note that since non-energy related work is outside of the redress fund's scope, financial support is provided by external partner organisations only. If the project is not equipped to deal with the client's issues, grantees have said that they contact an organisation who they can refer the client to, ensuring that they access the support they need. This closely ties with the benefit of working with partners to support clients, as other organisations possess the knowledge and skills required to bridge any gaps in the project's scope.

Help accessing more funding

Three grantees reported that, owing to the success of their Energy Redress Scheme funded project, they have secured additional funding to improve or continue their project. One grantee explained that redress funding has given other funders confidence in their project now that it is established, and this has enabled them to leverage additional funding to extend the project. Another grantee said that the evidence of the impact that their project has had has encouraged donations from local business. The remaining grantee reported that they have secured funding from four other funders since their redress funding.

Improved living conditions

Two grantees cited improved living conditions as significant qualitative project deliverables. Both these grantees received feedback from clients in a wellbeing survey, in which they reported that the advice and small energy efficient measures that they were provided with has resulted in a warmer and drier home. One grantee also found that over a third of the survey respondents felt that the knowledge around energy and energy bills they were provided with was a key factor

¹³ [The Energy Redress Scheme Evaluation Reports | Energy Redress scheme](#)

for them to improve their homes, evidencing that the projects have empowered clients to change their behaviours and improve their living conditions and make financial savings.

Increased geographical reach

Two grantees noted that their project has delivered a consistent service over a wider geographic area. Both grantees said that the redress funding allowed them to widen their network in their region and create new relationships with their local authority and other organisations working in the area. One grantee reported that without the funding they would not have the resources to access isolated residents and provide them with the support they require.

4.2.3.4. Project issues and resolutions

This section outlines the issues that projects faced and how they overcame them. As was the case in the previous evaluation, COVID-19 was reported as a challenge by most respondents (60%). However, this number is lower than the 80% who reported Covid as an issue last year. This is to be expected as the impact of Covid subsides, but it also demonstrates that grantees have adapted well to the obstacles associated with the virus. For further details on the impact of Covid and grantees solutions to the issues they faced, please see section 5.2.3.4 of the Evaluation Report 1 (Phase 1) published in January 2023¹⁴.

Other project issues and grantee's solutions to these are as follows:

- **Rising energy costs (4):** an unstable and unpredictable energy market made it difficult for these grantees to provide their clients with support, as high energy prices across the industry meant switching services to an affordable tariff no longer became a viable option to reduce bills, and liaising with energy suppliers became more difficult as their demand increased immensely. Rising energy costs coupled with the cost-of-living crisis meant that alleviating people from fuel poverty became harder than when grantees began their project. **Solutions:** grantees referred clients to additional financial support from local authorities (2), explored new areas within the home (unspecified) where they could save households money (1) and employed a proactive approach to dealing with energy suppliers by contacting them before their clients faced issues (1).
- **Rising demand (4):** as energy costs and the cost of living increased, grantees became inundated with requests for support. Managing the number of clients who needed to use their service became an administrative problem. One grantee also mentioned that they had planned on delivering more face-to-face advice to assist their disabled clients but were unable to meet this unanticipated demand for in-person support. **Solutions:** grantees utilised other staff members who could support the project, such as the social media officer and communication team, to reach residents through their social media

¹⁴ [The Energy Redress Scheme Evaluation Reports | Energy Redress scheme](#)

platforms (2) and pooling resources into different teams, one example of this was pausing their callback option to focus on the rising number of inbound calls (2).

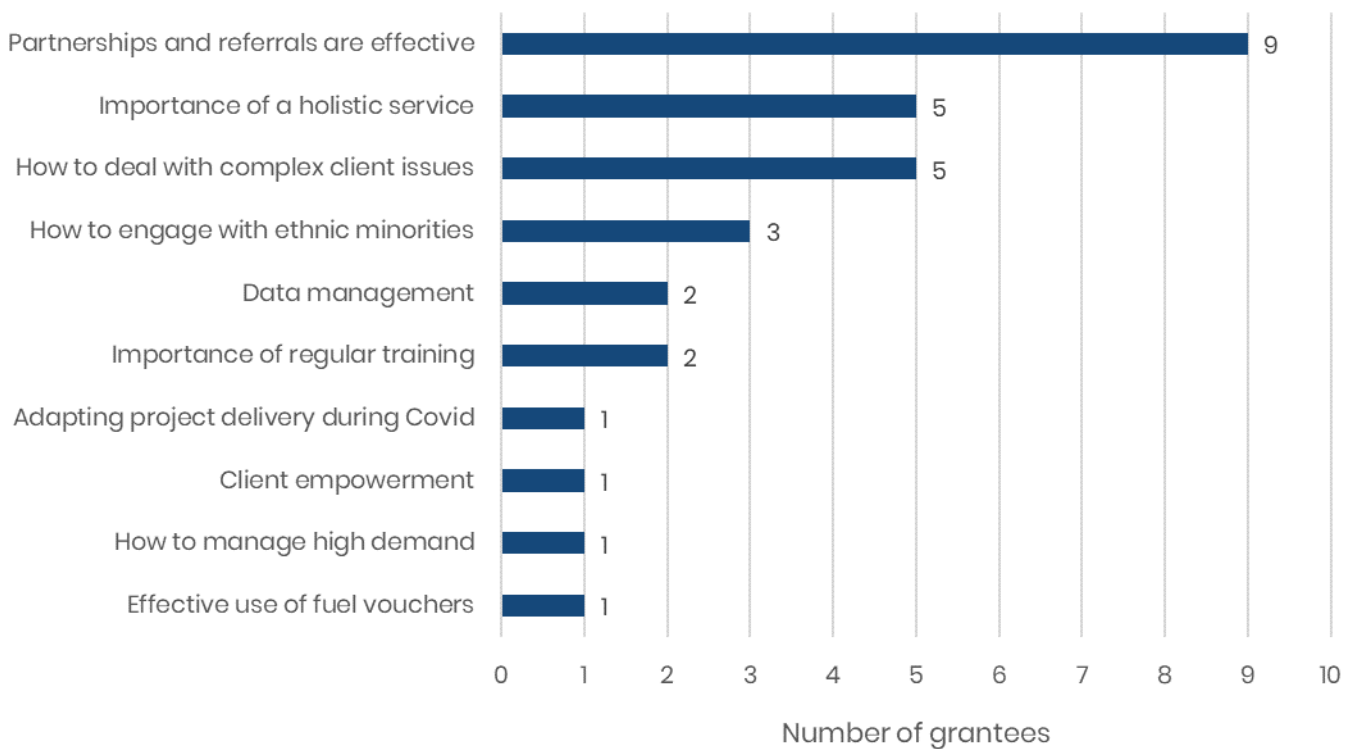
- **Complexity of client issues (2):** as grantees developed their casework with clients, it became ever clearer that their cases were becoming more complex and demanding. One grantee reported that it had become increasingly time consuming to identify and resolve the intricate problems their client's faced. **Solution:** grantees worked with partner organisations to better inform their staff to assist them with empowering householders (2).
- **Digitally excluded clients (2):** grantees found that they were not reaching those who were digitally excluded. Despite having the support of frontline workers, they realised that their information is largely provided as online resources rather than in print. Those who are digitally excluded are also often isolated, making engagement with them problematic. **Solutions:** grantees attended more in-person events that the digitally excluded would be more likely to know about (1) and partnered with local organisations to identify those most difficult to reach (1).
- **Staffing issues (2):** capacity within grantee's project teams was a barrier due to the combination of an increase in demand and recruitment issues. Grantees reported that it took a long time and many resources to recruit and train key staff. **Solution:** both grantees are looking to expand their project teams to ensure that any staff changes can be managed accordingly, as well as better meeting the demand for their service.

