

# Safe and Warm Advice Service

Vulnerability and Carbon Monoxide Allowance

Update December 2024

SGN



# SGN

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## 1 Description

Project title	Safe and Warm Advice Service
Funding GDN(s)	SGN
New/Updated (indicate as appropriate)	Updated
Date of PEA submission:	5 Feb 2024 Updated December 2024
Project contact name:	Margaret Hamilton
Project contact number/email:	Margaret.Hamilton@sgn.co.uk
Total cost (£k)	£1,659,907
Total VCMA funding required (£k)	£1,659,907

## 2 Problem statement

Research from Citizens Advice Scotland (CAS) indicates that energy bills are the biggest financial concern for 2.2 million people during winter 2023. and also estimates that over 1.4 million people are worried about being able to adequately heat their home this winter.<sup>1</sup>

Despite the price cap falling in autumn 2023, people are not going to find it easier this winter, many people will face higher bills than last winter because support schemes have ended. Meanwhile other households have had their financial resilience wiped out by 18 months of higher bills, costs, and stagnant incomes, and this was following on from the pandemic. These price increases haven't happened in a vacuum. They have happened alongside higher costs for housing, fuel, the weekly shop and increasing energy debt.

The impact of energy costs on customers can be seen across the Citizens Advice Bureau (CAB) network, with demand for Utilities and Communications advice coming into the CAB advice service rising by 37% from October 2022 and 38% from September 2023. This was almost entirely due to increases in demand for energy-related advice.<sup>2</sup>

Figures for advice given in local Citizens Advice Bureaux show that fuel vouchers accounted for 21% of all regulated fuels advice in November 2023. This is a 105% increase from November 2021, indicating how customers across the country are struggling to pay fuel bills due to the rise in the energy price cap.<sup>3</sup> In November 2023 advice on Utilities and Communications, which energy advice is categorised under had increased by 22% from November 2022.<sup>4</sup>

The increase in top advice areas in the last few years can be seen in the figures below, showing that advice on Utilities and Communications remains high and increased in December 2023, even though December is historically a quieter month for advice demand due to public holidays. In December 2023 advice on Utilities and Communications increased by 22% from November 2023 to December 2023, accounting for 14% of all advice provided.<sup>5</sup>

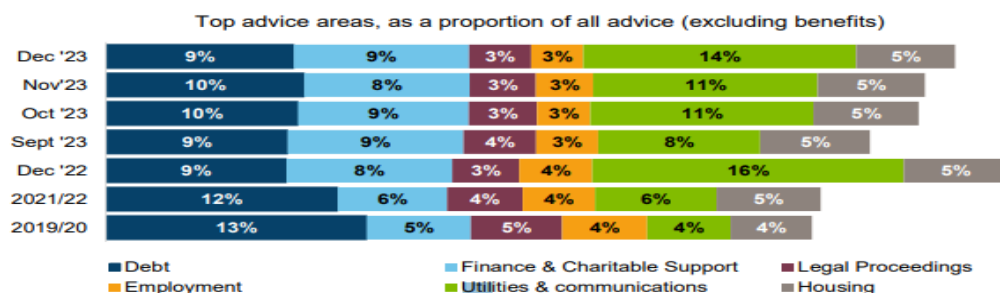
<sup>1</sup> <https://www.cas.org.uk/news/energy-bills-are-top-worry-22-million-winter>

<sup>2</sup> [https://www.cas.org.uk/system/files/publications/october\\_2023\\_dashboard\\_0.pdf](https://www.cas.org.uk/system/files/publications/october_2023_dashboard_0.pdf)

<sup>3</sup> [https://www.cas.org.uk/system/files/publications/november\\_2023\\_dashboard\\_0.pdf](https://www.cas.org.uk/system/files/publications/november_2023_dashboard_0.pdf)

<sup>4</sup> As 2

<sup>5</sup> [https://www.cas.org.uk/system/files/publications/december\\_2023\\_dashboard.pdf](https://www.cas.org.uk/system/files/publications/december_2023_dashboard.pdf)



