

# **Energy Best Deal+**

## **Evaluation Report**

### **October 2012**

**By Lyndsay Russell, Energy Best Deal+ Project Coordinator**

**Citizens Advice Scotland and its member bureaux form Scotland's largest independent advice network. CAB advice services are delivered using service points throughout Scotland, from the islands to city centres.**

**The CAB Service aims: to ensure that individuals do not suffer through lack of knowledge of their rights and responsibilities, or of the services available to them, or through an inability to express their need effectively**

**and equally**

**to exercise a responsible influence on the development of social policies and services, both locally and nationally.**

**The CAB Service is independent and provides free, confidential and impartial advice to everybody regardless of age, disability, gender, race, religion and belief and sexual orientation.**

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## EXECUTIVE SUMMARY

This report presents the evaluation findings from the Energy Best Deal+ pilot project. A result of the Fuel Poverty Summit in Scotland in October 2011 and coordinated by Citizens Advice Scotland and funded by Eon, EDF Energy, Npower Scottish Gas, Scottish Power and Scottish and Southern Energy. The pilot ran for eight weeks from July to September 2012 from nine Scottish citizens advice bureaux.

The aims of the Energy Best Deal+ pilot were:

- To provide a mechanism to link those who could benefit most significantly to the support, savings, discounts and energy efficiency measures they may be entitled to, through their energy supplier and/or an Energy Saving Scotland advice centre.
- To ensure that 1,000 clients/customers were referred to their energy supplier for the above benefits and discounts, to the advantage of the client/customer and the supplier.

Consumer awareness of the support and benefits available to them in terms of their fuel bills and energy efficiency measures is low. However, with one in three households in Scotland estimated to be living in fuel poverty it is vital that consumers are connected to that support. The Scottish CAB Service is ideally placed to reach many of the most vulnerable and fuel poor living in local communities.

### Referrals

- By creating a referral pathway between participating citizens advice bureaux, energy suppliers and the Energy Savings Trust, a successful mechanism has been established which can be easily used throughout the Scottish CAB Service and other agencies. Bureaux used this mechanism to refer 585 consumers to their energy supplier over eight weeks.
- This mechanism utilises the Scottish CAB Service position as a trusted agency, targets a key demographic which the energy suppliers can find it hard to engage with and uses the bureaux experience as an intermediary body.
- Having the option of supported calls or e-mail referrals suited the needs of different client groups whilst still ensuring that energy suppliers were put in touch with customers who may not have engaged with them under their own volition.
- The process of eligibility checking should be integrated into everyday advice giving, where possible and relevant to the client, such as for those requiring a benefits check or looking to reduce outgoings. A ‘booster’ campaign in the autumn/winter would raise awareness of the service.

- A more robust approach is required in regards to the collation and retrieval of referrals and their associated data.

## Consumers

- Broadly the evidence shows that targeted demographic of those “who could benefit most significantly” has been reached. This is specifically shown by the high eligibility rates of the participant consumers for the available support, savings and discounts. Where the project has not benefitted consumers as it might have, is in regards to energy efficiency measures such as insulation.
- Taking part in this campaign benefitted clients financially by £72,053, around £123 per client<sup>1</sup>.
- Delivery should be broadened to organisations which have regular contact with vulnerable people; such as Jobcentre Plus, the DWP, Local Authorities, social housing providers, LA Advice Shops. These may include but not be limited to organisations represented on the Fuel Poverty Forum.

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<sup>1</sup> This is a modest number based on reported figures. Many positive financial outcomes for clients could not be recorded. One supplier reported over £21,000 savings for their customers based on WHD, tariff changes and free white goods, one CAB recorded £14,000 financial gain between just two clients, but neither of these figures could be included because of overlap with official figures and inconsistent recording with other aspects of the pilot.

## Recommendations

This evaluation will establish that the Energy Best Deal Plus pilot project successfully provided a mechanism to link those living in, or at risk of, fuel poverty with the support they may be entitled to from their energy supplier. Whilst the target of 1,000 referrals was not reached, the reasons for this established a more realistic understanding of the rate of referrals which can be achieved by Scottish bureaux.

Given that this pilot has successfully met the needs of those it aimed to serve, CAS believes that the Energy Best Deal Plus project should be rolled out nationally with the following recommendations taken into account.

1. The process used for the pilot proved to be a workable and successful model. The framework of this model should be used for future rollout with the following improvements and adaptations:
  - Checklists should be kept and expanded upon, so that more benefits and discounts can be checked by advisers ahead of a referral.
  - Checking for a lower tariff for the client should become a standardised part of the procedure for supported calls and should be highlighted in e-mail referrals to suppliers.
  - Those bureaux with an adviser trained by Energy Best Deal Scotland should offer switching advice as part of the package.
  - The process of eligibility checking should be integrated into everyday advice giving, where possible and relevant to the client, such as for those requiring a benefits check or looking to reduce outgoings. A 'booster' campaign in the autumn/winter would raise awareness of the service.
  - Ideally the client's needs would be captured as part of a triage system. It should be at the discretion of the adviser as to which clients they carry out the checks with in a generalist advice session. Clients requiring a supported call should make another appointment so that advice sessions do not take more time than usual, causing a backlog in the bureaux.
  - Where possible, clients attending an appointment should be instructed to bring a bill to the session in order to ensure that their data is as accurate as possible. Clients in advice sessions where the check was unexpected should be asked to book a further, separate appointment for a supported call or for assistance with a WHD application if required.
  - Bureaux should be given a script to use for supported calls and a standardised form to send for an e-mail referral. Energy supplier advisers should also have a script and parameters over what help is offered and

what data is recorded from that call. Each side should have sight of the other's script for reference.

- Reference numbers should be attached to each phone call and e-mail referral and shared in order to improve data recognition and collation.
  - Given the difficulty of engaging with the target group and the biased workload bureaux experienced as a result of trying to achieve 100 referrals each, targets should not be used for a future rollout of the project.
2. Delivery should be broadened to organisations which have regular contact with vulnerable people such as Jobcentre Plus, the DWP, Local Authorities, social housing providers, LA Advice Shops. These may include but not be limited to organisations represented on the Fuel Poverty Forum.
- A wide scale rollout to Scottish bureaux should be completed before adaptations are made for partner organisations.
3. The following funding model should be considered.
- A sum to CAS for project coordination for a fixed term.
  - A starter fee for each bureau to cover the cost of startup, resources, training and marketing.
  - An additional payment to cover the costs of an autumn/winter publicity campaign.
  - A payment to bureaux based on each bureau making an average total of around six telephone and e-mail referrals per week.
4. It is vital that the project ensures the trust of consumers is maintained and client expectations are met. The project should be not be marketed in regards to any one benefit, discount or aspect of energy efficiency. Different suppliers have different needs from the project and the main draw for consumers, WHD, cannot be accessed year round. A coordinated approach between suppliers and bureaux is required to ensure that this is managed.
5. LPG and oil suppliers are not currently part of the process but should be considered.

## THE SCOTTISH CITIZENS ADVICE BUREAUX SERVICE

Citizens Advice Scotland and its CAB offices form Scotland's largest independent advice and advocacy network. Citizens Advice Scotland (CAS) is the umbrella organisation for Scotland's network of 81 citizens advice bureau (CAB) offices.

These bureaux deliver frontline advice services throughout over 250 service points across the country, from the city centres of Glasgow and Edinburgh to the Highlands, Islands and rural Borders communities. Citizens advice bureaux achieve positive social outcomes for hundreds of thousands of clients each year by providing advice across a range of issues, including welfare, debt, employment, housing and utilities. For many clients, good advice has helped them to avoid negative outcomes such as homelessness, unemployment, bankruptcy, and mental health problems.

In 2010/11, citizens advice bureaux in Scotland achieved a financial gain of almost £126 million for clients based on funding of £16.3 million (including £7.6 million in core funding). This means that clients were better off by almost £8 for each £1 of funding given to bureaux. As well as achieving better social outcomes, advice leads to better financial outcomes for clients.

There are citizens advice bureaux in 30 of the 32 local authorities in Scotland, making the network the only independent advice body in the country with truly national on the ground coverage.

Citizen advice bureaux are the key frontline service that hundreds of thousands of people turn to and they deal with over half a million new issues in Scotland every year.

## ACKNOWLEDGEMENTS

CAS would like to thank the following for their support, guidance and resources in the development of this project

- The Scottish Government
- EDF Energy
- E.on
- Npower
- Scottish and Southern Energy
- Scottish Gas
- Scottish Power
- The Energy Savings Trust
- Consumer Focus Scotland
- Shelter Scotland
- Energy Action Scotland

Thanks to all the citizens advice bureaux that participated in the pilot and to staff and managers in bureaux who gave their time to help evaluate the project.

- Airdrie
- Denny and Dunipace
- Dumfries and Galloway
- Motherwell and Wishaw
- North Ayrshire
- Nairn
- Roxburgh and Berwickshire
- Rutherglen
- Stirling

Finally CAS would like to thank the clients who participated in the pilot.

# INTRODUCTION AND CONTEXT

## Introduction: Energy and Advice

Energy advice and assistance for both regulated and non-regulated fuel enquiries is an everyday part of the support to consumers that the Scottish CAB Service provides. The service delivers face to face, online and telephone advice on all aspects of billing, charges, debts, disconnection, complaints, switching and more. Support for clients living in fuel poverty is often through related areas of concern such as welfare benefits, housing, debt and utilities more generally. Almost two thirds (62%) of all enquiries to Scottish bureaux in 2010/11 were in regards to debt and benefits advice. Consumer goods advice accounted for 2% of all advice sessions over the same period.

## Energy Best Deal

The Scottish CAB Service has also been developing consumer and energy advice capacity through project and campaigning work, such as the Energy Best Deal campaign. The need for a practical solution to reduce energy costs for fuel poor consumers was identified by Consumer Focus Scotland (CFS) working with Ofgem, CAS and Money Advice Scotland. Energy Best Deal was originally delivered by CFS but was transferred to the Scottish CAB service in 2011.

Energy Best Deal delivers training to frontline advice workers in order to develop their ability to best advise fuel poor and vulnerable consumers on how to reduce their energy costs. The up skilled advisers work for agencies such citizens advice bureaux, housing associations, money advice services and local authorities. Training sessions are also delivered to members of the public to help empower them to switch suppliers, change tariffs and identify energy efficiency measures which could help them to reduce their bills. Since the transfer, CAB have delivered 140 training sessions across Scotland, vastly improving the practical knowledge of those advising fuel poor consumers.

## Big Energy Week

CAS and member bureaux also took on the “Big Energy Week” campaign in 2011 to help mitigate the effect of rising energy bills on Scottish consumers and to work towards reducing the high levels of fuel poverty in Scotland. A secondary objective was to raise the profile of the Scottish CAB Service and identify it as the lead organisation to ask for advice on energy and fuel poverty issues. In October 2011 Citizens Advice joined energy suppliers, representatives from consumer groups and the Department of Energy and Climate Change to discuss what could be done to help consumers cope with rising fuel bills. One of the outcomes of the meeting was that Citizens Advice in England, Wales and Scotland would coordinate the campaign week, during which consumer organisations, energy suppliers, switching sites and Government agencies worked together to let consumers know about the free help and advice available and the steps they can take to save money on their energy bill and maximise their income.

Due to the success of the first campaign the “Big Energy Savings Week” was developed and took place at the end of October 2012; again it was coordinated by Citizens Advice in Scotland, Wales and England. The campaign was twice the size of the event in January with over 20 events taking place in Scotland alone.

## Context

At the start of October 2012 Citizens Advice Scotland published mid-year figures which show that Scottish bureaux are seeing more ‘crisis cases’ about fuel bills than ever before. In the six months since 1st April, Scottish bureaux have already seen 7,652 people seeking help with their energy bills. Last year Scottish bureaux dealt with 10,500 energy cases in total. This year the final number of enquiries may be around 50% higher than in 2010/11.

## Rising Prices

This increase in cases is attributable in part to the rising cost of energy. At the start of 2012, the average UK energy bill was 21% higher than at the start of the previous winter: rising from £1,069 in November 2010 to £1,294 in January 2012<sup>2</sup>. Each increase in energy prices pushes more Scottish consumers into fuel poverty. In 2009, around 770,000 homes, about one third of all Scottish households, were said to be in fuel poverty, compared with 618,000 in 2008 and 293,000 in 2002. The number of households in "extreme fuel poverty" had risen from 3% in 2002 to 10% in 2009<sup>3</sup>.

By 2011/12, the average annual household energy bill was double what it had been just eight years earlier. The additional price increases this autumn, between 6 and 9% for electricity and gas, will already be causing more concern for Scottish energy consumers. 83% of bureaux clients seeking advice on fuel debt during 2011/12 were having difficulty making payments. We can only conclude that those who have already tightened their belts in order to meet the rising cost of their energy will have to tighten them further or find a way to reduce their energy costs in order to avoid accruing arrears to their supplier.

## Consumer Awareness

Many consumers do not know that there is support available to them from the Scottish Government and their energy suppliers. One in ten UK households are entitled to some form of assistance with their fuel bills; unfortunately many of that

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<sup>2</sup> Source: Populus interview, on behalf of Consumer Focus, 1684 GB adults aged 18+ who are responsible for paying the household energy bill, by telephone between 10-19 August 2012 <http://tinyurl.com/dx1hw4m>

<sup>3</sup> Scottish Government House Condition Survey 2009 <http://tinyurl.com/ama3t4v>

10% are not aware that the support is available. That help is worth an average of £250 for each household<sup>4</sup>.

