

**energy  
saving  
trust**

# Ofgem Energy Redress Scheme Evaluation Report

November 2022



## Contents

1.	Executive summary	3
2.	Introduction	8
3.	Evaluation aims	9
4.	Methodology	10
5.	Energy Redress scheme evaluation	12
6.	COVID-19 crisis fund and Winter Energy Fund evaluation	41
7.	Conclusion	47

# 1. Executive summary

## 1.1. 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 redress fund in lieu of, or in addition to, a financial penalty for breaches of licence conditions. This voluntary payment is to help remedy any harm to consumers in addition to compensation to those directly affected. 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 8 August 2022, 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 – a qualitative review of a sample of 10 projects that have completed since the last evaluation report (August 2021).
- 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 projects (eight completed and two active).

The focus of this evaluation 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 Energy Redress scheme opened in May 2022 under a new contract. A separate Evaluation report will be prepared for Phase 2 covering activity relating to grants issued after 5<sup>th</sup> May 2022.

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

- **Grants worth £35.3 million** have been provided (an increase of £8.3 million provided since the previous evaluation in August 2021).
- Over **£20.7 million worth of activity has been delivered** and reported on to date – 59% of the total funding awarded in rounds 1 to 13 (£3.9 million worth of activity delivered since the previous evaluation in August 2021).
- **294,660 households** have been provided with energy advice to date (an increase of 166,071 households provided with advice since the previous evaluation in August 2021).
- **84,518 capital energy and fuel saving measures have been installed or provided to households** (an increase of 58,581 capital energy and fuel saving measures installed since the previous evaluation in August 2021).

- Estimated financial savings that have been reported so far by grantees as a result of activities delivered using the funding include:
  - **over 12,000 MWh of annual energy savings** (increased by 7,000 MWh since August 2021)
  - **over £12.5 million of annual bill savings from energy advice** (increased by £6.5 million since August 2021)
- Based on the cost of activity delivered so far, the data shows that the average cost of support per household is £70.25 (up from £67 in the previous evaluation in August 2021).

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

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, the key successes highlighted in the reporting documents analysed in this evaluation are similar to those identified in the previous evaluation report in August 2021:

**Vulnerable customers:** The 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.

**Legacy:** Grantees have provided examples of the legacy secured by their completed projects. This includes receiving additional funding from the Redress fund or other sources to continue or expand their project, continued partnership/stakeholder relationships and study findings and potential further research.

**Partnerships:** Nearly all the grantees identified forming or strengthening partnerships as beneficial to the delivery of their project. Grantees noted the wide-ranging benefits of working with referral partners, such as easily identifying target recipients, being able to distribute more vouchers, reducing client's costs and saving time by reducing administration burdens.

**Improved wellbeing:** Many grantees reported improved wellbeing as a significant outcome, particularly in the context of the COVID-19 pandemic. Projects reported reducing client anxiety and stress by reducing their energy bills via switching tariffs as well as making behavioural or measure improvements to reduce the amount of energy used. Furthermore, simply having a friendly conversation with their clients had a massive impact on improving their mental health.

**Empowerment:** The improved knowledge base achieved by clients through the projects will continue to raise awareness and increase empowerment in fuel-poor communities, allowing informed clients to manage their own energy bills.

Other qualitative impacts and successes identified by grantees that were not reported in the previous evaluation in August 2021 included:

**Promotion of the project/organisation:** Some grantees reported that they saw an increase in demand for their services and advice after they had delivered quality support to their clients. These clients were grateful for their help and as a result have referred their friends and family to the project. This not only promotes the project via word of mouth, but also increases the project's reach as individuals who are typically difficult to engage with were informed of the project.

**Effectiveness of holistic support:** A flexible, holistic approach to providing support was reported to have been extremely beneficial in supporting vulnerable people with all their basic needs. Grantees noted that many vulnerable people are experiencing various hardships during a time of unprecedentedly high energy bills and increased cost of living, be that fuel poverty, difficulties paying their rent or mortgage, or struggles with debt. Providing support that tackles multiple issues – or referring the vulnerable person to another organisation who can provide the support – has been effective in tackling all the issues that vulnerable people are faced with.

As was the case in the previous evaluation in August 2021, the most significant barrier to project delivery identified by all almost all evaluated grantees (80%) was the **COVID-19 pandemic**. COVID-19 has impacted event delivery and home visits, created staffing issues, delayed training and meant that grantees were unable to install as many measures as they had initially planned. Some grantees had their entire project put on hold; grantees whose projects were already operational when the COVID-19 pandemic began were offered the opportunity to submit a COVID-19 mitigation plan for their project.

Lessons from COVID-19 include:

- **Adapting service provision** – home visits, events and training were all held online after they were disrupted by restrictions. Although those who are digitally excluded may not be able to receive advice remotely, certain grantees reported that video calls and telephone advice were as effective as home visits and allowed the project to interact with more individuals due to time and resource savings.
- **Engagement** – several grantees shared how they changed the way they promoted their project, by using social media campaigns, articles and leaflets, the latter of which were included in food parcels. The advice itself has also evolved as clients' concerns shifted to financial security. The nature of the advice provided therefore adapted to meet the growing need for money saving advice.
- **Training** – of staff and volunteers was impacted by Covid restrictions, but grantees adapted to this well by delivering training and sharing best practices online.

Other lessons learned so far by grantees included partnerships and understanding client's needs and concerns, both of which were identified in the previous evaluation in August 2021:

- **Partnerships** – several grantees specifically highlighted that the partnerships have enabled their organisation to close any gaps in the services provided by the project to ensure as many types of vulnerable people are assisted. Grantees have also learned that they can work with partners to provide clients with holistic support that meets all their needs.

- **Understanding client's needs and concerns** – it is important to understand the needs of vulnerable clients, both in terms of the complexity of client issues and that often they will have multiple problems to deal with at once. The complexity of client issues and the more intensive support this requires means organisations need to allocate sufficient resources. Working with other organisations can relieve this pressure on the grantee and provide bespoke solutions to the client.

One lesson learned that was not mentioned in the previous evaluation report was how to navigate the client journey:

- **Navigating the client journey** – supporting the client right the way through from initial engagement to delivering the advice or measures was noted as a challenge. Developing strong referral pathways with reliable partners can benefit both the grantee and the client at different stages of the client journey.

## 1.2. 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 8 August 2022, **137 grantees have been successful** in applying for the COVID-19 crisis fund. These grantees funded over seven rounds have utilised **£9.64 million** to distribute **200,270 vouchers** to **144,853 households**.

To date, **50 grantees have successfully applied** for the Winter Energy Fund. These grantees have been funded in three rounds and have utilised over **£5 million** to date to distribute **106,022 vouchers** to **67,458 households** thus far.

In order 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 shared by grantees in their reporting documents highlighted successful methods of delivering vouchers. Three of these best practices were identified in the previous evaluation report in August 2021:

- 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, reducing client's costs and saving time by reducing administration burdens.
- **Utilising databases of existing clients** – to maximise the number of vouchers distributed, grantees identified vulnerable customers within their own contact list that may require support. This was an efficient method of quickly distributing vouchers to households who they already had contact information for.
- **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 two new strategies to effectively distribute their vouchers:

- **Deploying a marketing strategy to raise awareness** – webinars, home visits (after Covid restrictions were lifted) and targeted emails were all utilised to encourage the uptake of 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.

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

- **Clients experiencing issues when redeeming vouchers** – these issues are related to the mental health and the vulnerability of the client, who is unable to redeem their vouchers because of their difficult circumstances. Extra assistance for these vulnerable people is crucial.
- **Dealing with suspected instances of fraud** – which requires project time and resource that could be put to supporting more vulnerable people.

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.

## 2. Introduction

Energy Saving Trust has been appointed by Ofgem to distribute voluntary payments made as a result of Ofgem investigations. Under Ofgem's redress process, organisations who are found to have breached a license condition or were part of an investigation or compliance case can agree in settlement to make payments to the voluntary redress fund in lieu of, or in addition to, a financial penalty for breaches of licence conditions. 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.

### 2.1. 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 will distribute up to £10 million through eligible charities that have registered with the Energy Redress Scheme and have passed the due diligence assessment. As of 8 August, three rounds of funding have issued 50 charities with vouchers since the first round began in December 2021, with each round lasting six months.



### 3. 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 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. 82 projects have been completed whilst the remainder are in progress. The evaluation is continuous and builds upon the previous evaluation.

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

## 4. Methodology

### 4.1. Energy Redress Scheme

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 – 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 instructed 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 8 August 2022). As the data is self-reported by grantees, the level of detail provided does vary. 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 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 5-13 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.

## 4.2. 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 1-7 of the COVID-19 crisis fund and 1-3<sup>1</sup> 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.

---

<sup>1</sup> 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.

## 5. Energy Redress scheme evaluation

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

1. Reporting project impact metrics for all grantees in Phase 1 (section 5.1).
2. Analysing 10 completed projects (section 0).
3. Examining the progress of 10 grantees that have not yet completed their projects (section 5.3).

**Table 5-1** provides an overview 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 £20.7 million (59%) worth of activity has been delivered and reported on to date.

**Table 5-1: 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	28	£4,374,103
6	28	June 2020	13	£5,079,862
7	11	August 2020	6	£2,981,599
8	17	October 2020	5	£3,543,340
9	10	February 2021	2	£2,014,397
10	32	April 2021	1	£6,087,557
11	12	June 2021	0	£2,207,978
12	7	September 2021	0	£1,972,715
13	20	January 2022	0	£3,913,619
<b>Total:</b>	<b>201</b>	<b>-</b>	<b>89</b>	<b>£35,285,268</b>

Figure 5-1 shows a map of the locations of projects funded by the Energy Redress Scheme. Each pin represents the location of a project.

Figure 5-1: Map of Energy Redress Scheme-funded project locations



## 5.1. 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 8 August 2022. 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 294,660 distinct households through their advice work.