### The gap in understanding lived experience of vulnerability in Scotland

We've identified from the vulnerability and insight 6-month pilot, recently supported by our Safe and Warm Outreach project, that it's essential to have a full and detailed understanding of the unique experiences of vulnerable customers in Scotland. This will help organisations such as CAS to advocate on their behalf. Comprehensive and person-centred, local insight is currently missing, posing a particular risk and therefore it is essential we continue with the analysis from the initial pilot which has provided the foundation for a much deeper and more comprehensive piece of research, which will deliver the best outcomes for customers.

## 3 Scope and objectives

### Scope

This project will provide targeted support to customers in energy crisis, providing access to key services from CAB including the Priority Services Register (PSR), interventions that address fuel and water poverty and broader safeguarding and wellbeing services. The project will provide holistic utility efficiency advice, income maximisation and debt management and CO safety interventions, empowering each householder to use energy/appliances safely, efficiently, and affordably.

The project will work collaboratively with other organisations/communities to maximise positive impacts beyond energy, increasing the health and wellbeing of the individuals supported and delivering defined outcomes.

The Safe and Warm Advice Service will continue beyond 31 March 2024 for a further 24 months, until 31st March 2026. This initiative will include, local community energy support services, front line group sessions, NHS support and a Vulnerability Insight Officer.

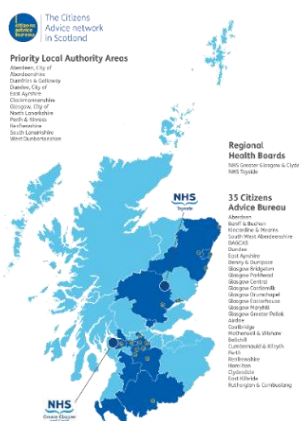
Specialist Energy Advisers will deliver one to one advice and group sessions across the top 12 deprived areas across Scotland. Two of these Energy Advisers will be part of a pilot project delivering Safe and Warm service in hospital settings. Our Vulnerability Insight Officer will work alongside this project and a wider piece of work across Scotland's bureaux.

Best practice will be taken from our existing initiative providing the following, which includes, but is not limited to:

- Bespoke energy advice which involves resolving energy billing and debt issues, energy efficiency advice, help to switch suppliers or tariffs (as and when this becomes a feasible option), how to read meters and/or bills, payment methods, raising disputes with suppliers about back billing or other complex issues, taking forward a complaint about an energy supplier or distributor on a customer's behalf and referrals to Home Energy Scotland (HES)
- Benefit entitlement checks to ensure customers are receiving the appropriate benefits and grants based on their individual circumstances, including Warm Home Discount
- Support vulnerable customers to register on the Priority Services Register (PSR) for their DNO / Supplier/Water PSR
- Locking Cooker Valve referrals into SGN where a need is identified to add a safety device to the gas cooker

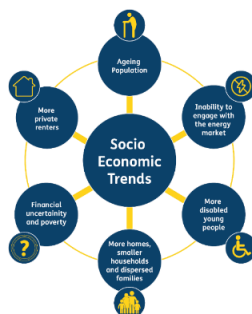
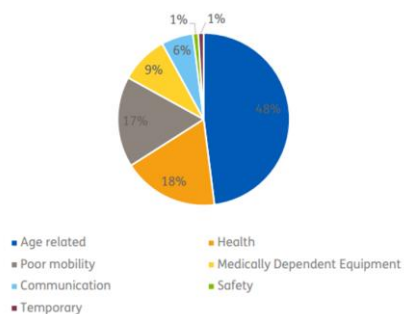
- Providing emergency funds, housing support, and food vouchers to support with immediate need
- Providing advice/support on managing household outgoings
- CO awareness sessions provided to customers including key CO messaging; annual appliance testing, CO alarm maintenance, identifying signs/symptoms, and actions if CO exposure/presence is suspected
- Access to dedicated frontline worker CO safety training for the 12 CABs to educate them on the sources, signs, and symptoms of CO poisoning (including the risks around low-level poisoning), what actions to take if CO poisoning is suspected, and what they can do to mitigate CO risk.