Other challenges that grantees faced included client communication issues when English is not their first language (1), data collection issues when their different partners gather information in different ways and record it in different formats (1) and receiving a lower number of referrals than anticipated (1).

4.2.3.5. Lessons learned

Grantees shared their lessons learned over the course of their project (Figure 4-8). The most frequently mentioned lesson learned was the effectiveness of partnerships (90%), followed by the importance of a holistic service (50%) and how to deal with complex client issues (50%).

Figure 4-8: Lessons learned over project lifetime (n = 10, multiple responses coded)



Partnerships and referrals learnings

Nine grantees reported that one of the key lessons that they learned during their project delivery was that partnerships and referrals are effective at ensuring that their clients are provided with all the support they need. This increased from five grantees in the previous evaluation, showing the benefits that grantees have realised by collaborating with organisations with similar aims. One grantee highlighted that by working with other agencies they can identify those who are vulnerable and socially isolated and provide them with the tailored support that they need to resolve their issues. Another grantee reported that they had learned how to effectively manage and share information between different partners, enabling efficient sharing of best practices. Strong partnerships with external organisations was said to be crucial by one grantee who learned to signpost clients to suitable organisations who are able to support them during periods of high demand when their service is under pressure.

Holistic service

Five grantees learned that providing a holistic service, which supports all the client issues, is the most robust way to ensure that the most vulnerable are provided with effective assistance. This method of support seeks not only to solve one of the surface issues that clients are experiencing, eg high bills, debt, cold homes, but to solve the cause of all the issues, via referrals to consistent financial support, behaviour change, and the installation of small energy measures, so that the

client is not subject to reoccurring issues in the future. Strong and effective partnerships were said to be key to delivering this holistic service, as the project can refer clients to other organisations or signpost them to other support that can provide solutions to certain client issues that the project itself may not be able to resolve.

Dealing with complex client issues

Learning how to deal with complex client issues, further complicated by high energy prices and the cost-of-living crisis, was reported as a learning by five grantees. Two of these said that they had learned how to become active listeners, whereby they would take the time to fully understand the depth of each client's issues in order to tackle their issue appropriately, while simultaneously improving their mental health. One grantee worked intimately with their clients to help them understand their energy costs and encouraged them to attend an energy bills workshop to learn about how the energy market has changed. Another grantee learned that follow-up checks a few weeks after they have provided a client with support is effective in ensuring that no lingering or reoccurring issues persisted.

