

Safe & Warm community team

Vulnerability and Carbon Monoxide Allowance (VCMA) Project Eligibility Assessment (PEA)

Updated: April 2026

PEA reference: SBTM-SGNBoth-014a



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Project registration table

Project summary	
Project title	Safe & Warm community team
Strategic area	Services Beyond the Meter
Lead partner name	SGN
New/Updated (indicate as appropriate)	New
Date of PEA submission	March 2026
Project start and end date	April 2026 – March 2027
Project location	SGNs regions
Project contact	
Name	Shelley Smith
Contact details	Positive.impact@sgn.co.uk
Project partners and third parties involved	
Organisation name	Role
Energy Action Scotland	Energy Advice trainer – Scotland
National Energy Action	Energy Advice trainer – Southern England
Gas Safe Charity	Carbon monoxide awareness training
Scope	Disability Awareness training
IncomeMax	Income Maximisation training
deafPLUS	Deaf Awareness training
CSM	Emergency First Aid training
McCormack Training Ltd	Personal Safety Awareness training
Nithcree Training Services	Car to van training provider Scotland
Blue Lamp Trust	Car to van training provider South
Costs and funding	
Total cost (£k)	£600,000
Total VCMA funding required (£k)	£600,000
Total BAU vulnerability and CO safety activity baseline allowance funding by activity (£k)	BAU funded resources that support this project will be reported and recorded against BAU metrics.

Problem(s)

This section needs to outline the problem(s) which is/are being addressed by the VCMA project.

In Scotland and England, high energy costs have driven rising levels of fuel poverty, with 861,000 households (34%) in Scotland and approximately 9.94 million households in England now struggling to heat their homes adequately and accumulating significant energy debt, leaving many customers in persistent financial stress and at risk of disconnection or self-rationing energy use.

Since the energy crisis began in autumn 2021, millions of people have been struggling to stay warm at home each winter. As of mid-2025, Ofgem data shows total UK household energy debt and arrears reached £4.43 billion, affecting over 1 million households with projections suggesting this could climb toward £6 billion by end-2026 amid ongoing affordability pressures.

Across our communities, many people are experiencing “hidden” vulnerability behind the front door, with chronic loneliness and social isolation now affecting around one in four adults in the UK and recognised as a major public health issue with wide ranging health and financial impacts. Despite the availability of help, there is still poor take up of support services, often linked to low awareness, poor accessibility, and barriers created by both social and digital exclusion, particularly for those who are older, on low incomes, or living with health conditions.

According to 2024 research carried out by [The Parliamentary Office of Science and Technology \(POST\)](#), the rising cost of living also exacerbated financial inequalities via digital exclusion, as more people experienced poverty, and were unable to benefit from the online tools to save money, apply online for state benefits, or find support. Good Things Foundation reported people with the least digital capabilities are nine times more likely to struggle immediately following a financial shock than those with the highest digital capabilities (27% vs 3%).

At the same time, increasing scam activity and fraudulent contacts, amplified by rapid advances in digital technology, have further undermined public trust in service providers. The volume and sophistication of scams impersonating banks, government bodies, and utility companies has risen sharply, leaving many people fearful of answering calls, responding to texts, or engaging with unfamiliar numbers. This erosion of trust has a direct impact on help-seeking behaviour. Research from Ofgem and consumer advocacy groups consistently shows that customers in financial difficulty are less likely to contact their energy supplier, often because they fear being judged, don't believe the company will help, or simply don't trust that the caller is genuinely from the utility provider. In many cases, the first organisation a customer speaks to about affordability issues is not their energy company but a charity, advice agency, or local support service.

This reluctance to engage means problems escalate unnoticed, with households accumulating debt or self-disconnecting before any intervention is made. Over the past five years, our frontline teams and contract partners have witnessed a significant worsening of hidden vulnerabilities in our communities, exacerbated by rising fuel poverty, social isolation, diminished trust and barriers to support services.

Scope and objectives

Outline the scope and objectives of the VCMA project linked to the problem statement above. This should be clearly defined including the benefits which would directly impact customers on the participating GDNs' network(s), and where the benefits of the VCMA Projects lie.