The map below shows the proposed location of the Citizens Advice Bureau (CAB) to deliver advice and group sessions as part of this initiative. These top priority areas are based on local authority areas in Scotland, that through an analysis and evaluation of need, using both SGN's and Citizens Advice Scotland analytical data and research, have been carefully selected.



## Demographic groups and the Priority Services Register

We will focus on the importance of the Priority Services Register (PSR) and the role we have in emphasising the support offered to safeguard vulnerable customers. Throughout this project we will reach customers with a wide range of vulnerabilities, from customers who rely on energy to operate vital medical equipment (like oxygen concentrators or sleep apnoea masks), to customers with a long-term disability or mobility need and those who require additional support because of their age. We will continue to contribute to the growth of the PSR by targeting the key groups outlined below.



## Vulnerability Insight Officer

We will continue with the role of the Vulnerability Insight Officer who will via person centred qualitative research with local CAB advisers and clients, provide distinct insight into the experiences of households in Scotland, alongside the opportunity to co-produce the solutions households require.

The Vulnerability Insight Officer can capitalise on the value of accruing intersectional knowledge through working closely with colleagues possessing unique expertise on energy and the just transition to net zero, housing, and social security. All of this will deliver bespoke and highly valuable insight into those with vulnerabilities and the target support required for these households.

## Update December 2024

### Funding realignment to maximise impact

The Safe and Warm Advice Service is currently being delivered in 10 top priority areas and within 2 hospital settings. These top priority areas are based on local authority areas in Scotland, that through an analysis and evaluation of need, using both SGN's and Citizens Advice Scotland analytical data and research, have been carefully selected.

An opportunity arose following the departure of the Gas Distribution Vulnerability Insight Officer to review how best to utilise the available VCMA funding to support vulnerable households. Following this review CAS will realign the funding for the recruitment of two 0.75 FTE advisers. These advisers will be based in Health Board settings where we believe they will be most impactful.

A list of the top priority areas from which two 0.75 FTE will be allocated is to be confirmed in early 2025. There will then be an internal application process where bureaux are invited to apply to deliver the project, followed by a scoring exercise and approval by CAS's Development Committee.

Priority will be given to bureaux who already have existing relationships with their local Health Board. Bureaux will be asked to ensure they would be able to increase the posts to full-time posts if needed should additional funding be available. This would increase the outcomes that will be achieved.

### Objectives

Continuation of the Safe and Warm advice service will support vulnerable and fuel poor households, group sessions for front line organisations to help them/their clients use energy safely, efficiently, and affordably<sup>6</sup> by:

- supporting over 9,900 customers with one-to-one advice specific to their need, providing holistic support either within local bureaux or within NHS setting
- training up to 1,111 people, with incremental increases in the number of customers supported each month as the service becomes more established and advisers build up local partnership relationships
- developing partnership working and trust building with local organisations where the advice is provided to promote the benefits of energy advice and CO awareness
- improving the knowledge of local advice provision and challenges in local areas, allowing Safe and Warm advisors to provide bespoke advice to customers
- upskilling the knowledge of volunteer advisers to provide support at group sessions
- develop and maintain partnerships with local community groups to increase awareness of the project and refer to Safe and Warm initiative
- improved partnership working and building up trust with local organisations and rural areas (e.g. food banks, housing associations, healthcare provision, local libraries) to promote the benefits of the Priority Services Register, carbon monoxide safety and energy advice

### Safe and Well in Regional Health Boards – pilot

Following best practice from the Home and Well project in SGN's Southern network we will replicate this model in Scotland. Specialist Energy Advisers will work with local NHS discharge units, or similar, to develop referral pathways, raise awareness of the Safe and Warm service and provide additional energy related help and safeguarding. This project will support patients being discharged from hospital, particularly those with medical equipment, or who have been advised to keep warm because of their medical condition(s).