General awareness of rights in regards to utilities bills is low in the UK. Fewer than half of people (49%) in the UK are aware that their energy supplier has to take their circumstances and ability to pay into consideration when arranging repayments of outstanding bills. Almost one in five (19%) believe their supplier could name any amount and they would have to pay it.<sup>5</sup> One in three people don't know that help is available to insulate their home.<sup>6</sup> A recent Which? poll also found that people feel less knowledgeable about gas and electricity and less well protected, compared with other markets.<sup>7</sup>

## **Consumer Action**

Despite the anticipation of many UK energy consumers that they face higher bills this winter, only a quarter have checked with their supplier to see if they were on the best deal and just 16% have changed to another energy company.<sup>8</sup>

The results of a survey in January 2012 showed Scots have been taking action to lower their bills through reducing their energy consumption. 43% don't have the heating on as much as they used to, one third (32%) have insulated their home, one in five (19%) have changed to a cheaper way to pay such as direct debit and 14% have switched to another energy supplier.<sup>9</sup>

## **Energy Advice**

Scottish citizens advice bureaux have successfully supported clients with regulated and non-regulated fuel issues and have garnered significant client financial gain for those clients. In terms of action and assistance for regulated fuel customers; including but not limited to, metering, switching, cancellation, methods of payment, disconnection, billing and energy assistance applications, the client financial gain was £113,794 in 2011/12. This figure increases to £160,717 when non-regulated fuel consumers and fuel debt clients are taken into account: an average gain of £635 per client.

The Scottish CAB Service is therefore demonstrably well placed to assist clients with all aspects of fuel enquires and issues. The service is also ideally positioned to

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<sup>4</sup> Source: Home Heat Helpline The New Policy Institute (NPI) was commissioned by the Home Heat Helpline to estimate the number of vulnerable households who are eligible for free CERT home insulation grants and other free help from their energy supplier in November 2011.

<sup>5</sup> Source: Populus interview, August 2012 <http://tinyurl.com/dxlhw4m>

<sup>6</sup> Source: TNS OnLineBus, on behalf of Citizens Advice, interviewed 2069 GB adults aged 16-64 between 20th and 28th December 2011.

<sup>7</sup> Which Quarterly Consumer Report, July 2012

<sup>8</sup> Source: TNS OnLineBus, on the behalf of Citizens Advice, interviewed 2,431 GB adults aged 16yrs+ between 3rd and 8th October 2012.

<sup>9</sup> Source: TNS OnLineBus, December 2011.

support vulnerable and disadvantaged consumers who could benefit from a trusted intermediary when trying to access support to reduce their energy costs.

The service has a proven track record of successfully assisting clients, to the financial benefit of the client, and the holistic approach of the Scottish CAB Service ensures that fuel issues are tackled at the root cause whenever possible. The recent shift to the consumer agenda for the Citizens Advice Service, UK wide, means that the service's ability to help energy clients with all levels of enquiry will only improve.

## AIMS AND OBJECTIVES

The pilot project known as Energy Best Deal+ (EBD+) is an outcome of the Scottish Fuel Poverty Summit in October 2011. At the Summit it was recognised that many of the people who need support with their energy costs are often the last people to access the schemes and support available to them. It was agreed that a mechanism should be sought to best link those who could benefit most significantly to the support, savings, discounts and energy efficiency measures they may be entitled to. Such consumers are often unable or unwilling to contact their energy suppliers to see if they could benefit or are not aware that there is any help available to them at all.

Citizens Advice Scotland worked with the Scottish Government and the six biggest energy suppliers in Scotland, namely E.on, EDF Energy, Npower, Scottish Gas, Scottish Power and Scottish and Southern Energy (SSE), Consumer Focus Scotland and the Energy Savings Trust (EST), to develop a pilot which fulfilled this need. These energy suppliers funded the project based on their market share in Scotland.

The resultant pilot project was a bureaux-based, face-to-face service in which bureaux advisers would call clients energy suppliers on their behalf to ensure they gained access to the benefits, savings and support they might be entitled to. This was followed by contact with the Energy Saving Scotland advice centre (ESSac) to ensure that the client did not miss out on any additional benefits which may be available from the Scottish Government. This mechanism utilised the position of the Scottish CAB Service as a trusted agency, targeted a key demographic which the energy suppliers can find it hard to engage with and used the bureaux experience as an intermediary body.

A list, describing the measures, types of support and discounts accessed through Energy Best Deal+, and definitions of 'Priority' and 'Super Priority' can be found in [Appendix 3](#).

The aims of the Energy Best Deal+ pilot were:

- To provide a mechanism to link those who could benefit most significantly to the support, savings, discounts and energy efficiency measures they may be entitled to, through their energy supplier and/or an Energy Saving Scotland advice centre. Specifically to link Priority and Super Priority groups to CERT measures, the Warm Home Discount and the Priority Service Register, in order to help those living in, or at risk of, fuel poverty.
- To ensure that 1,000 clients/customers were referred to their energy supplier for the above benefits and discounts, to the advantage of the client/customer and the supplier.

## Participating citizens advice bureaux

CAS asked all bureaux to apply to take part in the pilot. From the applicants, CAS selected nine bureaux with a history of fuel poverty work and/or excellent records for delivering projects to take part. The following bureaux were selected to deliver the pilot:

- Airdrie CAB
- Dumfries and Galloway Citizens Advice Service
- Denny and Dunipace CAB
- Motherwell and Wishaw CAB
- North Ayrshire Citizens Advice Service
- Nairn CAB
- Roxburgh and Berwickshire CAB
- Rutherglen CAB
- Stirling CAB

Each participating bureaux was asked to refer 100 clients to their energy suppliers, a total of 900 referrals. Shelter Scotland were to produce the remaining 100 referrals so that the referral mechanism could be tested with an external agency. However, several weeks after the pilot began Shelter Scotland felt that due to a lack of resources and their estimated client coverage it would be best to withdraw from the project. In place of Shelter Scotland Leith CAB participated in the project.

Each bureaux was offered a flat fee of £1,500 for participation, with an extra £500 as an added incentive for reaching their target of 100 referrals. Two of the nine bureaux achieved this target. That seven bureaux did not reach their target is indicative of the difficulties bureaux faced getting referrals.

- The delivery process used by participating bureaux can be found under [Appendix 1](#).
- The questionnaire they completed with each client can be found under [Appendix 2](#).

## **Generating Referrals: citizens advice bureaux**

The pilot officially began on July 16<sup>th</sup> 2012 and concluded on 14<sup>th</sup> September. The original end date of 31<sup>st</sup> August was extended to ensure that a satisfactory number of referrals were made to enable a fair assessment of the pilot.

The final number of referrals was calculated as 585. This figure includes 373 phone call referrals, 169 e-mail referrals and an additional 43 referrals from Nairn CAB, gathered after they had exceeded their original target of 100 referrals. 58.5% of target was therefore achieved against the target of 1,000 referrals.

Because Nairn CAB reached their target within the original period of the pilot, the remaining two weeks of the project was used as an opportunity to trial a more streamlined process, including asking the client fewer questions and recording less post call data. This more efficient process is closer to the model which could be practically rolled out and used if the project continues.

Bureaux were asked to record the various methods they used to attain clients for referral. It was initially hoped that a significant number of clients could be identified through day to day bureau contact, but it was quickly established that this would not generate the required number of referrals over the course of the pilot. Bureaux promptly took action to publicise and promote the service, variously using methods outlined in [Appendix 4](#).

CAS also took action to promote the service centrally though the limited nature of the pilot made national publicity difficult. Methods used are also listed in Appendix 4.

Whilst many of these methods were successful, it was apparent from the first fortnight of the pilot that referrals would be more difficult to attain than initially estimated. However, the difficulty participating bureaux have faced in achieving their targets has produced valuable information for potential future rollout and funding models. The barriers bureaux experienced are listed in [Appendix 5](#).

## RESULTS: CITIZENS ADVICE BUREAUX

There are several sources of data regarding CAB referrals to be considered.

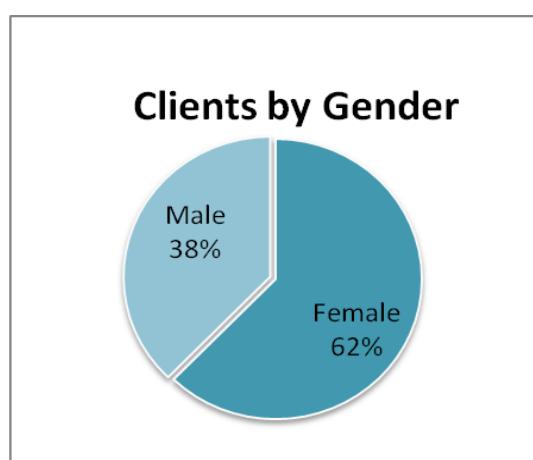
- Phone call referrals
- E-mail referrals
- Post target referrals from Nairn CAB

The results of this data are expanded upon below; where the same data points have been recorded the results are shown together. Where the data points differ, a separate set of results is listed.

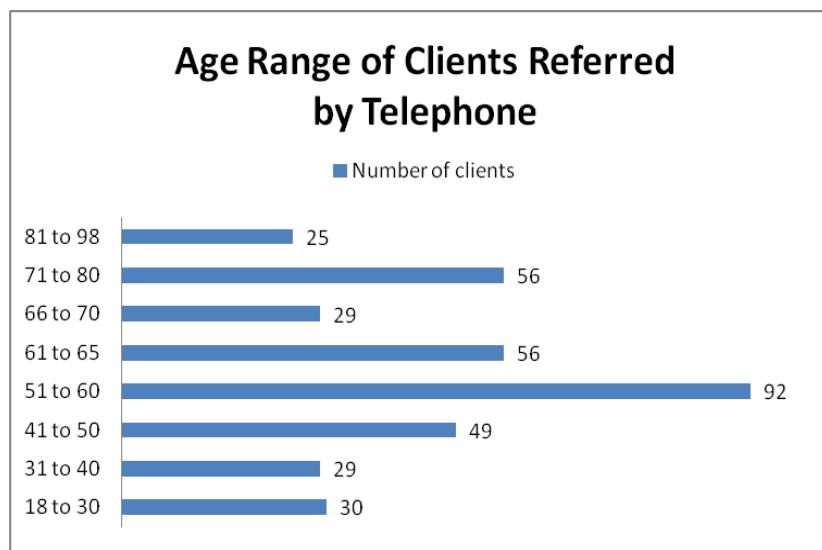
### Demographic Information

Participant citizens advice bureaux recorded the demographic data of 542 of the 585 clients during the course of the pilot, from all telephone and e-mail referrals. The results exclude the 43 additional referrals from Nairn CAB. ([Appendix 6](#))

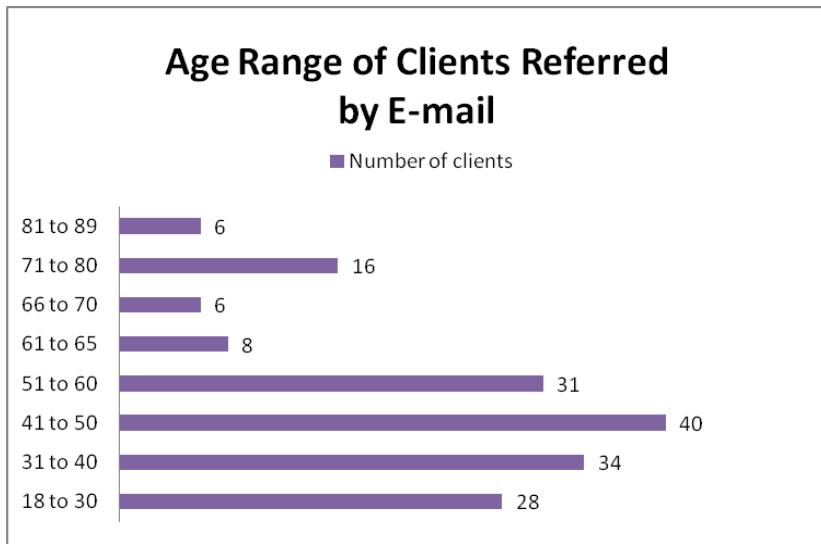
Figure 1 to Figure 3 show demographic characteristics of the participants.



**Figure 1: Clients by Gender  
(538 responses)**



**Figure 2: Age Range  
of participants  
referred by telephone  
(366 responses)**



**Figure 3: Age Range of participants referred by e-mail (169 responses)**

There is a difference in the average age of those supported in a call to their supplier (57 years) and those happy to handle the call in their own time, and therefore referred by e-mail (48 years). This averaged difference is also reflected in the age ranges between the two methods (see Fig 2 and 3), demonstrating the different needs of the various age ranges; the younger the client, the less likely they are to require a supported call.

