

Breaking Barriers

Energy Advice for Dorset

Vulnerability and Carbon Monoxide Allowance

March 2024

SGN

Update October 2024



SGN

Your gas. Our network.

Contents

1	Description	3
2	Problem statement	3
3	Scope and objectives	5
4	Why the project is being funded through the VCMA	5
5	Evidence of stakeholder/customer support	6
5.1	Citizens Advice Dorset feedback	6
5.2	SGNs Vulnerable Steering Group	7
6	Outcomes, associated actions and success criteria	8
6.1	Outcomes	8
6.2	Success Criteria	8
7	Project partners and third parties involved	9
8	Potential for new learning	10
9	Scale of VCMA Project and SROI Calculations, including NPV	10
10	VCMA Project start and end date	11
11	Geographic area	11
12	Internal governance and project management evidence	11

1 Description

Project title	Breaking Barriers – Energy Advice for Dorset
Funding GDN(s)	SGN
New/Updated (indicate as appropriate)	Update October 2024
Date of PEA submission:	March 2024 Update October 2024
Project contact name:	Janet Duggan
Project contact number/email:	janet.duggan@sgn.co.uk
Total cost (£k)	£908,965 Update October 2024 £126,000 Total Update Cost: £1,034,965
Total VCMA funding required (£k)	£684,162 Update October 2024 Update cost: £63,000 Overall VCMA total: £747,162

2 Problem statement

In 2022, there were an estimated 3.26 million households living in fuel poverty in England, based on the LILEE metric (Department for Energy Security and Net Zero, 2023). This is an increase from 3.1 million in 2021 and doesn't take into consideration the cost-of-living crisis that has hit households throughout the winter of 2022-23 and beyond. National Energy Action's October 2023 figures show 6.5 million UK households are in fuel poverty, based on the definition of low-income households spending more than 10% of their income on their energy bills. Fuel poverty is driven by energy efficiency, energy costs and income. It is recognised that nearly half of low-income households are still living in hard to heat homes, and the rate of improvements was well below what is needed to lift people out of fuel poverty by a target date of 2030.

In the same NEA YouGov polling it was found that 49% of households turned the heating off even though it was cold in the house, 43% of adults had gone to bed early to stay warm and 13% of households had used appliances like ovens to stay warm.

Findings from [Friends of the Earth](#) predict that last year more than 1 million households were in extreme fuel poverty, spending more than 20% of their disposable income on energy. 742,200 households will be spending between 20-30% of their income on energy costs, 196,500 between 30-40%, and 117,400 more than 40%. Friends of the Earth highlight the strong correlation between vulnerable customer groups and fuel poverty, reporting that 21% of households in fuel poverty have somebody in receipt of disability payments and 42% of older people are spending more than 10% of their income on energy.

Dorset is in the South West, which the largest regional fuel poverty gap (2022) of £289 for the [region](#). Of the eight constituencies in Dorset and Bournemouth, Christchurch, and Poole council areas 4 are above the South West average and 2 equal or exceed the national average. For example, South Dorset (including Weymouth) has 5,888 households in fuel poverty - above national average. North Dorset has 4,723 households in fuel poverty and Bournemouth East (including Boscombe) has 6,503 households in fuel poverty - above national average. Over the last five years in The South West, according to the [Office for National Statistics](#), an average of 500 people died from cold-related illness over the winter.

Other local factors include;

There is a higher number of households [Off gas grid](#); much higher than national average with around 50% (50.7% in West Dorset, 47.2% in North Dorset) households unable to access gas central heating. A large proportion of households in North and West Dorset are off the main gas grid and use oils as their primary energy. This makes it harder, especially for PPM customers, making self-disconnection more prevalent.

Incomes; a lower than average gross weekly pay at 10% below the national median. Dorset has four constituency areas of high need with regards the measure of fuel poverty and multiple smaller pockets of deprivation these include Boscombe West (Bournemouth) Weymouth Town, Central Bournemouth, Westham North and Radipole.