The Safe & Warm community team represents our proactive initiative, developed throughout the GD2 period and refined through close collaboration with stakeholders to directly tackle the escalating challenges of hidden vulnerability, fuel poverty, and social exclusion.

Aligned to operational depots across our Scotland and Southern England networks, this dedicated team of Level 3 trained energy advisors work alongside frontline operational colleagues and our Safe & Warm partnership network to deliver in community, face-to-face support, helping vulnerable households beyond our core services.

The initiative breaks down barriers for digitally excluded or isolated customers by bringing personalised energy safeguarding, advice, and referrals directly to their doorsteps and community centres. Our service ensures no one is left without the support they need to maintain a safe and warm home today, but also tomorrow as we support our customers on their journey to a clean and inclusive energy transition.

In delivering face-to-face energy advice alongside our operational projects and via community events, we're able to break down barriers for vulnerable households who may find it difficult to access support. By leveraging our trusted role, we're helping vulnerable households access the support they need to stay safe, warm and well at home now and into the future.

Our dedicated Safe & Warm community team deliver the following activities to ensure our customers stay safe, warm and well at home:

- Frontline identification and case management of vulnerable or at-risk customers during both unplanned and planned operational work, with tailored provisions and referrals to SGN's Safe & Warm partnership network.
- Delivery of specialist energy safeguarding advice, including assessments for efficiency improvements, access to local schemes, and resilience during outages.
- Training for SGN frontline teams and community organisations on vulnerability awareness, energy efficiency, and utility support schemes.
- Community venue engagement (eg Warm Welcome Spaces) to provide practical advice on safe energy use, scam awareness, and energy transition enablers like smart meters.
- Targeted support for digitally excluded households, facilitating access to essential services, benefits, and charities they cannot reach independently.

This initiative, now central to our GD3 Vulnerability Strategy, positions us as a trusted community anchor driving measurable improvements in customer safety, warmth, and wellbeing while rebuilding trust eroded by scams and debt pressures.

Project design engagement

Targeting vulnerability support: This must describe how the GDN(s) identified the vulnerability need being addressed through the VCMA project, including the use of consumer research, stakeholder engagement, and data and technology.

Evidence of stakeholder and/or customer support: Information regarding all stakeholder and/or customer engagement which has contributed to the development of the VCMA Project.

Stakeholder project design input: How stakeholders were actively involved in the project design, and how their input and feedback were incorporated to shape the project design. Where stakeholders disagree about the project design, justification must be provided for why the current project design is deemed preferable.

Our Safe & Warm community team was developed in response to emerging trends observed during frontline operations across 2022–23. The initiative originated from feedback provided by our engineers, who consistently highlighted an increase in safeguarding concerns raised by customers during emergency and planned

maintenance works. These interactions revealed an evolving landscape of customer vulnerability, shaped by the lasting impact of the COVID-19 pandemic and compounded by the ongoing cost-of-living challenges.

While our frontline team's primary remit focuses on ensuring the safety and reliability of gas network services, our teams have increasingly encountered customers facing a range of broader social and wellbeing issues. In many cases, these concerns extended beyond energy specific matters, covering financial hardship, mental health pressures, and social isolation. Our frontline engineers, trained and trusted to keep customers safe, are often the first point of contact for individuals in distress or in need of support.

Over the past four years, we've piloted and developed a team of dedicated energy safeguarding advisors who have taken a regional leadership role in providing community-based energy advice services alongside our frontline teams and Safe & Warm partnership network to bridge the gap between vulnerable customers and local support services that help those most in need maintain a safe, warm and well home.

Through a successful onboarding and development of our Safe & Warm community team have grown to be a valued support service to customers, one that brings value to customers and stakeholders alike.

Throughout the pilot and into the development of the Safe & Warm community team, we engaged extensively with stakeholders to shape and refine the initiative. Our Vulnerability Steering Group, a dedicated expert stakeholder panel, alongside employees from across the business, including frontline teams and the Careline team helped to define the scope of the pilot and identify the training, tools, and resources necessary to deliver meaningful impact. Following our first winter, our Safe & Warm network partners collaborated closely with our teams to develop a comprehensive training programme, informed by current insights from local advice services and become qualified as energy advisors.