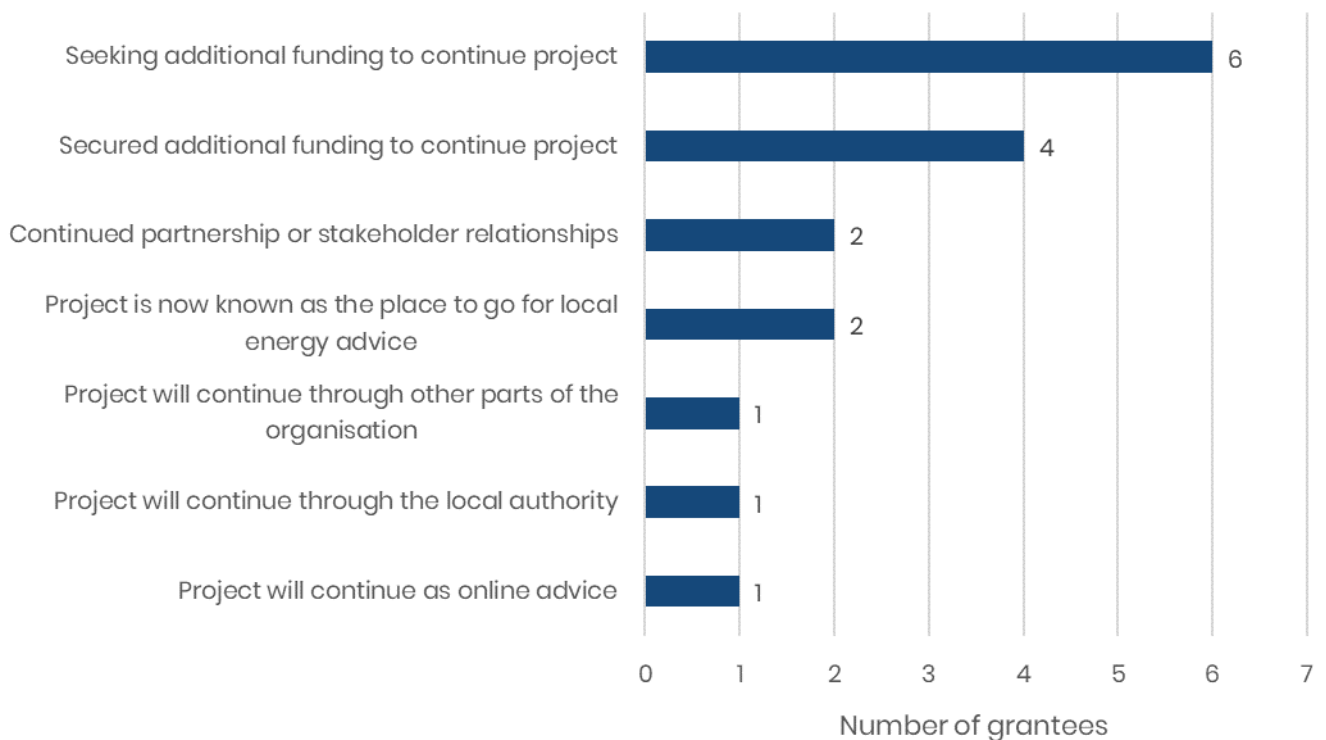
Engaging with ethnic minorities

Three grantees learned how to best reach and support different ethnic communities. One of these found that ethnic communities are the most difficult to engage with as they are reluctant to seek support, but this project overcame this challenge by tailoring their marketing tools and resources to gain their trust. One grantee found that their original aim of creating translated documents for non-English speakers was no longer needed, as this was already being provided by another organisation, so they have now worked closely with this new partner to focus on reaching isolated ethnic minority groups. Another grantee has been working with various ethnic groups and have held workshops to identify common ground and create an outreach effort that will support everyone.

4.2.3.6. Project legacy

All grantees provided at least one example of the legacy established by their completed project (Figure 4-9). Six grantees are currently seeking additional funding to continue their project, and four of these six have secured funds to keep their service going, although two admitted that this funding was considerably less than the redress funding and they would therefore need further funding to continue.

Figure 4-9: Project legacy (n = 10, multiple responses coded)



Specific examples from grantees regarding their project legacy include:

- The project created a new Customer Relationship Management (CRM) tool which the redress funding made possible and means that they can easily contact clients when new relevant support schemes become available, thus increasing their impact and efficiency.
- To meet the growing demand for their energy advice service, the project will expand by recruiting eight new full-time employees to provide specialist knowledge and build relationships with partners.
- The project was able to successfully bid for a second round of Energy Redress Scheme¹⁵ funding, which will allow the project to continue for another two years. The aim is to further embed the service at a grassroots level in the local communities, and to diversify the income that supports the service for it to be resilient and sustained via other funding streams. The long-term goal is to have a sustainable service model.
- The funding has allowed the project to grow in reputation in their local area, and for many frontline workers they are the first place to go for any issues related to energy. This reputation has allowed the project to secure further funding. However, these funds do not allow for the same level of support and are only short term, so the project has applied for

¹⁵ Subsequent projects funded through the Energy Redress fund are required to demonstrate additionality. This could be through reaching further households, for instance.

a second round of funding from the Energy Redress Scheme to continue their work with some improvements.

- As the project has other teams within their organisation, they are able to continue to provide support to their service users through the Benefits, Employment, and Health & Wellbeing teams. The project staff will be transiting into new roles within the organisation and their expertise can be carried over to provide a bespoke service.
- The project will not continue as its own entity but will be moved within the council. The project will continue to support residents who are struggling with fuel poverty, and residents can be referred to the council service.

4.3. 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 9 to 13 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 to ensure a variety of project types are included in the analysis. No projects from rounds 1 to 8 have been included in the progressing projects analysis as the majority of these have been completed as of 19 June 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 4-9 below.

Table 4-9: Aims of analysed progressing projects

Grantee	Project aim
Grantee K	The project aim is to empower 3,100 vulnerable energy consumers struggling to heat their homes and pay their energy bills, and to tackle fuel poverty's root causes: high energy costs, low income, and poor energy efficiency of home/behaviours.
Grantee L	The project will enable energy consumers in vulnerable situations to overcome financial barriers to achieving affordable warmth by providing energy advice and funding to pay for the repair/replacement of heating measures not supported by ECO.
Grantee M	The project will assist rural households where the consumer is vulnerable or affected by the impact of Covid, and not otherwise served by available support. They will give holistic and bespoke advice and support to address the root causes of fuel poverty.
Grantee N	The project aims to develop and test a service that enables consumers to benefit from expert retrofit advice, to support them through the install and to verify its outcomes. The project will target a mixture of able to pay and vulnerable customers.

Grantee O	The project aim is to ensure vulnerable households receive in-depth support to improve their financial resilience, confidence managing energy use and bills; warmth, comfort, and safety at home; and access to benefits they are entitled to.
Grantee P	The project aims to improve students' energy literacy by targeting action on energy efficiency behaviours, choosing energy efficient properties, improving their home efficiency and thermal comfort, and navigating the energy market.
Grantee Q	The project aim is to support people at the highest risk of fuel poverty by providing tailored, individual advice and practical help alongside access to preventable and capital measures.
Grantee R	To support vulnerable energy consumers to be warmer, safer, and healthier by providing a holistic approach that recognises the links between fuel poverty, avoidable health inequalities and well-being.
Grantee S	The project will test and refine a local delivery pathway for deep retrofit, identifying and working through barriers and opportunities around publicity, pre-assessment, surveys, cost/design, installation, post-install evaluation and feedback.
Grantee T	The project aim is to achieve a reduction in carbon emissions from domestic energy use by improving the energy efficiency of local housing stock and accelerating the transition to renewable energy sources amongst local households.

4.3.1. Progressing against quantitative targets

Tables Table 4-10 and

Table 4-11 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.

It should be noted, however, 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 (including weather and COVID-19 lockdowns and restrictions) can significantly impact on the number and form of advice interactions undertaken.

As described further below, projects have had to adapt their delivery approach due to COVID-19 and this is likely to have taken time and resource away from activities directly related to achieving targets. This is particularly the case for home visits, number of households reached at events and number of face-to-face advice sessions; the targets for most of these had not yet been met. However, some of these had been replaced with telephone energy advice calls, email or online interactions and other types of advice, the targets for which have mostly been met and in many cases have been greatly exceeded.