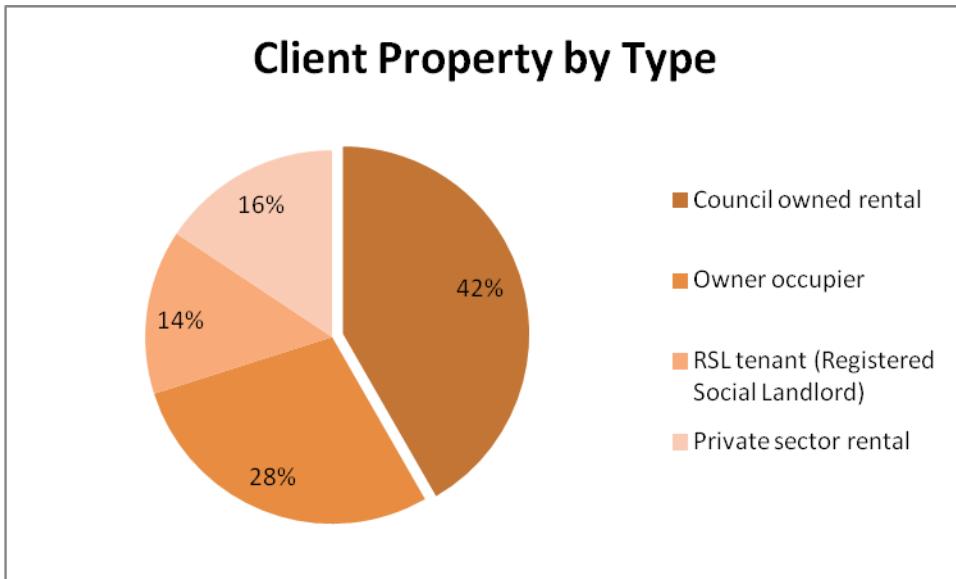
### Energy Best Deal

34% of participant clients had taken part in an Energy Best Deal (EBD) session. 31% of the clients had not taken part in an EBD session but would like to take part in one in the future. EBD participants were targeted by the bureaux because they had marked themselves out as people interested in reducing their energy bills, and would also appreciate the value of the support they were being offered.

### Housing

42% of participant clients lived in a Council owned rental property or owned their home (28%). The remaining clients were fairly evenly split between private sector rentals and Registered Social Landlords (RSLs). Four out of ten of typical bureau clients are owner occupiers, although they are significantly less likely to be owner occupiers than the adult Scottish population. CAB clients are usually more likely than the Scottish population to be in social or private rented accommodation.<sup>10</sup> Therefore EBD+ clients were 12% less likely to be owner occupiers than the average CAB clients. This result, shown in Figure 4, could be a result of cold calls, to clients in receipt of the relevant benefits, skewing the average demographic of CAB attendees.

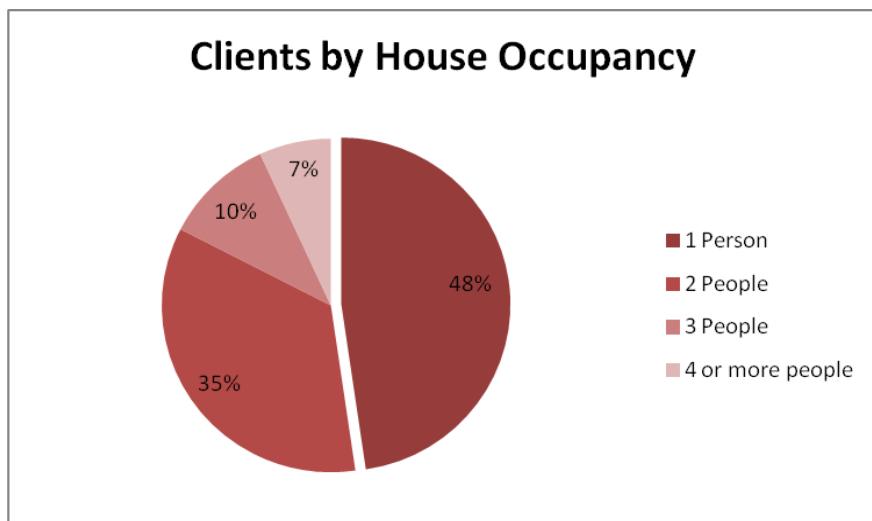
<sup>10</sup> Advice in Scotland 2010/11 CAS



**Figure 4:**  
**Participant property types**  
**(542 responses)**

As per Figure 5, 48% of all participants lived alone. This number indicates that the Energy Best Deal+ project helped more people living alone than in the general Scottish population, where 38% are entitled to single occupancy council tax (though there are differences between rural/urban and deprived areas)<sup>11</sup>. 35% of all taking part lived with one other person. Those living on their own were most likely to be over 65.

Those referred to their supplier by e-mail were more likely to live with another person than alone; 34% lived alone, 37% lived with another person, again indicating that those who live alone are more likely to require support to make a call.



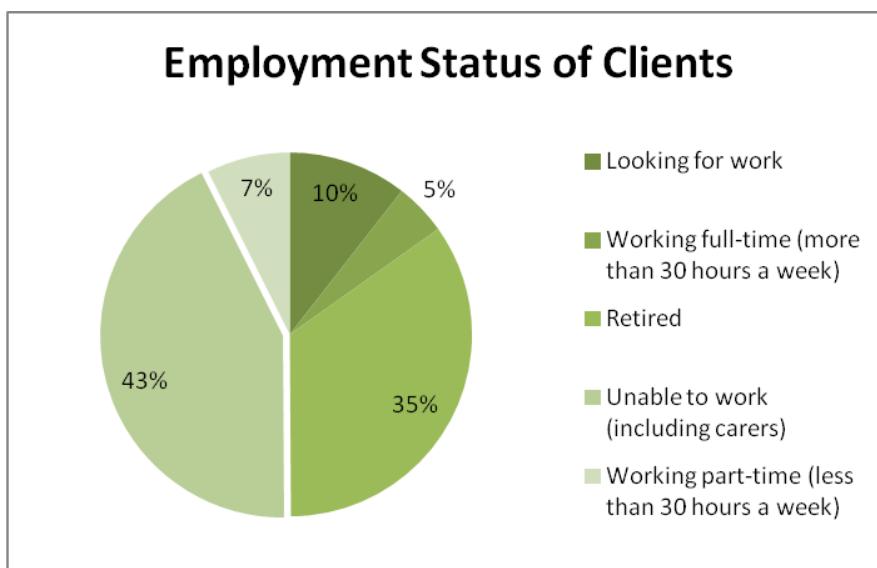
**Figure 5: Clients by house occupancy, telephone and e-mail referrals**  
**(539 responses)**

<sup>11</sup> Estimates of households and dwellings in Scotland, 2009 <http://tinyurl.com/c52cwy>

## Employment

Almost half of bureau clients (44%) are in employment. Compared to the Scottish population, bureau clients are four times as likely to be unable to work due to ill health or disability, three times as likely to be unemployed, but less likely be retired or looking after family.<sup>12</sup>

The profile of Energy Best Deal+ clients is quite different; only 12% of participants were in employment. 43%, the majority, were unable to work through ill health or because they cared for another person. The second biggest demographic was those who are retired at 35%, making a retired person more than twice as likely to be a client of the project than of the general UK population<sup>13</sup> This suggests that organisations and charities working with an older clientele would be ideally placed to run the Energy Best Deal Plus project.



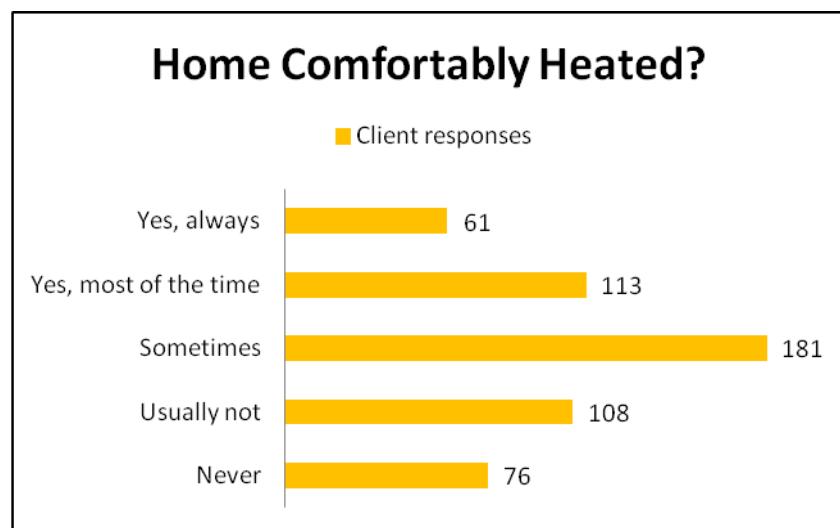
**Figure 6:**  
**Employment**  
**Status of clients**  
**(541 responses)**

<sup>12</sup> Advice in Scotland 2010/11, Citizens Advice Scotland

<sup>13</sup> Key Issues for the New Parliament 2010, House of Commons Library Research <http://tinyurl.com/8exe4r6>

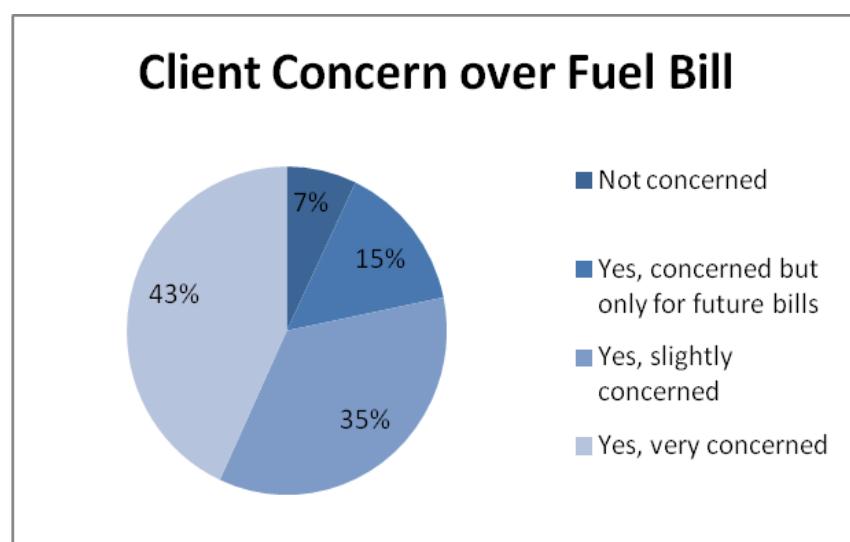
## The Client's Perspective

Clients were asked if they felt that they could heat their home to a comfortable level on their income. 68% of clients answered that they could "sometimes", "usually not", or "never" heat their home comfortably. 14% of those clients could "never" heat their home comfortably in winter, indicating a significant number of participants are living in extreme fuel poverty.



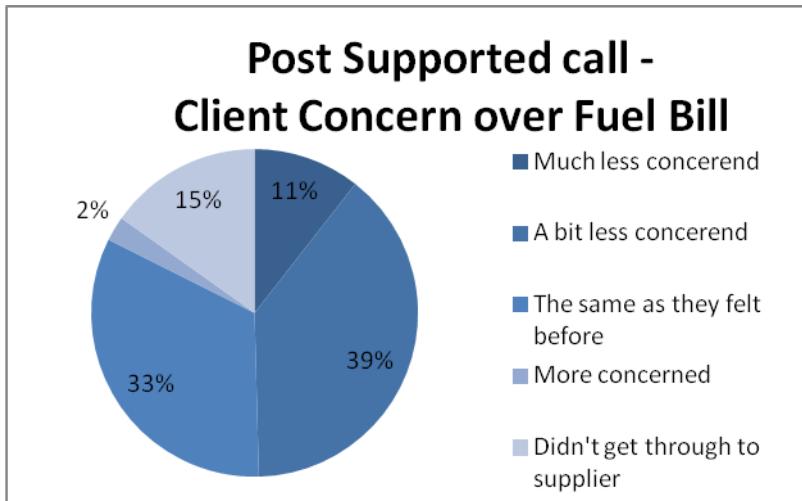
**Figure 7: Did clients feel that they could heat their home comfortably in the winter, on their income? (539 responses)**

Before they were referred by telephone or e-mail to their supplier or the Energy Saving Trust, clients were also asked if they were concerned about whether they could afford their fuel bills - now and in the future. The results are shown in figure 8.



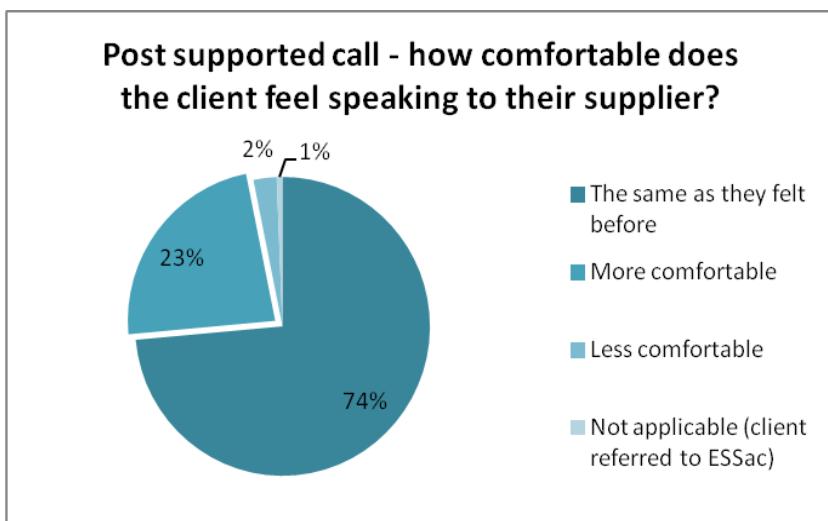
**Figure 8: How concerned are clients about being able to afford their fuel bills, now and in the future? (538 responses)**

78% of clients expressed concern about whether they could afford their current fuel bills. Only 7% were not concerned at all about their energy costs. However, 50% of clients supported in a call to their supplier or the Energy Savings Trust were “much less” or “a bit less” concerned about whether they could afford their fuel bills after the phone call. 11% of those people were “much less” concerned.