As part of our [GD3 business planning stakeholder engagement](#) and testing programme, the Safe & Warm community team was consistently recognised and valued highly by a broad range of stakeholders. We've also openly shared learning across the GDNs and regional utility partners, demonstrating how this specialist team model can enhance the support offered to vulnerable customers. By leveraging the trusted position of our Safe & Warm community team has been recognised for their role in helping to open doors to customers who might otherwise have remain unseen resulting in receiving help well beyond energy.

Key stakeholders including Citizens Advice have shared the insights that have shaped the service. Having advisors trained not only in energy efficiency and energy debt advice but also how to provide holistic support to vulnerable customers with access to a wide range of support organisations, the team are very well placed to support households within our network. [Citizens Advice 2024 data](#) found 50% of people supported with energy issues also needed help with crisis support like food banks or emergency charitable support. Citizens Advice in their 2025 report '[Building Support: Improving consumers' experiences of energy efficiency schemes](#)', highlights that low awareness and a lack of trust that means that often those who need the help the most, and who are eligible for assistance miss out.

Meanwhile, consumer research from the [British Gas Energy Trust](#) found nearly four in 10 adults still don't seek professional advice or support when struggling to pay their energy bills because of the stigma around asking for help.

This insight supported the shaping of the role our Safe & Warm community team has to play as a trusted community organisation in supporting vulnerable customers to access energy advice and locally based community support services.

Why the project is being funded through the VCMA

This should include an explanation of why the VCMA project meets the VCMA eligibility criteria, and how it aligns with the GDN's VCMA strategy.

The Safe & Warm community team is a key delivery mechanism for achieving several of our GD3 business plan commitments, specifically:

1. Providing training to all frontline employees and contractors to help them identify and support vulnerable customers
2. Supporting at least 650,000 households in the most vulnerable circumstances during the GD3 period

This project meets the eligibility requirements as detailed in the VCMI Eligibility Criteria tables located at the end of this Project Eligibility Assessment (PEA). It is fully aligned to our GD3 Vulnerability Strategy under the strategic area 'Providing direct services for vulnerable customers', where the initiative has been carefully designed, tested, and validated through ongoing stakeholder engagement.

In addition, the project reflects the strategic priorities of our Vulnerability Strategy – an approach shared by all four gas networks – which delivers support across four core areas:

- Providing Services Beyond the Meter – direct services for vulnerable households as we go about our day-to-day operational work that extends beyond traditional gas network responsibilities
- Tackling Fuel Poverty and Energy Affordability – targeted support for customers struggling to afford energy, helping households reduce energy costs, improve efficiency, and access essential advice
- Supporting Priority Customer Groups – identifying and assisting those with heightened needs, ensuring they receive tailored and timely support
- Reducing Carbon Monoxide Harm – a data driven approach to raising awareness, improving safety, and reducing carbon monoxide risks.

By addressing these themes, the project demonstrates strong strategic alignment and delivers tangible benefits to vulnerable customers, making it a clear fit for VCMA funding.

How VCMA funding complements or supplements BAU activities

Where the VCMA Project is being delivered alongside a BAU vulnerability and/or CO safety activity or activities funded through the GDN's baseline allowance, the GDN must provide sufficient evidence that the VCMA Project complements or supplements the BAU activity or activities to prevent the risk of double funding.

The funding of the Safe & Warm community team complements and strengthens our business-as-usual (BAU) activities within the wider VCMI programme by extending the depth and reach of the support we can provide.

By providing tailored, one-to-one support, the Safe & Warm community team is well placed to identify households in need of Priority Services Register (PSR) information, carbon monoxide (CO) alarms, and general safeguarding support, while also addressing the broader factors that contribute to vulnerability. This includes energy efficiency advice, guidance on energy bills, education on energy-saving behaviours, and practical support on how to stay safe, warm, and well at home.

A key strength of the team lies in their proactive outreach approach. By engaging directly with local community groups and support organisations, they reach households that may not otherwise come into contact with us

through our traditional operational or emergency services. The team’s specialist training and professional qualifications enable them to identify a wide range of support needs and to coordinate tailored solutions beyond standard PSR registration and CO safety information.