Table 4-10: Quantitative metrics for energy advice interventions grantees K to O

Metric	Grantee K		Grantee L		Grantee M		Grantee N		Grantee O	
	Total	% target	Total	% target	Total	% target	Total	% target	Total	% target
No. of advice events	73	111%	63	-	150	125%	57	-	43	-
No. of households reached at events	866	66%	295	61%	9	45%	1,754	88%	756	72%
No. of home visits	205	43%	71	36%	18	51%	202	67%	144	32%
No. of face-to-face advice sessions	797	34%	51	26%	9	113%	-	-	1,392	464%
No. of households attending workshop/talk/group session	493	-	4	-	248	97%	-	-	232	-
No. of telephone energy advice calls ¹⁶	1,206	97%	3,722	258%	-	-	556	111%	2,641	140%
No. of email/online advice interactions	3,691	159%	13	1%	9	-	4,946	99%	-	-
No. of training sessions (for partners)	4	-	-	-	137	343%	-	-	21	-
No. of frontline workers/volunteers trained	28	-	-	-	-	-	-	-	161	332%
No. reached by other means	-	-	1,000	-	425	99%	-	-	5,050	-
Total distinct households reached with advice	2,550	82%	3,827	147%	248	97%	1,785	179%	3,955	158%

¹⁶ 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 4-11: Quantitative metrics for energy advice interventions grantees P to T

Metric	Grantee P		Grantee Q		Grantee R		Grantee S		Grantee T	
	Total	% target	Total	% target	Total	% target	Total	% target	Total	% target
No. of advice events	25	-	249	-	82	-	26	100%	2	13%
No. of households reached at events	1,638	164%	557	80%	864	86%	1,616	108%	240	1,500%
No. of home visits	592	118%	50	25%	2,676	71%	101	67%	0	0
No. of face-to-face advice sessions	-	-	653	131%	206	28%	463	93%	0	-
No. of households attending workshop/talk/group session	167	84%	-	-	854	-	573	-	100	-
No. of telephone energy advice calls ¹⁷	-	-	998	77%	827	72%	234	156%	0	0
No. of email/online advice interactions	-	-	627	1,045%	258	103%	807	807%	155	29%
No. of training sessions (for partners)	-	-	3	-	26	-	-	-	11	-
No. of frontline workers/volunteers trained	-	-	-	-	374	125%	0	0	15	15%
No. reached by other means	249,532	2,546%	-	-	681	-	-	-	19,815	198%
Total distinct households reached with advice	2,397	36%	1,785	65%	1,582	53%	2,293	139%	3,022	1,119%

¹⁷ 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.

4.3.2. 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 (the number in brackets refers to the number of grantees who reported the issue/solution):

- **Staffing issues (4):** three of these grantees have seen staff and volunteers leave midway through their project, causing an interruption to its delivery and meaning that there is less capacity to support the service. One of these also mentioned that this impact on staff workload has caused feelings of stress. Two grantees reported problems with recruitment, one found it especially difficult to recruit debt advisors and the other struggled to recruit retrofit assessors and heating engineers. **Solutions:** speedily recruit more staff to fill the gaps left by staff and volunteers (2), recruit retrofit assessors outside of the Domestic Energy Assessor audience and offer to pay part of their training course (1) and implementing wellbeing sessions to minimise staff pressure and sickness levels (1).
- **Home visits behind schedule (3):** two grantees said that they have not been meeting their home visit target because they have been prioritising other types of advice, such as telephone advice or advice at in-person events, over home visits. The other grantee said that there is still a high demand for home visits from those who prefer them to other forms of advice, particularly elderly and infirm clients, but they had been struggling to meet their home visit target because they do not have the capacity to deliver them. **Solutions:** provide in-depth advice to people at in-person events (1) and via telephone (1) as a substitute for home visits; use volunteers to assist with home visits (1) and allow their partners, who have greater capacity and experience, to lead on home visit delivery (1).
- **Vulnerable clients not engaging (2):** one grantee reported that many vulnerable clients are digitally disengaged and do not appear in online workshops. The other said that they had experienced silent client drop-out, where householders have not confirmed their request for support and have distanced themselves from the service without reason. **Solutions:** hold in-person events where people have a sanctuary where they can enjoy hot food and drink and take advantage of a warm space during the winter (1) and continue to communicate with those who silently disengage with the service and substitute them with other people who need support until they come back into contact (1).
- **Underspend of capital costs (2):** one grantee reported that they had been struggling to deliver all their funded measures because of low demand for the project during Covid restrictions. The other cited a tight completion deadline and complicated eligibility criteria for their concern about spending all their capital costs. **Solutions:** more effort will

be channelled into achieving targets when high demand returns in colder months (1) and taking a case-by-case approach for each application to ensure clients satisfy eligibility criteria (1).

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

- Certain homes use biomass or wood burners as the primary heating source in their home which makes it difficult to monitor energy usage. An alternative means of assessing performance – a smart HTC (Heat Transfer Coefficient) test – will overcome this challenge.
- Difficulty in attracting builders to attend retrofit awareness courses. Online modules are now being offered so builders can complete them in their own space and time.
- Health and wellbeing referrals have been lower than expected as people are often receiving this type of support before they interact with the project. Other types of referrals, such as safeguarding service partners, are being explored instead.
- High price of energy means that financial advice is more difficult. Comprehensive budget plans and referrals to financial support will be used to support clients through hard times.
- Poor weather meant that turn out at some events was lower than anticipated. Email and online advice will be used to reach those who could not make the events.
- Reaching people at events was harder than anticipated. Volunteers have been used to monitor an active list of clients who need support to proactively engage with those who are most isolated.
- Return of events after Covid occurred later than anticipated, but telephone interviews continued to support clients when they were unable to meet in-person.
- Several students who took the City and Guilds accredited course have not yet completed the assessment due to high university workloads. Students will be allowed to complete the assessment after their exams are completed.
- Some clients have been returning in search of further support after initial contact. Financial advice sessions will encourage behaviour change with respect to budgeting and spending habits to empower their clients.

4.3.3. 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:

- **Complex client issues need to be understood (3):** with rising energy costs and inflation compounding existing financial and debt related issues, client cases are becoming more complicated. This is a particular issue for staff who must set up multiple appointments

with clients to address each of their different problems. Grantees have learned to allocate more time to these complex cases and untangle them accordingly so that all issues are resolved.

