

Energy Efficiency Advice Service Pathway



The different stages of energy efficiency advice and measure delivery support for households

Engaging with households on home energy efficiency can be done at different levels or depths of detail.

The Stages identified by Community Energy England give an overview of each level of advice commonly given by community organisations, and are laid out in order of complexity, required resources and the level of risk to deliver. Organisations may begin at any stage, but most will find it easier to start at Stage 1 and grow their service organically, unless there are other organisations already delivering energy efficiency advice and retrofit in their area, and they are aiming only to fill in the gaps in provision, or help to promote existing services through their community networks.

Stage and Service Name	Type of Advice or Service	Existing Provider or Resource	Funding Options
<p>Stage 1:</p> <p>Energy Awareness Advice</p>	<p><i>You could offer:</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> Community Outreach Events eg Energy Clinics <input type="checkbox"/> Using volunteers to provide advice and raise awareness at events <input type="checkbox"/> Telephone advice <input type="checkbox"/> On the spot eg PSR support (help them with the form) <input type="checkbox"/> Referral to other help eg local Council or LEAP <input type="checkbox"/> Information provision - energy saving behaviour change, appliances, understanding your bill, getting a TOU tariff, basic changes like LEDs <input type="checkbox"/> Keyworker training 	<p><i>Who is already doing it? Who could you partner with? Do your own analysis of your area. Examples might be:</i></p> <p>Better Housing, Better Health – National Energy Foundation</p> <p>Citizens Advice Bureau</p> <p>Local or national fuel poverty charity</p> <p>Community Energy groups</p> <p>Agility Eco's LEAP programme</p> <p>Community Action Groups (CAG)</p> <p>Energy Saving Trust</p>	<p><i>Examples might include:</i></p> <ul style="list-style-type: none"> <input type="checkbox"/> County, District Council/Local Authority <input type="checkbox"/> Energy Redress Fund <input type="checkbox"/> NetZero Hub <input type="checkbox"/> Community Board <input type="checkbox"/> Community Benefit Fund (CE) <input type="checkbox"/> National Grid <input type="checkbox"/> Awards for All <input type="checkbox"/> National Lottery Climate Action Fund

Stage 1 Measurement and Evaluation tools

Client interactions: Excel or Google Spreadsheet basic database. CRM? Track outcomes, both ££ and CO2 savings

Events: Event Log with outcomes

Checklist of Steps/Actions to deliver:

Stage One – Energy Awareness Advice



Resource needed	Training and funding needed	Next steps for a CE group
Energy Advisors	<p>NEA: City & Guilds Level 3 Energy Awareness</p> <p>CEE Awareness to Advisor Course</p> <p>Energy Action Scotland: https://www.eas.org.uk/city-guilds-energy-awareness-6281-01</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Work out budget needed <input type="checkbox"/> Apply for or allocate funding <input type="checkbox"/> Recruit Energy Advisors (vols or staff, depending on funding) <input type="checkbox"/> Book training <input type="checkbox"/> Set up appointment administration (system and staff) <input type="checkbox"/> Get insurance
Energy Champions	<p>NEA Introduction to Domestic Energy Efficiency</p> <p>Energise Sussex Coast Energy Champions Course</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Work out budget <input type="checkbox"/> Apply for or source funding <input type="checkbox"/> Recruit Energy Champions volunteers <input type="checkbox"/> Book training (online course) <input type="checkbox"/> Use this resource at events <input type="checkbox"/> DBS clearance required if doing home visits and outreach if one to one or dependent on venue or host organisation.
Event staff (organisation and staffing at events)	<p>None (use Energy Advisors and volunteer Energy Champions)</p> <p>Example salaries/costs:</p> <p>£25,000 per Energy Advisor</p> <p>£36,000 Energy Advice Service Manager</p> <p>£10,000 Events budget (venues, staff etc.)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Recruit Event manager <input type="checkbox"/> Recruit marketing resource <input type="checkbox"/> Get funding or charge fee for entry <input type="checkbox"/> Set date and time <input type="checkbox"/> Book venue (or piggyback on other people's events eg Christmas Fairs or climate action groups) <input type="checkbox"/> Book in staff/volunteers <input type="checkbox"/> Create partnerships with event sponsors, exhibitors, speakers including local authority or other advice providers.
Referral network	<p>Entities in the referral network often have information sessions/training which covers what they do eg. the Fire & Rescue Service</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Create list of organisations who can help with next steps after basic energy advice <input type="checkbox"/> Create referral process with their agreement

Administration/marketing	Energy Advisors to use CRM system Administrator on CRM system	<input type="checkbox"/> Once Energy Advisors are trained, begin marketing campaign <input type="checkbox"/> Book appointments <input type="checkbox"/> EAs to capture case notes and outcomes and follow up on referrals or other actions that come out of appointments with clients – in CRM system <input type="checkbox"/> Monthly reporting (management)
Systems and equipment		<input type="checkbox"/> CRM System <input type="checkbox"/> Smartphone for in-house advisor for accessing client account and calling energy supplier.
Funding		<input type="checkbox"/> Investment via Community Share Offer <input type="checkbox"/> Grant sourcing and applications <input type="checkbox"/> Partnership with local authorities
Governance		<input type="checkbox"/> Incorporation <input type="checkbox"/> Recruitment of Trustees/Board <input type="checkbox"/> Risks and Liabilities <input type="checkbox"/> Policies & Procedures: Data security, Health & safety, Safeguarding, Risk assessment, Lone worker, Volunteers etc <input type="checkbox"/> Insurance
Advice Definition	<p>What areas of energy use are covered by this advice service? What is its scope?</p> <p>It may depend on where the funding has come from.</p>	<input type="checkbox"/> Questionnaire <input type="checkbox"/> Next steps - referrals and other outcomes: what is for the homeowner to do and what support do they need going forward?
Monitoring and Evaluation		<input type="checkbox"/> Decide what you are going to monitor and what your measures for success are. Quality and Quantity - include what you want people to do and a way to find out if they did it.

Define what successful delivery of Stage 1 looks like: test, review, repeat - assess what you've achieved so far. Get feedback from attendees or people you've spoken to at events, monitor comments and enquiries, ask people why they have come to your group for advice and not gone to another tradesperson or consultant.

Anecdotal advice from your team - have team meetings regularly and discuss issues popping up.

Follow up and see what people did after speaking to your organisation.

If you've achieved all you want to at this level or there is huge demand for a more in-depth service or no one is making changes to their homes/behaviour...maybe you are ready to move on to the next stage.