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<sup>6</sup> <https://www.sgn.co.uk/sites/default/files/media-entities/documents/2022-07/Appendix-023-SGN-Customer-Vulnerability.pdf>

Regional Health Boards	
NHS Greater Glasgow and Clyde	NHS Tayside

Trained citizen advice bureau advisers within each selected area / hospital setting will provide holistic, bespoke advice which includes but is not limited to providing energy advice, including energy efficiency advice and CO awareness information, along with benefits/income maximisation advice associated with fuel poverty. Given the rising occurrence of energy related debt, the provision of initial debt and money budget advice will also be available.

Our project will also deliver tailored group training sessions to different staffing groups to enable healthcare staff to develop their skills in asking patients if they need help with their energy bills and then referring them for specialist advice. The staffing groups will include Allied Health Professionals, District Nurses and Health Visitors who undertake home visits. Through this additional advice provision, the pilot would aim to prevent patients from entering fuel poverty as a result of extended hospital stays and alleviating pressures on NHS primary and hospital services by reducing the length of hospital stays and hospital readmissions.

### Group sessions

As well as providing one to one support, CABs will continue to deliver group sessions to raise awareness of the advice and support they can provide and the sources of help from other organisations. Figures from the current Safe and Warm project show that around two thirds of attendees are customers and one third are frontline workers and we would expect this to be replicated in this project. This model has worked effectively for the Safe and Warm Advice Service since April 2022 and has enabled bureaux to:

- Target customers who would not normally engage with the energy market by working in partnership with local community groups to offer group sessions to vulnerable customers
- Deliver group sessions to frontline workers who support those in or at risk of fuel poverty.

This has been proven to extend the reach of the project into local communities. Where vulnerable customers attending group sessions require more in-depth support, they will be offered one-to-one support by the bureau advisers.

The project will deliver non-financial gains, including supporting customers to improve their ability to:

- use energy safely, efficiently, and affordably
- manage their energy bills (including cheaper energy bills)
- improve their housing situation, including having a warmer home
- improve their understanding of carbon monoxide safety issues (and be provided with CO monitors where these are needed).

## 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 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 (outcomes also in 2 and 4).

## 5 Evidence of stakeholder/customer support

### 5.1 Front line worker feedback from group sessions

Frontline workers group sessions delivered by the Safe and Warm Advice Service between April 2022 and December 2023 – 870 frontline workers attended a group session. 44% estimated that 60-100% of their customers were in fuel poverty. 100% reported that the sessions were useful and helped to increase their confidence in delivering energy advice.

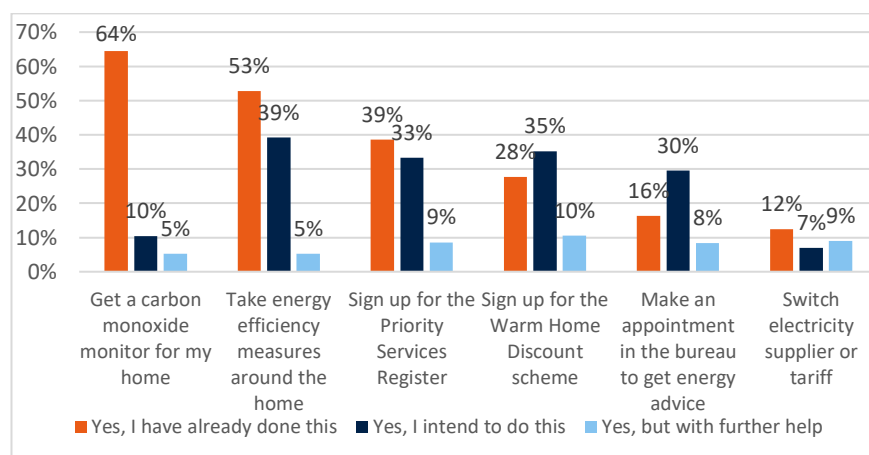
Survey responses from the frontline workers shows that most intend to share what they had learnt with their colleagues and customers.