As shown in **Figure 5-2**, householders have been advised in a number of different ways:

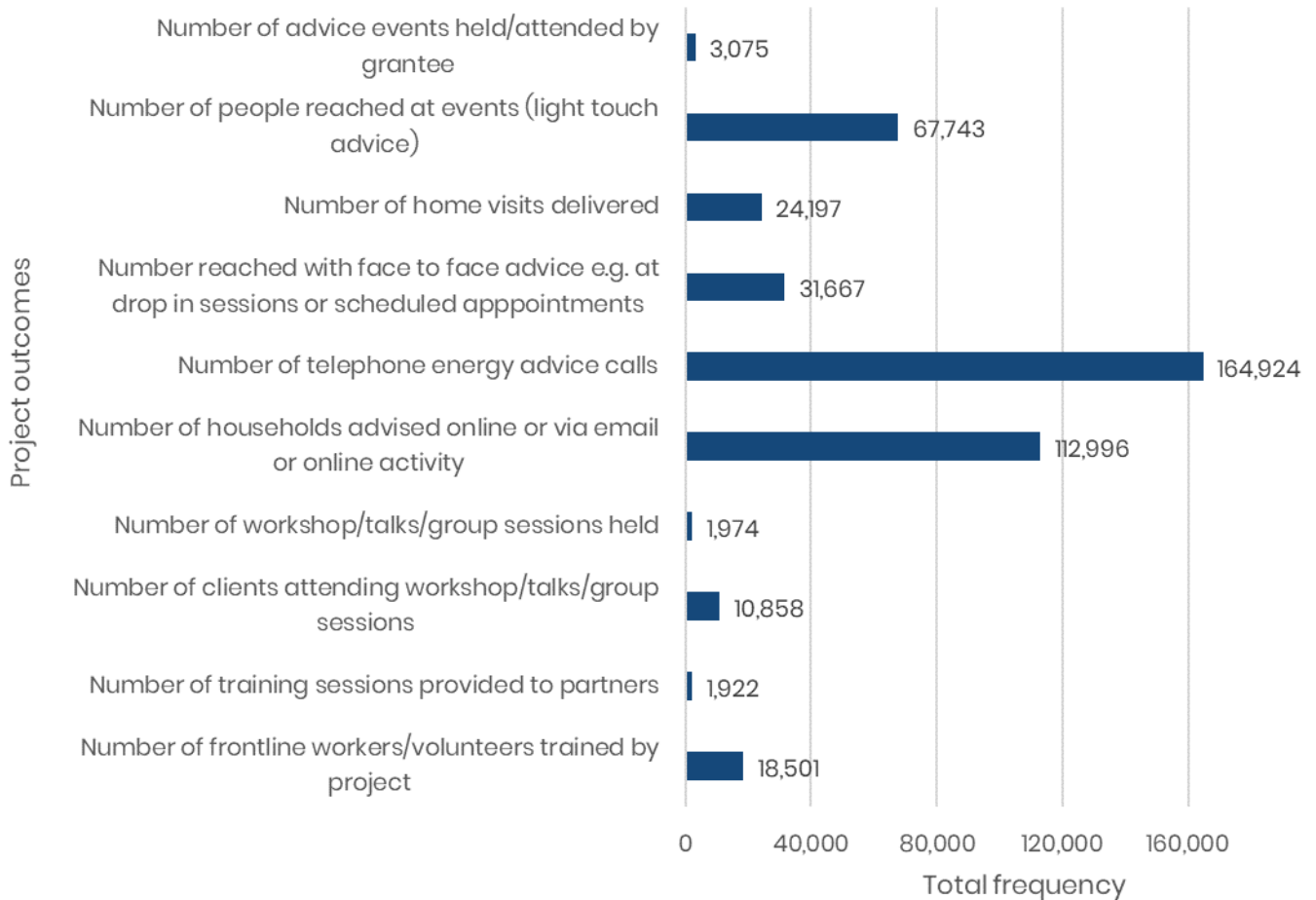
- 164,924 households have been advised by telephone<sup>2</sup> (an increase of 91,029 households advised since August 2021)
- 112,996 households have been advised online or via email or online activity (an increase of 78,290 households advised since August 2021)
- 67,743 people have been reached at events (an increase of 47,178 people reached at events since August 2021)
- 24,197 home visits have been completed (an increase of 12,465 home visits completed since August 2021)
- 31,667 people have received face to face advice (an increase of 20,076 people receiving face to face advice since August 2021)

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

---

<sup>2</sup> Some grantees record the number of households receiving telephone advice, rather than the total number of calls made. Therefore, the number of telephone energy advice calls is likely to be higher than the reported figures, due to households often requiring multiple advice calls to resolve complex issues.

**Figure 5-2: Deliverables reported as achieved to date by Energy Redress Scheme projects (N=201)**



### 5.1.1. Overall impact of fund

Throughout the entirety of Phase 1 of the Energy Redress Scheme, a total of 294,660 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 distributed<sup>3</sup> to date, the amount of grant money distributed equates to an average cost of £70.25 per household reached with advice<sup>4</sup>.

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

<sup>3</sup> The value of funding distributed represents the value of money claimed to date, not allocated in grant offers.

<sup>4</sup> It should be noted that not every project delivers energy advice to households, and many projects include other activities such as research or capital projects, therefore this figure is likely to be lower than estimated.

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 5-2** 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 8 August 2022. The table also shows the increase in savings since the previous evaluation report in August 2021. 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)

84,518 capital measures were installed with Redress funding, with 20,850 distinct households being provided with at least one small measure<sup>5</sup>. The most commonly implemented capital measure so far is LED bulbs, which constitute 45,597 (54%) of these measures, although many other measures have been installed, such as radiator foils (13,141), draught proofing (5,254) and heating controls (204).

There has been a total of 8,489 measures installed as a result of Energy Redress Scheme grantee referrals. Boiler repair or replacement has been the most frequently referred measure thus far (1,687), followed by draught proofing (703), new heating system (649) and loft insulation (429). The projects have also achieved social benefits, with 3,415 volunteers involved in delivering the projects and 261 new jobs being created as a result of the projects commencing.

It is clear in the table that 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

---

<sup>5</sup> 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.



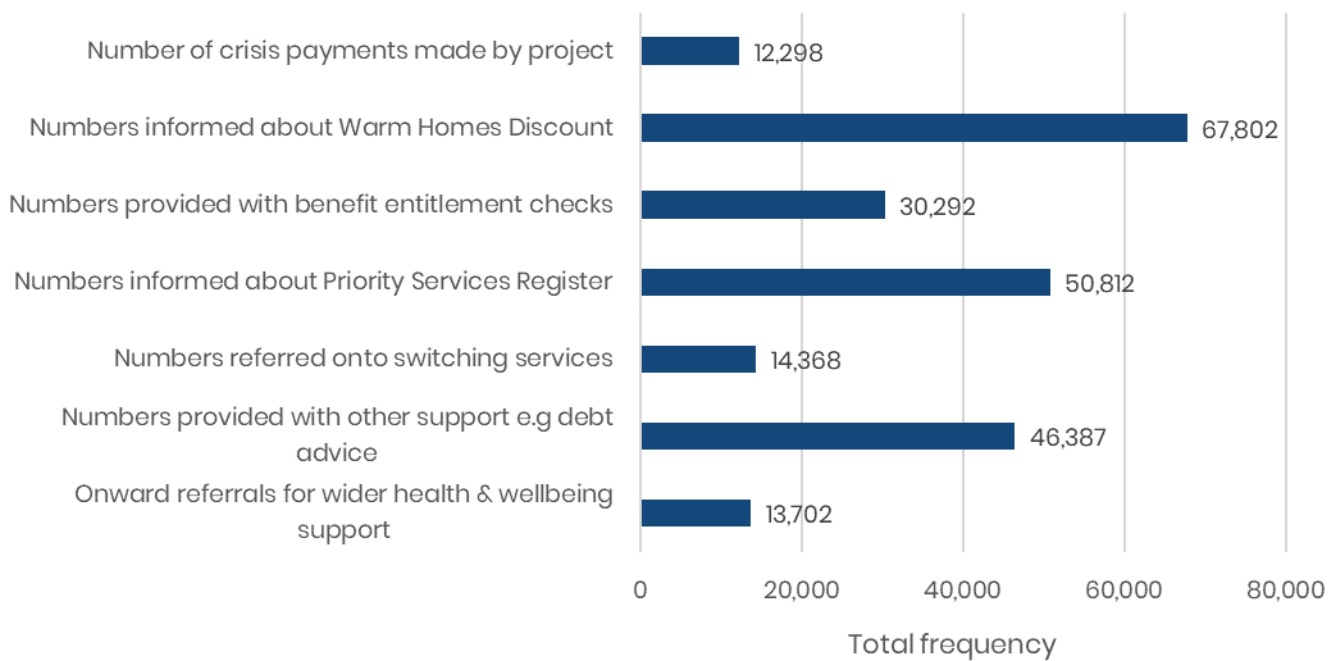
are captured within the scope of the Energy Company Obligation (ECO) scheme and therefore cannot be financed using Energy Redress funding.

**Table 5-2: Estimated measured and actual lifetime energy and bill savings from quantifiable sources (eg switching supplier and measures) resulting from Energy Redress Scheme projects to date (self-reported) (N= 201)**

Estimated savings	Total as of August 2022	Increase since August 2021
Measured annual energy savings achieved (kWh) through advice & measures installed	384,304	81,573
Estimated annual energy savings achieved (kWh) through advice & measures installed	12,823,734	7,800,668
Actual annual energy bill savings (£) from advice	£1,330,424	£628,722
Estimated annual bill savings (£) from advice	£12,503,699	£6,781,381
Estimated annual bill savings (£) from small measures (LEDs etc)	£1,247,865	£678,235
Actual financial gains (£) from benefits advice, debt write off etc that can be attributed to the project	£26,205,080	£17,935,438
<b>Capital measures installed</b>		
Total number of capital measures installed or provided to households (such as LED bulbs, draught proofing, power down devices and radiator foils)	84,518	58,581
Other measures installed as a result of advice referrals to other funding sources (this includes insulation and boiler replacements)	8,489	1,303
<b>Social benefits</b>		
Number of volunteers involved in delivering the project	3,415	1,152
Number of new jobs created	261	76
Number of project team gaining new qualifications	526	300
Number of well-being surveys completed	5,411	3,808

Through the Redress projects, households have been informed about, or referred to, other schemes. Figure 5-3 shows these schemes and the number of people that have been informed of each service. In total, 235,661 people have been informed about, or referred for, additional support. 29% of people were informed about the Warm Home Discount, and 22% were informed about the Priority Services Register.

**Figure 5-3: Schemes that Energy Redress Scheme-funded grantees have informed, or referred, their clients to (N= 201)**



In Phase 1 of the Energy Redress Scheme, 14 charities have been awarded a grant from the Energy Redress Scheme Innovation Fund. The Innovation Fund is aimed at developing products or services which are truly innovative and not currently accessible to energy consumers or certain groups of energy consumers. 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.

