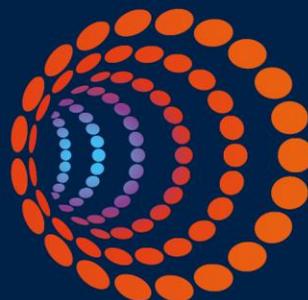


# Supporting communities across Falkirk in partnership with The Wise Group

Vulnerability and Carbon Monoxide Allowance

April 2024  
SGN



# SGN

Your gas. Our network.

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## 1 Description

Project title	Supporting communities across Falkirk
Funding GDN(s)	SGN
New/Updated (indicate as appropriate)	New
Date of PEA submission:	27.02.24
Project contact name:	Linda Spence
Project contact number/email:	<a href="mailto:Linda.spence@sgn.co.uk">Linda.spence@sgn.co.uk</a>
Total cost (£k)	£297,543
Total VCMA funding required (£k)	£297,543

## 2 Problem statement

Falkirk, a region grappling with significant levels of deprivation and fuel poverty, is a stark example of the energy challenges faced by many communities. With close to a third of its households in the grips of fuel poverty and 16% of its residents living in some of Scotland's most deprived areas, the struggle to afford basic energy needs is a daily reality for many. Of the nearly 28,000 households connected to gas, over 6,000 are registered on the Priority Service Register, highlighting the urgent need for solutions to maintain and manage energy costs. There are also 5 communities being connected to gas for the first time.

SGN is extending gas connections to five towns in the Falkirk region, namely Whitecross, Letham, California, Avonbridge, and Slamannan. Within these towns there are fuel poor households who own their own home and will struggle without support to find the best solution on the most suitable heating solutions for their homes.

Currently, there is no existing support available to help these homeowners who have never had access to mains gas as a potential fuel source for heating and has historically relied solely on electricity. As a result, they will require substantial assistance and guidance to transition to a new fuel source.

### General Fuel Poverty Support for households in Falkirk

Fuel poverty affects over a third of households in Falkirk. This prevalence makes it one of the top 15 areas with high levels of fuel poverty and deprivation. Given the wide-ranging consequences of fuel poverty, including adverse health effects, there is insufficient support in place available to these households.

A comprehensive fuel poverty initiative in partnership with SGN to support households across Falkirk will help alleviate not just the immediate financial burden of high energy costs for households, but also to tackle the root causes of fuel poverty in the region.

## 3 Scope and objectives

This project will provide mentoring support and advocacy to vulnerable households to ensure no one has to struggle between choosing to heat or eat. The partnership will deliver personalised services to fuel poor households across Falkirk using a successful Home Energy Advocacy Team (HEAT) service model. This specific team known as HEAT mentors will create Individual Action Plans based on the unique needs of each customer, ensuring that the solutions provided directly address the issues of fuel poverty for them and their homes.

Over **two years**, the partnership will provide energy safeguarding and energy related services to:

2,600 households with 1,200 fuel poor households supported and 1400 additional people reached in community outreach and advice drop-in settings across Falkirk.

The project will provide in-depth, complex advocacy casework to the 1200 households engaged. This level of provision will deliver the greatest impact for households as it enables positive engagement over a period of time which transactional/one-off advice engagements will not allow.

All fuel poor households experiencing energy crisis will receive help through the provision of independent, tailored advice to ensure emergencies are dealt with quickly and efficiently. By working with households to optimise their relationship with fuel consumption and efficiency over time, this support will reduce fuel poverty and help more people live comfortably in a warm home.

The project will provide an energy mentoring service for households in/at risk of fuel poverty and fuel fear. This energy mentoring service includes:

**Gas transition support:** Households will need intensive support to understand the process and benefits of using mains gas for heating their home. They will require detailed information about the installation process, safety measures, and energy efficiency advantages of using gas. This support can enhance their understanding of the new fuel source and help them make informed decisions.

Gas transition support will offer households a comprehensive guide outlining the installation process step-by-step. This will include information on the necessary paperwork, procedures, ensuring that homeowners are well-informed and prepared for the connection process. Safety measures will be emphasised throughout the guide, highlighting the importance of working with certified professionals and following all necessary regulations.

All households will be informed to help them select the most suitable gas appliances for their needs, including gas hobs and central heating systems. Households will receive guidance on the energy ratings, and installation options, ensuring that households make informed decisions that maximise their energy efficiency.