**Figure 9: Post phone call to supplier- how concerned are clients about being able to afford their fuel bills, now and in the future? (369 responses)**

Of the clients who were supported in a phone call to their energy supplier, 34% felt uncomfortable about speaking to their supplier but after the supported call 23% of clients felt they would be “more comfortable” about speaking to their supplier again in the future.



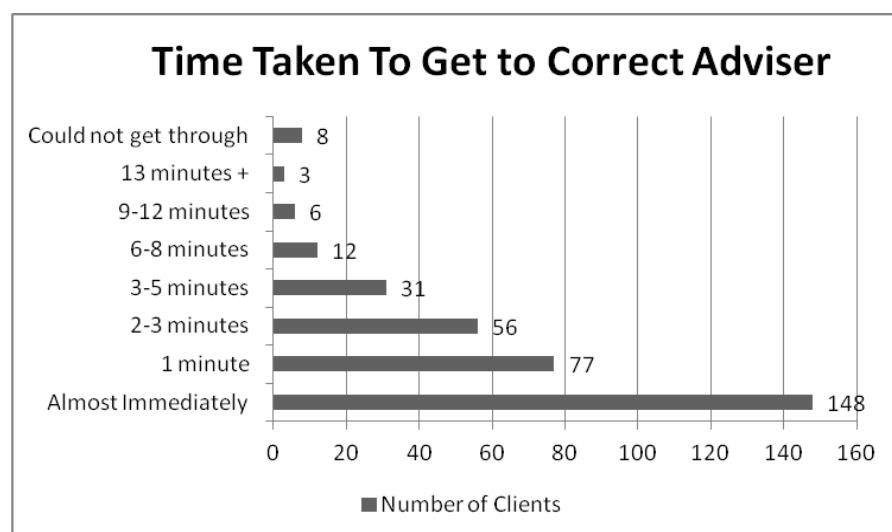
**Figure 10: Post phone call to supplier, how comfortable does the client feel speaking to their supplier? (314 responses)**

## Telephone Referral Statistics (373 clients)

43% of phone calls to energy suppliers and ESSac resulted in the clients or adviser getting through to the correct adviser “almost immediately.” For a further 46% took 1 to 5 minutes.

- 22% within 1 minute.
- 16% within 1 to 3 minutes.
- 8% within 3 to 5 minutes.

86% of clients got through on their first call to their energy supplier. Of the remaining 14% of clients, 2% could not get through at all and the rest had to wait longer than they were willing to, or got through on a second attempt at a call.



**Figure 11: How long did it take before the client was able to speak to the correct energy supplier or ESSac adviser? (341 responses)**

Further outcomes for clients supported in a call were recorded during the call by the adviser and were given to the adviser by the energy supplier adviser. These results are therefore explored under energy supplier results.

## RESULTS: ENERGY SUPPLIERS

Different terms have been used for those members of the public participating in this pilot project. When in association with bureaux data, the public are called clients. When in association with their energy supplier, people are referred to as customers. When neither or both terms apply, the public are referred to as consumers.

Energy Company data:

- Correlating data, cross referencing CAS referral numbers
- Warm Home Discount application outcomes
- Priority CERT measures
- Benefits to customers
- Financial gain for customers

In order to present the data in the fairest way possible, the energy suppliers are consistently referred to as “Energy Supplier 1”, “Energy Supplier 2” etc, up to “Energy Supplier 6”.

Data from the energy suppliers regarding the outcomes for their customers has varied in content and nature; one supplier has declined to supply any data. Missing data is a result of differences in recording between suppliers and a shortage of time since the end of the pilot to provide final outcomes for clients. Some suppliers used CAS data in order to match their own records. Others used their own data and did not data match, so outcomes, negative or otherwise, are not always available to compare to all the data supplied. The following analysis is based on the information submitted by the energy suppliers as per Table 1. ([Appendix 7](#))

ES = Energy Supplier *Suppliers were not asked to supply this information	Energy Supplier 1	Energy Supplier 2	Energy Supplier 3	Energy Supplier 4	Energy Supplier 5	Energy Supplier 6
<b>Correlating data; cross referencing CAS referral numbers</b>	Submitted by ES	Only CAS data available	Only CAS data available	Submitted by ES	Submitted by ES	Submitted by ES
<b>Warm Home Discount application outcomes*</b>	Submitted by ES	Only CAS data available	Only CAS data available	Submitted by ES	Submitted by ES	Submitted by ES
<b>Priority CERT measures referrals received</b>	Submitted by ES	Only CAS data available	Only CAS data available	Only CAS data available	Submitted by ES	Submitted by ES
<b>CERT measures successfully installed</b>	Submitted by ES	No Data	Partial Data	Partial Data	Partial Data	Submitted by ES
<b>Additional benefits to customers including tariff change*</b>	Submitted by ES	No Data	No Data	Submitted by ES	Submitted by ES	Submitted by ES
<b>Financial gain for customers recorded by Supplier*</b>	No Data	No Data	No Data	Submitted by ES	No Data	Submitted by ES

**Table 1: Data available from Energy Suppliers**

## **Correlating Data; cross referencing CAB referral numbers with Energy Suppliers 1, 4, 5 & 6**

Table 2 shows an average attrition rate of 20% between data recorded as submitted by bureaux and the data recorded as received by the suppliers. It is encouraging to note that as a rule, the higher the number of referrals made, the lower the attrition rate. The staff of those suppliers receiving a lower volume of referrals may have been less likely to recognise or record the customer as part of the project. Those suppliers receiving higher volumes of referrals may have become better at recognising and/or recording project customers.

No. of referrals, total (Telephone and E-mail referrals from Suppliers 1, 4, 5 & 6).				
	Recorded by CAB	Recorded Received by ES	Discrepancy	% difference
Energy Supplier 1	26	18	8	30.8
Energy Supplier 4	233	200	33	14.2
Energy Supplier 5	136	105	31	22.8
Energy Supplier 6	138	103	35	25.4
Total	533	426	107	20.1

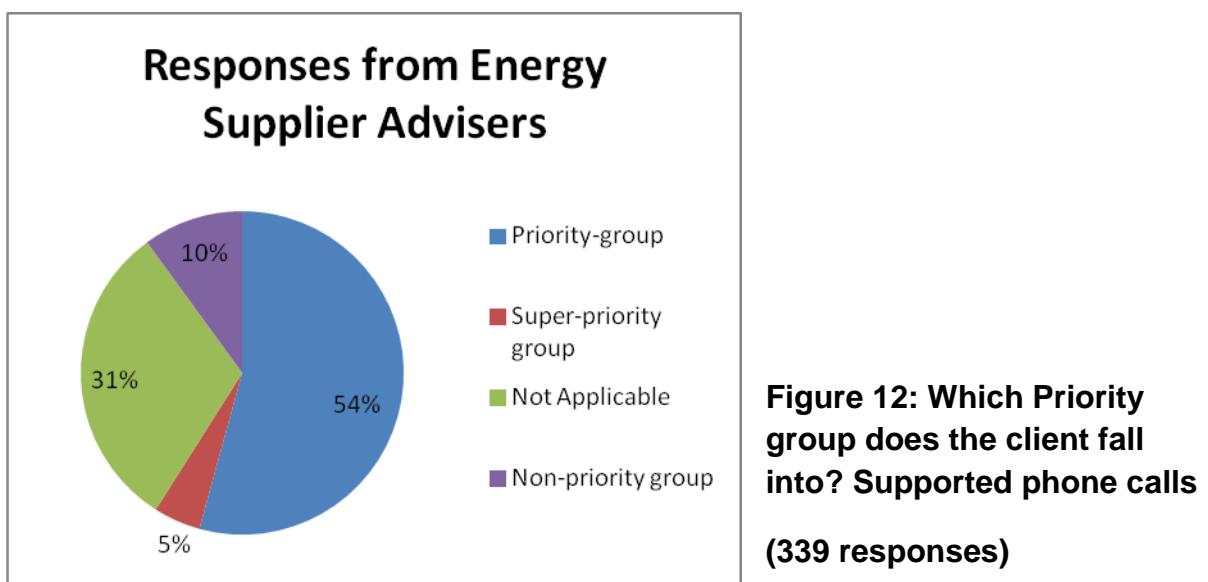
**Table 2: Discrepancy between data submitted and data recorded**

It should be noted that customer referrals labeled as 'no contact from CAB' were very few in number. The main reason referrals have been discounted was because the client could not be traced. In most instances these issues were caused by incorrect and/or inaccurate information supplied by the customer. For instance one supplier reported that 23 of the referrals made to their company were not from their customers.

An additional 52 referrals were recorded by participating bureaux for customers of Energy Suppliers 2 and 3.

## Priority and Super Priority Group Customers

As part of the supported call process, CAB advisers recorded whether clients were part of the Priority or Super Priority group as described by the Energy Supplier adviser. As per figure 12, 54% of clients were classed as part of the Priority group but only 5% were classed as Super Priority. Given the demographic of Scottish CAB clients - a third of new issues handled in 2010/11 were in regards to benefits, it is surprising that more clients did not fall into the Super Priority group<sup>14</sup>. ESA is the second most commonly seen benefit issue in Scottish CAB, and the remaining qualifying benefits for the Super Priority group are all in the top 10 most common benefit issues.



<sup>14</sup> Advice in Scotland 2010/11, Citizens Advice Scotland Keith Dryburgh

## **Warm Home Discount Application Outcomes from Supported Calls**

Warm Home Discount applications made or checked over the phone with Energy Suppliers are the only applications for which the final outcomes have been recorded. Many more WHD applications were made as part of e-mail referrals, but these outcomes could not be recorded because there was no contact with clients post referral from the CAB. Clients who were recorded as already in receipt of the discount have not been included in Table 3.

Warm Home Discount Applications from Supported Calls					
	Applications Made	Application in Process at Time of Reporting	Did Not Qualify	Qualified	% Qualified
Energy Supplier 1	11	0	3	8	<b>72.7</b>
Energy Supplier 2*	4	0	1	3	<b>75.0</b>
Energy Supplier 3*	22	3	10	9	<b>40.9</b>
Energy Supplier 4	133	2	14	117	<b>82.0</b>
Energy Supplier 5	50	1	6	43	<b>86.0</b>
Energy Supplier 6	93	0	3	90	<b>96.8</b>
Totals/Average % qualified	313	14	37	262	<b>83.7</b>

\* Not confirmed, CAS data only

**Table 3: Warm Home Discount Applications from Supported Calls**

313 WHD applications were made through 373 phone calls (84% of calls involved an application). Of the 313 applications made 84% of these were successful, as per Table 3. Therefore 70% of all calls resulted in a successful application for WHD. Overall, participating bureaux reported 76% of clients referred by telephone were eligible for the Warm Home Discount. The figure of 76% was recorded directly by the bureaux adviser from the energy supplier adviser during the call. This 6% difference is likely due to clients recorded by participating bureaux not being recorded (or verified to CAS) by the supplier. It could also be a result of incomplete client data provided by the client or bureaux, making it difficult for the supplier to trace and report the same data.

Bureaux making e-mail referrals were asked to report whether they believed each client should be eligible for the WHD by using the WHD checklists specific to each Energy Supplier. Bureaux reported that they thought 70% of the 169 clients should be eligible for the Discount from their supplier. A further 7% were assisted to make an application to their supplier, but the bureaux adviser was unsure as to whether or not it would be successful. 2% of clients were already in receipt of the WHD. Therefore participating bureaux put forward 77% of their clients referred by e-mail for the WHD. A slightly lower percentage than were statistically likely to receive it but very much within reason. This indicates that the checklists were an efficient tool for determining the likelihood of a client receiving the discount from their supplier.

## Priority CERT Measures

There has been significant difficulty in gaining an accurate measure of the success of CERT referrals. There are several issues; the first is that not enough time has necessarily passed from the date of the original referral to record an outcome for a customer. Secondly there is a difference between referrals received, referrals being of value, referrals leading to surveys and referrals leading to successful installation. Definitions have also differed between suppliers as to whether a referral is recorded as a referral if the customer does not choose to engage with the scheme from the outset.

Energy Suppliers 1, 3, 4, 5 and 6 have been able to provide partial or complete data for the process from referrals received to referrals leading to surveys.