Frontline workers who completed the survey rated the Safe and Warm sessions highly and reported improved confidence in their ability to provide advice to customers on energy issues. Most expected to pass on knowledge gained in the sessions to both colleagues and customers. All frontline workers described aspects of the session as good or excellent. This includes the presentation skills of the trainer that 100% reported was excellent or good, the usefulness of the session that 100% reported was excellent or good and the overall content that 100% reported was excellent or good. The sessions increased many frontline workers' awareness of energy issues.

Frontline workers anticipated that they would pass on what they had learnt during the sessions to either customers or colleagues. Frontline workers were asked to give an estimate of how many customers they expect to advise in the next six months using information they had learnt. The frontline workers said they would report that they would probably or definitely pass on what they learnt at the session to an average of 16 colleagues, estimating that they would pass what they had learnt on to an average of 180 customers.

### 5.2 Customer group sessions – feedback

In order to assess the impact of the advice received at group sessions; customers were asked what actions they have taken since the appointment. These results show the lasting impact of the advice given by the Safe and Warm Energy Advisers, as it shows that customers feel empowered and equipped by the service to act themselves. This can be seen in the graph below.

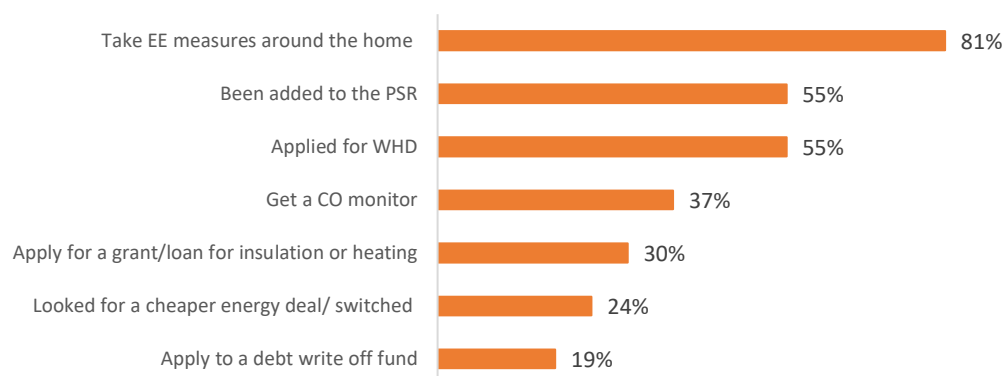


### 5.3 CAB Impact of advice giving

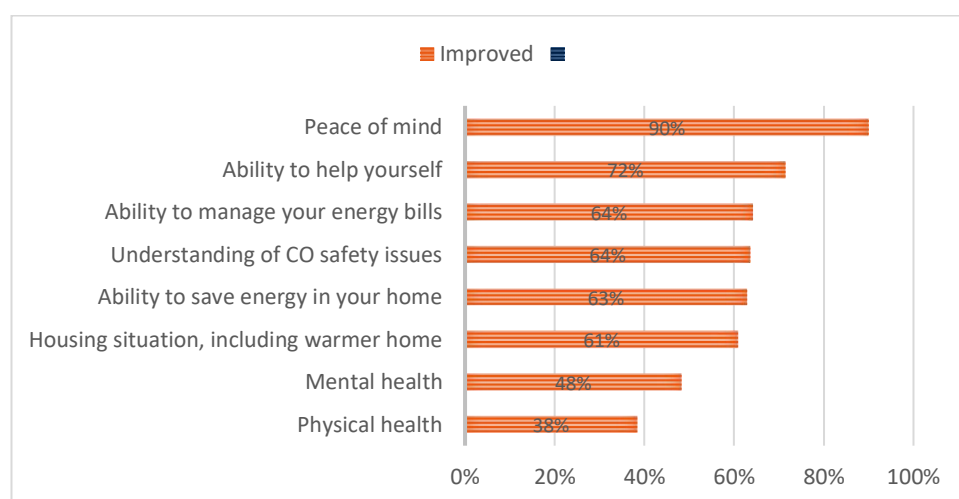
To assess the impact of the one-to-one advice received; customers were asked what actions they have taken since their appointment. These results show the lasting impact of the advice given by the Safe and Warm