The Dorset Council areas of significant deprivation are largely located in the urban areas - in particular the former borough of Weymouth & Portland - but many of Dorset's rural communities could also be considered deprived in terms of barriers to housing and essential services. There are 11 areas in Dorset within the top 20% most deprived nationally for multiple deprivation, up from 10 in 2015. 46% of Dorset's population lives in rural areas. Barriers to housing and essential services are significant in Dorset reflecting rurality and distance from services. 66 Dorset neighbourhoods fall in the 20% most deprived nationally.

Dorset Council area has a population of 380,000 residents, 29% of whom are aged 65 and older (compared to 19% in England and Wales). In Bournemouth, Christchurch and Poole council area income deprivation affecting older people has 31 LSOAs within the most deprived 20%.

Citizens Advice East Dorset and Purbeck is an independent charity providing free confidential and impartial advice and support to the residents of Dorset. Over recent years they have built expertise in energy advice and deliver this via their Dorset Energy Unit which has become the go to service for local organisations and agencies across both Dorset and Bournemouth, Christchurch, and Poole Council areas. The team have eight years of addressing the underlying causes and barriers faced by residents struggling to maintain a safe and warm home.

Residents who are accessing the service often face complex intersectionality in their needs for support, as older people, disabled people, and those with health conditions.

The Energy Advisers offer an emergency service, which was developed based on a client need, providing a triage service supplying initial energy advice, offering a benefit check and access to emergency PPM vouchers for those clients who are off supply or in jeopardy of being off gas and/or electricity supply, they have issued over 103 emergency PPM vouchers between April and December 2023. In addition, the team have started to provide in depth casework to Dorset and Bournemouth, Christchurch, and Poole residents, highlighting the need for further debt advice provision in the energy team.

Between January 2023-January 2024; 73% of clients helped by the Energy Unit identified themselves as being disabled or as having a long-term health condition and 22% of these clients said they have Mental Health issues. Of the clients that were supported by the energy team; 36% presented with debt issues alongside their energy problems and 56% had issues related to welfare benefits, 18% of clients also had housing issues.

The demand for the services provided by the Energy Unit has grown beyond capacity. The added benefit of delivering energy advice through the Citizen Advice network is the integration of energy advice sits within a holistic advice service, providing a seamless experience for the clients they support.

Update October 2024

Due to the end of the Winter Fuel Payments in September 2024 for those not on means tested benefits, there is going to be a direct impact on Citizens Advice East Dorset and Purbeck's ability to continue to provide Surviving Winter grants. The impact of ending the winter fuel payments is that there are going to be those who are not eligible for means tested benefits, who will struggle this winter. Furthermore, that funding raised for the Surviving Winter grants is going to be negatively impacted as fewer people will be able to make the donation. The grants are therefore likely to be higher in demand and fewer in number.

3 Scope and objectives

Working in partnership with Dorset Citizens Advice offices, local councils and third-party organisations, the project will improve access to and provide energy advice to Dorset residents on how to stay safe and warm, tackle fuel poverty, through targeting areas of deprivation and vulnerable residents. The partnership will focus on reaching people who struggle to access services. We have access to the translation service Language Line, that all advisers have access to and access to BSL interpreters if required. We also have hearing loops in our office locations.

Through the partnership and development of new and innovative service where inclusion will be at the forefront of the initiative and will provide:

- Train and support frontline workers to identify and support households living in fuel poverty or eligible to join the Priority Services Register and triage into the service where required
- Provide energy safeguarding support services to help alleviate fuel poverty ensuring that the service can be tailored to meet the needs of a diverse community (e.g. rural community outreach via a dedicated mobile Energy Bus service and translation services for those unable to communicate in English)
- Establish a new access route into a Specialist Support Unit (SSU) offering support to vulnerable customers from energy adviser
- Hold and attend energy events and workshops at warm spaces and community hubs for people affected by fuel poverty to help them address the underlying causes of fuel poverty
- Provide access to CA energy debt caseworkers to help those most vulnerable receive specialist support, helping to alleviate debt
- Provide information on the Priority Services Register and support where required to help identified vulnerable households to sign up for support
- Provide access to the Locking Cooker Valve where required for dementia groups and/or people with autism
- Provide information on carbon monoxide safety and where required provide free carbon monoxide alarms
- Provide access to fuel vouchers and other grants including Surviving Winter and HSF (if continued) for households in energy crisis.