## 5.2. Completed projects analysis

### 5.2.1. Completed project metrics

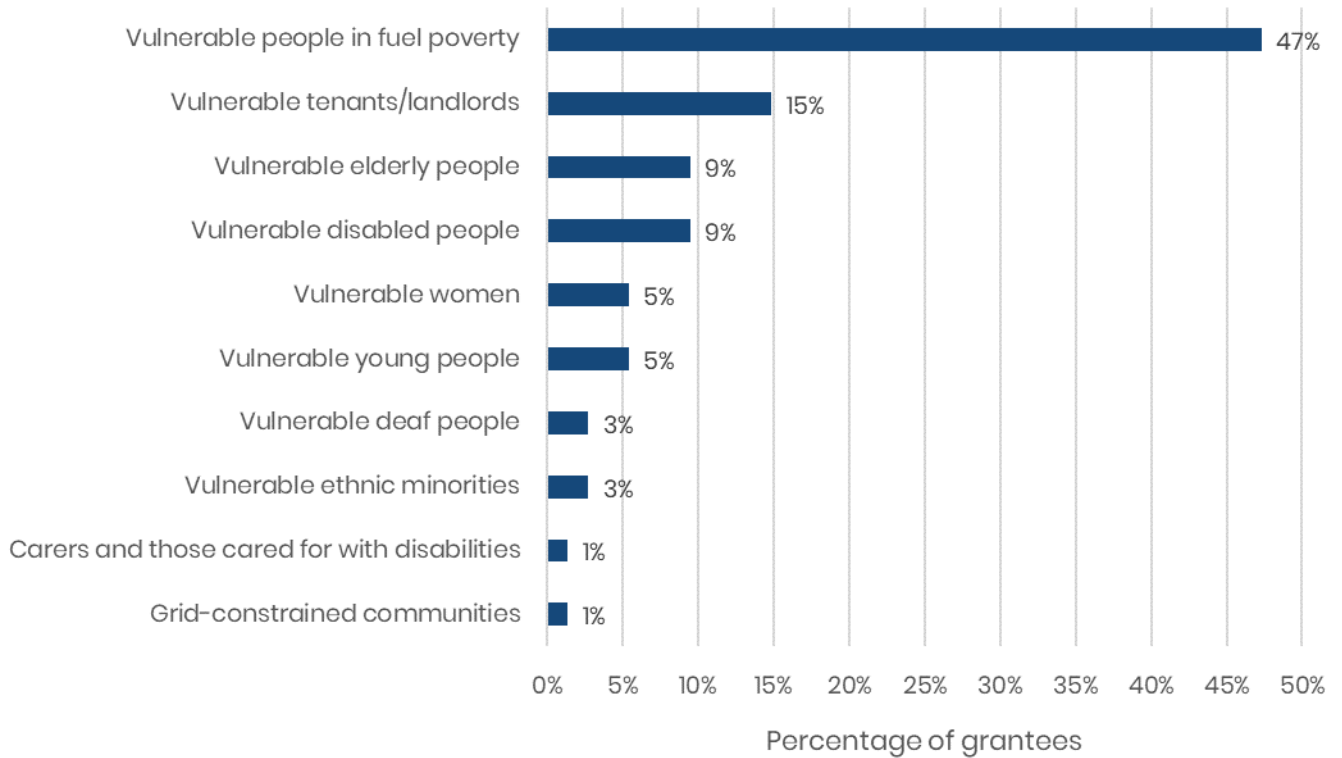
As of 8 August 2022, 89 projects have been completed under the Energy Redress Scheme, see **Table 5-3** for completed breakdown by round.

**Table 5-3: Completed projects to date by funding round (N= 89)**

Round	Number of projects completed
Round 1	6
Round 2	15
Round 3	7
Round 4	6
Round 5	28
Round 6	13
Round 7	6
Round 8	5
Round 9	2
Round 10	1

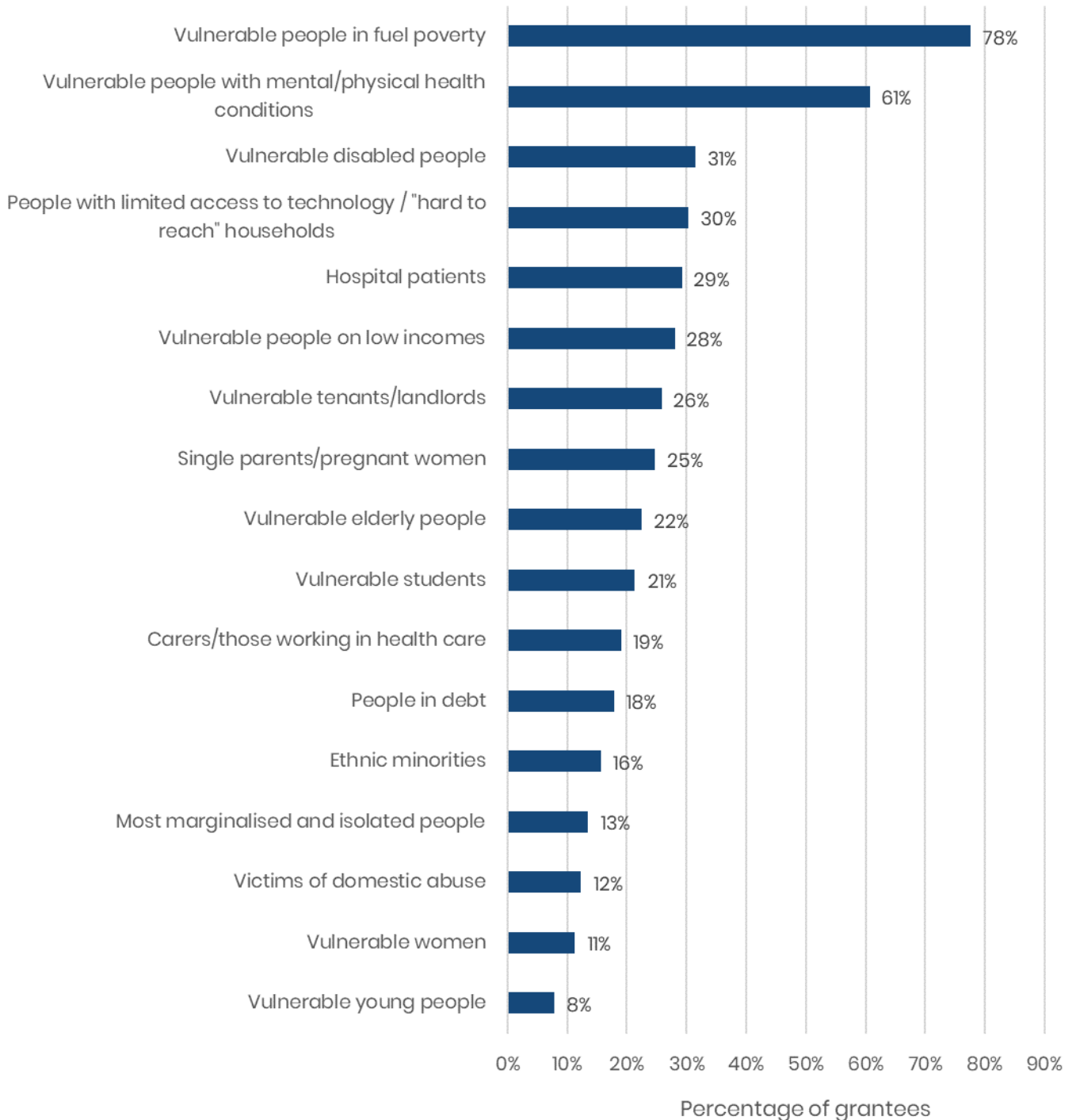
To illustrate the types of vulnerable people that the completed projects have supported during their delivery, the 89 completed projects' (as of 8 August 2022) final reporting documents were analysed to understand the types of vulnerable groups that they have been helping. **Figure 5-4** displays completed 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 5-5). 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. Almost half of the completed grantees who shared a primary target vulnerable population said that they were predominately seeking to help those in fuel poverty (47%).

**Figure 5-4: Grantee’s primary target vulnerable group they aimed to support through their project (N= 74)**



**Figure 5-5** 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 (78%), followed by vulnerable people with mental/physical health conditions (61%). 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 5-5: Percentage of completed grantees supporting different types of vulnerable groups (N= 89, multiple responses)**



### 5.2.2. Completed projects quantitative analysis

Qualitative and quantitative data obtained from final reports, completed by each of the grantees selected for analysis, has been used to inform this section. Ten projects from rounds 1-9 have been selected for analysis. 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 covered both high and low performing projects. Grantees have been assigned a letter for anonymity purposes within this report.

**Table 5-4** and **Table 5-5** 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, 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 5-4: 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	39	130%	77	39%	21	175%	25	93%	-	-
No. of households reached at events	1,046	105%	535	-	1,238	103%	565	113%	-	-
No. of home visits	475	91%	167	56%	144	96%	-	-	11	14%
No. of face-to-face advice sessions	-	-	11	-	1,381	138%	17	-	466	117%
No. of households attending workshop/talk/group session	-	-	-	-	-	-	4	-	156	52%
No. of telephone energy advice calls <sup>6</sup>	76	59%	564	-	1,817	363%	161	215%	-	-
No. of email/online advice interactions	-	-	353	177%	674	135%	12	48%	-	-
No. of training sessions (for partners)	-	-	29	-	-	-	16	123%	-	-
No. of frontline workers/volunteers trained	410	-	75	-	107	103%	143	143%	-	-
No. reached by other means	-	-	-	-	-	-	75,783	1,515%	74,467	7447%
Total distinct households reached with advice	1,435	144%	1,464	146%	3,368	168%	759	127%	192	19%

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

Table 5-5: 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	47	4,700%	-	-	-	-	-	-	-	-
No. of households reached at events	516	-	6,000	133%	-	-	-	-	-	-
No. of home visits	755	1,424%	13	-	-	-	69	92%	-	-
No. of face-to-face advice sessions	126	-	4	-	-	-	-	-	-	-
No. of households attending workshop/talk/group session	83	415%	-	-	-	-	-	-	16	-
No. of telephone energy advice calls <sup>7</sup>	1,433	2,470%	2,732	137%	8,768	186%	282	75%	18	90%
No. of email/online advice interactions	-	-	2,781	-	306	306%	63	-	544	136%
No. of training sessions (for partners)	9	-	40	100%	-	-	-	-	-	-
No. of frontline workers/volunteers trained	392	-	252	-	-	-	-	-	-	-
No. reached by other means	-	-	159,611	1,596%	-	-	-	-	-	-
Total distinct households reached with advice	2,550	3,269%	1,931	30%	8,997	187%	344	92%	578	145%

<sup>7</sup> Some grantees record the number of households receiving telephone advice, rather than the total number of calls made. Therefore, the number of telephone energy advice calls may be higher than the reported figures, due to households often requiring multiple advice calls to resolve complex issues.