Understanding that financial assistance is often necessary for households the project will offer support in identifying and finding funding options. This may include exploring government grants, local authority schemes, or financing options provided by gas suppliers. The Wise Group delivers the Scottish Government's national Home Energy Scotland service which provides impartial advice on available grants; therefore, will have comprehensive, up-to-date knowledge of the financial support available.

**Historic debt:** From local fuel poverty research, it is expected these households to be experiencing severe challenges. Support will include addressing historic debts, such as unpaid electric bills on pre-payment meters. Intensive support will be required to help them negotiate repayment plans or access financial assistance programs specifically designed for low-income households. This assistance can alleviate their burden of debt and provide a fresh start as they transition to a new energy source.

**Education:** As these households have exclusively used electric heating in the past, each household may need assistance in adapting their current heating system or purchasing new gas-based heating appliances. They will require guidance to help them select the most suitable and energy-efficient options, ensuring a smooth transition to gas heating or other alternative solutions.

**Financial support:** Financial support may be required to cover the initial costs associated with the installation of gas infrastructure and purchasing gas-based appliances. This could be in the form of accessing grants, subsidies, or low-interest loans specifically targeted at supporting households in adopting cleaner and more efficient energy sources. Households can be empowered to make the necessary changes without facing undue financial strain.

Other support will include:

- **CO Awareness Conversations:** Raising awareness about the dangers of Carbon Monoxide (CO), provide information on how to detect a CO leak, and advise on what to do in an emergency, with additional provision of free CO alarms for households.
- **Energy Efficiency Advice:** Expert guidance on how households can reduce energy consumption and improve efficiency, with the ultimate goal of lowering their energy bills.
- **Heating and Tariff Advice:** Advice on the most cost-effective heating systems and energy tariffs, helping households make informed decisions that could save them money in the longer term.
- **Energy Efficiency & Energy Saving Measures:** Introducing practical measures to improve the energy efficiency of homes, such as insulation or energy-efficient appliances. These measures will be tailored to the specific needs of each household. All households will be offered energy efficiency and savings

advice looking at the measures they have in place and advise on immediate/low-cost actions that can be taken to improve their efficiency such as switching to LED lightbulbs. Where households are eligible, we will assist them to access funding available to improve the energy efficiency of their home and/or to obtain energy efficient appliances.

- **Energy Crisis & Advocacy Support:** In-depth support from a designated HEAT Energy Mentor to address crisis situations such as where households have self-disconnected their energy supply or have no access to fuel/heating. Mentors will support the household to resolve any billing/account issues, including negotiating with their energy supplier with repayment plans where considerable fuel debt has been built up. Households will also be supported to access energy supplier initiatives such as Priority Services Register. Where support from other services is required, households will be assisted to access through managed referrals. In cases where households are on pre-payment electricity meters without gas access, there's a significant chance they may be in fuel debt. The team will engage rigorously with them and advocate with their current energy provider to arrange repayment schemes or tap into financial support programs specially tailored for low-income homes. The Wise Group maintain a strong partnership with Scottish Power to offer their customers energy-related guidance, and this collaboration will be leveraged to assist these households.
- **Income Maximisation:** Identifying and accessing any available financial support, grants, or benefits, helping to increase the disposable income of these households. Advice will be provided on energy billing, including assistance to access eligible support to maximise household income. This also includes checking they are on the correct tariff. Households will be supported to engage with DWP to check they are receiving all benefit entitlements, including claiming any missed benefits. Our knowledge and experience also help us to easily identify what crisis/hardship funding and local initiatives may be available to a household to support with their bills.
- **Debt Support:** Providing guidance and support for those struggling with existing energy-related debts, helping them manage and reduce their debts in a manageable and sustainable way.
- **PSR Registrations:** Assisting with registration for the Priority Services Register, ensuring those who are elderly, disabled, chronically sick or in other vulnerable situations receive the additional support they need from energy companies.

### Key Objectives

- Increased and maximised household income
- Reduced fuel poverty and fuel debt
- Improved household energy usage and efficiency
- Improved customer health and wellbeing
- Improved knowledge and awareness of how to prevent or resolve energy issues
- Improved customer relationship with energy consumption and management

### Service Delivery Methods

**Outreach** – To engage the hardest-to-reach households the project will adopt a comprehensive, place-based approach. It is understood that effective community outreach is not a one-size-fits-all approach, but rather a process of listening, learning, and adapting to the unique needs and contexts of each community we serve. Our strategy is rooted in understanding the communities we serve, their unique needs, and the barriers they face, particularly those households most impacted by cold, damp living conditions or digitally excluded from accessing traditional energy services.