In addition, the expertise held by the Safe & Warm community team directly enhances our frontline team’s capability. As vulnerability and energy specialists, the team help to train and upskill our engineers and customer-facing staff, equipping them with the knowledge, confidence, and resources to identify vulnerable customers particularly those at risk of living in cold, damp, or unsafe homes. This partnership approach ensures that no customer is left unsupported and that our engineers have the tools to help when presented with a customer who is vulnerable in their own home.

Justification for why the project should not be collaborative

This should include evidenced reasoning as to why the VCMA Project cannot, or should not, be delivered in collaboration with other GDNs. For example, this could include the unique context within a network area, or the development of an innovative pilot project.

This project is being delivered exclusively within our network area because it addresses a specific business plan commitment that we made to our stakeholders following successful piloting and embedding in GD2. The commitment is to continue to invest in a dedicated team of skilled energy advisors directly within our operational regions, ensuring seamless integration with our local workforce and local community partners and community resources. This embedded model is unique to us at SGN, and the learning from the pilot into rollout has been shared with the other GDNs throughout GD2.

Outcomes, associated actions and success criteria

Details of the VCMA Project outcomes and the associated actions to achieve these, interim milestones and how the Funding Licensee will evaluate whether the project has been successful. Each action should have a proportion of the funding allocated.

Outcome	Project Target	Interim Milestones
Energy triage	19,200	4,800 per quarter
Energy efficiency advice (behavioural) incl. metering info	12,000	3,000 per quarter
PSR conversations	19,200	4,800 per quarter
PSR registrations	6,000	1,500 per quarter
CO safety information	19,200	4,800 per quarter
CO alarms incl. accessible alarms	2,640	660 per quarter
Partnership network onward referrals	1,560	390 per quarter
Welfare provisions	1,500	375 per quarter
Frontline engineer training	500	125 per quarter
Community events	312	78 per quarter

** Interim performance – averaged out and delivered with seasonal adjustments*

Success Criteria

During this initial one-year project, our Safe & Warm community team will provide direct support to 19,200 vulnerable households within our regions. This person-centred support will be delivered through a combination of community events and at home visits across both our networks. The interventions from the Safe & Warm community team will ensure customers are engaged where they are, and are provided with helpful advice on how to stay safe and warm at home, including working with customers to identify opportunities both short and long term to save energy as well as support eligible households to sign up to the Priority Services Register and be more aware of the risks of carbon monoxide.

In addition, we'll see evidence of the Safe & Warm community team connecting customers within our communities with both our Safe & Warm partnership network where relevant and make warm introductions into community resources that help connect vulnerable customers for improved health and wellbeing.

Overall, the team will deliver meaningful support to all households they interact with resulting in tangible outcomes.

Potential for new learning

Provide details of what the GDN(s) expect(s) to learn and how the learning will be disseminated.

Throughout the duration of the project, we will continually assess the effectiveness of our training, community engagement activities, customer feedback, and case studies. This evaluation will help us identify the areas that deliver the greatest impact for vulnerable households.

We will disseminate key learnings and outcomes to other GDNs, as well as to internal and external stakeholders, including our Safe & Warm partnership network. These insights will also be shared through the VCMA Annual Report. As our team works directly within communities alongside partners from the Safe & Warm partnership network, we will actively share best practices and emerging insights to strengthen and enhance the services they deliver.

All outputs will be openly shared with other GDNs through the Vulnerability Working Group, the GDN National Delivery Group, and, where requested, the National Steering Panel.

Aligning with and supporting wider vulnerability approaches

Details of how the project supports or aligns with approaches to vulnerability taken by the wider energy industry, other utilities and/or consumer organisations; local, national or devolved governments; or evidence innovation or a gap in vulnerability support provision. For example, this could include evidence of collaboration beyond the VCMA, non-VCMA joint funding of the initiative, or identified gaps in the provision of vulnerability services which the project seeks to address. The GDN should show how the project fits within broader approaches to vulnerability.

This project is designed to provide comprehensive support to vulnerable customers within our communities, ensuring they remain safe, warm, and well in their own homes. It directly aligns with the priorities outlined in Ofgem's [Consumer Vulnerability Strategy](#), particularly the commitments to improving the identification of vulnerability and supporting customers who, by nature of their circumstances, are less able to engage in the energy market, and may struggle to manage or pay their energy bills. By proactively addressing these needs, the

project contributes to a more equitable energy system and helps ensure that no customer is left behind due to personal, financial, or health-related challenges.