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 Table 5-4 and Table 5-5, 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 5-6** 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 5-6: Examples of further quantitative deliverables reported by grantees**

Grantee	Wider outputs
Grantee A	<ul style="list-style-type: none"> <li>• Fitted 1,678 small measures, the top three measures installed being LEDs (1,234), radiator foils (330) and door brushes (76)</li> </ul>
Grantee B	<ul style="list-style-type: none"> <li>• 176 energy efficiency measures were installed for people who engaged with the project</li> <li>• 39 referrals were made to HES for assistance accessing support for new heating systems or renewables</li> </ul>
Grantee C	<ul style="list-style-type: none"> <li>• Delivered 12 advice open days on a monthly basis</li> <li>• Trained three volunteers to support the project</li> </ul>
Grantee D	<ul style="list-style-type: none"> <li>• Educated tenants and landlords about EPCs and Minimum Energy Efficiency Standards</li> </ul>
Grantee E	<ul style="list-style-type: none"> <li>• Of the 202 clients that received one to one advice or attended workshops, 110 (55%) of them were over 50 years old</li> <li>• All of the team undertook energy awareness training, with 17 staff receiving NEA training</li> </ul>
Grantee F	<ul style="list-style-type: none"> <li>• 231 Fuel Bank Foundation prepayment meter vouchers issued</li> <li>• Total estimated savings from all advice and interventions £1,123,818 which is an average of £582 per client</li> </ul>
Grantee G	<ul style="list-style-type: none"> <li>• 4,293 provided with benefit entitlement checks and 4,057 provided with other support such as debt advice</li> </ul>

	<ul style="list-style-type: none"> <li>8,997 unique calls answered and an estimated £3,602,461 of savings identified for clients</li> </ul>
Grantee H	<ul style="list-style-type: none"> <li>80 properties surveyed and 163 landlords and 37 tenants given advice</li> <li>Improving properties by lodging 21 EPCs, removing 75 excess cold hazards and saving an estimated £32,924 in running costs</li> </ul>
Grantee I	<ul style="list-style-type: none"> <li>Surveyed 548 disabled customers to determine the aspects they found most challenging about switching sites and services to devise solutions to these</li> </ul>
Grantee J	<ul style="list-style-type: none"> <li>56 refugee families were supported through casework and approximately 150 more were supported by the team to obtain assistance through government grants</li> <li>£704,097 of secured benefits to residents came from project casework, an average of £924 per unique household</li> </ul>

### 5.2.3. Completed projects qualitative analysis

#### 5.2.3.1. Achieving quantitative outcomes

Overall, the ten completed projects analysed did well in achieving their original project targets, with 69% of the targets being met or, in most cases, exceeded. The most successful deliverable was the number of households reached at events, with all four grantees that had this target exceeding it, and with two additional grantees reaching 1,051 people at events despite this not being their target. Despite COVID-19 disrupting many events, grantees deployed tactics to encourage attendance, once restrictions had been removed and events resumed, so that they could catch-up with their targets. One grantee reported using incentives such as offering free LED bulbs and draught excluders.

Training frontline workers and volunteers was also a great success among these completed projects. 1,379 individuals were trained by six of the projects, and the two projects who specifically targeted training were able to exceed their metric. One grantee explained that delivering training sessions online was effective, as trainees were often able to join existing meetings and trainers were given time to speak as part of the meeting agenda to educate and inform them and current staff.

Another successful deliverable was the number of distinct households reached with advice. Seven of the ten grantees analysed exceeded this target, with Grantee H reaching 8,997 distinct households with advice, which was 187% of their target. In two of the three instances where this target was not met, the metric of reaching people by other means was far exceeded. These grantees used social media platforms such as Facebook, Instagram and Twitter to share energy saving and financial advice videos that were viewed by thousands of people.

As the completed projects delivered the majority of their home visits during periods of strict Covid restrictions, only one of the grantees met their home visit target. COVID-19 was a considerable barrier to delivering home visits as grantees reported that even after restrictions

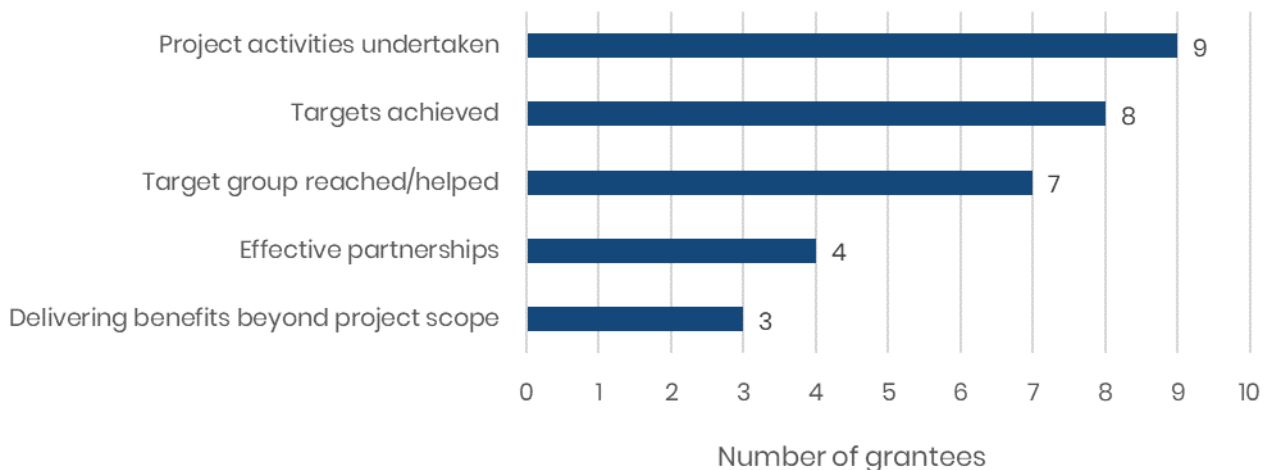
were lifted, many of their vulnerable clients were hesitant to allow them to visit their home out of fear of catching the virus. The one grantee who managed to exceed their home visit target agreed with the Redress team via their COVID-19 mitigation plan that some intensive phone advice/virtual visits were able to be counted as home visits due to the nature and more intensive support provided, in comparison to a standard advice phone call.

Many projects delivered email/online or telephone advice in place of home visits during COVID-19 lockdowns and restrictions. Four of the five projects who had a target number of email/online advice interactions exceeded their target, and a further two projects delivered 2,844 email/online interactions even though this was not a target for them. Regarding telephone advice, five of eight (63%) projects exceeded their target, and another project delivered an additional 564 telephone advice calls.

### 5.2.3.2. Achieving project aims

Grantees were asked to define to what extent they believed they had achieved the original aims of their project. Eight (80%) believed that they had achieved their aim, while the remaining two (20%) believed that they had partially achieved the original project aim. This is similar to the previous evaluation report when 78% believed that they had achieved their aim, and 22% believed that they had partially achieved the original project aim. **Figure 5-6** shows the factors which supported the grantee's belief that they had achieved or partially achieved their aim. These included the project activities undertaken (90%), target(s) achieved (80%) and target groups reached/helped (70%).

**Figure 5-6: Reasons for achieving or partially achieving aim (N= 10, multiple responses, coded)**



Despite only two of the 10 grantee project's analysed achieving all of their targets, eight believed that they had fully achieved their project aim. These grantees stated that this was because they had undertaken all of the project activities that they had set out to deliver. One grantee noted that although they did not hit all of their targets, they adapted well and were able to support their target population in other ways, such as completing face to face advice over the internet rather than in person. Another grantee explained that they fully achieved their project aim because they helped their target group, which in this case was alleviating low-income families from financial hardship, and this is exactly what they set out to accomplish.

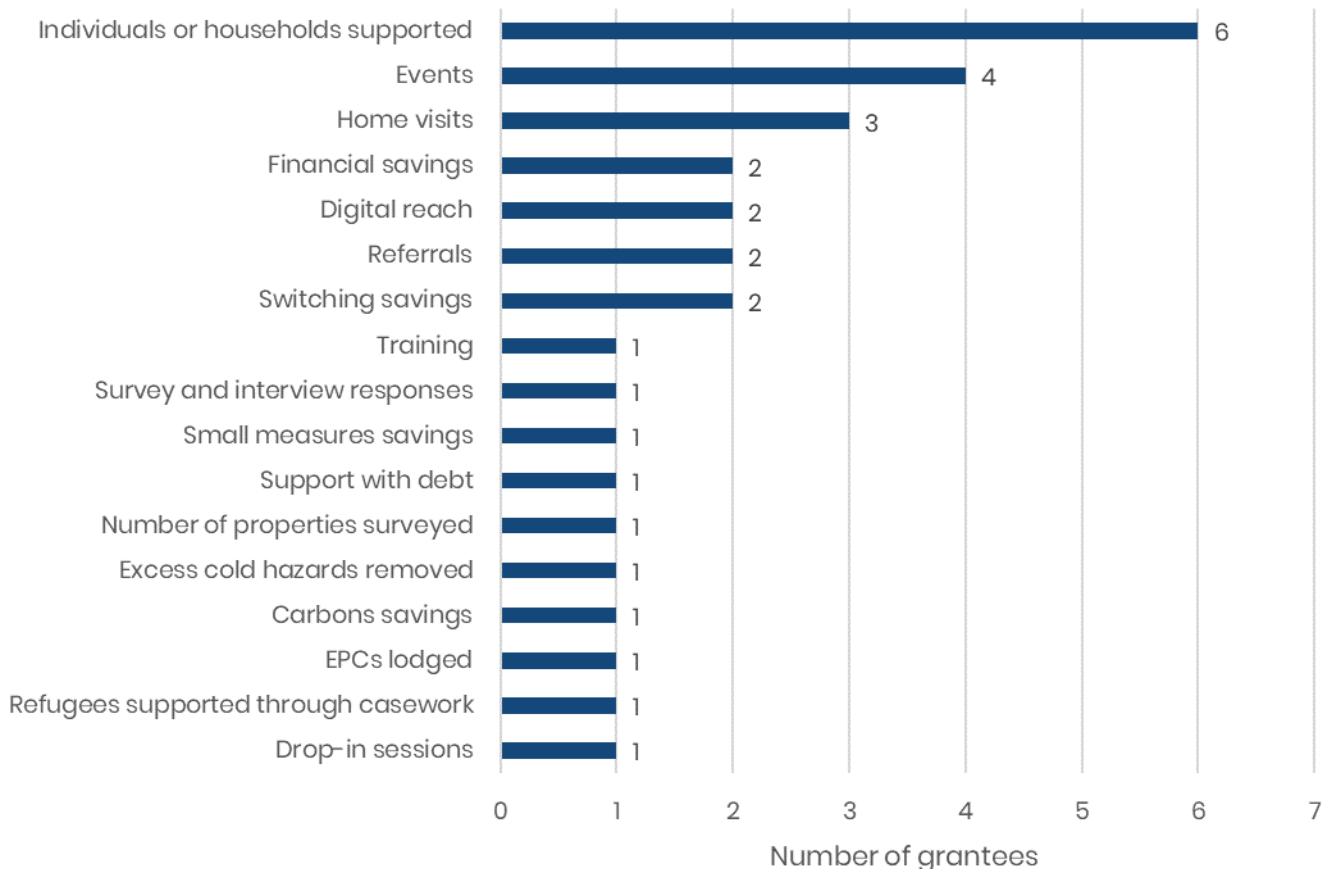
The two grantees who specified reasons for only partially achieving their project aims gave the following reasons for their aims not being fully met: one grantee only partially achieved their aim of assessing the indoor air quality of houses, although they had been advising on ways to reduce and prevent the spread of damp (1). The other grantee reported that COVID-19 lockdowns disrupted the number of workshops being held and therefore the number of households attending them (1).