Energy Advisers, as it suggests customers feel empowered and equipped by the service to act themselves. The graph below shows the actions carried out.



Customers are also asked to rate whether the service has improved aspects of their lives. The feedback received has been extremely positive.



## 5.4 SGN's Vulnerable Steering Group (VSG)

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

Our project will provide two annual reports which will provide outcomes around the following

- Providing customers with one-to-one advice supported by our energy advisers in bureaux
- Supporting customers through our NHS energy pilot in two hospitals in Scotland
- Supporting people (customers & frontline workers) via group sessions, designed to help them live in a Safe and Warm home and support those who are in communities and at risk of living in cold damp homes
- Impact analysis and output of our VCMA project and the wider challenges faced by vulnerable and fuel poor households across Scotland

### 6.2 Associated actions

On a monthly basis, we will report on the number of customers advised on a range of issues including CO awareness (and CO monitors gifted to customers), debt write off, emergency funds, energy efficiency advice, income maximisation/benefits checks, locking cooker valve referrals, PSR registrations, switching and Warm Home Discount.

Number of customers who have had

- energy efficiency advice and support
- signed up to the Priority Services Register
- received a financial gain
- received a non-financial gain
- volume of support and advice given
- referrals made to partnership organisations
- partnership referrals (in particular those to Home Energy Scotland with associated outcomes, where known) and outcomes delivered.

Through the work of the GD Vulnerability Insight Officer unique and detailed analysis and research will be produced alongside monthly reporting will be provided both on a monthly, quarterly comprehensive end of project report.

### 6.3 Success Criteria

Our project will increase the reach of the CAB network in Scotland and support over 9,215 vulnerable and fuel poor customers and 1,111 front line workers use energy safely, efficiently, and affordably<sup>7</sup> by:

- Supporting 6,102 customers over the next 2 years with one-to-one energy and holistic support services, which includes income maximisation, debt, and energy tariff support
- 2,096 at group settings educating people around energy safeguarding, energy efficiency and support to keep their homes safe and warm
- 1,017 customers as part of our NHS hospital pilot
- training an additional 1,111 front line workers with incremental increases in the number of customers supported each month as the service becomes more established and advisers build up local partnership relationships
- Conducting a pilot within hospital settings continual learnings and improvement as the pilot embeds will evidence increased figures beyond those anticipated in the second year.

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<sup>7</sup> <https://www.sgn.co.uk/sites/default/files/media-entities/documents/2022-07/Appendix-023-SGN-Customer-Vulnerability.pdf>