Through collaboration the partnership will directly alleviate the financial stress caused by rising fuel bills for vulnerable households at a time of need, by targeting hard to reach communities via the Energy Bus, the partnership ambition is to help now and leave a lasting legacy within communities.

Update October 2024

Through extending the scope of the partnership, the most vulnerable households will continue to be able to receive support through an emergency fund, helping to alleviate financial stress caused from the Winter Fuel Payments finishing.

4 Why the project is being funded through the VCMA

This project is proposed for funding through the Vulnerability and Carbon Monoxide Allowance (VCMA) as it aims to provide energy advice to those residents who have previously not been able to access it and who may be in crisis. This project aims to tackle this by evolving their current energy advice service, to suit the needs of clients via mobile advice and targeted outreach.

The project delivers against SGNs Vulnerability Strategy, by targeting households on low-income, with disabilities, older people, families and the financially vulnerable. We have found that mobile advice is particularly helpful to people with mobility issues, who cannot drive and who don't have the time/resources to get to local CA offices. Being able to offer multi-channel energy advice, the partnership can better support people with mental health issues and families.

This partnership service goes above and beyond our core responsibilities as a Gas Distribution Network and is eligible under the VCMA funding criteria as it will provide support to hard-to-reach communities who may be in crisis, providing information on using energy safely, efficiently, and affordably.

This partnership aligns to the SGN commitment to deliver support services 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 all of the strategic pillar 3 (with outcomes in 2 & 4)

5 Evidence of stakeholder/customer support

5.1 Citizens Advice Dorset feedback

The partnership would enable Citizens Advice Dorset and East Purbeck to safeguard and extend the provision that they already offer and keep their experienced Energy Unit doing what it does best. The advisers and the Project Coordinator are all NVQ level 3 Award in Energy Awareness qualified and since September 2022 have helped 625 clients with complex case work issues and have seen income gains in excess of £500,000.

Energy Specialist from the team, Laura Wilcox, won ‘Champion on the Ground; Advocating for fuel poor households locally’ at the recent National Energy Action Awards 2023, in recognition of her outstanding work. All knowledge is kept up to date and shared throughout the Energy Unit and to the general advice service, improving the experience for all.

Feedback from stakeholders and partners:

Dorset Council Financial Capabilities team:

‘Being able to refer to CAB Energy has been a real help for our tenants. The service is comprehensive, the staff are very knowledgeable, and I have every confidence when referring a tenant, they will receive appropriate help and support. The feedback from tenants is always positive and most tenants would not be able to afford their energy bills without this help. Without this service it would be a struggle to signpost to a Provider in the area for energy help. We refer or advise tenants about the service on a regular basis as energy help is much needed by our tenants. We refer tenants who would like help with their energy bills when they cannot afford what is being charged, need help with a smart meter, when they have been overcharged and when they cannot decipher what is being charged and why. Energy grants are offered by CAB Energy when required which is much needed for especially vulnerable tenants.

Thanks for all the support which you provide’

Ridgewater Energy:

‘When we work together, we are able to bring a much more holistic and in-depth offering to clients. For example, the Energy Unit are able to offer longer-term case work and work through energy supplier issues, meter issues and helping clients access vouchers and maximise their income, as well as assist with other issues that might be contributing to the client’s circumstances.

Ridgewater Energy is then able to help, by carrying out an in-depth home visit, identifying any other necessary referrals, fitting free energy saving measures (e.g., LED light bulbs), boiler replacements, appliances, insulation, enabling measures, heating upgrades and renewable energy measures.

Between our organisations, we have a vast knowledge base and well-trained teams, which allows us to give professional impartial energy advice, refer to multiple partners and services, identify common difficulties, understand the housing stock and the associated issues, risks, and solutions.

There is a great deal of empathy, understanding and support that we are both able to provide to get real long-term positive outcomes for Dorset residents. These client interactions result in lower bills, higher household income, more disposable income (which is also to the benefit of local commerce) better physical and mental health, and carbon emissions reductions.'

Dorset NHS:

'We have been fortunate to be able to collaborate with the CAB teams across Dorset with a number of our Staff Wellbeing events and roadshows over the last couple of years. This has always been really well received by our staff and we have had feedback from individuals. They have said how useful it is for this to come to them as they often do not have the time to access these services due to shift patterns or workload.