	Recorded as a Priority CERT referral by CAB from supported call	Recorded as a Priority CERT referral by CAB through e-mail	Recorded as Priority CERT referral by Supplier	Referral "In progress"	Successful installation
Energy Supplier 1	*	3	4	1	unknown
Energy Supplier 2	2	1	not supplied	not supplied	unknown
Energy Supplier 3	7	4	not supplied	1^	unknown
Energy Supplier 4	*	27	45	11	unknown
Energy Supplier 5	11	26	not supplied	5	unknown
Energy Supplier 6	*	5	9	4	unknown
Total	10	64	57	N/A	N/A

\*where a supplier has provided data CAB data has been treated as superseded

^ Energy Supplier is unsure if this is the final figure as has experienced difficulty data matching

"Unknown" may refer to the data not being available to CAS, or the data may be unavailable to the supplier, or the supplier may not have been able to supply this data as yet.

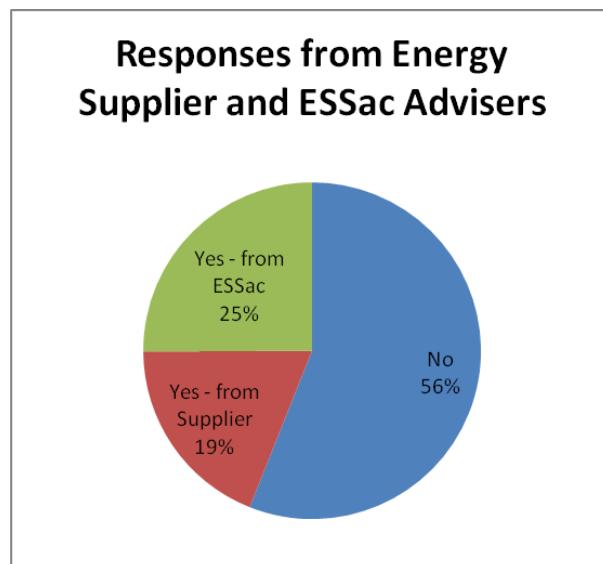
"Not supplied" means that the data may have been unavailable, irrelevant to the energy suppliers reporting process, or there may be nothing to report in those categories

**Table 4: CERT referrals**

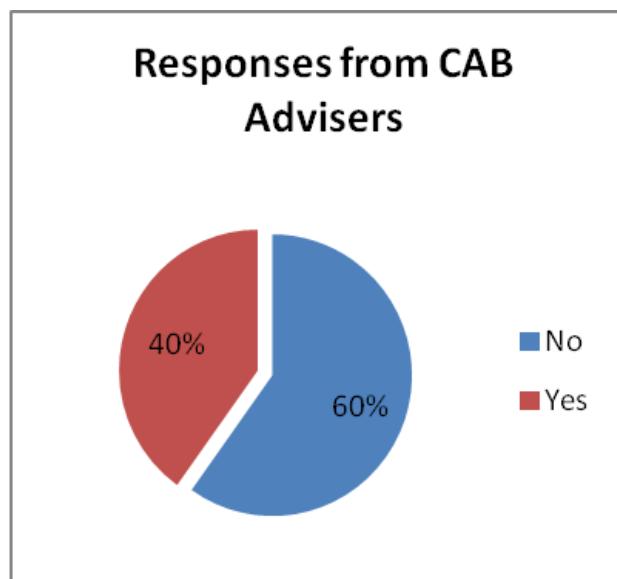
Table 4 indicates that 131 referrals were made to, or counted by, the energy suppliers. From 585 customers this indicates a 22% Priority CERT referral rate. The information collated on the success of these referrals in Table 4 suggests that 22 of these referrals led to further action with the customer. This gives a very approximate referral success rate of 16.7%. What is not known is how many of these have actually led to a successful installation, unfortunately the figures above suggest a very high drop off rate between customer eligibility and the customer choosing to progress with the measures.

During each supported call CAB advisers asked the energy supplier and ESSac advisers if the client had been put forward for energy efficiency measures including CERT. The results are shown in figure 13.

**Figure 13: Was the client put into the process to receive energy efficiency measures, including CERT?  
Supported phone calls  
(339 responses)**



Bureaux were also asked to record how many clients they believed were eligible for a Priority CERT referral using their checklists. As per figure 14, CAB advisers recorded that 40% of clients looked to be eligible for such a referral. This indicates that the Priority CERT checklist was not an accurate tool for predicting the eligibility of clients for a Priority CERT referral, although still a helpful gauge.



**Figure 14: using the checklist - did the CAB adviser think the client would be eligible for a Priority Cert referral? From e-mail and telephone referrals (391 responses)**

## **Additional Benefits to Customers and Recorded Financial Gain for Customers**

Four energy suppliers were able to provide information on additional benefits received by customers who were referred through the Energy Best Deal+ scheme. These benefits would be available to any eligible customer but were picked up through the Energy Best Deal+ scheme.

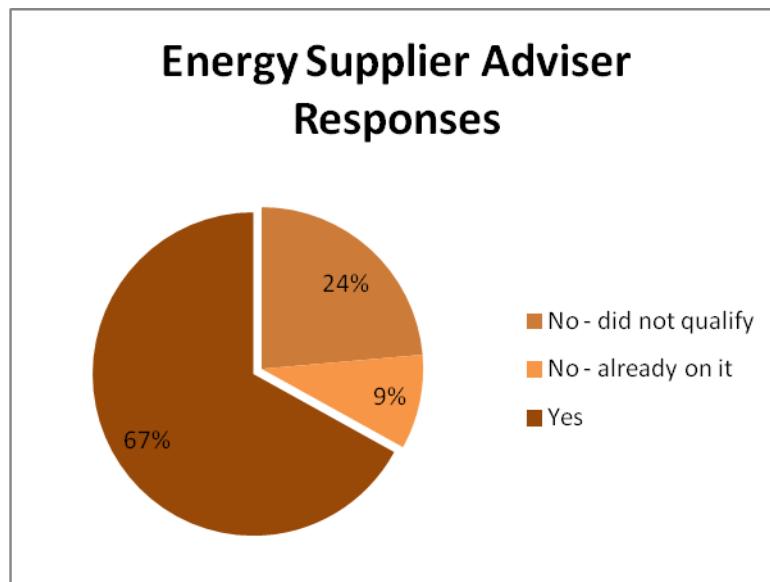
Energy Supplier 1 reported that they received 6 enquiries regarding cheaper tariffs and were able to provide a cheaper tariff for 3 of those customers. 8 clients were added to the Priority Service Register.

Energy Supplier 4 reported that 49 customers were given energy efficiency advice through Energy Best Deal+ referrals, and savings of £2,496.27 were made by clients moving to a cheaper tariff.

Data from Energy Supplier 5 shows that 15 of their customers were confirmed as moving to a cheaper tariff after a supported call from a CAB. Tariff changes for customers referred by e-mail are not known. The same data from supported calls suggests that 40 of their clients were added to the Priority Service Register.

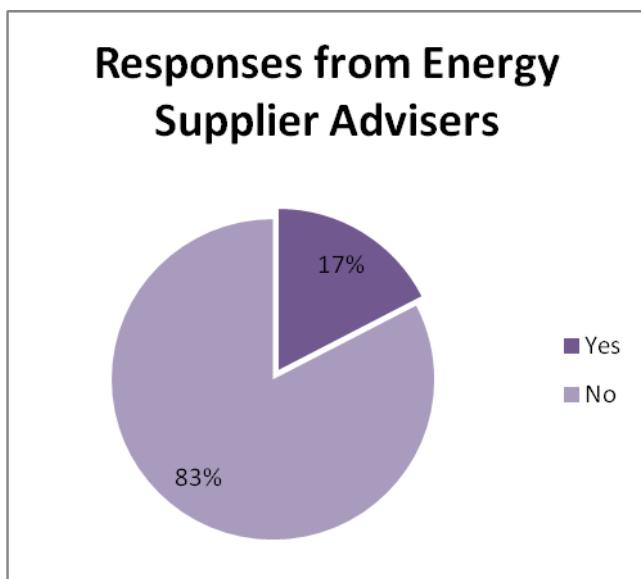
Energy Supplier 6 reported that 15 customers changed tariff through EBD+. They acknowledged that it was difficult to predict but each customer would likely save around £24.25 a year on their new tariff. The same supplier also runs a free appliance scheme as part of their Warm Home Discount Broader Group. As part of this scheme 16 EBD+ participants received eight cookers, five fridge freezers and five washing machines. The supplier reported that through the WHD scheme, tariff savings and their free appliance scheme, customers contacted through Energy Best Deal+ experienced an overall financial gain of £21,964. Energy Supplier 6 also indicated that 72 of their customers had been added to the Priority Service Register.

**Figure 15: Was the client added to the Priority Service Register? Supported phone calls  
(339 responses)**



Bureaux recorded outcomes from supported calls indicated that 67% of clients were added to the Priority Service Register by their energy supplier, as per figure 15.

Bureaux recording outcomes from supported calls reported that 17% of clients had been advised that they were moved to a cheaper tariff by the energy supplier adviser, as per figure 16.



**Figure 16: Was the client moved to a cheaper tariff? Supported phone calls (339 responses)**

### Client Financial Gain recorded by participating bureaux

(384 responses: supported calls including Nairn CAB additional phone call referrals)

89% of clients for whom outcomes could be recorded from a supported call benefitted financially. An additional 5% of clients may have made a saving but it wasn't known how much at the time of the interview (they had submitted application for Warm Home Discount and had no other saving recorded). The client financial gain recorded by bureaux was £56,713 for these clients. This figure does not include instances where clients later reported to their bureaux that they had whole new central heating systems or boilers installed, for two clients in Nairn alone these new systems were worth a total of £14,000.

In addition bureaux reported that according to their checklists that 70% of their clients would be eligible for the Warm Home Discount, this is a potential client financial gain of £15,340. Therefore total financial gain for the 585 clients participating in this project is around £72,053, an average £123 per client.

## RESULTS: ENERGY SAVINGS TRUST

Bureaux reported that 366 clients had been referred to the Energy Savings Trust (EST), via their Energy Savings Scotland advice centres, either by telephone or e-mail. Originally all referrals to an ESSac were made by telephone, but this was soon standardised to an e-mail referral so that clients who were happy to take the call themselves did not have to spend extra time at the bureaux on the call.

According to bureaux statistics, 12 clients were put straight through to an ESSac because they were not a customer of any of the six biggest suppliers and 70% (116 of 166) of clients being referred by e-mail to their supplier opted for a referral to an ESSac at the same time.

Whilst EST were able to track and record the outcomes of phone calls relatively easily, e-mail referrals often ended up in advice centre's call back queues and were not all recorded with Energy Best Deal Plus as the source. The outcomes for these referrals are therefore missing as they are not traceable as part of the project, unless manual, time consuming searches are run.

Only 86 contacts were traced, so the figures collated by EST are indicative of what happened overall but are not a definitive record of client outcomes. 58 of those clients accepted specific advice (67%) and eight (14%) got a Stage 4 referral.

As per the pilot experience between bureaux and the energy suppliers, a more robust system of referral and recording should be established in order to ensure data is easy to trace when required. The Energy Savings Trust expressed a preference for e-mails to be delivered in batches to make them easier to track.

# **ANALYSIS, CONCLUSIONS AND RECOMMENDATIONS**

This chapter will evaluate the success of the project by checking that the aims of the project have been achieved through examination of data from the following sources:

- Findings from the data submitted by citizens advice bureaux, energy suppliers and the Energy Savings Trust.
- Points raised, debated and agreed upon at a post pilot evaluation day attended by all stakeholders.
- The results of a post pilot survey of participating bureaux.

The aims of the pilot were:

- To provide a mechanism to link those who could benefit most significantly to the support, savings, discounts and energy efficiency measures they may be entitled to, through their energy supplier and/or an Energy Saving Scotland advice centre. Specifically to link Priority and Super Priority groups to CERT measures, the Warm Home Discount and the Priority Service Register, in order to help those living in, or at risk of, fuel poverty.
- To ensure that 1,000 clients/customers were referred to their energy supplier for the above benefits and discounts, to the advantage of the client/customer and the supplier.

## **Delivery Process**

### **Aim: To Provide a Mechanism**

In terms of the delivery process the broad framework of the pilot worked well. Having the option of supported calls or e-mail referrals suited the needs of different client groups whilst still ensuring that energy suppliers were put in touch with customers who may not have engaged with them under their own volition.

### **Phone Calls**

The supported phone calls were very productive for both the client and the suppliers, and built trust and confidence in the energy suppliers for a number of their clients. Bureaux reported that 86% of clients got through on their first call to their supplier; only 2% could not get through at all and were referred by e-mail. A very beneficial byproduct of the phone call method was that outcomes could be easily recorded, and bureaux could ensure that the client understood the content of the call. Bureaux experience with working with vulnerable and hard to reach groups also enables them to take some of the stress out of the interaction for the client and ensures that the needs of the client are expressed in the clearest possible terms to the supplier. This helps to make sure that the client's needs are met in the most appropriate way.

Problems with the phone call method mainly revolved around resources; namely time, space and money. The call time could sometimes reach 40 minutes, costing

the bureaux staff resource time, tying up a phone line and using a room in an organisation where space is often at a premium.

Solutions to this would centre on tightening up the process of exchange between the bureaux and energy supplier advisers, and, where possible ensuring that the client brings all the data necessary (account numbers, bills, information on benefits they are in receipt of) before they partake in an EBD+ session.

In Nairn CAB, calls to one particular supplier were cut to as little as four minutes per call because the bureau did not have to explain the details of the project with each contact, and both sides became quicker at exchanging the required information. It would be expected that these quicker exchanges would become the standard as the project was rolled out.