## Success outcomes for Safe and Warm Advice Service

	Year 1	Year 2	Totals
<b>Measurable Outcome</b>			
People Reached	2,929	3,173	6,102
People chatted to informally, ie at roadshows, events etc.	419	454	873
CO Alarms gifted (one to one advice)	550	600	1,150
CO alarms gifted (group sessions/roadshows, etc)	550	600	1,150
CO Awareness Conversation	1,694	1,835	3,529
CO awareness group sessions ***	1,540	1,668	3,208
Debt Write Off	27	29	56
Emergency Funds	1,792	1,941	3,733
Energy Advice Behavioural	2,729	2,957	5,686
Food and Household Essentials	337	365	703
Income Max / Benefits Checks	761	825	1,586
PSR Registrations	2,234	2,421	4,655
Utility Tariff Service (Energy/Water)	233	253	486
Warm Homes Discount	627	679	1,306
Billing/meter reading*	1,876	2,032	3,908
Complaints and redress	1,127	1,220	2,347
Prepayment meter	784	850	1,634
Smart meter	727	788	1,515
PPM Discretionary Credit	212	230	443
Methods of Payment	593	642	1,235
Trust fund applications/ fuel vouchers	1,579	1,711	3,290
<b>Total</b>			
No. of consumers at group sessions	1,006	1,090	2,096
No. of frontline workers at group sessions.	533	578	1,111
Total Client Financial Gain	£527,344	£571,290	£1,098,634
<b>From Home Energy Scotland</b>			
Referrals	483	524	1,007
Energy Advice	204	221	426
Signposting	113	123	236
Home Energy Check	88	95	182
Warmer Homes Scotland referral	35	38	73
<b>Total</b>	<b>923</b>	<b>1,000</b>	<b>1,924</b>

## Success outcomes for NHS pilot

	Year 1	Year 2	Totals
<b>Measurable Outcome</b>			
People Reached	488	529	1,017
People chatted to informally	70	76	146
CO Awareness Conversation	282	306	588
Emergency Funds	299	324	622
Energy Advice Behavioural	455	493	948
Food and Household Essentials	56	61	117
Income Max / Benefits Checks	127	137	264
PSR Registrations	98	106	203
Utility Tariff Service (Energy/Water)	39	42	81
Warm Homes Discount	104	113	218
Complaints and redress	94	102	196
Prepayment meter	131	142	272
Smart meter	121	131	253
PPM Discretionary Credit	35	38	74
Methods of Payment	99	107	206
Trust fund applications/ fuel vouchers	263	285	548

To monitor our impact in line with the above, we will

- Monitor outcomes against services provided
- Monitor who is making use of the service - customer demographics, vulnerabilities, and needs
- Work closely with organisations who will support customers to ensure that we all understand the issues faced to continue to develop our services at a local level.

The GD Vulnerability Insight Officer role will lead to:

- Improved understanding of SGN customer experience in Scotland through unfiltered insight into factors which cause and exacerbate vulnerability and fuel poverty.

- Improved understanding of specific policy context as applies in Scotland through tailored briefing underpinned by evidence from the CAB network.
- Improved insight into experience of vulnerable consumers in Scotland through CAB adviser focus groups.

#### Update December 2024

Following six months in post for the GD Vulnerability Insight Officer, a report was produced which supports with locating the greatest need, building an understanding of the challenges of keeping warm, and helping organisations support consumers and address fuel poverty - **Cost of Keeping Warm: Lived Experience of Energy and Vulnerability in Scotland Pilot:**

<https://www.cas.org.uk/publications/cost-keeping-warm-lived-experience-energy-and-vulnerability-scotland-pilot>

The research was carried out with a focus group of CAB advisers and the launch of the Lived Experience of Vulnerability pilot during which four CAB clients were interviewed on matters relating to their lived experiences of fuel poverty.

The research findings provide evidence and narrative around client experiences of the fuel poverty condition and vulnerable circumstances. It shows that fuel poverty cannot be effectively addressed in isolation from other aspects and drivers of vulnerability. Fuel poor households present multiple, holistic issues and therefore require multiple, dynamic solutions which tackle the root causes of fuel poverty.

#### Update December 2024

Additional Success Criteria linked to the two 0.75 FTE advisers funded by the realignment of the GD Vulnerability Insights Officer role:

Measurable Outcome	1.5 Advisers
People Reached (1-2-1)	366
People chatted to informally, i.e. at roadshows, events etc.	52
CO Alarms gifted (from existing CO alarm allowance)	150
CO Awareness Conversation	212
CO Awareness Group sessions	192
Debt Write Off	3
Emergency Funds	224
Energy Advice Behavioural	341
Food and Household Essentials	42
Income Max / Benefits Checks	95
PSR Registrations	279
Utility Tariff Service (Energy/Water)	29
Warm Homes Discount	78
Billing/meter reading*	234
Complaints and redress	141
Prepayment meter	98
Smart meter	91
PPM Discretionary Credit	27
Methods of Payment	74
Trust fund applications/ fuel vouchers	197
No. of consumers at group sessions	126
No. of frontline workers at group sessions.	67
Total Client Financial Gain	£65,918