- **Events and workshops are an effective way of reaching vulnerable people (3):** grantees are learning to attend other organisations' energy or financial support related events and workshops to reach more people. At these events, grantees can set up their own stalls and engage with those who are digitally excluded or isolated and promote their project, as well as deliver light touch advice.
- **A holistic service can resolve multiple issues (2):** the need for deeper energy and financial related support was reported as essential to assisting vulnerable people with a multitude of problems. Providing this and referring or signposting to other organisations or funding schemes was cited as the most effective method of dealing with the root cause of client's multi-faceted issues.

Other learnings cited by one grantee each included:

- Householders want independent support that is impartial, bespoke, and clear, and they want to be informed of what is happening each step of the journey. Some householders want a lot of information, while others are happy with the essentials.
- Installers prefer practical training rather than online. Further education colleges are keen to build home retrofitting into their syllabus.
- Targeted email advice is an effective way to reach clients with discrete advice topics in a way that is easy for those with vulnerabilities to understand.
- Thermal imaging has had one of the biggest impacts with householders, and their reports are valuable alongside general energy saving tips.
- Rising demand for the project and all partner services shows the importance of the Energy Redress Scheme funding.

5. COVID-19 crisis fund and Winter Energy Fund evaluation

5.1. Project metrics

This section presents the outputs achieved by the COVID-19 crisis fund and Winter Energy Fund¹⁸ as of 19 June 2023. Table 5-1 provides a breakdown of the crisis fund by round. The table shows that 137 projects funded in seven rounds have utilised £9.63 million to distribute 200,270 vouchers to 144,853 households. The value of the vouchers is usually £49, although they can be £30 or less and recipients can receive up to three vouchers in total. The average amount received per household equates to £67 per household.

Table 5-1: Overview of the COVID-19 crisis fund by round (n = 137)

Round	Number of projects	Number of vouchers distributed	Number of households receiving vouchers	Funding spent by grantees
1	35	53,204	37,185	£2,546,898
2	26	12,112	8,199	£564,581
3	13	13,590	11,005	£612,994
4	18	24,569	18,801	£1,235,788
5	19	45,284	32,174	£2,148,665
6	10	33,398	24,682	£1,690,173
7	16	18,113	12,807	£839,536
Total:	137	200,270	144,853	£9,638,634

Table 5-2 provides a breakdown of the Winter Energy Fund by round. The tables shows that 66 projects funded in three rounds have utilised £8.4 million to distribute 176,436 vouchers to 121,524 households, which equates to £70 per household.

¹⁸ The third round of the Winter Energy Fund is included under the new contract but has been included within this report for completeness in order to cover activity that has taken place so far.

Table 5-2: Overview of the Winter Energy Fund by round (n = 66)

Round	Number of projects	Number of vouchers distributed	Number of households receiving vouchers	Funding spent by grantees
1	27	70,820	45,588	£3,337,844
2	23	59,981	43,586	£2,898,812
3	16	45,635	32,350	£2,204,739
Total:	66	176,436	121,524	£8,441,395

5.2. Lessons learned

This section outlines the key lessons learned from grantees who were awarded funding in Rounds 1-7 of the COVID-19 crisis fund and rounds 1-3 of the Winter Energy Fund. In the reporting documents that grantees submitted, they provided details on the successful methods of project delivery and the challenges they experienced when distributing the vouchers. Ten grantees were randomly selected to have their reporting documents analysed to understand the key lessons they learned when issuing vouchers. One grantee was chosen from each of round of funding that has opened as of 19 June 2023 to provide a balanced insight of the crisis fund and the Winter Energy Fund in Phase 1 of the Energy Redress Scheme. All rounds of the COVID-19 crisis fund and Winter Energy Fund have concluded.

Table 5-3 shows the key metrics for voucher distribution for the ten grantees whose reporting documents were analysed to understand the successes and challenges of issuing vouchers. Included within the table is the total number of vouchers issued and money spent on vouchers alongside the percentage of target vouchers issued and target spend on vouchers, respectfully.

For most grantees, the total number of vouchers issued exceeds the target number of vouchers issued, and for all the total spend on vouchers is less than the target spend on vouchers. For some grantees, this was because the value of some of their vouchers was lower than they had forecasted in their initial request for funding (eg some organisations issue lower value vouchers for single-person households or during the summer months) so they were able to distribute more than they originally budgeted for. Other grantees were provided with additional funding from other sources which helped them to issue more than they had initially targeted.

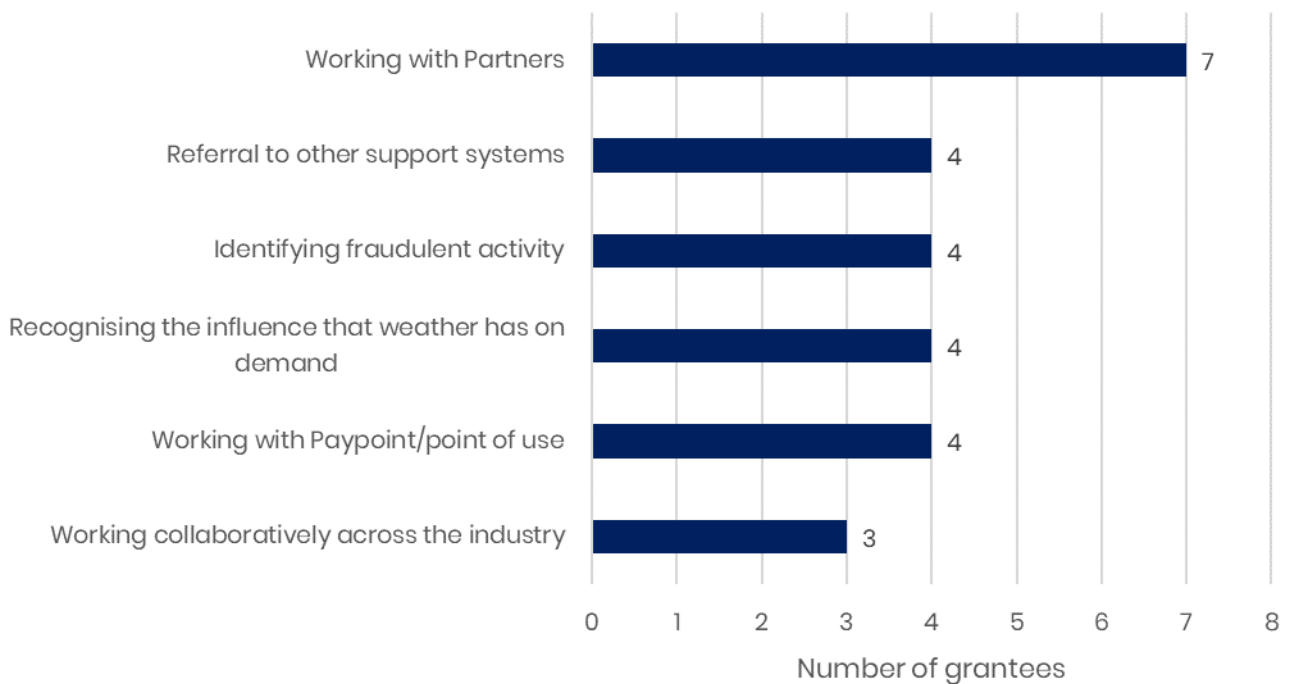
Table 5-3: Key metrics for 10 COVID-19 Crisis and Winter Energy Fund grantees whose reporting documents were analysed (n = 10)

