



Llywodraeth Cymru
Welsh Government

GUIDANCE

In-home domestic energy advice pilot: guidance

Please ensure you read the guidance note before completing the form and complete every section of the form. Incomplete forms will not be assessed and therefore not considered for a grant.

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Introduction

The provision of energy advice has been delivered by Welsh Government through the Warm Homes Nest scheme since its inception in 2011, and is currently embedded within the contract awarded to British Gas in 2018, to deliver the Warm Homes Programme Nest Scheme.

Consideration is now being given to how best the Welsh Government can provide advice and support services to improve home energy efficiency as part

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of the new 2020-35 plan to tackle fuel poverty. A key policy goal within the new draft plan is to “Ensure arrangements are in place to provide proactive advice and outreach support to people who are, or at risk of being in fuel poverty”. As part of the plan, which was published for consultation on 30 September, the Welsh Government is proposing to undertake a consultation in 2021 on the delivery of advice services beyond the current Nest Scheme. The learning gathered from the in-home advice pilot will inform this consultation.

Project background

Welsh Government officials are scoping options for the provision of domestic energy advice services in Wales beyond the current Warm Homes Nest contract. A workshop was held regarding Domestic Energy Efficiency Advice Services on 9 March 2020 attended by key stakeholders. Stakeholders suggested in-home energy advice services have a positive impact on people’s lives, with potential to make a significant contribution to tackling fuel poverty; however, insufficient data is available to support and quantify or refute this claim.

In order to ensure the options for the future provision of energy advice services are fully assessed against credible evidence, the Welsh Government has agreed to commission a short pilot study to gather this evidence to measure the effectiveness of in-home advice.

The Minister for Environment, Energy and Rural Affairs agreed to total funding not more than £550,000 over two years for a pilot to gather evidence on the impact in-home energy advice services has on people living in, or at risk of, fuel poverty. This is split into £400,000 in the financial year 2020/21 and £150,000 in financial year 2021/22. This funding includes all associated costs in relation to the pilot.

Project aim

The purpose of the In-home Energy Advice Pilot is to test and measure the

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effectiveness of providing in-home advice and support services to people across Wales in relation to tackling fuel poverty. This is proposed to be a phased approach, testing the beneficiary impact of each intervention on the cost of energy used and household income resulting from each intervention.

The evidence gathered from this pilot exercise will help determine the benefit which can be gained from supporting vulnerable households and households disengaged from the energy market to implement changes designed to reduce their energy use, thereby saving money.

Project objectives

The pilot will deliver a one-to-one in-home advice service to proactively support people living in or at risk of fuel poverty.

The effectiveness of a person centred approach to the provision of energy advice will be measured against the following actions:

- The provision of in depth advice and support to households in or at risk fuel poverty enabling them to reduce their energy consumption whilst maintaining a satisfactory heating regime.
- Helping households to switch their energy tariff of supplier to save money;
- Enabling households to improve income maximisation by ensuring all benefit entitlements are secured from the UK Government or grants/concessions from Energy Companies;
- Helping households to switch to digital metering and utilise smarter technologies
- Reducing the number of homes using domestic prepayment meters and securing them on a lower cost tariff
- Appropriate referrals for funding to install home energy efficiency measures to help reduce energy consumption thereby reducing the cost of energy supplied.
- The provision of in depth advice and support on managing fuel debts.

There is no target to provide the advice and support service to a specific number

of households. The primary focus of the pilot is to measure the impact the intervention has on participating households, focusing on quality over quantity. Welsh Government envisage the organisation securing a reasonable and appropriate cohort of participating households to take through the various stages of in-home advice.

The pilot will be aimed at vulnerable people ^[footnote 1] those who are disengaged from the domestic energy market, and those living on a lower income (defined as less than 80% of the UK national median). The participating households will be:

- living in fuel poverty who spend more than 10% of their household income before housing costs to maintain a comfortable and safe temperature in their homes.
- living in Severe fuel poverty who spend more than 20% of their household income before housing costs to maintain a comfortable and safe temperature in their homes.
- at risk of living in fuel poverty who spend between 8% and 10% of their household income on fuel costs. This is estimated to consist of 144,504 households in Wales, or equivalent of 11% of households in Wales. The fuel poverty estimates suggest elderly people are at most risk of living in fuel poverty.
- living in persistent fuel poverty, meaning those who have been in fuel poverty for two out of the last three years.