### 5.2.3.3. 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 5-7**. The most frequently reported deliverable was the number of individuals/households supported (60%), followed by events (40%) and home visits (30%).

Many of the significant quantitative deliverables were mentioned by grantees analysed in the previous evaluation in August 2021. Individuals or households supported was also the most frequently reported quantitative deliverable last year (78%), followed by financial savings (67%) and energy saving measures (33%).

**Figure 5-7: Most 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
- improved wellbeing
- empowerment
- upskilled workers
- promotion of the project/charity

Partnerships, improved wellbeing, empowerment and upskilled workers were all reported by grantees as successful qualitative deliverables in the previous evaluation report in August 2021. An insight into each of the qualitative deliverables mentioned by more than one grantee is provided below.

### Partnerships

Half of the grantees included within the analysis specifically referred to partnerships either forming or strengthening through the delivery of the project as a success. Many of these grantees also highlighted that the partnerships have led to their organisation being able to reach more people and, in some cases, form new projects with partners. One grantee specifically noted that by working in partnership with another organisation they were able to reach vulnerable people in their community that they never would have been able to support without their help. Another reported that they have been able to help hundreds of vulnerable people by referring them to the services of their partner organisation. Additionally, many grantees acknowledged that their partners helped them achieve their own targets as clients were referred to them.

### Improved wellbeing

Four grantees specifically highlighted improved wellbeing as a significant outcome amongst their clients, with a couple of these also noting the importance of this in the context of the COVID-19 pandemic. This included the reduction of anxiety and stress of energy bills by helping clients to reduce bills through switching tariffs as well as making behavioural or measure improvements to reduce the amount of energy used. Amidst the COVID-19 pandemic, telephone advice provided a friendly voice at a time when people were feeling particularly anxious and isolated from others.

### Empowerment

Four grantees spoke of how their project has empowered clients to begin to make their own energy choices. The improved knowledge base achieved by clients and collaborators throughout this project will continue to raise awareness and increase empowerment in fuel-poor communities.

### Upskilled workers

Four grantees mentioned that through the training provided, workers have been upskilled in energy advice. Through the training, these trainees were provided with the skills to effectively deliver the project's aims. Additionally, and equally as important, grantees mentioned that their advisors have gained invaluable experience which has helped them to understand the wider challenges faced by the vulnerable clients they work with.

### Promotion of the project/organisation

Two grantees reported that the promotion of their project and their charity was a beneficial outcome of their activity. These grantees saw an increase in demand for their services and advice after they had delivered quality support to their clients, who were grateful for their help and as a result have referred their friends and family to the project, increasing the project's reach.

## **5.2.3.4. Project issues and resolutions**

### COVID-19

Almost all of the grantees (80%) stated that COVID-19 had been a barrier to project delivery in their end of project reports, and it is likely that it had at least some impact on the other two projects, but they did not mention this in their reporting documents. The specific issues projects faced that were caused by the spread of COVID-19 and the consequential restrictions enforced are as follows, with the number of grantees reporting this in their end of project report in brackets:

- **Event delivery impacted (3):** events were rescheduled or cancelled due to COVID-19, meaning that projects were unable to interact with potential clients and targets were not met. This even remained an issue when lockdown lifted as vulnerable people were wary of attending gatherings of large amounts of people. **Solution:** agreeing a mitigation plan with the Redress team to alter targets to deliver advice and engage with people in other ways, such as over the phone, in place of in-person events (2) and holding events online (1).
- **Home visits impacted (3):** home visits were cancelled because of the various COVID-19 lockdowns, and even with the advisors taking necessary precautions, such as taking regular Covid tests and wearing personal protective equipment, many vulnerable people were unwilling to allow them into their homes. **Solution:** switching to remote sessions over video call to survey the property and provide advice (3). One grantee noted that this is becoming a standard practice and home visits will only be conducted in future when absolutely necessary.
- **Entire project put on hold (2):** some projects had stop completely due to lockdowns preventing them from operating as usual. **Solution:** these two projects that did not run during periods of strict Covid restrictions were granted extensions so that they could resume operation when regulations had been lifted and they were able to deliver their aims (2).

- **Staffing issues (2):** employee attrition, staff absences and volunteer retention were all consequences of COVID-19 and placed severe stress on these two projects. **Solution:** One grantee hired two additional advisors to help deliver the project, but at a considerable cost (1), while the other took on more volunteers and existing volunteers stepped up to work more hours (1).
- **Delayed training (1):** training was postponed and, in some cases, cancelled during periods of Covid restrictions. **Solution:** training was delivered online (1). This grantee reported that the online training was very effective.
- **Unable to conduct in-person research (1):** this project was unable to collect data from respondents in face-to-face interviews as they initially planned. **Solution:** data was gathered in telephone interviews and online surveys (1).
- **Unable to install as many measures (1):** Covid restrictions meant that this grantee was unable to install as many small measures in their client's homes as they had originally targeted. **Solution:** When restrictions were lifted, advisors were able to make home visits, and the service gave very comprehensive support packages of advice / income maximisation and simple measures in place of installing the intended small measures (1).

Further details of COVID-19 related issues impacting the earlier rounds of the Redress fund are provided in section 5.2.4 of the previous Ofgem Redress evaluation report published in 2021.

#### Complexity of client issues

Two grantees identified complexity of client issues as a key challenge, as clients are often vulnerable for multiple reasons which each require bespoke solutions. One grantee noted that this can have a direct effect on resourcing within an organisation as demand is heightened by individuals requiring many different interventions. This grantee has secured more funding to be able to manage this demand. The other grantee reported that as energy advisers it is difficult for them to know where their intervention stops and another organisation's intervention begins. As they are unable to solve every problem for their client, they are reassessing their networking and training to improve referral partnerships within local areas to ensure onward referrals are made to the relevant teams.

#### The client support journey

Two grantees reported that guiding their clients through their support journey, from their initial engagement with the project to them receiving advice, a home visit or a home measure, was a challenge. Both grantees acknowledged that there are difficulties at every stage, but in particular they emphasised the obstacles that their vulnerable clients encountered when undertaking administrative work, such as switching energy supplier or applying for benefits or a government grant. The grantees noted that although they can complete this administrative work themselves, there is a lot of resource required to liaise with their client to find the right solution and complete applications with client authorisation to tight timescales. One grantee noted that developing strong referral pathways with organisations can help to alleviate the workload at different stages of the client journey.

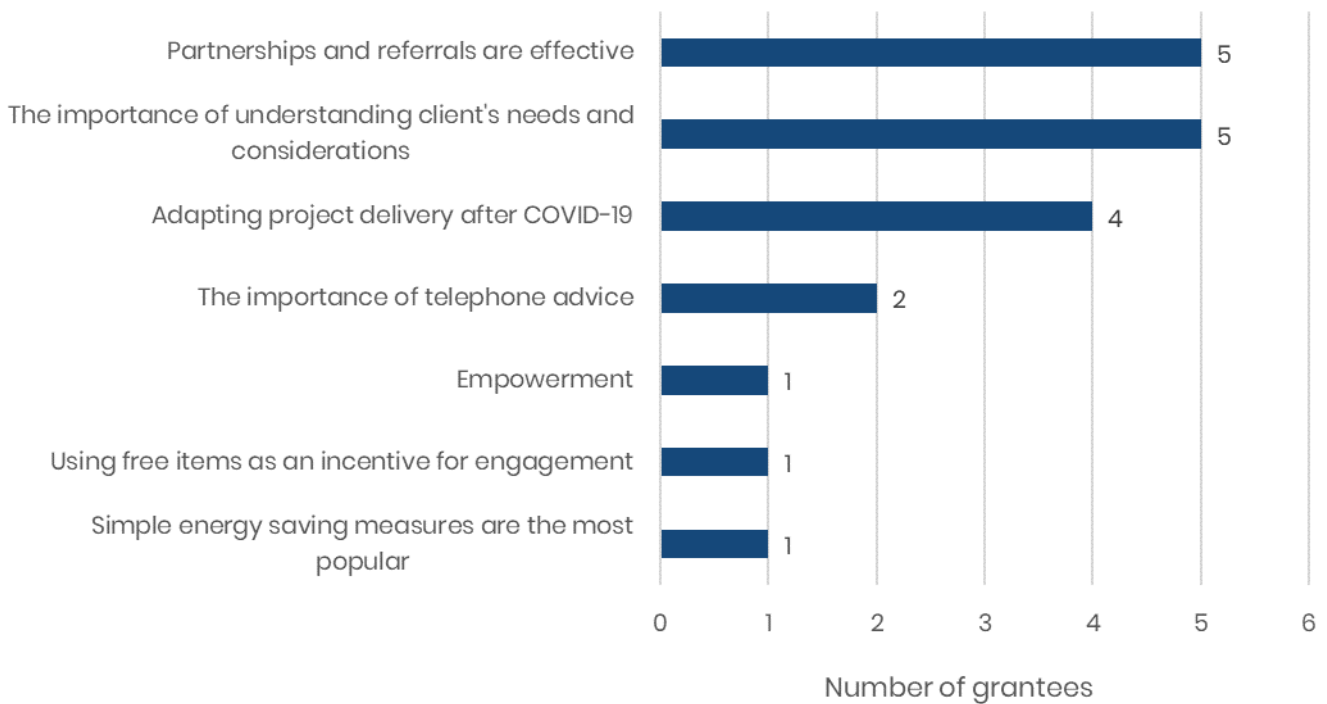
Other challenges

Other challenges that grantees faced included client communication issues when English is not their first language (1), electric vehicle supply issues (1), client engagement (1), lack of government action regarding Minimum Energy Efficiency Standards (1) and finding it hard to reach their target population (1).

**5.2.3.5. Lessons learned**

Grantees shared their lessons learned over the course of the project (**Figure 5-8**.) The most frequently mentioned lessons learned included the effectiveness of partnerships (50%) and the importance of understanding client’s needs and considerations (50%).

**Figure 5-8: Lessons learned over project lifetime (N= 10, multiple responses, coded)**



Partnerships

Five 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. One grantee mentioned that working with partners closes any gaps in the services provided by the project, making certain that all the client’s issues are resolved. Another grantee stated that having good referral pathways between organisations is invaluable for vulnerable people, as it helps them to realise that there is support that can benefit them which they would not have engaged with had they not been referred to it.