Grantee	Fund	Round	Target of vouchers issued	Total vouchers issued	Number of households receiving a voucher	Target spend on vouchers	Total spend on vouchers
Grantee 1	Crisis fund	1	850	859 (101%)	612	£56,274	£42,992 (76%)
Grantee 2	Crisis fund	2	600	600 (100%)	268	£35,850	£31,440 (88%)
Grantee 3	Crisis fund	3	5,655	5,938 (105%)	4,122	£300,000	£263,577 (88%)
Grantee 4	Crisis fund	4	750	910 (120%)	670	£38,775	£37,986 (98%)
Grantee 5	Crisis fund	5	1,495	1,531 (102%)	568	£81,281	£71,459 (88%)
Grantee 6	Crisis fund	6	5,000	5,000 (100%)	4,604	£275,600	£242,000 (88%)
Grantee 7	Crisis fund	7	1,200	1,169 (97%)	757	£65,703	£57,695 (88%)
Grantee 8	Winter Energy	1	900	900 (100%)	797	£56,160	£47,421 (97%)
Grantee 9	Winter Energy	2	1,260	1,268 (101%)	656	£75,789	£66,947 (88%)
Grantee 10	Winter Energy	3	3,000	2,967 (99%)	1,104	£187,200	£157,800 (84%)

5.3. Best practice

All 10 grantees whose reporting documents were analysed as part of the crisis fund and Winter Energy Fund evaluation provided information on best practices when distributing vouchers. Figure 5-1 shows that these best practices included successful methods of delivering vouchers, the most frequently mentioned being working with partners (7), followed by referral to other support systems (4), implementing an internal process to quickly identify suspected instances of fraudulent activity (4), recognising the influence that weather has on demand (4) and working with vendors such as Paypoint (4).

Figure 5-1: Best practises identified in crisis fund and Winter Energy Fund reporting (n = 10)



Seven of the ten grantees reported working with referral partners as a key success when distributing vouchers. This was also the most frequently identified best practice in the previous evaluation in August 2022, when seven respondents mentioned its importance. By working with other organisations in their local community, grantees were able to easily identify their target recipients and therefore distribute their vouchers faster than they would have been able to otherwise. Some benefits associated with working with referral partners included being able to distribute more vouchers, ensuring vouchers reached vulnerable users and strengthening new and existing relationships.

Four grantees reported that they had included referrals to other support programmes. This was specifically highlighted by grantees using the COVID-19 crisis fund. The support included training, development and back to work assistance given the number of applications experiencing layoffs during COVID-19. Further support provided included grant funding for energy efficiency measures, warm home discounts, information on how to reduce energy use, health, debt and financial support.

Four grantees noted that they had precautionary processes in place to detect fraudulent applications. Examples of these internal processes included requiring ID to redeem vouchers, sending evidence of a pre-payment meter or credits, and conducting stringent checks on names, addresses and phone numbers before issuing the voucher. However, grantees reported that this process increased processing time for staff, and it also created a barrier for some vulnerable applicants (ie, language or cultural barriers). Moreover, those who could not access or manage the technology were required to send evidence, with one grantee experiencing a

high dropout rate. To avoid this these grantees introduced fraud mitigation questions that could be asked by phone or accepted vulnerable clients from external organisation referrals where appropriate. Two applicants reported fraudulent claims, both centred around either one area or a specific referral point.

Four grantees acknowledged that the weather had a major impact on the demand for vouchers. This was also mentioned by three of the grantees analysed in the previous evaluation report in 2022, and by five in 2021. The grantees highlighted that, unsurprisingly, during cold months, when consumers used more energy at home, the demand for vouchers increased rapidly. Other grantees recognised that during warmer months, when the weather was more comfortable and consumer's need to use gas and electric was reduced, the demand for vouchers was far lower. Some grantees reported that planning ahead to manage high demand during cold months and expecting low uptake of vouchers in warmer months allowed them to manage their voucher distribution accordingly.

Six grantees reported that clients had experienced issues redeeming vouchers from vendors. Four grantees highlighted that they worked directly with vendors, specifically Paypoint, to help address these challenges. This helped to raise awareness of how to use the vouchers and increase the number being redeemed.