The key output of this pilot will be the production of an interim and a final report outlining the relevant activity and analysing the impact of in-home advice and support on the participating households. Reports must be subjective and impartial, and must also detail what advice was offered.

The reports must include information on household incomes, benefit entitlements and energy usage. The participating household's incomes and fuel costs should be assessed before and after the intervention at each phase to determine the impact the service has on households living in or at risk of fuel poverty.

The data collected must follow GDPR 2018 regulations. All sensitive information

will be anonymised in the published reports.

The reports will be considered as part of a business case setting out the Welsh Government's proposals to improve the delivery of domestic energy efficiency advice services in the future.

The pilot must be available to householders through the medium of both Welsh language and English language. The advice provider must deliver advice in compliance with the Welsh Language Standards, and demonstrate to the Welsh Government these standards are being met.

Target areas

The pilot must include within its cohort, households in urban areas as well as rural on-grid and off-grid areas. Our research and stakeholder engagement identified three potential areas which would meet these characteristics. These are Ceredigion, Gwynedd and Caerphilly. Ceredigion and Gwynedd are recognised as having high estimated levels of fuel poverty according to the 2018 estimates and are largely rural, which allows us to test the impact support may have in rural on-grid and off-grid areas.

The third area is Caerphilly. While the estimated level of fuel poverty in the area is high, it is comparable to other areas in South East Wales; however, according to the Welsh Index of Multiple Deprivation (WIMD), levels of deprivation are higher.

These areas are suggested as potential areas only. Welsh Government will consider bids for the delivery of the pilot for other areas where bidders can demonstrate householders from urban, rural on-grid and off-grid areas will be included within the cohort of participating households. Bidders will not be disadvantaged in this case.

Timeline

Welsh Government will invite bids from the Third Sector as part of a competitive grant exercise from 2 November to 30 November, with a view to awarding the grant in December. The pilot will commence in January 2021 and will run for a period of 9 months up to the end of September 2021.

The Interim report should be submitted to Welsh Government in May 2021, with the final report being submitted after the end of the pilot in September 2021.

We would expect to appoint an organisation in December 2020, after which we would expect the mobilisation, recruitment and training of energy advisors to commence and be concluded in January. In January/February 2021 we expect the service to begin engaging with households to secure a cohort of participants to enable the gathering of credible evidence. An interim report on the effectiveness of the service is expected 5 months into the commencement of the pilot by May 2021 and a final report by September 2021.

Section 1: Lead organisation

We expect one lead organisation to submit a bid in the event a consortium of organisations join up together to bid. An organisation can bid to deliver the pilot in one, two or all three areas. Bids for funding for one or two of the three areas will not be disadvantaged.

Please give the name and job title of the person who will be making this application and the details for the main contact person who will liaise with Welsh Government throughout the project (if different). Please provide the organisation address, telephone number and email address/es. If applying as a consortium please name all organisations applying for funding.

Forms must be sent electronically to:

EnergyEfficiencyandFuelPoverty@gov.wales by 5pm on 30 November 2020.

Please do not send additional information as this will not be assessed.

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Font should be Arial 12 and coloured black.

Section 2: About the proposed service/s

2.1: Tick box to indicate number of areas you are bidding for funding to deliver the pilot in. Please name the local authority areas where you intend to deliver the pilot. Please also tick box to indicate whether your bid will cover urban households, rural off-grid or on-grid households. Tick all that apply.

2.2: Please explain your experience of successfully engaging with the target groups, who are disengaged with advice services and the energy market, to provide 'person centred' holistic domestic energy advice and your experience of maintaining positive and proactive relationship with a household across a period of time. Please also outline your experience of working with advice partners to ensure householders are able to access wider advice, where need is identified (e.g advice on claiming entitlements and income maximisation).