From Home Energy Scotland	
Referrals	60
Energy Advice	26
Signposting	14
Home Energy Check	11
Warmer Homes Scotland referral	4

## 7 Project partners and third parties involved

- CAS - Citizens Advice Scotland
- Home Energy Scotland
- Gas Safe Charity
- SGN
- Local partners including the NHS, social care, local third sector organisations, local authorities, libraries
- Local community groups, local warm hubs, and healthcare settings, e.g. GP surgeries

## 8 Potential for new learning

### Monitoring and evaluation

The following activities will be in place to monitor and evaluate project progress and impacts:

- Quantitative and qualitative service user outcomes and demographics/vulnerabilities recorded/monitored
- Service user before-and-after-support surveys
- In-bound and out-bound referrals from/to partners and other services recorded/monitored
- Feedback, indicators, outputs, and outcomes reported at end of initiative.

### Learning

We will continue to learn from the energy adviser programme and the impact/benefits of local engagement in communities and how key messages are cascaded. Through CAS's continuous improvement we are continuing to understand more around type of engagement preferred, especially in the harder to reach/seldom heard communities.

Through quantitative and person-centred qualitative research with advisers and clients, a far greater understanding of the unique challenges of those experiencing vulnerability in Scotland will be gained. This includes insight into fuel poverty, the cost-of-living crisis, geography, partnership working and devolved social security, alongside recommendations for additional support measures to best meet the needs of households.

Bureau advisers will be trained on CO/PSR through SGN from the Gas Safety Charity which has and will continue to enable further awareness and a deeper understanding throughout the CAB network in Scotland.

## 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 in investment (SROI) of £1.70.

<b>Total cost</b>	£1,645,482.11
<b>Total gross present value</b>	£4,448,994.86
<b>NPV</b>	£2,803,512.75
<b>SROI</b>	£1.70

#### Update December 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 to our services for vulnerable customers incorporated in the repurposing of funds in this partnership to enable the additional two 0.75 FTE advisers. Carrying out an assessment of the predicted outcomes we forecast a revised net Social Return on Investment of £1.94 for the partnership.

#### Revised overall SROI forecast

<b>Total cost*</b>	£1,645,482.11
<b>Total gross present value</b>	£4,836,325.98
<b>Net Present Value (NPV)</b>	£3,190,843.87
<b>SROI</b>	£1.94

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

## 10 VCMA Project start and end date

The project will run from 1<sup>st</sup> April 2024 to 31<sup>st</sup> March 2026.

## 11 Geographic area's

Glasgow City, Dundee City, Aberdeen City, North/South Lanarkshire, Clackmannanshire, Dumfries and Galloway, Renfrewshire, West Dunbartonshire, Perth, and Kinross, Aberdeenshire, and East Ayrshire.

## 12 Internal governance and project management evidence

SGN has worked alongside Citizen Advice Scotland 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.

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.

#### Update December 2024

The original SROI forecast was externally assessed by SIA Partners using DNO Methodology with GDN specific proxies. This gave a forecast positive SROI of £1.70 for each £1 invested. For the additional outcomes from the repurposed funding enabling an additional two 0.75 FTE advisers we have used the GDN Rulebook developed by SIRIO Strategies as part of the Industry Standard Social Value Framework. As detailed above we have reviewed the additional scope which has been forecast at adding an additional £387,331.12 of social value, which when combined with the original SROI forecast gives a revised overall project forecast of £1.94 for each £1 invested. This will be monitored closely to ensure we adhere to the VCMA governance criteria.