Having the Advice Bus at a number of our Winter Wellbeing Roadshows sites at the end of last year was great. The visibility of the bus encouraged staff to come and engage with the CAB team and it also meant that they had a warmer, private space to talk to staff if this was needed.'

Local Citizens Advice Offices:

'The Dorset Energy Unit has a strong track record in delivering vital support to Dorset residents. This new proposal, targeting the key areas of deprivation in Weymouth and Portland, is exactly what is needed. It will add much needed capacity to the work of Citizens Advice in this area and it will complement the existing links with community groups and other partners.'

"The Dorset Energy Unit is a vital resource at a time when many people are struggling to meet the high cost of energy and make efficiencies. The Energy Unit supports us with client referrals for complex energy issues and training and support for our advisers locally. The Unit provides invaluable assistance for clients in identifying and claiming the range of discretionary energy grant support.

Customer feedback

"I would like to express my appreciation and thanks to the service provided by the Citizens Advice Bureau. My own experience involved dealing with my energy provider, I was at my wits end but then came the phone call from Laura. The relief I felt that at last there was help. Laura took on my problem completely, kept me informed at all stages and resolved the problem. I cannot express strongly enough my thanks to Laura. Certainly, a gold member of staff. Thank you again Laura, you kept me sane."

'She was very helpful and very supportive. Many thanks to you all. Wouldn't know what to do without you amazing people. I am deeply grateful to you all'

5.2 SGNs Vulnerable Steering Group

Our Vulnerable Steering Group has helped us shape our vulnerability strategy and our priorities for GD2 from strategy into delivery. With their guidance we intend to prioritise key initiatives to support our most vulnerable customers.

With a data driven approach to identify communities most likely to suffer detriment from living in a cold and unhealthy home, it was identified that we should extend our programmes that support residents across SGNs geographic areas including rural communities where there are barriers to accessing support and require targeted engagement.

In 2023 our strategic steering group re-iterated the vital impact we could have by coordinating our activities with others to identify and support those most in need, those most impacted by the cost of living and energy cost crisis.

6 Outcomes, associated actions and success criteria

6.1 Outcomes

Through the partnership SGN & Citizens Advice East Dorset and Purbeck will increase resilience to fuel poverty by:

- Encouraging vulnerable households to keep warm at home, to aid or improve their health and wellbeing. Helping them to find ways to better manage the balance of this with the costs involved
- Encouraging behavioural change in the home by better using what they have (e.g. thermostats, TRVs, isolators, heating controls, timers etc.)
- Increasing household income through running Benefits Checks to identify eligibility, and making internal referral for help with benefits applications and/or appeals
- Building financial capability skills and confidence in the energy market (e.g. help understanding bills, understanding payment methods, confidence in contacting suppliers,)
- Identifying eligible households for free insulation via Public Health Dorset funded project, (LEAP/Ridgewater Energy)
- Reducing energy debt through negotiating affordable repayment plans, applying to trust funds to get debt written off, or referring to our energy debt caseworkers where households have multiple debts and require full debt advice, challenging billing issues and applying the back-billing rules
- Applying for emergency help where needed (e.g. Household Support Fund, Prepayment Top-up Crisis Support Fund, Emergency Local Assistance, Food Parcels etc)
- Giving clients information on Carbon Monoxide safety awareness and offering CO monitors where appropriate
- Reducing stress and improving mental wellbeing among vulnerable households.
- Assisting clients in understanding their rights and responsibilities and the energy suppliers' responsibilities to ensure accurate billing, giving confidence in raising complaints at the start of an issue
- Holistic support identified by the Energy Caseworker and appropriate referrals made to internal projects or offices or a partner organisation for additional advice, such as water billing advice/support, environmental health, and housing
- Helping clients understand the pros and cons of smart meters to review what is best for that client.
- Assessing eligibility and assisting with applications for the Priority Services Register (PSR), Locking Cooker Valve Scheme and Fuel Poor Network Extension Scheme (FPNES) when appropriate.