2.3: Welsh Government envisage the pilot will gather a cohort of households to participate. These households must represent the target groups outlined in the above guidance, and ideally include a variety of households ranging from single person, families and the elderly. Please explain how you propose to engage with households to gather a cohort of eligible participants, while maximising the variety of households types. There is no target number which need to take part in the pilot; however, please provide an estimate number of households you anticipate taking part.

2.4: Please describe how you intend to ensure the energy advisors providing householders with domestic energy efficiency advice are suitably qualified to deliver a person centred, holistic advice service. The qualifications we deem to be suitable in this case are provided by National Energy Action (NEA), and these are the Level 2 Fuel Debt qualification and the Level 3 Award in Energy Awareness.

2.5: It is important the service provided across all three localities is consistent, and that we collaborate with partners working in communities to ensure a high

quality service. Please explain how you will work in partnership with local providers to ensure there is effective join up of services, and the services provided in each of the localities are consistent.

2.6: Tick one box only.

2.7: If you are already receiving grant funding from elsewhere please ensure you consider state aid rules before applying for funding. If grant funding is already being received to deliver some of the services included in this pilot, please outline what services these are (e.g. fuel debt advice, energy tariff/supplier advice etc) and how much this funding is. Please also outline what additional services would need to be funded by Welsh Government to ensure all the aspect of this pilot would be delivered. Welsh Government will look to fund additional costs only in the event grant funding is already being received to deliver some of the services required.

2.8: List the staff that will be funded by this project to deliver the services. Person names are not required, please list staff as post 1 etc.

2.9: Welsh Government are keen to ensure cases are not dropped at the end of the pilot without having received all the required support, either directly or from appropriate signposting to a partner organisation. Please outline how you intend to ensure cases are completed at the end of the pilot to ensure households receive the support they need.

2.10: Since March 2020 social restrictions have been in place across Wales to tackle the spread of Covid-19. Welsh Government accept in-home advice may not be possible throughout the entirety of the pilot given the uncertainty around social restrictions in the short and medium term. In the event in-home advice is not possible, please outline how you intend to replicate the intensity and depth achieved by face to face in-home support using other communication channels, such as video-conferencing or telephony services. Please ensure you stay up to date with the latest [Welsh Government guidance on Covid-19](#).

2.11: The Welsh Government have proposed a timeline in the above guidance for the delivery and completion of the pilot, as well as the completion of the interim and final reports on the impact of in-home advice. Please describe your

level of confidence in delivering to the timeline, or where you feel the timeline is unrealistic, propose an alternative timeline for delivery and identify milestones.

Section 3: Financial information

3.1: Please include as much information as possible about anticipated costs in delivering the proposed service/s in the table provided in the proposal form. When completing this, please take into account whether you are already receiving grant funding to deliver some of the services outlined above, which may reduce the amount of grant required to deliver the pilot.

Should your application be successful you will be asked to confirm the expenditure profiles and provide updates to anticipated expenditure at regular intervals through the life of the project. You will also be required to provide a report on expenditure and project progress.

Grants will be paid in arrears on a monthly basis following receipt of a claim form and associated reporting information (which will be available from Welsh Government if your proposal form is successful).

Payment of the grant will be made quarterly in arrears on submission of accurately documented claims in accordance with the provisions that will be set out in the formal grant award letter/conditions. However, payments may be made in advance where a need for this can be clearly demonstrated. If appropriate, providers can request a Payment in Advance template or confirm that one has been submitted for the current financial period for other Welsh Government grant funding.

Section 4: Declaration

The person signing this section should be the person who has completed the

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form and the same details that have been provided in section 1. The person signing should be fully authorised by the lead organisation to submit a bid up to the value of the project.

[1] A vulnerable home is defined by the Welsh Government as one with any person aged 60 years or over living in the home, or with a child/young person under the age of 25 years, or with any long-term limiting condition or disabled person. The estimated level of fuel poverty in vulnerable households follows the same trend as for all households, that is to say more than a quarter of vulnerable households are estimated to be living in fuel poverty.

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