Bureaux advisers used a script during the pilot; anecdotally many found this very helpful, especially for the first few calls. It could be of benefit if the energy supplier adviser had sight of this script and had one of their own which bureaux advisers also had sight of, to ensure that every client was asked the same questions and the bureaux adviser would be able to prep the client suitably before the call began.

Vitally, energy supplier advisers must be well aware that the call was part of a particular project and should be handled and recorded in a set manner. At the evaluation day one supplier stated that they felt they needed a smaller, more skilled team of advisers handling the calls and a standard template for the information coming from the customer.

A wider rollout of the project would alleviate a lot of the data loss problems suffered by the pilot. Even during the pilot the more calls or referrals a supplier handled, the lower the attrition rate between bureaux referrals and referrals recorded as received by the suppliers. This is a positive indication that a higher volume project would be more likely to yield better data matching between bureaux and the suppliers, especially in the longer-term.

## E-Mail Referrals

E-mail referrals were a less resource intensive method of referral than the supported calls and an attractive option for clients who did not wish to spend more time in the bureau than they might have otherwise. A significant issue with this method was that referrals were hard to trace for the suppliers and were, on occasion, lacking in essential or accurate data regarding clients.

Looking ahead, e-mail referrals should be grouped as much as practical, both in time and volume. If referrals were only sent at the end of each week, or from one account at each bureaux, or one bureau acted as a 'champion' for their local group of bureaux and collated the referrals, it would be easier for the suppliers to track them coming in. A response confirming receipt of these referrals would also benefit both suppliers and bureaux.

A set template for e-mail referrals was distributed to participating bureaux for the purposes of this pilot but was not always strictly adhered to. A form to send as an attachment, where all data fields must be filled in by the bureau, would be a more robust approach to ensuring that essential data was always provided. The client should also be provided with a simple reminder, such as an appointment card with the date/time they have opted for, to increase the likelihood of them answering their phone at that time.

## Checklists

The pre-referral use of checklists for bureaux was a practical and successful way to inform the client of how likely they were to be eligible for a CERT referral or the WHD. They are also simple to produce and update. The checklists proved to be a more accurate measure of a client's eligibility for the WHD. This is most likely because additional factors affected the criteria for CERT referrals which were not on the checklist, including the kind of property the client lived in and whether they had insulation already (many people are unaware of this).

One issue with the checklists was the cost of printing for bureaux. CAS centralised printing where possible but this would be both impractical and not cost-effective for a full scale rollout. Going forward a reusable checklist, such as a laminated one, would be a practical solution to this problem.

Additional checklists, including for the Priority Service Register and whether the client fell into the Priority or Super Priority group would be beneficial to improve call time and to improve the quality of information in e-mail referrals.

## Data Collation

In regards to the collation and retrieval of referrals and their associated data, a much more robust approach is required. Methods to improve this have been outlined above; including more paperwork from the client, scripting, use of best practice in each bureau, grouping of e-mails, and ensuring knowledge of the project was widespread and ingrained with the all energy supplier's advisers.

In addition it would be useful if each supported call and e-mail was given a reference number by the supplier which the bureaux could record against their client, ensuring that both sides definitely had a record of each client. A standardised format for recording outcomes across all bureaux and each supplier would also be required in order to measure the success of such a project more accurately. Many of the problems suffered during the pilot regarding data collation were due to the speedy launch of the pilot with very little preparation time for any organisation involved. A further rollout would require more preparation time to allow for training and to put proper systems in place. There will always be a level of attrition when handling these kinds of referrals but a belt and braces approach to tracking and recording would make certain this was minimal, to the benefit of all involved.

In conclusion, the mechanism used for the pilot worked well and simply requires a small number of adjustments, and a tightening of the process, in order to make it suitable for wider rollout.

## **Benefit to Consumers**

**Aim: link those who could benefit most significantly to the support, savings, discounts and energy efficiency measures they may be entitled to.**  
**Specifically Priority and Super Priority groups to CERT measures, the Warm Home Discount and the Priority Service Register**

Results from the data collated by participant citizens advice bureaux verified that the majority of people who took part in the pilot project were people “who could benefit most significantly” from accessing “support, savings, discounts and energy efficiency measures”.

Those who could benefit most significantly from this project are people living in, or at risk of fuel poverty, by definition spending 10% or more of their income on their energy consumption. Others who could benefit “most significantly” include those who are entitled to, but are not accessing the Warm Home Discount and those defined under the Priority and Super Priority groups.

Fuel poverty status could not be measured as clients were not asked to divulge their income other than if it was under £16,190 per year for eligibility purposes. However the following client information indicates that many clients would be likely to be on a low income. 43% of clients were unable to work through ill health or because they cared for another person. These clients are likely to get their income from Disabled Living Allowance, Incapacity Benefit or Carers Allowance. 35% of clients were retirees and a further 11% were unemployed. Only 12% of clients were in employment.

Additionally 31% of clients stated that they could not heat their home to a comfortable level in the winter on their income. 26% of clients were in fuel debt and 43% of clients were “very concerned” about their bills. 54% of clients supported in a call lived alone; those living with one or more other people would be more likely to have someone to make that call on their behalf. The data showed that the older the client, the more likely they were to require or appreciate a supported phone call to their supplier. These figures advocate that many pilot participants were consumers who could “benefit significantly”.

## **Warm Home Discount**

In terms of people eligible for, but not in receipt of, the Warm Home Discount, outcomes from supported calls demonstrated that 70% of all calls resulted in a successful application for the discount. 84% of calls involved an application for the discount and 84% of those applications were successful. This alone accounts for a client financial gain of £30,060. Anecdotally CAB advisers reported that many

their clients were unaware of the WHD. For example Nairn and Dumfries and Galloway citizens advice bureaux reported that none of their clients had heard of the Discount and would therefore not have been likely to claim the discount on their own. It was also reported that awareness of WHD amongst CAB advisers was low. However, those who would be in receipt of the core element of the discount would have received the discount automatically and credit cannot be given to the project for their accessing the discount. Bureaux were not asked to record which category the client fell into, however they did record how many clients were eligible - but already in receipt, including those who had automatically received the discount and the rate was just under 3% of all those supported in a call.

Online applications for WHD were reported to be a preferred route by some bureaux and too difficult for others. Part of the difficulty experienced was in ensuring that the client had their electricity account number; obtaining this often required a call to the supplier even when the client was being referred by e-mail. Another difficulty lay in the various methods that suppliers used for the submission of applications, these included; different numbers to call for applications than the supported call number, a phone call to confirm eligibility before a paper application was submitted, and another where the supported call had to be transferred to another department to complete the application.

Participating bureaux reported that support with WHD applications was one of the most valued aspects of the project for clients. It was also a hook which drew many clients in. However, by January 2013 many suppliers' schemes will be closed and will not reopen again until next April. WHD therefore cannot always be used as a hook as doing so could create false expectations for the client.

There is also variable benefit to suppliers to be gained from citizens advice bureaux promoting the scheme. For instance, by October 2012 some suppliers had already filled their quota for WHD and were not actively seeking more customers who could make a claim.

## **Priority Service Register**

According to participating bureaux, two out of every three clients supported in a call to their supplier were added the Priority Service Register. Adding such a significant portion of clients to the register has been a particular success of the project. The register provides those of a pensionable age, or who have a disability, or who are experiencing long-term ill-health, with a range of support services from their supplier. This support is a particularly positive non-financial outcome for CAB clients and confirms that a considerable number of participating clients were from the desired demographic.

## **Priority and Super Priority Groups**

Whilst 54% of supported call customers were classed as part of the Priority group by the supplier, just 5% were classed as Super Priority, a surprisingly low number. This number was even more surprising given the normal demographic of CAB clients, a third of whom contact their local bureaux about benefit issues. Without a detailed breakdown of the benefits each client is in receipt of it is difficult to assess

the accuracy of this number. If this discrepancy were to continue with a larger sample size during project roll out, the cause would require to be investigated. However, that 59% of clients fell under either classification is another solid signifier that the correct demographic was reached by this project.

## **Carbon Emissions Reductions Target Measures**

It has been difficult to determine the value of the CERT referrals delivered as part of the project, due to a lack of data regarding successful installations. It appears that whilst 22% of clients could be referred in principal, fewer than 17% of those are likely to lead to further action. This means that from the total number of clients involved in the project, only 4.5% chose to, or were able to, progress with the measures. Even with these clients there are no guarantees about how many may face unexpected objections from neighbours or may be unaware that their house is already insulated. Energy suppliers have found it increasingly difficult to reach those who want or require installation for their home as the market for these customers reaches saturation point. It was hoped that a previously untapped group of people could be reached by accessing the CAB demographic. Whilst this is definitely the case, the numbers may not be as significant as desired.

A complicating factor for those looking for assistance to insulate their home in Scotland is that the options for energy efficiency support extend wider than the options offered by the energy suppliers. Specifically the Energy Assistance Package (EAP) from the Energy Savings Trust and Universal Home Insulation Scheme (UHIS) run by a number of local authorities in Scotland. Adding to the complexity of options available, the CERT scheme ends in December 2012 and is being replaced by the “Green Deal” from October 2011. The Green Deal aims to give consumers a new way to finance energy saving home improvements. However, energy suppliers will still be required to help those on benefits, in low income households or older properties to make their homes more energy efficient through the “Energy Company Obligation” (ECO). ECO will oblige energy suppliers to reduce the energy consumption of those groups by funding energy efficient home improvements such as boiler repairs and replacement, cavity, solid wall or loft insulation or improvements to other aspects of heating systems. There are likely to be different offers and benefits available from each participant supplier.

In order to assist bureaux clients impartially and independently, bureaux cannot recommend that a client uses an energy supplier scheme over a local authority scheme, or one energy supplier scheme over another. Given the prevalence of the schemes, the most suitable approach would be to ask the client if they were interested in a referral to the Energy Savings Trust to discuss their options, either through a supported call or an e-mail referral. Those looking for information on the Green Deal and ECO could be advised in the usual manner by the bureaux and those wishing to use the bureaux as an intermediary to discuss options with a supplier could be supported to do so.

The customer journey through the energy efficiency options available to them needs to be as efficient and as clear as possible to ensure they are not deterred

by its complexity. Not just in terms of this pilot but for the general public trying to access the schemes.

## Switching and Changing Tariff

Bureaux were not specifically asked to push for a change of tariff for the client but to record from the outcomes of supported calls whether the client *had* been moved to a cheaper tariff. Bureaux advisers reported that 17% of clients supported in a call were moved to a cheaper tariff. This low number of changes presents an opportunity for bureaux to engage further in tariff changes in a future rollout. A recent statement from Ofgem regarding the potential simplification of tariffs<sup>15</sup> may be something the CAB can help clients connect with. Especially if the cheapest tariff available to a customer is printed on their bill.

The question of switching must also be considered. The Consumer Focus Scotland evaluation of Energy Best Deal Scotland training provided a valuable insight into the perceptions and practicalities of switching for both advisers and clients. The evaluation reported that advisers already engaged in income maximisation and financial management are best placed to make use of switching training<sup>16</sup>. The report also quotes a recent Ofgem Study which identified that 85% of consumers found the switching process easy<sup>17</sup>.

Anecdotally bureaux reported many EBD+ clients were fearful that taking part in the project would involve *having* to switch, something they were very unwilling to do. However, the option should be available to clients who would like to check the market. Funding for Energy Best Deal training for 2012/13 has been confirmed and CAB can continue to train other advisers across Scotland to assist clients who were willing to switch, and those skills can be transferred to the EBD+ project.

Broadly the evidence shows that the targeted demographic of those “who could benefit most significantly” has been reached. This is specifically shown by the high eligibility rates of the participant consumers for the available support, savings and discounts. Where the project has not benefitted consumers as it might have, is in regards to energy efficiency measures such as insulation.

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<sup>15</sup> <http://www.bbc.co.uk/news/business-20001111> 19 October 2012

<sup>16</sup> Consumer Focus Scotland, Helping vulnerable people in Scotland to switch and save on fuel bills  
<http://tinyurl.com/d2wpma5>

<sup>17</sup> Ipsos MORI (2011) Customer Engagement with the Energy Market

## **Generating Referrals**

### **Aim: Referring 1,000 clients/customers.**

The generation of referrals was a more involved, difficult, and slower process than originally anticipated. An overt effort from nine bureaux and the project coordinator, over eight weeks, resulted in 585 referrals, 415 less than target. This is an average of around eight referrals per bureau per week, although some bureaux were able to secure significantly more referrals than others. These bureaux achieved high referral numbers through staff and volunteers working out-with, and over and above, their usual hours. Their rates of referral would be unsustainable in the long term.

Bureaux employed a range of methods to gain participation from clients in the project. The most successful methods were;

- the use of triage systems
- building delivery of the project into everyday advice
- Advertising to current clients (and passersby) the money gained for clients through the project.

Appointments tended to give way to structured drop in sessions as the number of missed appointments became problematic. Some outreach work garnered clients but the best way engage clients was from within the bureau itself.

Given the low take up rate with the majority of outreach work, it would be advantageous to consumers if other organisations were to join in the delivery of the project. This has proven to be of benefit for similar projects taking place in England and Wales. Working with other organisations would boost referral numbers and ensure that vulnerable people using those organisations, such as Jobcentre Plus, DWP and Housing Associations would not need to attend a bureau to get the support they may require. Stakeholders discussed rollout beyond the Scottish CAB Service at the evaluation day and agreed it would be beneficial.