Update October 2024

- Provide an emergency fund targeting the most vulnerable households in response to the Winter Fuel Payments being stopped

6.2 Success Criteria

To support at least 10,500 clients over two years addressing the issues of fuel poverty and cold homes. We aim to support those most in need to receive specialist energy advice including information on the Priority Services Register, carbon monoxide awareness and other energy safeguarding schemes

Over the two years our ambition is to;

- Train 200 front line workers and volunteers on energy safeguarding / triage and referral
- Provide 4,300 households with personalised energy advice in person, or through specialist support worker referral route, from a qualified energy adviser (including the offer of a Quick Benefits Check)
- Provide 1,700 clients with in-depth specialist case work to assist with the resolution of complex energy issues including energy debt, supplier and metering issues, income maximisation and the offer of home visits for vulnerable clients
- Deliver 150 energy events and workshops at warm spaces and other community hubs

- Provide 4,500 clients with light touch, in person, advice through talking to advisers at events/warm spaces

We forecast that these interactions will result in;

- Signing up 800 vulnerable customers to the Priority Services Register
- Identifying 10 households who would benefit from the Locking Cooker Valve
- Distributing 400 carbon monoxide alarms
- 1,000 households identified for Surviving Winter Grants for over 50s in fuel poverty funding from Dorset Community Foundation
- 300 households would be assisted with water debt / water sure applications
- 400 households would be provided with fuel vouchers funded by Fuel Bank Foundation
- 500 vulnerable households identified for winter warm packs funded by Ridgewater Energy and Dorset Council

Update October 2024

- Provide emergency funds for at least 300 vulnerable households

7 Project partners and third parties involved

- **SGN** – Lead gas network providing funding and support to the delivery team, including training, access to broader referral partners, and direct services for customers including but not limited to the Priority Services Register, Locking Cooker Valves, CO alarms
- **Citizens Advice East Dorset and Purbeck** – delivery and coordination of the service, setting up a dedicated Energy Advice Bus to cover the entire County of Dorset targeting areas of deprivation offering vulnerable clients expert energy advice and support and onward support
- **National Citizens Advice** – will provide £173,388 funding for the extended telephone consultation with an energy adviser providing energy efficiency, CO safety, QBC, with the opportunity for internal referral for holistic advice. They also provide the funding for the Frontline worker training
- **Dorset Council** – will provide £28,000 funding for internal specialist income maximisation advice, for the most vulnerable clients
- **Dorset Community Foundation** – will provide £8,000 funding to administer 1,000 Surviving winter grants of £200 each, over the 2 winters of the project period
- **Ridgewater energy** – provide some funding for warm packs and will offer added value of access to boiler replacements, insulation, LED lightbulbs, radiator foils and other practical energy efficiency measures
- **Smart GB** - will provide funding over 2 years to fund additional energy advice on our EDP General Advice bus
- **Bournemouth, Christchurch, and Poole council referrals** - built a strong relationship with the Councils financial capabilities team, who frequently make 3rd party referrals. These referrals most often come from the most deprived areas of Bournemouth, Christchurch, and Poole
- **Carer Support Services** - actively support the local Carer Groups and the National Carers Rights Day by attending these events held, giving talks and personalised energy advice at a point most suitable for the carer
- **LEAP/Ridgewater Energy** - mutual referral relationship, as they benefit the clients we see. This is often for funded insulation, boiler replacement, schemes to improve the energy efficiency of the property
- **Links with the Gypsy, Romany, Traveller community Dorset;** Kushti Bok, helping this hard-to-reach section to access advice and grants in a way which best suits their needs
- **Age UK** - share information on services available, making and receiving direct referrals
- **Social Prescribers** - working out of local GP services who currently make 3rd party referrals into the Energy Unit online, this is often vulnerable patients; by having a direct phone line to an energy adviser at the time of being with the patient would improve the patient journey in getting immediate support.