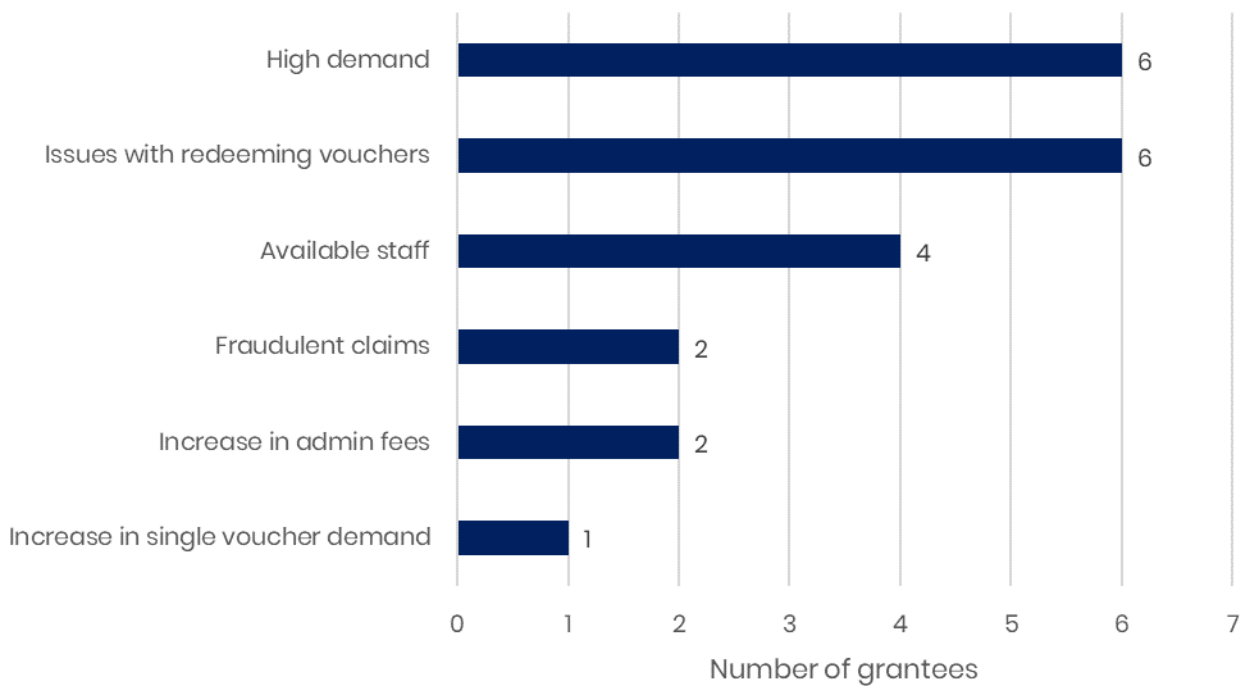
In addition to the approaches outlined above, other specific strategies that were each only mentioned in one of the analysed grantee's reporting documents included:

- Follow-up on customers who have not redeemed their vouchers, particularly during quiet periods.
- Mapping the vouchers redeemed to identify vulnerable populations and postcodes.
- Steadily increase voucher distribution to effectively manage demand.

5.4. Key challenges

Within their project progress reporting, grantees also described the challenges that they experienced when issuing vouchers. Figure 5-2 illustrates that the two main challenges that grantees faced were high demand for vouchers (6) and clients experiencing issues when redeeming vouchers (6). Clients experiencing issues when redeeming vouchers (4) was also the most frequently mentioned challenge in the previous evaluation report in August 2022, alongside dealing with fraudulent claims (4; 2 in this evaluation).

Figure 5-2: Challenges that grantees experienced when distributing vouchers (n = 10)



Six of the ten grantees reported that high demand for vouchers was a challenge. This frequently related to the lack of staff available to issue vouchers and support administration. Two grantees specifically highlighted staff illness and a further two reported reduced staff numbers during the winter months when the demand is highest. To address this issue many grantees allocated additional staff resources to the project and strived to reduce administration workload. However, this was challenging while trying to balance a robust process to reduce fraudulent claims and ensuring vulnerable people could access vouchers. High demand was a particular issue in winter months, and as stated above many grantees planned their resources in anticipation of this increase. Grantees stated other factors that impacted the increase in demand including an increase in energy bills, changes in furlough schemes and lockdowns increasing energy use at home. They frequently reported that the demand for vouchers was higher than the number available and expressed interest in further rounds of funding.

Six of the ten grantees mentioned that their clients experienced issues when redeeming vouchers. For five of these grantees, the issues related to challenges with the vendor and point of use ie in shops. Grantees reported working with vendors to ensure that they were aware of the scheme and would process the vouchers appropriately when received. Many highlighted that this initially increased administration time, however it resulted in an increase in redeemed vouchers and improved applicants' experience. Grantees also reported that the issue in redeeming vouchers related to the clients themselves. This was addressed by educating vendors and collaborating with referral partners such as frontline workers to help clients redeem their vouchers correctly.

Two grantees reported that they had to deal with suspected instances of fraudulent activity when issuing their vouchers, compared to four citing this in August 2022. Both grantees reported that fraudulent activity was detected from cluster areas, either from a specific referral point or area. As shown in the Best practice section above, grantees implemented stringent measures in order to identify and revoke any fraudulent attempts at receiving vouchers, but this requires project time and resource that could be put to better use.

Other challenges included an increase in administration fees impacting the number of vouchers they could issue (2) and an increase in single voucher demand (1).

6. Conclusion

In order to determine whether the Energy Redress Scheme has achieved its aims, the overall impact on end consumers of projects delivered by charities 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.

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

- **All grantees under the main and small grant funds have supported energy consumers in vulnerable situations.** An analysis of all 128 completed projects' (as of 19 June 2023) final reporting documents showed that 17 different types of vulnerable groups have been supported, with vulnerable people in fuel poverty being the most supported group across all completed grantees to date (78%). This was followed by vulnerable people with mental/physical health conditions (60%). It is important to note here that respondents were not specifically asked to report on the vulnerable groups that they have supported through their projects, and therefore the actual percentage of the types of vulnerable groups supported by all completed projects is likely far higher.
- **14 charities have been awarded a grant from the Energy Redress Scheme Innovation Fund in Phase 1.** The Innovation Fund is aimed at developing products or services which are truly innovative and not currently accessible to energy consumers or certain groups of energy consumers. Two Round 1 projects, one Round 2 project, one Round 5 project and one Round 10 have been completed, and the remaining nine projects (awarded under rounds 10, 11, 12 and 13) are still in progress. The total grant amount for all 14 projects is £3,108,250.

2. Evaluating the impacts of redress projects on end energy consumers¹⁹

The Energy Redress Scheme funds projects which support energy consumers in vulnerable situations. Key deliverables from projects funded in rounds 1 to 13 include:

- 402,066 distinct households have received advice.
- 104,912 people were advised at events.
- Upwards of 225,080 telephone advice sessions.
- 135,232 households have been advised online or via email or online activity.
- 39,752 home visits have been delivered.
- 58,500 people have received face-to-face advice such as drop-in sessions.

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

Capital measures installed from projects funded in rounds 1 to 13 include:

- 118,016 small energy efficiency measures were installed or provided to households with redress funding (such as LED bulbs, draught proofing, power down devices and radiator foils).
- 12,147 other measures installed²⁰ as a result of referrals to partner organisations (including insulation and boiler replacements).