This approach also reflects the direction set out in the UK Government's recent Warm Home Plan, which places strong emphasis on improving access to independent advice, simplifying customer journeys, and ensuring that households, particularly those in vulnerable circumstances receive tailored guidance on reducing bills and improving home energy efficiency. The Warm Home Plan highlights the need for coordinated, trusted support that helps people understand their options, access funding, and make informed decisions about how best to move within capacity towards a more energy efficient and resilient home. Through having our Safe & Warm community team of trained energy advisors in the residential setting, greater opportunities are visible to provide a route for households to receive personalised, future-focused energy advice.

In addition, the project supports the objectives set out within the Government's 2026 [Crisis and Resilience fund](#), which emphasises the importance of protecting low income- households who may experience sudden financial shocks. These shocks such as unexpected job loss, bereavement, or the onset of ill health can have an immediate and significant impact on a household's stability and wellbeing. Our Safe & Warm community team plays a critical frontline role in recognising and responding to these circumstances. Through regular, proactive engagement with customers, the team often becomes a trusted point of contact, enabling individuals to share sensitive information and seek help at moments of significant vulnerability. The team is trained extensively to identify early indicators of financial distress and to respond with empathy, practical support, and clear signposting to appropriate grants, schemes, and services. Their knowledge and relationships allow them to provide meaningful interventions that not only address immediate concerns but also help customers build longer-term resilience.

By combining regulatory alignment, government priorities, and community-based insight, this project strengthens our organisation's commitment to supporting those at greatest risk and ensures that vulnerable customers receive the right help, at the right time, from a team they can rely on.

Monitoring and evaluation

Details of how the GDNs will work with their project partners to monitor the impact of the VCMA project and evaluate its effectiveness and success.

Throughout GD2 we've developed a robust reporting framework to ensure that our Safe & Warm community team is fulfilling the role which has been developed to service vulnerable customers in our communities beyond our core service, with the intention to connect customers with quality information on energy safeguarding services and warm connections into tailored services.

To ensure that we're resourcing the team with current skills and capacity, we ensure their training, advice toolkit and understanding of the changing policies landscape are always up to date. We'll continue to monitor the team including through weekly and monthly reporting and monthly meetings as well as refresher training and new training when it is identified.

We'll continue to report annually on the Safe & Warm community team project and the impact it's had for our customers. We'll share outcomes through our company specific report as well as outcomes in our regional stakeholder showcases and key learning to inform future delivery. Additionally, the learnings will be shared across the GDN Vulnerability working group as well as disseminating results through our business governance processes, including on request to our Independent Steering Group (ISG) as well as the GDN National Delivery Group and where requested the National Steering Panel.

Scale of VCMA project and SROI calculations, including NPV

Justify the scale of the VCMA project – including the scale of the investment relative to its potential benefits. As part of this, the Funding Licensee(s) should provide the SROI calculation, including NPV. Note: The value in numbers of the SROI and NPV must be provided, rather than confirmation of positive impact.

Together with the other Gas Distribution Networks, we worked with leading social impact research consultancy SIRIO Strategies on the development of the Industry Standard Social Value Framework and supporting GDN Rulebook. We've used that GDN Rulebook to carry out an assessment of financial and wellbeing outcomes applicable to our services for vulnerable households included in this partnership.

We've incorporated social value based on the deliverables and associated targets detailed above. Carrying out an assessment of these predicted outcomes we forecast a positive net Social Return on Investment of £5.33 for every £1 spent.

Social value measurement

Total cost*	£604,959.09
Total gross present value	£3,831,391.05
Net Present Value (NPV)	£3,226,431.96
SROI	£5.33

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

Internal governance and project management evidence

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

We worked closely with stakeholders, our own frontline eour Vulnerability Strategy, developed with support from our stakeholders including through principles designed in partnership with our Vulnerability and Carbon Monoxide Steering Group and overseen by our Independent Steering Group.

The PEA has been reviewed and approved through our internal governance processes and formally signed off as detailed below.