Informational sessions will be held in local community centres and churches in the target areas, for example, Slamannan Community Education Centre and Avonbridge Community Hall. Hosting these sessions in familiar, trusted environments will not only increase accessibility for many community members, but also provide a platform for open dialogue. This approach also enables us to reach people who are not digitally connected, ensuring they do not miss out on critical information and services.

The frequency of outreach sessions will be informed by the demand and need of the target communities.

Furthermore, we recognise that there are households whose health is significantly impacted by living in cold, damp houses. By working closely with local health professionals (e.g. GP practices) and support workers, we aim to identify these households and understand their needs better.

**Carbon Monoxide Awareness** – During in home visits, awareness will be raised about the dangers of Carbon Monoxide (CO), information will be provided on how to detect a CO leak, as well as advice on what to do in case of an emergency. Additionally, at drop-in sessions and outreach events, Energy Mentors will provide information and advice on the dangers of CO.

1. Remote Assistance – Initial contact made with customers will be by telephone (unless otherwise agreed). Ongoing communication will continue to be by telephone or by the customer's preferred method of communication (inc. email, video call etc.). HEAT Mentors will maintain regular communication with the customer as required to provide updates on casework and ensure agreed actions are completed and advice implemented.
2. In Home Support – An initial home visit will be conducted by a HEAT Mentor to assess the full range of support required by the customer, including assessing the home environment and existing heating systems in operation. They will maintain regular communication with the customer as required to provide updates on casework and ensure agreed actions are completed and advice implemented. Subsequent visits will be agreed and arranged between the HEAT Mentor and Customer, as necessary.
3. Advice Drop-In – The project will deliver energy advice and address fuel poverty through community-based drop-in sessions. For example, in local community centres, churches, primary schools, and GP practices. The Wise Group will work with SGN and community partners to identify key locations that will best reach our target customer group. Frequency and locations of sessions will be determined by demand. This will be reviewed throughout the service delivery period to ensure we are proactively targeting and reaching the households that will benefit the greatest.

## 4 Why the project is being funded through the VCMA

The project delivers against SGNs Vulnerability Strategy, by providing targeted support to households most at risk of living in fuel poverty based upon their personal circumstances and their geographical location.

The partnership service aligns to our strategic ambition to support customers in energy crisis, helping those in fuel poverty to access financial crisis support, and other services including the Priority Services Register, awareness of the dangers of carbon monoxide and energy efficiency advice, empowering vulnerable households to use energy safely, efficiently, and affordably.

This partnership aligns to the SGN commitment to deliver support services for customers aligned to our four strategic pillars:

1. Services Beyond the Meter
2. Supporting Priority Customer Groups
3. Fuel Poverty & Energy Affordability
4. Carbon Monoxide Awareness

This project aligns to strategic pillar 3, (with outcomes in pillars 2 and 4).

## 5 Evidence of stakeholder/customer support

### 5.1 Stakeholder Endorsement

Both the Wise Group and SGN have engaged with the local community and Falkirk Council in relation to supporting households being connected to gas for the first time.

The Wise Group is acutely aware of the historic problems faced by the community struggling with high energy costs and inefficient heating systems, in particular the challenges faced by households not eligible for support and the mistrust towards the council and energy providers. The Wise Group's Home Energy Scotland (HES) team have been able to support a very limited number of households in the 'forgotten villages' over the years and expect many more households now require in-depth support to navigate the process to get their homes connected as well as addressing complex fuel and related debt issues.

As a result of the council being unable to offer help to private homeowners, they welcome the support the Wise Group and SGN are able to offer to local fuel poor residents through the delivery of this project.

The Wise Group is an independent and trusted advocate of households struggling with fuel poverty. Feedback from our HEAT customers demonstrate the positive impact the service brings.

*"Our grateful thanks to you for securing funding to assist with our home energy costs. Your empathy, compassion and commitment has been outstanding, and we totally appreciate all the work you have done to support us in our time of need."*

*"within 6 months of my initial contact with The Wise Group my life has moved forward in many positive ways"*

*"I felt heard and valued after going through an extremely difficult period."*

*"Great service spoke to me like a human being rather than treating me as a number."*

*"Helped to clear my debt and took a lot of pressure off while going through a really rough time."*

### 5.2 Addressing Local Need

This project will address the issue of fuel poverty and increase awareness of the dangers of carbon monoxide in households that are being connected to Mains Gas for the first time.