Some projects have quantified or estimated the impact of advice and measures installed. These projects have recorded the following savings from activity delivered by projects funded in rounds 1 to 13 as of 19 June 2023:

- 16,909,773 kWh estimated annual energy savings through advice and measures installed.
- £2,022,322 actual annual energy bill savings from advice.
- £17,381,664 estimated annual bill savings from energy advice.

¹⁹ The figures in this section are correct as of 19 June 2023; please note many projects are still in progress therefore figures are subject to change.

²⁰ 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.

In addition to energy bill savings projects can also result in actual financial gains (for example, through income maximisation, debt write-off etc.) for households. As of 19 June 2023, £41,928,047 of actual financial gains has been achieved from rounds 1 to 13 projects, noting some of these projects are still in progress. Furthermore, grantees provide a wide range of support directly to their clients and through onward referrals to other services.

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

Through the Energy Redress Scheme 402,066 distinct households have been reached with advice thus far. This figure includes both households which have received in-depth energy advice, and households who have received 'light-touch' energy advice. When considered against the funding distributed to date, the amount of grant money distributed equates to £65.12 per household reached, although this figure is likely to be lower due to projects delivering wider activities outside of, or in addition to, household energy advice.

Additionally, the following points provide a breakdown of the costs and quantifiable outcomes associated with the Energy Redress Scheme and the total support that projects from rounds 1 to 13 have delivered using this funding:

- 13 rounds funding 201 projects since launching in August 2018, with 128 of these projects completed as of 19 June 2023.
- Over £35.3 million awarded to grantees delivering projects across England, Scotland and Wales.

Grants worth £35.3 million have been provided, and over £26.1 million worth of activity has been delivered and reported on to date – 74% of total funding awarded in 13 rounds. The following key metrics²¹ demonstrate what has been delivered for over £26.1 million of grant distributed to date²²:

- 402,066 distinct households have been provided with energy advice to date.
- 118,016 measures have been installed or provided to households directly and via advice referrals to other funding sources.
- Estimated savings that have been reported so far by grantees as a result of activities delivered using the funding include:
 - 16,909 MWh of annual energy savings through advice and measures installed.

²¹ It should be noted that projects have different aims, activities and targets therefore each project does not report a quantifiable gain against every project metric listed below.

²² Note that savings are expected to increase significantly as further project activity is undertaken.

- £17.4 million of annual bill savings from energy advice.
- £2.5 million of annual bill savings from small measures (LEDs etc).
- Actual savings that have been reported so far by grantees attributable to the funding include:
 - £2.5 million of annual energy bill savings from advice.
 - £41.9 million of financial gains from benefits advice, debt write-off etc.

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

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

The key lessons learned identified by grantees in this report include:

- The importance of partnerships and referrals to provide holistic support to vulnerable clients. Maximising other types of support can help to solve client's root issues and reduce their likelihood of requiring further support. Other benefits of a successful partnership include sharing best practice, identifying socially isolated and digitally excluded people and alleviating demand.
- Learning how to resolve complex client issues. The volatile energy market and rising cost of living has resulted in multiple, entangled problems for clients. Spending more time to address these various issues, actively listening to clients, utilising partners and other types of support, and follow-up appointments were all successful tactics used to resolve this.
- Using events and workshops can help to reach disengaged people. Grantees learned to attend and often set up a stall at large events held by external organisations to engage with people who are otherwise hard to engage with. At these events, the project can deliver light touch advice in-person, or identify customers for more in-depth advice.

The most significant barriers and the solutions to these were identified in the report. These included:

- Staffing issues. Employees and volunteers leaving the project midway through its delivery disrupted its capability to complete certain outputs, having an adverse impact on remaining staff's mental health. Recruitment was reportedly time and effort consuming

and distracted from the project's delivery. To resolve these issues, grantees speedily recruited to fill capacity gaps and hosted wellbeing sessions to reduce stress.

- Rising energy costs. It became increasingly difficult for projects to deliver effective support as energy costs soared across the industry and the cost-of-living rose sharply, meaning some successful support mechanisms that were previously effective, such as switching suppliers, were no longer saving clients money. In response, grantees increased referrals to funding schemes and proactively assisted their clients when dealing with their energy supplier.
- High demand. With the increase of energy prices and the cost-of-living, many projects became overwhelmed with the number of people seeking support. Grantees reallocated their employees and volunteers into high demand positions within the service, such as the inbound calls.

Further barriers included the complexity of client issues, home visit targets, vulnerable clients not engaging, underspend of capital costs and reaching digitally excluded clients.

5. COVID-19 crisis fund and Winter Energy Fund

The evaluation of the COVID-19 crisis fund and Winter Energy Fund aims to:

- (i) Learn best practice and understand the challenges projects faced.
- (ii) Evaluate the impacts on end energy consumers.

Grantees of the COVID-19 crisis fund and the Winter Energy Fund have distributed vouchers to those on pre-payment meters at risk of self-disconnection across England, Scotland and Wales. Key findings from the evaluation are as follows:

- (i) Best practices identified by grantees included:
 - Working with referral partners to easily identify target recipients, being able to distribute more vouchers, ensuring vouchers reached vulnerable users and strengthen new and existing relationships.
 - Referring applicants to further support systems or advice services to help address underlying causes of fuel poverty.
 - Implementing an internal process to quickly identify suspected instances of fraudulent activity, while ensure the process doesn't create a barrier to vulnerable users.

- Recognising the impact of weather on demand by planning ahead during the summer months to prepare for the high demand in the winter months.
- Working with vendors to increase awareness of fund and how to redeem vouchers.

Key challenges associated with delivering the projects included:

- High demand for the fund and available staff resources to issue vouchers.
- Vendors not accepting or redeeming vouchers.

(ii) Key impacts of the COVID-19 crisis fund on end energy consumers are as follows:

- Over £9.6 million spent on vouchers by 137 organisations to date²³
- 200,270 vouchers distributed
- 144,853 households have received vouchers

Key impacts of the Winter Energy Fund on end energy consumers are as follows:

- Over £8.4 million spent on vouchers by 66 organisations to date¹³
- 176,436 vouchers distributed
- 121,524 households have received vouchers

²³ This figure does not include any charity admin fees.