Approver (Name and Role)	Date
Kerry Potter, Group Social Impact and Vulnerability Manager	31/03/26
Maureen McIntosh, Director of Customer Services	01/04/26

Eligibility Criteria

Eligibility Criteria	Description	Project qualifies Yes / No
Positive SROI	Have a positive, or a forecasted positive, Social Return on Investment (SROI) calculated in accordance with a model which the GDNs have developed and submitted to Ofgem including for the gas consumers funding the VCMA Project	Yes
Positive NPV	Have a positive, or a forecasted positive Net Present Value (NPV)	Yes
Support Criteria	Either: i. provide support to consumers in Vulnerable Situations and relate to Energy Safeguarding, or ii. provide support for those most at risk of being left behind in the transition to net zero, or iii. provide awareness of, and education on, the dangers of CO beyond the activities funded as business as usual (BAU) through baseline allowances, or iv. reduce the risk of harm caused by CO	Yes
Defined Outcomes	Have specific, measurable, and time-bound outcomes which align with relevant Consumer Vulnerability Strategy objectives to achieve the requirements set out in Support Criteria above;	Yes
Beyond Other Funding	Go beyond activities that are funded through other price control mechanism(s), including baseline allowance funding, or required through licence obligations	Yes
Support or Align	Support or align with approaches to vulnerability taken by the wider energy industry, other utilities and/or consumer organisations, and local, national and devolved government, or evidence innovation or a gap in vulnerability support provision;	Yes
No Other External Funding	Not be delivered through other external funding sources directly accessed by a GDN, including through other government (national, devolved or local) funding	Yes
BAU vulnerability and CO safety activities	Where a GDN's BAU vulnerability and CO safety activities are funded through baseline allowances, these are not suitable for funding through the VCMA. The GDN is permitted to use VCMA funds to supplement or complement its BAU activities, however, it must ensure that its reporting provides sufficient evidence to prevent double funding.	Yes

Eligibility criteria for company specific essential gas appliance servicing

Eligibility Criteria	Description	Project qualifies Yes / No or N/A
Servicing must meet the following criteria:	Either: i. A GDN has had to isolate and condemn an essential gas appliance following a supply interruption or as part of its emergency service role; or ii. A GDN or its Project Partner has identified an essential gas appliance which has not been serviced in the last 12 months in the owner-occupied home of a customer in a Vulnerable Situation where an occupier of the property suffers from a permanent or temporary health condition¹² that makes them more vulnerable to health risks associated with cold homes; or iii. A GDN or its Project Partner has identified an essential gas appliance which has not been serviced in the last 12 months in a tenant-occupied home of a customer in a Vulnerable Situation where it is the tenant's responsibility to maintain the essential gas appliance, where an occupier of the property suffers from a permanent or temporary health condition that makes them more vulnerable to health risks associated with cold homes	Yes
Affordability	The household cannot afford to service the essential gas appliance, as assessed against the affordability criteria set out in the VCMA governance document	Yes*
Funding	Sufficient funding is not available from other sources (including a social or private landlord and national, devolved, or local government funding) to fund the essential gas appliance servicing	Yes*

*any funded cases for essential gas appliance servicing identified will be assessed for eligibility and evidence recorded under the scheme.

Eligibility criteria for company specific essential gas appliance repair and replacement

Eligibility Criteria	Description	Project qualifies Yes / No or N/A
Unsafe pipework and essential gas appliance repair or replacement must meet the following criteria:	Either: i. GDN has had to isolate and condemn unsafe pipework or an essential gas appliance following a supply interruption or as part of its emergency service role; or ii. A GDN or its Project Partner has had to condemn unsafe pipework, or an essential gas appliance, following an essential gas appliance service (as described in 3.19 of the VCMA governance document)	Yes
Health condition	Either: i. The occupier of the property suffers from a permanent or temporary health condition that makes them more vulnerable to health risks associated with cold homes and has a household income of £31,000 or below in 2025/26 prices, adjusted for inflation using Consumer Price Index with Housing costs (CPIH) 13, or ii. the household cannot afford to service the essential gas appliance, as assessed against the affordability criteria set out in Appendix 1 of the VCMA governance document	Yes*
Funding	Sufficient funding is not available from other sources (including national, devolved, or local government funding) to fund the unsafe pipework or the essential gas appliance repair or replacement.	Yes*

*any funded cases for essential gas appliance repair or replacement identified will be assessed for eligibility and evidence recorded under the scheme.