8 Potential for new learning

Monitoring and evaluation

- The partners will work closely to ensure that we’re monitoring outcomes against the success criteria by delivering monthly reporting against KPIs, including identification of good practice and case studies
- Measuring our impact through regular service feedback questionnaires. We will use a tailored five-point evaluation questionnaire to monitor the specific components that we want to improve for beneficiaries
- Feedback from questionnaires enable us to measure how well we are helping by providing practical advice, are attendees reporting better access to information and support. We are also looking at aspects of general health and well-being such as such as feeling more connected to others and less anxious
- The questionnaires have additional space for attendees to write more in-depth personalised reviews and this qualitative data is invaluable to us in helping assess and shape our services
- Support given to VCSE organisations to do the same with beneficiaries and design user friendly ways to measure initial awareness and measure awareness following energy conversations.

Learning

We are keen to learn from this project and for successes to be incorporated into ongoing projects that engage VCSE organisations. Through working across hard-to-reach communities in Dorset, the group will review the success of training, workshops, and case studies to identify and share best practice. In addition to networking, the project offers learning opportunities to all stakeholders which result in an improved understanding of the organisation’s needs.

Citizens Advice East Dorset and Purbeck CEO will continue to promote the service through their involvement in Dorset Council Cost of Living meetings and will use internal and external communications to continue to promote the service. This will include the use of stakeholder newsletters and press releases; the Energy Unit is often interviewed for local BBC and other radio stations.

The project will build on referral pathways, especially for the most vulnerable clients, building relationships with the local community groups to find locations and times that suits their needs best. The bus will help shape this going forward, providing flexibility to go to different locations each week.

SGN will share the outcomes via stakeholder mechanisms including the SGN Safe and Warm partnership network the GDN Vulnerability Working Group as well as via the VCMA Annual Showcase and VCMA Annual Report.

9 Scale of VCMA Project and SROI Calculations, including NPV

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. Carrying out an in-depth assessment of the predicted outcomes we forecast a positive net social return of £1.36

Social Value Measurement

Total cost*	£893,594.30
Total gross present value	£2,109,323.76
Net Present Value (NPV)	£1,215,729.46
SROI	£1.36

**Accounting for inflationary factors over the term of the project.*

Update October 2024

We and the other Gas Distribution Networks worked with leading social impact research consultancy SIRIO Strategies on the development of the Industry Standard Social Value Framework and supporting GDN Rulebook. We have used that GDN Rulebook to carry out an assessment of the financial and wellbeing

outcomes applicable expansion of scope to incorporate the provision of emergency funds for those most in need. Carrying out an assessment of the predicted outcomes we forecast a positive net Social Return on Investment of £0.17. When considering the original SROI forecast, this gives a revised overall SROI forecast of £1.28.

Emergency funds SROI forecast

Total cost*	£61,864.46
Total gross present value	£72,161.22
Net Present Value (NPV)	£10,296.76
SROI	£0.17

**Accounting for inflationary factors over the term of the project.*

Revised overall SROI forecast

Total cost*	£955,458.76
Total gross present value	£2,181,484.98
Net Present Value (NPV)	£1,226,026.22
SROI	£1.28

**Accounting for inflationary factors over the term of the project.*

10 VCMA Project start and end date

The project will run from April 2024 - March 2026

11 Geographic area

Dorset County (including both Dorset and Bournemouth, Christchurch, and Poole council areas)

12 Internal governance and project management evidence

Description of GDN(s) review of proposal and project sign off, with details on how the project will be managed

SGN has worked alongside Citizens Advice East Dorset & Purbeck 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 / GDN common rulebook. As detailed above SIA partners have reviewed the current partnership scope which has been forecast at adding an additional £1.36 for each £1 invested, this will be monitored closely to ensure we adhere to the VCMA governance criteria.

SGN and Citizens Advice East Dorset & Purbeck will meet monthly and quarterly to review outcomes, learn, share best practices, and address any delivery issues.

The PEA has been reviewed and approved by the business lead Kerry Potter and the Director of Customer Services Maureen McIntosh.

Update October 2024

The SROI has been updated to account for the additional funding and outcomes linked to the provision of emergency funding following the Winter Fuel Payments being stopped. We used the GDN Rulebook developed by SIRIO Strategies as part of the Industry Standard Social Value Framework to assess the social value generated from the provision of this emergency funding. This forecast at adding an additional £0.17 for each £1 invested, when combined with the original SROI forecast this gives a revised overall project forecast of £1.28 for each £1 invested. This will be monitored closely to ensure we adhere to the VCMA governance criteria.