Households that are newly connected to Mains Gas may not be aware of the potential dangers of carbon monoxide. Carbon monoxide is a colourless and odourless gas that can be produced when fuel is not burned completely, such as in faulty gas appliances. It is highly toxic and can cause serious health issues or even death if inhaled in high concentrations.

Through delivery of this fuel poverty project, our aim is to educate and inform households about the risks associated with carbon monoxide and provide them with the necessary knowledge and tools to ensure their safety. This includes raising awareness about the importance of regular gas appliance maintenance, proper ventilation, and the installation of carbon monoxide detectors.

Additionally, the fact that one third of households in Falkirk Council are in fuel poverty further emphasises the need for this initiative. This partnership will enable this project to provide support and resources to vulnerable households in Falkirk Council, helping them improve their living conditions and reduce their energy costs. By addressing both fuel poverty and carbon monoxide safety issues, we are working towards creating safer and healthier homes for the residents of Falkirk Council.

### 5.3 SGN's Vulnerable Customer Steering Group

During the shaping of the SGN business plan we committed to support at least 250,000 vulnerable households to use gas safely, affordably, and efficiently over GD2. During 2023, following ongoing engagement with Ofgem, SGN's Customer and Stakeholder Engagement Group and Vulnerable Steering Group we increased this commitment to support 500,000 vulnerable households, those most at risk of living in a cold and unhealthy

home. SGN have used data and insights to develop our programme, this has underpinned how this commitment to support those most in need from a strategic ambition into an extensive partnership-based delivery programme.

As we have progressed our portfolio of projects throughout GD2, our strategic steering group reiterated the vital impact we could have by co-ordinating our activities with others to support those most in need, those most impacted by the cost-of-living and energy cost crisis. The VSG have recommended that we look at ways in which we can build stronger links with other organisations including collaborating with other utilities, health services and charities to deliver support services that tackle the fuel poverty gap and the underlying causes of fuel poverty.

## 6 Outcomes, associated actions, and success criteria

### 6.1 Outcomes

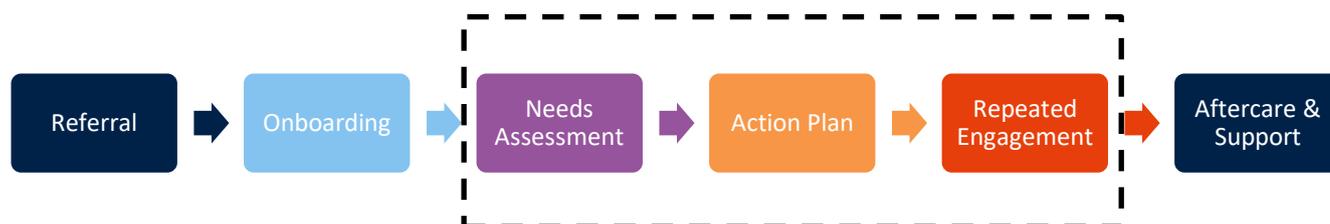
Outcomes will be achieved through the repeated delivery of linked activities and/or the assertive confirmation from a customer that the outcome has been achieved. For example, improving a customer's access to energy specialist services will be achieved by providing them assistance to access and engage with energy specialists.

Outcomes which relate to behaviour and/or skill change will meet the success criteria when the Customer confirms with the HEAT Mentor that they feel progress has been made.

The progress and outcomes achieved for each household supported will be meticulously monitored to tangibly demonstrate interventions and support have brought about meaningful change in the lives of local people and help analyse and evaluate the impact of support on the behaviours of the households.

The project aims to educate on the use and benefits of mains gas, change energy consumption habits, encouraging households to adopt more sustainable practices and reduce their carbon footprint. By monitoring changes in energy usage patterns and surveying the households, we can measure the success of our efforts in influencing their behaviours.

#### Typical Customer Journey



1. **Referral** – Internal, external or customer self-referral, driven by Outreach work.
2. **Onboarding** – Customer is allocated an Energy Mentor.
3. **Needs Assessment** – To identify the level of the customer's need, which is then reviewed to track progress.
4. **Action Plan** –Setting out the customer's expected outcomes. For example, this could be dealing with a historic fuel debt, education on transitioning to mains gas, or advice on the most efficient way to heat their home.
5. **Engagements** – Regular, repeated customer engagement using Relational Mentoring Approach, completion of activities and achievement of outcomes
6. **Aftercare & Support** – Customers can continue to access support from their Mentor as required to ensure sustained progress.