Understanding client’s needs and considerations

Five grantees discussed how they have learned important lessons about the needs of their vulnerable clients. These grantees highlighted the importance of providing holistic support to those with complex needs, rather than solely providing energy advice. One grantee explained



that only by providing multiple services or referring what you cannot support with to other organisations who specialise in that support area, you can tackle the root issues causing a client to be fuel poor. Another grantee said that they are now reaching a wider range of vulnerable people and providing a “onestop” approach to improving the household financial situation and keeping homes warm.

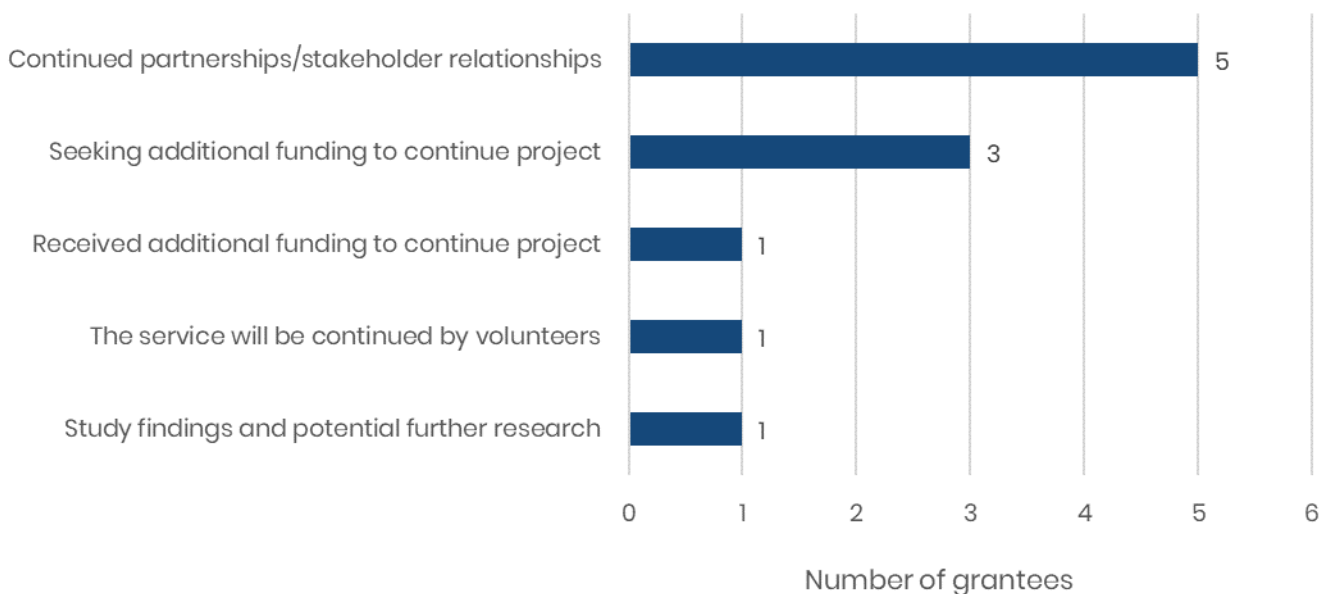
Adapting to COVID-19

COVID-19 was the greatest obstacle to overcome for many of the grantees. Four grantees specifically mentioned that they learned how to adapt their project delivery to mitigate against Covid related issues. This included replacing home visits with video calls and events with online workshops. One grantee highlighted the importance of telephone advice and explained how they were able to equip all of their staff to work at home during lockdowns. Grantees also changed the way they promoted their project, spreading their outreach using social media campaigns, articles and leaflets which were included in food parcels. The advice itself has also had to evolve with the changing times. One grantee noted that due to lockdown and the resulting impact on jobs and the economy, clients main concern has been their financial security, and therefore the nature of the advice provided has had to adapt to meet this growing need.

**5.2.3.6. Project legacy**

All grantees provided at least one example of the legacy secured by their completed project (Figure 5-9). Three of the ten grantees reported that at the time of their project’s completion, they were seeking additional funding to continue (or expand) their project. One grantee had already been awarded further funding through the Energy Redress fund<sup>8</sup>.

**Figure 5-9: Project legacy (N= 10, multiple responses, coded)**



<sup>8</sup> Subsequent projects funded through the Energy Redress fund are required to demonstrate additionality. This could be through reaching further households, for instance.

Specific examples from grantees regarding their project legacy include:

- The project has received funds from the Redress fund to continue and develop the service. It aims to grow the work started with refugee agencies in areas not deliverable during the pandemic.
- The service will continue to a certain extent – it will be run with only volunteer support, and the service will only involve a telephone advice line, through which potential clients can call for advice or book a face-to-face appointment. There will also be volunteers available one or two mornings a week to run a drop-in service.
- The project aims to provide information and advice about energy usage, benefits and grants through our roadshows and one-off events later this year.
- The improved knowledge base achieved by clients and collaborators throughout this project will continue to raise awareness and increase empowerment in fuel-poor communities.
- The bespoke energy plan established by the project will continue to teach clients and gain agreement on the steps they can take to save energy.

### 5.3. Progressing projects 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 5-13 have been selected for analysis, to ensure projects in different stages of progression have been captured. Additionally, project(s) from the main fund, small projects fund and innovation funding streams have been selected to ensure a variety of project types are included in the analysis. No projects from rounds 1-4 have been included in the progressing projects analysis as they have all been completed as of 8 August 2022.

Grantees have been assigned a letter for anonymity purposes within this report. Additionally, grantee names, partner organisations and place names have been omitted from quotes for this purpose. The aims of each of the selected projects for analysis are presented in **Table 5-7** below.

**Table 5-7: Aims of progressing projects**

Grantee	Project aim
Grantee K	The aim of this project is to trial a technology which will reduce electricity consumption compared to storage heaters, lowering customers' bills and carbon emissions.
Grantee L	The aim of this project is to engage and help families with disabled children that struggle to afford their heating bills due to the higher than average energy consumption required and added financial pressure they face as carers, making them vulnerable to fuel poverty.
Grantee M	This project aims to reduce the incidence and impact of fuel poverty amongst vulnerable older energy consumers, with the specific target of delivering home energy advice and technical housing solutions to benefit people over 70 years old.
Grantee N	The aim of this project is to significantly improve its clients' wellbeing by providing energy health checks/inductions for 450 vulnerable families per year, giving practical support on energy usage/savings.

Grantee O	This project will deliver free, impartial advice to vulnerable households. Energy advisors will resolve complex cases, ensuring bills or energy debt is fair and accurate and making savings through switching providers.
Grantee P	The project aims to provide direct support to the tenants that are in vulnerable situations with regards to energy consumption. Home visits and dedicated telephone support, alongside community education workshops and drop-in sessions, will enable them to tackle fuel debt.
Grantee Q	The project aims to support, advise and guide energy consumers who traditionally slip through support networks, such as elderly people, single men, low-income families, by reducing physical health problems exacerbated by fuel poverty. This will be achieved by enabling people to be warmer at home and releasing income for other essentials.
Grantee R	This project will reduce incidences and impact of fuel poverty amongst vulnerable customers by delivering high quality, impartial energy advice that does not duplicate existing advice services. It will also undertake awareness raising activities based in some of its communities and refer people to more specialist support where necessary.
Grantee S	The aim of this project is to reduce fuel poverty by identifying and supporting vulnerable veteran households by providing them with holistic advice and support service.
Grantee T	This project's aim aligns with the priorities of the fund by reducing fuel poverty and reducing the impact this has on the health, wealth and wellbeing of vulnerable older people through raising awareness of energy saving measures. It will offer support when people feel bills are out of their control, empowering people to take control of their energy consumption.

### 5.3.1. Progressing against quantitative targets

**Table 5-8** and **Table 5-9** illustrate 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.

**Table 5-8: Quantitative metrics for energy advice interventions grantees K-O**

Metric	Grantee K		Grantee L		Grantee M		Grantee N		Grantee O	
	Total	% target	Total	% target	Total	% target	Total	% target	Total	% target
Latest quarterly report	Q9	-	Q7	-	Q7	-	Q7	-	Q7	-
No. of advice events	-	-	37	74%	42	-	-	-	2	-
No. of households reached at events	-	-	500	100%	-	-	-	-	298	41%
No. of home visits	42	-	868	-	128	5%	127	18%	286	29%
No. of face-to-face advice sessions	-	-	728	40%	125	-	27	39%	-	-
Number of workshop/talks/group sessions held	-	-	4	-	50	50%	1	-	-	-
No. of households attending workshop/talk/group session	-	-	35	-	206	-	25	-	-	-
No. of telephone energy advice calls <sup>9</sup>	12	-	162	81%	119	48%	1,702	106%	3,063	204%
No. of email/online advice interactions	15	-	890	-	32	13%	1,927	241%	944	94%
No. of training sessions (for partners)	-	-	-	-	5	-	1	-	1	50%
No. of frontline workers/volunteers trained	-	-	127	-	182	-	-	-	16	-
No. reached by other means	-	-	84,668	847%	1,295	-	6,334	-	1,700	-
Total distinct households reached with advice	17	189%	1,393	70%	331	12%	1,411	157%	1,075	88%

<sup>9</sup> Some grantees record the number of households receiving telephone advice, rather than the total number of calls made. Therefore, the number of telephone energy advice calls may be higher than the reported figures, due to households often requiring multiple advice calls to resolve complex issues.

**Table 5-9: Quantitative metrics for energy advice interventions grantees P-T**

Metric	Grantee P		Grantee Q		Grantee R		Grantee S		Grantee T	
	Total	% target	Total	% target	Total	% target	Total	% target	Total	% target
Latest quarterly report	Q6	-	Q5	-	Q4	-	Q2	-	Q2	-
No. of advice events	1	-	-	-	3	-	53	126%	0	-
No. of households reached at events	5	1%	189	76%	22	15%	430	61%	49	11%
No. of home visits	32	16%	229	65%	25	8%	154	10%	8	5%
No. of face-to-face advice sessions	7	4%	486	49%	19	24%	199	13%	39	13%
No. of workshop/talks/group sessions held	-	-	103	43%	1	-	6	-	5	17%
No. of households attending workshop/talk/group session	-	-	-	-	-	-	29	-	65	26%
No. of telephone energy advice calls <sup>10</sup>	2,750	191%	220	88%	37	37%	829	22%	25	25%
No. of email/online advice interactions	11	1%	-	-	13	26%	412	82%	3	6%
No. of training sessions (for partners)	-	-	-	-	-	-	10	48%	0	-
No. of frontline workers/volunteers trained	-	-	-	-	-	-	20	-	0	-
No. reached by other means	-	-	-	-	2992	-	2,000	-	0	-
Total distinct households reached with advice	2,562	99%	895	60%	70	16%	902	15%	109	24%

<sup>10</sup> Some grantees record the number of households receiving telephone advice, rather than the total number of calls made. Therefore, the number of telephone energy advice calls may be higher than the reported figures, due to households often requiring multiple advice calls to resolve complex issues.