Further lessons learned from the pilot, in relation to future rollout to bureaux; indicate that incorporating the project into day to day advice giving would be a practical and less resource intensive way to subsume the project into the work of the bureaux. When clients are not in crisis and reducing their outgoings is relevant to their situation or issue, a quick assessment of their eligibility for discounts and benefits would be easy to combine as part of an advice giving session. Those looking for a benefits check, financial advice or to otherwise maximise their income would be particularly well positioned for a quick run through the checklists to efficiently establish whether each client would benefit from a further referral. A similar model could be used in other organisations, where the checklists could be used as a quick indicator of whether a client would benefit from a referral.

There is evidence to suggest that it would be most beneficial to the operation of bureaux if they could incorporate the work of the project over an extended period, and not for short targeted campaigns. The post pilot survey of participating bureaux showed agreement amongst bureaux that working to a target for this project was not a suitable model. Due to the economic climate, all Scottish citizens advice

bureaux are working to cope with rising demand for advice which funding arrangements are not keeping up with. The pressure exerted by a target for further funding biases the work of the staff and volunteers in a detrimental manner as another priority must make way for the targeted work. A ‘built in’ model would limit the amount of resources bureaux would need to deliver the project and would give bureaux time to build public awareness of the service over time.

It was agreed at the evaluation day that an additional campaign, to boost public awareness would be a valuable addition the project each autumn. Big Energy Savings Week ran in October this year and could as an excellent tie to promote the availability of the EBD+ service year round.

The Recommendations following these conclusions can be found at the top of this document [here](#).

## APPENDIX 1: DELIVERY PROCESS

Bureaux were asked to record demographic data and, where possible, data regarding how the client felt pre and post phone call to their supplier and the outcomes of that call. When the client opted for an e-mail referral, outcomes could not be recorded.

CAS worked to produce a mechanism which enabled bureaux to check, in an efficient manner, if their client was eligible for help from their supplier. Two checklists were created, the first for 'Priority' CERT referrals, the second for Warm Home Discount 'Broader' group. The CERT checklist criterion was the same for all suppliers, the WHD checklist criteria varied between suppliers. Bureaux advisers would run through these checklists and could tell the client whether they were likely to be eligible for either.

Bureaux would then contact the client's energy supplier by one of two methods, depending on the support needs and confidence of their client. Less confident clients were assisted in a call to their electricity supplier where the bureau adviser would introduce the call, explaining to the supplier what they believed the client was eligible for. The call was then passed to the client who would confirm and give further details of their personal circumstances. The receiver would then be given back to the bureau adviser who would ask the supplier for information on what benefits, discounts and support the client had been able to access and confirmed as eligible for. To ensure that the client did not miss out on any additional help or advice available to them, the bureau would then support the client in a call to an Energy Saving Scotland advice centre (ESSac) run by the Energy Savings Trust. Making both these calls with the client could be a lengthy endeavour, so to shorten the process the supported call to an ESSac was made optional to the client and an e-mail referral to the agency was made as standard.

The bureau adviser would record this data and report it back to CAS. The bureau adviser would also check that the client understood the content of the calls.

More confident clients were given the option of an e-mail referral. The bureau would e-mail the client's supplier, with details of what they believed the client was eligible for and any relevant personal circumstances, and ask them to call the client on their personal number, at a time the client had stated as convenient. The client would then engage directly with the supplier to ensure they were in receipt of all they may be entitled to. Outcomes for these kinds of referrals could not be recorded. These clients were also offered a referral to an ESSac, which 70% agreed to.

## APPENDIX 2: QUESTIONNAIRES

### Questionnaire for Supported Calls

**Energy Best Deal+ Bureaux**

**Client Details**

\* 1. Which CAB are you working from?

Airdrie  
 Dumfries and Galloway CAS  
 Denny and Dunipace  
 Motherwell and Wishaw  
 North Ayrshire CAS  
 Nairn  
 Roxburgh and Berwickshire  
 Rutherglen  
 Stirling

\* 2. Please provide contact information for the client

Name: \_\_\_\_\_  
ZIP Postal Code: \_\_\_\_\_  
Email Address: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

\* 3. Please enter the age of the client

\_\_\_\_\_

\* 4. Has the client taken part in an Energy Best Deal session?

Yes  
 No but would like to take part in future  
 No and is not interested

\* 5. Gender of the client

Male  
 Female  
 Transexual  
 Preferred not to answer

**Energy Best Deal+ Bureaux**

\* 6. What type of property does the client live in?

Private sector rental  
 Council owned rental  
 RSL tenant (Registered Social Landlord)  
 Owner occupier

\* 7. What is the client's employment status?

Working full-time (more than 30 hours a week)  
 Working part-time (less than 30 hours a week)  
 Retired  
 Looking for work  
 Unable to work (including carers)

**Information regarding Property and Bills**

\* 8. How many people live at the client's property, including the client and any children, dependents or spouse/ partner?

1  
 2  
 3  
 4  
 5  
 6  
 7  
 8  
 9  
 10+

**Energy Best Deal+ Bureaux**

9. Please list the ages of each additional person living in the property, EXCLUDING the client

Person	Age
Person 1	_____
Person 2	_____
Person 3	_____
Person 4	_____
Person 5	_____
Person 6	_____
Person 7	_____
Person 8	_____
Person 9	_____
Person 10	_____

\* 10. In winter, does the client feel they can heat their home to a comfortable level on their income?

Yes, always  
 Yes, most of the time  
 Sometimes  
 Usually not  
 Never

\* 11. Is the client in fuel debt?

Yes  
 No  
 Not Applicable

**Information Gathered BEFORE Phoning the Energy Supplier/ ESSac**

\* 12. Pre-phonecall to energy supplier: is the client concerned about whether they can afford their fuel bills - now and in the future?

Yes, very concerned  
 Yes, slightly concerned  
 Yes, concerned but only for future bills  
 Not concerned

**Energy Best Deal+ Bureaux**

\* 13. Pre-phonecall to energy supplier: how comfortable did the client feel about speaking to their energy supplier about their bills?

Comfortable  
 Neither comfortable or uncomfortable  
 Uncomfortable  
 Not applicable (client being referred to ESSac)

**Information Gathered AFTER Speaking to the Energy Supplier/ ESSac**

14. Did you/ the client get to speak to the client's energy supplier?

Yes  
 No - EDF Energy  
 No - E.On  
 No - npower  
 No - Scottish/ British Gas  
 No - Scottish Power  
 No - SSE

\* 15. Which Energy Supplier did the client speak to?

EDF Energy  
 E.On  
 npower  
 Scottish/British Gas  
 Scottish Power  
 SSE  
 Energy Saving Trust/ ESSac (when electricity supplier not one of Big 6 above)

### Energy Best Deal+ Bureaux

- \* 16. Post-phonecall to the energy supplier: does the client feel more or less concerned about whether they can afford their fuel bills - now and in the future? (Compared to question 11)
- Much less concerned
  - A bit less concerned
  - The same as they felt before
  - More concerned
  - Not applicable (client referred to ESSac)

- \* 17. Post-phonecall to energy supplier: does the client feel more or less comfortable about speaking to their energy supplier about their bills? (Compared to question 12)
- More comfortable
  - The same as they felt before
  - Less comfortable
  - Not applicable (client referred to ESSac)

- \* 18. How long did it take before the client was able to speak to the correct adviser at the energy company or ESSac?
- Almost immediately
  - 1 minute
  - 2-3 minutes
  - 3-5 minutes
  - 6-8 minutes
  - 9-12 minutes
  - 13 minutes +
  - Could not get through
  - Any comments from adviser?

### Information Given to Adviser by Energy Supplier/ ESSac

- \* 19. Was the client moved to a cheaper tariff?

- Yes
- No

### Energy Best Deal+ Bureaux

- \* 20. What was the client's estimated discount, annual bill saving based on their current usage, or financial gain from the call?

- No saving
- Not yet known
- Saving in pounds:

- \* 21. Was the client added to the Priority Service Register?

- Yes
- No - already on it
- Not - did not qualify

- \* 22. Was the client eligible for a Warm Home Discount?

- Yes
- Yes - but already in receipt
- No - did not qualify
- Application made but no confirmation of eligibility yet

23. Using your checklist - did you think the client would be eligible for a priority CERT referral?

- Yes
- No

- \* 24. Was the client put into the process to receive energy efficiency measures (inc. CERT)?

- Yes - from supplier
- Yes - from ESSac
- No

- \* 25. Does the client fall into any of the following groups?

- Not Applicable
- Non-priority group
- Priority-group
- Super-priority group

### Energy Best Deal+ Bureaux

26. Client Property ID number from ESSac (if you don't have one enter "N/A")

27. We are expecting to get some media coverage for this project and are looking for some case studies. Would the client be prepared to be interviewed in the media about their experiences?

	Yes	No
Local Newspaper	<input type="checkbox"/>	<input type="checkbox"/>
National Newspaper	<input type="checkbox"/>	<input type="checkbox"/>
Radio	<input type="checkbox"/>	<input type="checkbox"/>
Television	<input type="checkbox"/>	<input type="checkbox"/>
Client isn't sure but would like to be contacted with more information on what would be involved	<input type="checkbox"/>	<input type="checkbox"/>
I didn't ask the client because it wasn't appropriate	<input type="checkbox"/>	<input type="checkbox"/>

If the client answered 'Yes' to any of the above, please ensure their contact details are recorded in this survey. There is space below to do so if these details have not been recorded earlier.

# Questionnaire for E-mail Referrals

**Energy Best Deal+ e-mail referrals**

**Client Details**

**\* 1. Which CAB are you working from?**

Airdrie  
 Dumfries and Galloway CAB  
 Denny and Dunipace  
 Motherwell and Wishaw  
 North Ayrshire CAB  
 Nairn  
 Roxburgh and Berwickshire  
 Rutherglen  
 Stirling  
 CAB

**\* 2. Please provide contact information for the client**

Name:   
ZIP/Postal Code:   
Email Address:   
Phone Number:

**\* 3. Please enter the age of the client**

**\* 4. Has the client taken part in an Energy Best Deal session?**

Yes  
 No but would like to take part in future  
 No and is not interested

**\* 5. Gender of the client**

Male  
 Female  
 Transsexual  
 Preferred not to answer

**Energy Best Deal+ e-mail referrals**

**\* 6. What type of property does the client live in?**

Private sector rental  
 Council owned rental  
 RSL tenant (Registered Social Landlord)  
 Owner occupier

**\* 7. What is the client's employment status?**

Working full-time (more than 30 hours a week)  
 Working part-time (less than 30 hours a week)  
 Retired  
 Looking for work  
 Unable to work (including carers)

**Information regarding Property and Bills**

**\* 8. How many people live at the client's property, including the client and any children, dependents or spouse/ partner?**

1  
 2  
 3  
 4  
 5  
 6  
 7  
 8  
 9  
 10+

**Energy Best Deal+ e-mail referrals**

**9. Please list the ages of each additional person living in the property, EXCLUDING the client**

Person	Age
Person 1	<input type="text"/>
Person 2	<input type="text"/>
Person 3	<input type="text"/>
Person 4	<input type="text"/>
Person 5	<input type="text"/>
Person 6	<input type="text"/>
Person 7	<input type="text"/>
Person 8	<input type="text"/>
Person 9	<input type="text"/>
Person 10	<input type="text"/>

**\* 10. In winter, does the client feel they can heat their home to a comfortable level on their income?**

Yes, always  
 Yes, most of the time  
 Sometimes  
 Usually not  
 Never

**\* 11. Is the client in fuel debt?**

Yes  
 No  
 Not Applicable

**Information Gathered BEFORE Phoning the Energy Supplier/ ESSac**

**\* 12. Is the client concerned about whether they can afford their fuel bills - now and in the future?**

Yes, very concerned  
 Yes, slightly concerned  
 Yes, concerned but only for future bills  
 Not concerned

**Energy Best Deal+ e-mail referrals**

**\* 13. How comfortable does the client feel about speaking to their energy supplier?**

Comfortable  
 Neither comfortable or uncomfortable  
 Uncomfortable  
 Not applicable (client being referred to ESSac)

**\* 14. Which Energy Supplier was the client referred to?**

EDF Energy  
 E.ON  
 npower  
 Scottish/British Gas  
 Scottish Power  
 SSE  
 Energy Saving Trust/ ESSac (when electricity supplier not one of Big 6 above)

**15. Did the client agree to an e-mail referral to ESSac?**

Yes  
 No  
 Client's first referral was to ESSac anyway

**Information Given to Adviser by Energy Supplier/ ESSac**

**\* 16. According to your checklist, did you think the client would be eligible for a Warm Home Discount ?**

Yes  
 Yes - but already in receipt  
 No - did not qualify  
 Application will be made but not sure