The partnership will work towards the following broad outcomes:

- Reduced fuel poverty/energy insecurity
- Improved confidence to manage energy use
- Improved household energy efficiency/ carbon footprint
- Improved financial situation
- Improved access to energy specialist services
- Improved understanding of how to resolve energy issues
- Improved skills and knowledge to manage energy use and costs
- Reduced energy debt
- Improved awareness of funding support available

## 6.2 Associated actions

A monthly report will be provided no later than 2 weeks after the start of each month, covering the following performance data of the prior calendar month:

1. Number of referrals received
2. Number of 1st, 2nd, and 3rd unsuccessful call attempts
3. Number of Customers supported
4. Number of Customers receiving energy advice and follow ups
5. Estimated value of savings levered from energy advice
6. Value of additional benefits levered
7. Value of debt reduced/written off
8. Onward referrals made
9. Number and value of Crisis Fund Payments distributed (where applicable)

The project partners shall meet at least quarterly to discuss the Services.

Additional reporting metrics can be agreed prior to service commencement.

## 6.3 Success Criteria

The project aim is to reach 2600 households across Falkirk providing information around energy efficiency, carbon monoxide awareness and support to help the Falkirk community use energy safely, efficiently, and affordably. These households will be reached either through Community outreach sessions (500), community advice drop-ins (900) or directly through our project where 1200 households will receive one to one support to reduce fuel poverty/energy insecurity facing households over the duration of the project.

### HEAT Mentors

- 1200 households will receive follow up advocacy, casework and savings levered from energy advice (behaviour change)
- 1200 households will receive information and advice on PSR (energy & water)
  - **1000** households will receive remote energy advice and support by telephone with a further **50** households receiving crisis interventions – funding via The Wise Group support
  - **840** households will receive assistance to maximise income, with **120** accessing WHD rebate
  - **600** new/updated PSR registrations
  - **480** households will receive assistance to access Energy Crisis Funding Support (Fuel Voucher) where available
  - **420** debt reduced/written-off
  - **240** Households will receive referral/assistance to obtain Foodbank voucher
  - **200** households will receive home energy advice and support delivered in person, providing In-depth household energy needs assessment with a further **20** households receiving crisis interventions – funding through Wise Group support
  - **120** households will receive assistance to improve energy efficiency of their home
  - **120** households will receive referral/assistance to access mental health services

- 60 households will receive referral/assistance to access employability service
- 60 households will receive referral/assistance to access other advice services (e.g. Citizens Advice, Money & Debt specialists) (estimated 5% of customers)
- 60 households will receive referral/assistance to access general health services

#### Community Outreach

- 500 households engaged through Community Outreach Information Sessions, (Minimum of 10 information sessions reaching 50 members) with provision of basic energy advice

#### Advice Drop in Sessions

- 900 households engaged through Community advice drop-ins, Minimum of 36 advice drop-ins reaching 25 members of the wider community
- 900 households will receive information and advice on CO of which 180 customers will receive CO alarm

## 7 Project partners and third parties involved

The Wise Group will be the service delivery partner, providing direct energy mentoring support to households experiencing fuel poverty across Falkirk. The Wise Group is responsible for engaging with the target households and communities. The Team Lead and Operations Manager overseeing this project will coordinate with partners to maximise collaboration and efficiency.

SGN will directly refer/provide private households with information for those who require support to set up their first gas connection for use.

The Wise Group's HES team will be able to refer target households to the service requiring support to get connected to gas or more in-depth advocacy to resolve energy related issues. HES colleagues will collaborate with the team to advise/access grants and loans a household may be eligible for to upgrade their home heating system.

## 8 Potential for new learning

#### Data tracked and reportable via our CRM

In order to ensure efficient tracking and storage of all engagements, activities, and outcomes, The Wise Group will leverage the capabilities of their centralised Customer Relationship Management (CRM) system. Every interaction, whether it is through email, phone call, or face-to-face meeting, will be logged into the CRM system. All activities related to a customer will be tracked, whether it is supporting a customer with their transition to gas, providing advice on heating systems, or advocating on their behalf with their existing energy supplier. The CRM will also help measure the outcomes of each customer journey and enable analysis of data. Reports will be generated on activities and outcomes, identify trends, and gain insights into performance.

