

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
Stage 1: Energy Awareness Advice	<i>You could offer:</i> ☐ Community Outreach Events eg Energy Clinics ☐ Using volunteers to provide advice and raise awareness at events ☐ Telephone advice ☐ On the spot eg PSR support (help them with the form) ☐ Referral to other help eg local Council or LEAP ☐ Information provision - energy saving behaviour change, appliances, understanding your bill, getting a TOU tariff, basic changes like LEDs ☐ Keyworker training	<i>Who is already doing it? Who could you partner with? Do your own analysis of your area. Examples might be:</i> Better Housing, Better Health – National Energy Foundation Citizens Advice Bureau Local or national fuel poverty charity Community Energy groups Agility Eco's LEAP programme Community Action Groups (CAG) Energy Saving Trust	<i>Examples might include:</i> ☐ County, District Council/Local Authority ☐ Energy Redress Fund ☐ NetZero Hub ☐ Community Board ☐ Community Benefit Fund (CE) ☐ National Grid ☐ Awards for All ☐ 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	NEA: City & Guilds Level 3 Energy Awareness CEE Awareness to Advisor Course Energy Action Scotland: https://www.eas.org.uk/city-guilds-energy-awareness-6281-01	☐ Work out budget needed ☐ Apply for or allocate funding ☐ Recruit Energy Advisors (vols or staff, depending on funding) ☐ Book training ☐ Set up appointment administration (system and staff) ☐ Get insurance
Energy Champions	NEA Introduction to Domestic Energy Efficiency Energise Sussex Coast Energy Champions Course	☐ Work out budget ☐ Apply for or source funding ☐ Recruit Energy Champions volunteers ☐ Book training (online course) ☐ Use this resource at events ☐ 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)	None (use Energy Advisors and volunteer Energy Champions) Example salaries/costs: £25,000 per Energy Advisor £36,000 Energy Advice Service Manager £10,000 Events budget (venues, staff etc.)	☐ Recruit Event manager ☐ Recruit marketing resource ☐ Get funding or charge fee for entry ☐ Set date and time ☐ Book venue (or piggyback on other people's events eg Christmas Fairs or climate action groups) ☐ Book in staff/volunteers ☐ Create partnerships with event sponsors, exhibitors, speakers including local authority or other advice providers.
Referral network	Entities in the referral network often have information sessions/training which covers what they do eg. the Fire & Rescue Service	☐ Create list of organisations who can help with next steps after basic energy advice ☐ Create referral process with their agreement

Administration/marketing	Energy Advisors to use CRM system Administrator on CRM system	☐ Once Energy Advisors are trained, begin marketing campaign ☐ Book appointments ☐ 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 ☐ Monthly reporting (management)
Systems and equipment		☐ CRM System ☐ Smartphone for in-house advisor for accessing client account and calling energy supplier.
Funding		☐ Investment via Community Share Offer ☐ Grant sourcing and applications ☐ Partnership with local authorities
Governance		☐ Incorporation ☐ Recruitment of Trustees/Board ☐ Risks and Liabilities ☐ Policies & Procedures: Data security, Health & safety, Safeguarding, Risk assessment, Lone worker, Volunteers etc ☐ Insurance
Advice Definition	What areas of energy use are covered by this advice service? What is its scope? It may depend on where the funding has come from.	☐ Questionnaire ☐ Next steps - referrals and other outcomes: what is for the homeowner to do and what support do they need going forward?
Monitoring and Evaluation		☐ 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.