### 5.3.2. Project issues and resolutions

Grantees are requested to report on any issues which may affect project delivery, either by causing delays, reducing the outcomes expected or which will lead to a significant change in the way a 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):

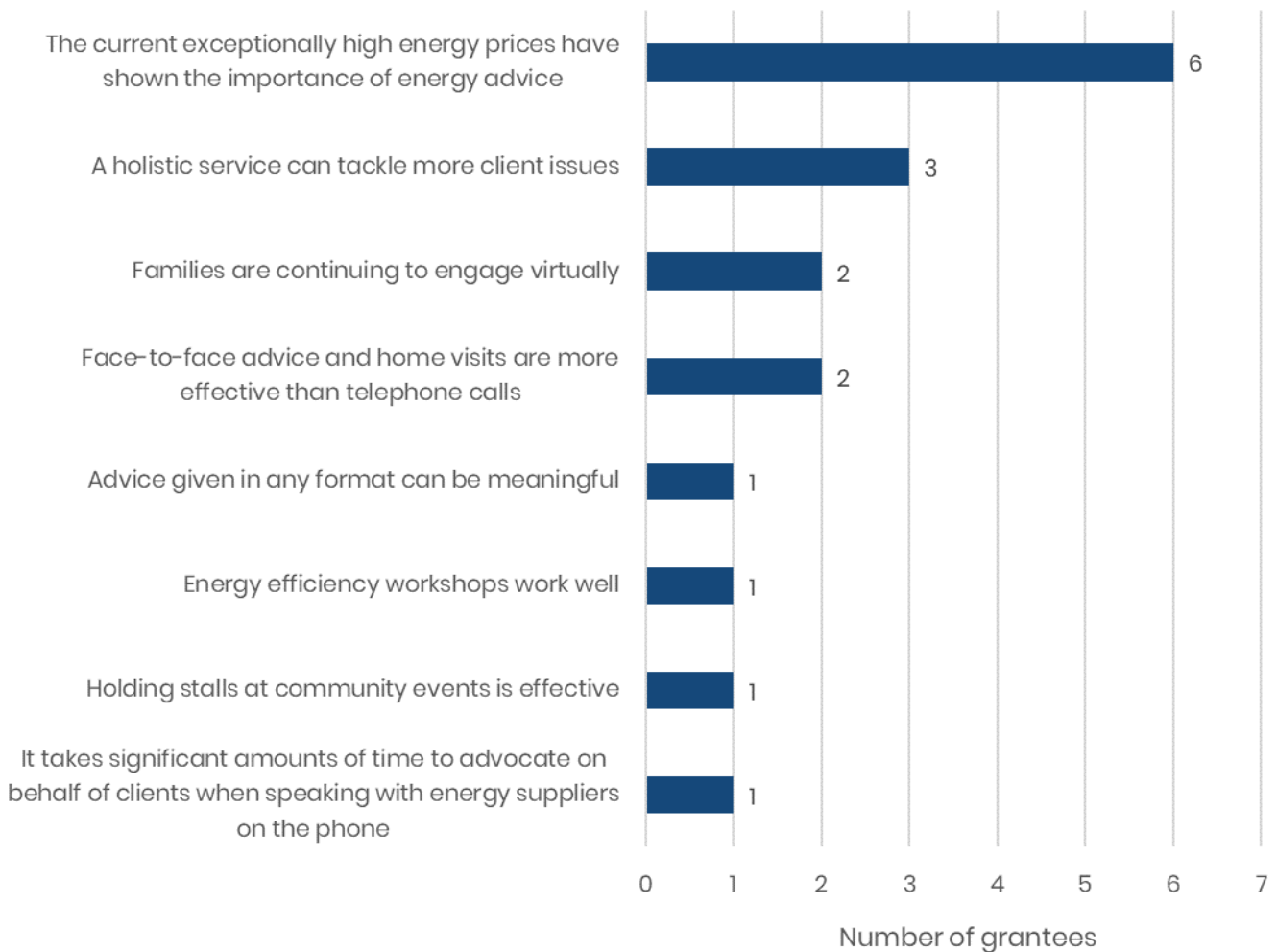
- **Impact of Covid restrictions (4):** project's inability to deliver home visits as initially anticipated when their aims were compiled was the most frequently reported issue (3), while another grantee mentioned that they have found it difficult to recruit staff due to the COVID-19 restrictions (1). **Solution:** these grantees acknowledge that as Covid restrictions lift these challenges will become easier to overcome. All grantees who reported delivering home visits as an issue have focussed their energy on other types of support, such as video calls or telephone advice, and one is currently in discussion with the Redress team to potentially agree a mitigation plan.
- **Vulnerable people not engaging (2):** two grantees found that those most in need of energy advice and information and financial support are not engaging with their projects. One grantee believes that this is because they are not interested in engaging in conversations about energy saving in the warmer months. **Solution:** one grantee plans to set up more stalls at events to offer face-to-face advice (1), while the other is putting preparations in place in anticipation of the incoming high winter demand by delivering training and recruiting more volunteers (1).
- **Issues with partners (2):** one grantee reported that they encountered teething issues in receiving timely and complete returns from all of their partner organisations, while the other has seen a delay in scheduled learning workshops. **Solution:** the first grantee has now created a calendar of return dates to ensure that their partners deliver these on time (1), while the other plans to speed up the planning stage of their learning workshops to ensure they begin soon.
- **Staffing issues (2):** both grantees have seen staff leave their project, one grantee has seen 12 volunteers exit the project for various reasons, while the other has had two members of staff on maternity leave. **Solution:** the first grantee is looking to improve volunteer retention, but notes that many of their volunteers left to complete their exams and are leaving the city to return home for the summer (1). The other grantee has recruited two maternity positions to cover the two vacant posts.

Other issues included complex cases requiring longer to resolve than initially anticipated (1), switching services no longer being a viable option for many with several energy companies going out of business (1), cancellations and no shows (1), technical project issues (1) and managing high demand (1).

### 5.3.3. Learnings to date

As part of the reporting process grantees are asked to share any lessons learned thus far in their project. **Figure 5-10** shows that the key lesson learned is that the current exceptionally high energy prices are showing the need for energy advice (60%).

**Figure 5-10: Lessons learned thus far (N= 10, multiple responses, coded)**



Examples of lessons learned include:

- Six grantees specifically highlighted that they have learned that the need for support on energy issues is growing rapidly due to increased fuel and cost of living costs. This highlights the importance of energy advice and financial support for the most vulnerable people in fuel poverty.
- A flexible, holistic approach has been extremely beneficial in supporting vulnerable people with all their basic needs.
- Two grantees noted that they continue to provide advice remotely and, despite lifted Covid restrictions, many families remain happy to receive advice virtually or over the telephone.

- Two grantees reported that face-to-face and in-person advice is more effective than remote advice as it reveals client needs that are not always identified virtually or over the phone
- One grantee reported that they are spending significant time advocating on behalf of clients whilst on the phone to energy suppliers. The grantee said that this can take more time than advising clients.



## 6. COVID-19 crisis fund and Winter Energy Fund evaluation

### 6.1. Project metrics

This section presents the outputs achieved by the COVID-19 crisis fund and Winter Energy Fund as of 8 August 2022. **Table 6-1** provides a breakdown of the crisis fund by round<sup>11</sup>. 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 3 vouchers in total, the average amount received per household equates to £67 per household.

**Table 6-1: 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
<b>Total:</b>	<b>137</b>	<b>200,270</b>	<b>144,853</b>	<b>£9,638,634</b>

**Table 6-2** provides a breakdown of the Winter Energy Fund by round. The table shows that 50 projects funded in three rounds have utilised £5.02 million to distribute 106,022 vouchers to 67,458 households thus far, which equates to £74 per household. Note that Rounds 2 and 3 are still open and therefore have not distributed all of their allocated vouchers or spent their total funding.

**Table 6-2: Overview of the Winter Energy Fund by round (N= 50)**

Round	Number of projects	Number of vouchers distributed	Number of households receiving vouchers	Funding spent by grantees
1	27	70,127	46,130	£3,310,377
2	23	33,943	19,927	£1,621,082
3	16	1,952	1,401	£90,071
<b>Total:</b>	<b>50</b>	<b>106,022</b>	<b>67,458</b>	<b>£5,021,529</b>

<sup>11</sup> 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.

## 6.2. 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 8 August 2022 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 are now complete, but only Round 1 of the Winter Energy Fund has concluded as of 8 August 2022. Rounds 2 and 3 of the Winter Energy Fund are currently progressing and therefore have not issued all of their allocated vouchers.

Table 6-3 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. Note that grantee 10 received funding in Round 3 of the Winter Energy Fund, and so is only part of the way through their project delivery, therefore they have not yet achieved their target of vouchers issued or target spend on vouchers.

For certain grantees, the total number of vouchers issued exceeds the target number of vouchers issued, and 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 6-3: 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	4,437	4,713 (106%)	2,550	£228,413	£237,582 (104%)
Grantee 2	Crisis fund	2	335	335 (100%)	176	£16,415	£17,567 (107%)
Grantee 3	Crisis fund	3	500	524 (105%)	524	£22,100	£22,096 (100%)
Grantee 4	Crisis fund	4	841	841 (100%)	664	£42,902	£42,277 (99%)
Grantee 5	Crisis fund	5	1,135	1,136 (100%)	1,127	£55,064	£55,078 (100%)
Grantee 6	Crisis fund	6	3,600	4,905 (136%)	2,936	£261,268	£261,290 (100%)
Grantee 7	Crisis fund	7	1,050	1,038 (99%)	864	£46,830	£46,787 (100%)

Grantee 8	Winter Energy	1	1,200	1,243 (104%)	1,243	£53,220	£53,218 (100%)
Grantee 9	Winter Energy	2	1,697	1,530 (90%)	1,338	£70,358	£71,348 (101%)
Grantee 10	Winter Energy	3	4,000	292 (7%)	289	£435,252	£15,371 (4%)

### 6.2.1. 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 6-1 shows that these best practices included successful methods of delivering vouchers, such as working with partners (7), implementing an internal process to quickly identify suspected instances of fraudulent activity (4), utilising internal referrals (3) and recognising the influence that weather has on demand (3).

**Figure 6-1: 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 2021, when 80% of 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, reducing client’s costs and saving time by reducing administration burdens.

Four grantees noted that the most effective way to combat fraudulent attempts to redeem vouchers was to implement an internal process that can quickly identify potential clients who they suspected of fraud. Examples of these internal processes included requiring ID to redeem vouchers, sending evidence of a pre-payment meter and the client’s name and address in one photograph and conducting stringent checks on names, addresses and phone numbers before issuing the voucher.