**\* 17. According to your checklist, did you think the client would be eligible for a priority CERT referral?**

Yes  
 No

# Questionnaire for Additional Nairn CAB Referrals

<b>Energy Best Deal+ Nairn Project</b>	<b>Energy Best Deal+ Nairn Project</b>
<p><b>*1. Client's Name</b> Name: <input type="text"/> Post Code: <input type="text"/></p> <p><b>*2. Which Energy Supplier was the client referred to?</b> <input type="checkbox"/> EDF Energy <input type="checkbox"/> E.On <input type="checkbox"/> npower <input type="checkbox"/> Scottish/British Gas <input type="checkbox"/> Scottish Power <input type="checkbox"/> SSE <input type="checkbox"/> Energy Saving Trust/ ESSac (when electricity supplier not one of Big 6 above)</p> <p><b>3. According to your checklist, did you think the client would be eligible for a priority CERT referral?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><b>*4. According to your checklist, did you think the client would be eligible for the Warm Home Discount ?</b> <input type="checkbox"/> Yes <input type="checkbox"/> Yes - but already in receipt <input type="checkbox"/> No - did not qualify <input type="checkbox"/> Application will be made but not sure</p> <p><b>5. Was the client referred by e-mail or did you call the energy supplier with the client present?</b> <input type="checkbox"/> E-mail referral <input type="checkbox"/> We called the energy supplier with the client present</p>	<p><b>6. (This question is only answerable if you were with the client during the call to their energy supplier)</b> Was the client... <input type="checkbox"/> added to the Priority Service Register <input type="checkbox"/> told they were eligible for Warm Home Discount <input type="checkbox"/> put in the process to receive CERT measures <input type="checkbox"/> put on a cheaper tariff</p> <p><b>7. Was the client interested in a referral to ESSac?</b> <input type="checkbox"/> No <input type="checkbox"/> Yes, referred by e-mail <input type="checkbox"/> Yes, we called them with the client</p>

## **APPENDIX 3: TYPES OF SUPPORT AND DISCOUNTS ACCESSED THROUGH EBD+**

### **Priority and Super Priority Group Customers**

Priority and Super Priority group customers are a key demographic each energy supplier aims to reach. Suppliers are required to meet 40% of their total target for CERT by delivering measures to a 'Priority Group' of vulnerable and low-income households, including those in receipt of eligible benefits and pensioners over the age of 70. An additional target requires that 15% of the savings be achieved in a subset of low income households, called a Super Priority Group, considered to be at high risk of fuel poverty<sup>18</sup>. Those in the Super Priority Group are likely to be in receipt of certain elements of Employment and Support Allowance (ESA), Jobseekers Allowance (JSA), Child Tax Credits or State Pension Credit.

### **Carbon Emissions Reductions Target (CERT) Measures**

Many clients from Priority and Super Priority groups could be referred to their energy supplier for CERT measures for which suppliers in Scotland must achieve high targets set by the Scottish Government. Those referred for CERT measures may benefit from the distribution of free and discounted energy efficiency measures through any supplier, not just their own. For the purposes of this pilot bureaux referred potential CERT clients to their own electricity supplier, this was to ensure that bureaux advisers did not have to be trained to learn the different benefits of each CERT scheme with each participant supplier. It also ensured that market share was represented as referrals were made. It should be noted that other free and discounted insulations are available to consumers in Scotland. Where an alternative to a CERT referral may usually be offered through an ESSac to a consumer, for the purposes of this pilot ESSac advisers did not suggest an alternative method of insulation if the customer had been referred for CERT measures.

### **Warm Home Discount (WHD)**

WHD is an annual £130 winter discount from an electricity bill for eligible customers of each supplier. Those customers in the 'Core' group for WHD receive letters from the DWP each year informing them that they will receive the discount. Those in the 'Broader' group must ensure that they apply for the discount from their own electricity supplier; criteria for the broader groups differ between suppliers.

### **Priority Service Register**

Eligible clients may also be added to the Priority Service Register. Suppliers are required to keep a register of priority service customers who, by virtue of being of pensionable age, disabled or chronically sick, require information or advice on the special services suppliers provide. Suppliers must provide the services such as quarterly meter readings, gas safety checks and third party billing free of charge

<sup>18</sup> Carbon Emissions Reduction Target (CERT) [http://www.decc.gov.uk/en/content/cms/funding/funding\\_ops/cert/cert.aspx](http://www.decc.gov.uk/en/content/cms/funding/funding_ops/cert/cert.aspx)  
October 2012

(where appropriate) to eligible customers who request it.

## **Additional Benefits**

Clients could also benefit from switching tariff, free white goods from their energy supplier, free or discounted heating systems, smart meters and energy efficiency measures.

## APPENDIX 4: GENERATING REFERRALS

Bureaux took action to publicise and promote the service, variously using the methods outlined below:

- Approaching people in person in the waiting room
- Putting up posters in the waiting room
- Giving an EBD+ leaflet to every client who visited the bureau
- Explaining EBD+ verbally to every client who visited the bureau
- Checking the bureaux case recording system (CASTLE) to identify past clients who may be eligible and contacting them
- Using the bureau triage system to identify eligible clients
- Using the bureau window to advertise the amount of money gained for clients through the scheme
- Putting up posters in public spaces
- A stall in a public space
- Handing out leaflets in public
- Advertising in local papers
- News articles in local papers/on local radio
- Visiting Housing Associations
- Visiting sheltered accommodation
- Visiting other organisations and events inc. Churches and church events
- Asking other organisations to refer their clients to the bureau
- Contacting local elected members
- Tying the project into other energy projects/outreach services currently run by the bureau
- Publicising the service on bureaux websites and social media channels

CAS also took action to promote the service centrally though the limited nature of the pilot made national publicity difficult. Methods used are listed below:

- Contacting MPs, MSPs and MEPs for each of the areas running a pilot and asking them to publicise the project to their constituents, including the use of their social media and the local press
- Releasing national news articles
- Promotion on the CAS website and through CAS social media channels.
- Promotion to other bureaux working in the same locality as participant bureaux to ensure referrals
- Ensuring existing bureaux projects were aware of the project and project workers nationally knew to refer their clients where suitable i.e. Money Advice Service, Armed Services Advice Project, Kinship Care project.
- Production of leaflets for bureaux to distribute
- Contacting participant bureaux on a regular basis in order to gather and share best practice weekly.

## APPENDIX 5: BARRIERS TO REFERRALS

- Summer

Three quarters of participating bureaux felt that they would have had more interest from clients in the Autumn/Winter than they experienced in July and August. Research from the Energy Savings Trust has found that the optimum time for messaging on insulation is during the Autumn/Winter. They have also found that other market forces and additional factors can compound the usual effect of seasonality. i.e. 2011 was a mild winter. Had winter been particularly bad, people may have been more motivated to look at fitting insulation early.

- Missed appointments

Despite reminder calls and texts between 1/8 and 1/3 appointments were missed by clients in half of the participating bureaux. Clients were anecdotally more likely to skip an appointment on a sunny day.

- Pre-occupation

The majority of bureaux reported that some potential clients were too consumed with the issue they had come to the bureaux with to engage with the project.

- Expectation

Half of participating bureaux reported that clients suspected that they were trying to sell them something or scam them.

- Partner organisations on holiday

This was an ongoing problem for some bureaux who had hoped to make use of their contacts to reach a wider audience. This made outreach work particularly difficult.

- Bureaux staff and volunteers on holiday

The majority of bureaux taking part experienced issues with staff shortages, over stretched staff and a lack of volunteers, specific to the summer months. Getting referrals became a difficult addition to day to day work. The bureaux which did achieve their target did so by getting part time volunteers to work full time for almost the entire duration of the project.

- Time

Each referral took more time than originally estimated and it was far more resource intensive to find and book suitable clients for an appointment than estimated.

- Preparation

A lack of lead in time for the project meant half the bureaux who took part reported that they felt there had not been enough time to prepare for such a project.

## APPENDIX 6: BUREAUX RESULTS

### Age Range of Participants

Referred by E-mail		Referred by Phone Call		All Referrals	
Age Range	Number of clients	Age Range	Number of clients	Age Range	Number of clients
18 to 30	28	18 to 30	30	18 to 30	58
31 to 40	34	31 to 40	29	31 to 40	63
41 to 50	40	41 to 50	49	41 to 50	89
51 to 60	31	51 to 60	92	51 to 60	123
61 to 65	8	61 to 65	56	61 to 65	64
66 to 70	6	66 to 70	29	66 to 70	35
71 to 80	16	71 to 80	56	71 to 80	72
81 to 89	6	81 to 98	25	81 to 98	31
Total	169	Total	366	Total	535

### Client Property by Type

Telephone Referrals	Number of Clients
Council owned rental	139
Owner occupier	114
RSL tenant (Registered Social Landlord)	63
Private sector rental	57
E-Mail Referrals	Number of Clients
Council owned rental	87
Owner occupier	40
RSL tenant (Registered Social Landlord)	14
Private sector rental	28
Property	Number of Clients
Council owned rental	226
Owner occupier	154
RSL tenant (Registered Social Landlord)	77
Private sector rental	85
Total	542

## Client Property Occupancy

<b>House occupancy of those referred by e-mail</b>	<b>Number of Clients</b>
1 Person	58
2 People	63
3 People	27
4 or more people	21
Total	169
<b>House occupancy of those referred by telephone</b>	<b>Number of Clients</b>
1 Person	199
2 People	125
3 People	30
4 or more people	16
Total	370
<b>House occupancy of those referred</b>	<b>Number of Clients</b>
1 Person	257
2 People	188
3 People	57
4 or more people	37
Total	539

## Employment Status of Clients

<b>Employment Status of those referred by telephone</b>	<b>Number of Clients</b>
Looking for work	27
Working full-time (more than 30 hours a week)	14
Retired	153
Unable to work (including carers)	158
Working part-time (less than 30 hours a week)	21
Total	373
<b>Employment Status of those referred by e-mail</b>	<b>Number of Clients</b>
Looking for work	30
Working full-time (more than 30 hours a week)	11
Retired	35
Unable to work (including Carers)	73
Working part-time (less than 30 hours a week)	19
Total	168
<b>Employment Status of all those referred</b>	<b>Number of Clients</b>
Looking for work	57
Working full-time (more than 30 hours a week)	25
Retired	188
Unable to work (including Carers)	231
Working part-time (less than 30 hours a week)	40
Total	541

**Did the client feel that they could heat their home to a comfortable level on their income in the winter?**

<b>Home Heated Comfortably?</b>	<b>All Clients Referred</b>
Never	76
Usually not	108
Sometimes	181
Yes, most of the time	113
Yes, always	61
Total	539

## **How concerned are clients about being able to afford their fuel bills, now and in the future?**

<b>Client Concern over Fuel Bills</b>	<b>Number of Clients</b>
Not concerned	38
Yes, concerned but only for future bills	79
Yes, slightly concerned	189
Yes, very concerned	232
Total	538

## **Post phone calls to supplier - how concerned are clients about being able to afford their fuel bills, now and in the future?**

<b>Post Phone Call Bill Concern?</b>	<b>Number of Clients</b>
Much less concerned	39
A bit less concerned	144
The same as they felt before	121
More concerned	9
Didn't get through to supplier	56
Total	369

## **Pre and Post phone call to supplier - how comfortable does the client feel speaking to their supplier?**

<b>Pre Phone call comfort</b>	<b>Number of Clients</b>
Uncomfortable	124
Neither comfortable or uncomfortable	123
Comfortable	114
Not applicable (client being referred to ESSac)	8
Total	369

<b>Post phone call comfort</b>	<b>Number of Clients</b>
The same as they felt before	231
More comfortable	73
Less comfortable	8
Not applicable (client referred to ESSac)	2
Total	314

## **How long did it take before the client was able to speak to the correct adviser at the Energy Company or ESSac?**

Time Taken	Number of Clients
Almost Immediately	148
1 minute	77
2-3 minutes	56
3-5 minutes	31
6-8 minutes	12
9-12 minutes	6
13 minutes +	3
Could not get through	8
Total	341

## APPENDIX 7: ENERGY SUPPLIER RESULTS

### Priority and Super Priority Group Customers from Supported Calls

Does the client fall into any of the following groups?	Number of Clients
Priority-group	184
Super-priority group	16
Not Applicable	105
Non-priority group	34
Total	339

### Warm Home Discount Estimates from Bureaux Checklists

Using your checklist - did you think the client would be eligible for a priority CERT referral? Telephone Referrals	Responses from CAB advisers
No	155
Yes	70
Total	225
Using your checklist - did you think the client would be eligible for a priority CERT referral? E-mail Referrals	Responses from CAB advisers
No	79
Yes	87
Total	166
Using your checklist - did you think the client would be eligible for a priority CERT referral? E-mail and Telephone Referrals	Responses from CAB advisers
No	234
Yes	157
Total	391

### Was the client put into the process to receive energy efficiency measures, including CERT? Results from supported phone calls.

Was the client put into the process to receive energy efficiency measures (inc. CERT)?	Responses from Energy Supplier Advisers
No	190
Yes - from Supplier	64
Yes - from ESSac	85
Total	339

## **Was the client added to the Priority Service Register? Results from supported phone calls.**

<b>Was the client added to the Priority Service Register?</b>	<b>Responses from Energy Supplier Advisers</b>
No - did not qualify	80
No - already on it	32
Yes	227
Total	339

## **Was the client moved to a cheaper tariff? Results from supported phone calls.**

<b>Was the client moved to a cheaper tariff?</b>	<b>Responses from Energy Supplier Advisers</b>
Yes	59
No	280
Total	339