#### Monitoring and evaluation and Learning

Potential Monitoring and Evaluation, and Learning opportunities include:

- Understanding the needs of customers on pre-payment meters transitioning to mains gas, including understanding the installation process, working with certified professionals, and implementing necessary safety measures.
- The level of education required for customers to transition to gas, including selecting suitable gas appliances, and providing advice on maximising energy efficiency.
- The current and most appropriate funding options and initiatives to help cover the costs of gas mains connection, particularly for low-income households.
- The level and type of support for households in crisis situations, including self-disconnection or lack of fuel/heating.

- Which methods of community-based outreach (e.g. informational sessions in community centres and churches, GPs visits, making door-to-door visits) are most effective.
- The efficacy of different approaches to communication - e.g. remote assistance via telephone or in-home visits.
- The amount of time required by each customer to achieve their desired outcome.
- The most effective way to educate households from disadvantaged areas on the dangers of Carbon Monoxide.

### Quarterly Case Studies

Case studies will be provided showcasing all efforts to alleviate fuel poverty and facilitate transition to the Mains Gas Network in Falkirk.

Data will be collected through surveys, interviews, and financial reports, tracking the number of households supported and monitoring changes in fuel poverty levels and financial stability. This data will be examined to identify trends and measure impact, providing the foundation to create engaging case studies detailing interventions and results.

At least one case study will be produced each quarter, showcasing a variety of scenarios. These case studies will demonstrate the commitment to alleviating fuel poverty and provide valuable insights for refining strategies used.

**Example Case Study** - *Miss H is a single mum to 3 children and is a housing association tenant. She has lived in her home since 2017. She suffers from a number of serious health conditions, including chronic depression, acute anxiety, and a spinal injury which causes her chronic pain and numbness throughout her body. Her symptoms were escalated due to the stress of dealing with fuel debt. Her health conditions requires her home to be kept warm. However, due to a change in circumstances she saw her income drop by £400 as her youngest son started college.*

*Our HEAT mentor was able to listen and relate to her situation and could understand why she was choosing to feed herself and her children and cut back on paying her energy bills as a matter of survival. This had resulted in debt being built up, and this was further worsened with the added worry of losing a further £400 of her income.*

*Her mentor applied to the Home Heating support fund on behalf of Miss H and was successful. She was awarded £1400 which was enough to clear off the debt that had been built up and leave credit within her account. Her mentor provided further behavioural energy advice that she could incorporate in her lifestyle to help keep the bills slightly lower going forward.*

*Customer quote – “My mentor helped resolve my issue greatly, even when I was feeling like giving up as I was in doubt, he supported me through the struggle and continued to help me through it until it was resolved. He had great manners and was very professional. He did not give up on me and continuously found ways to help me. I greatly appreciate the service and I cannot thank you enough.”*

## 9 Scale of VCMA Project and SROI Calculations, including NPV

### Social Value Measurement

We worked with leading social impact research consultancy SIA Partners to carry out an assessment of the financial and wellbeing outcomes applicable to our services for vulnerable customers incorporated in this partnership using the DNO methodology/rulebook with additional proxies developed for GDN activity. Carrying out an in-depth assessment of the predicted outcomes we forecast a positive net Social Return On Investment (SROI) of £1.79.

### Social Return on Investment calculations

Total cost*	£292,512.08
Total Gross Present Value	£815,310.39
NPV	£522,798.31
SROI	£1.79

*\*Accounting for inflationary factors over the duration of the project*

## 10 VCMA Project start and end date

The project will run from 1 April 2024 to 31 March 2026

## 11 Geographic area

Falkirk, Scotland

## 12 Internal governance and project management evidence

SGN has worked alongside The Wise Group to co-design this partnership and ensure that its ambition contributes to the delivery of our Vulnerability Strategy, the guidance from our Vulnerable Customer Steering Group and adheres to the updated VCMA governance criteria. The SROI has been externally assessed by SIA Partners using the DNO methodology/rulebook with additional proxies developed for GDN activity. To support the partnership to deliver the success criteria outcomes as detailed, the partners will review progress monthly and quarterly to learn, share best practices and address any delivery issues. The PEA has been reviewed and approved by the business lead Linda Spence and the Director of Customer Services Maureen McIntosh.