Three grantees reported that they utilised referrals within their organisation to maximise the number of vouchers they distributed. Three grantees in the previous evaluation also mentioned that referrals had been effective. As was the case in 2021, these internal referrals are clients that the grantees have had previous engagement with. By utilising their own contact list of vulnerable consumers, these grantees were able to distribute vouchers to more households in need.

Three grantees acknowledged that the weather had a major impact on the demand for vouchers. This was also mentioned by half of the grantees analysed in the previous evaluation report. 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.

Two grantees reported that developing a marketing strategy enabled them to raise awareness for their project. One grantee ran a series of webinars to promote their project to potential partners who could help refer vulnerable people to their voucher service. The second grantee told their existing clients about their project when they visited their homes to provide energy advice and sent targeted emails and texts to their target demographic to inform them that they could assist with their pre-payment meters if they were at risk of disconnection.

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

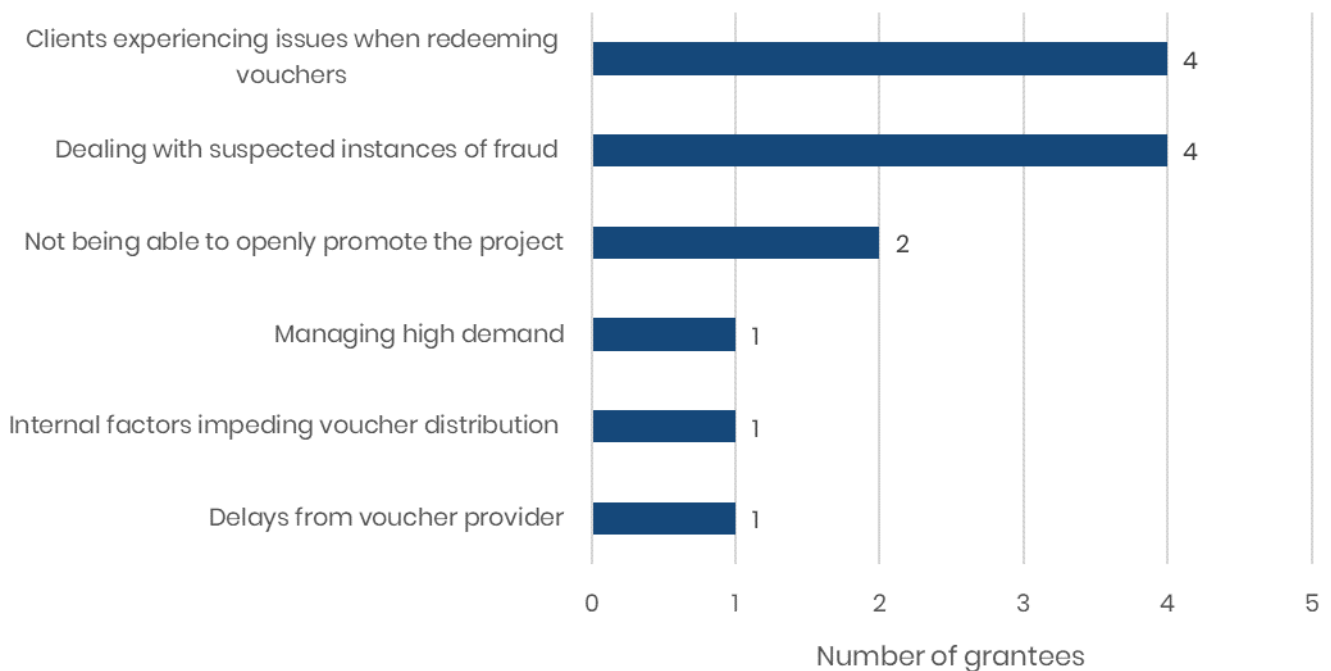
- alert local shops to the project so they are prepared when asked to redeem vouchers
- create a list of customers eligible for referrals who struggle to provide evidence of their pre-payment meter so that they can access vouchers
- follow-up on customers who have not redeemed their vouchers to understand if there are any issues preventing them from doing so
- implement an urgent fast track process so that disconnected households can access vouchers quickly
- mapping the vouchers redeemed to identify vulnerable populations
- steadily increase voucher distribution to effectively manage demand
- split £49 voucher into two separate vouchers (£25 and £24) in instances where customers have a different gas and electricity provider

### 6.2.2. Key challenges

Within their project progress reporting, grantees also described the challenges that they experienced when issuing vouchers. **Figure 6-2** illustrates that the two main challenges that grantees faced were clients experiencing issues when redeeming vouchers (4) and dealing with

suspected instances of fraud (4). Clients experiencing issues when redeeming vouchers (70%) was also the most frequently mentioned challenge in the previous evaluation report in August 2021, followed by managing high demand (50%).

**Figure 6-2: Challenges that grantees experienced when distributing vouchers (N= 10)**



Four of the ten grantees mentioned that their clients experienced issues when redeeming vouchers. For three of these grantees, these issues are related to the mental health and the vulnerability of the client, who is unable to redeem their vouchers because of their difficult circumstances. To assist these clients, grantees have worked with key workers and partners who can support them in redeeming their vouchers. The other grantee initially encountered resistance from some local shops when their clients presented them with a voucher code, but since the grantee has explained to these local shops that the funds were being administered by [the grantee organisation], they were happy to distribute them.

Four grantees reported that they had to deal with suspected instances of fraudulent activity when issuing their vouchers. Two of these grantees noted that individuals were being referred to the scheme under different names. As shown above in the Best practice section, grantees implement 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.

Two grantees said that one of their greatest challenges was not being able to advertise their project through their desired platforms. Under the terms of the crisis fund and Winter Energy Fund, projects are not permitted to advertise their project through their own marketing channels, such as social media, in order to manage demand and keep the vouchers targeted at those most in need. These grantees reported that they found it difficult to promote their project without advertising it openly through their usual advertising methods and believed that they would have distributed their vouchers quicker if they were allowed to.

Other challenges included managing high demand (1), internal organisational factors impeding voucher distribution (1) and delays from the voucher provider (1).

## 7. 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 89 completed projects' (as of 8 August 2022) 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 (61%). 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 group supported by all completed projects is likely far higher.
- As of 8 August 2022, **14 charities have been awarded a grant from the Energy Redress Scheme Innovation Fund.** The Innovation Fund is aimed at developing products or services which are truly innovative and not currently accessible to energy consumers or certain groups of energy consumers. 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 consumers<sup>12</sup>

The Energy Redress Scheme funds projects which support energy consumers in vulnerable situations.

---

<sup>12</sup> The figures in this section are correct as of 8 August 2022; please note many projects are still in progress therefore figures are subject to change.

Key deliverables from projects funded in rounds 1 to 13 include:

- 294,660 distinct households have received advice.
- 67,743 were advised at events.
- upwards of 164,924 telephone energy advice calls were made.
- 112,996 households advised online via email or online activity.
- 24,197 home visits delivered.
- 31,667 have received advice face-to-face eg at drop-in sessions.

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

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

- 84,518 capital measures installed or provided to households with redress funding (such as LED bulbs, draught proofing, power down devices and radiator foils).
- 8,489 other measures installed as a result of advice referrals to other funding sources (including insulation and boiler replacements).

As a result of these changes, quantifiable estimated savings from activity delivered by projects funded in rounds 1 to 13 so far are:

- 12,823,734 kWh estimated annual energy savings through advice and measures installed.
- £1,330,424 actual annual energy bill savings from advice.
- £12,503,699 estimated annual bill savings from energy advice.

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. To date, £26,205,080 of actual financial gains has been achieved from Rounds 1 to 13 projects, noting many 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 294,660 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 £70.25 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 89 of these projects completed as of 8 August 2022.
- Over £35.3 million awarded to grantees delivering projects across England, Scotland and Wales.

Grants worth £35.3 million have been provided, and over £20.7 million worth of activity has been delivered and reported on to date – 59% of total funding awarded in 13 rounds. The following key metrics<sup>13</sup> demonstrate what has been delivered for over £20.7 million of grant distributed to date<sup>14</sup>:

- 294,660 households have been provided with energy advice to date.
- 84,518 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:
  - 12,824 MWh of annual energy savings through advice and measures installed.
  - £12.5 million of annual bill savings from energy advice.
  - £1.2 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:
  - £1.3 million of annual energy bill savings from advice.
  - £26.2 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 learnt identified by grantees in this report include:

---

<sup>13</sup> 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.

<sup>14</sup> Note that savings are expected to increase significantly as further project activity is undertaken.

- The importance of partnerships and referrals to provide holistic support to vulnerable clients. Aligning with partners closes any gaps in the services provided by the project, making certain that all the client's issues are resolved.
- Learning about client needs – several grantees reported on what they had learned about their target audience, often highlighting the complexity of issues raised.
- Adapting service provision and advice due to COVID-19 – grantees learned to adapt their delivery methods to ensure that advice could still be provided to their clients remotely.

The most significant barriers and solutions identified in this report were COVID-19 related. Issues included:

- COVID-19:
  - Inability to deliver home visits and in-person advice – the projects were affected by COVID-19 restrictions preventing visits to other people's homes and remote working causing a decline in face-to-face advice. Projects overcame this barrier through provision of advice using alternative methods such as telephone, email, other online methods and via post.
  - Hampered delivery of training and events – with COVID-19 restrictions preventing large gatherings some grantees switched to online delivery using webinars, online meetings, social media etc. to disseminate information.
- Complexity of client issues – clients are vulnerable for a number of reasons, which puts a strain on grantee's resources as they attempt to solve multiple problems. Working with other organisations can relieve this pressure on the grantee and provide bespoke solutions to the client.
- Navigating the client journey – supporting the client right the way through from initial engagement to delivering the advice or measure was noted as a challenge. Developing strong referral pathways with reliable partners can benefit both the grantee and the client at different stages of the client journey.

Further barriers included communication issues, client engagement, issues relating to partnership working and reaching their target population.

#### 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, reducing client's costs and saving time by reducing administration burdens.
- Implementing an internal process to quickly identify suspected instances of fraudulent activity.
- Utilise internal referrals within the grantee's organisation to maximise the number of vouchers they distributed.
- Recognising the impact of weather on demand by planning ahead during the summer months to prepare for the high demand in the winter months.

Key challenges associated with delivering the projects included:

- Client issues when redeeming vouchers – these issues are related to the mental health and the vulnerability of the client, who is unable to redeem their vouchers because of their difficult circumstances. Extra assistance for these vulnerable people is crucial.
- Dealing with suspected instances of fraud – which requires project time and resource that could be put to supporting more vulnerable people.

(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 date<sup>15</sup>
- 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 £5 million spent on vouchers by 137 organisations to date<sup>13</sup>
- 106,022 vouchers distributed
- 67,458 households have received vouchers

---

<sup>15</sup> This figure does not include any charity admin fees.