

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	Provider or Resource	Funding Options
Stage 2: Energy Efficiency Advice	<i>You could offer:</i> ☐ Telephone advice ☐ Home visits - assessment ☐ Home visits - implementation eg install draught-proofing, LEDs, other small measures ☐ Represent client in dealings with energy supplier ☐ Onward referral to advice and support agencies ☐ Referral to internal thermal imaging service to enable cost-effective First Retrofit ☐ Referral to expert suppliers eg Retrofit Assessors or architects ☐ DIY Draughtbusters Events ☐ Community events such as Energy Fairs, or a presence at climate action events	<i>Who is already doing what and where are the gaps in provision you can fill?</i> Possibly a County or District Council Energy Doctors new staffed team funded by Shared Prosperity Fund grant Community Energy – volunteers? Better Housing, Better Health – NEF RetrofitWorks or similar	<i>How can you fund the service?</i> ☐ Local Council ☐ Energy Redress Fund ☐ Local foundations ☐ Shared Prosperity Fund ☐ Fees ☐ Community Benefit Fund (CE) ☐ ECO and ECO+ ☐ HUG ☐ LEAP ☐ National Lottery Climate Action Fund
Stage 2 Measurement and Evaluation tools Client interactions: Basic CRM database			

Checklist of Steps/Actions to deliver:

Stage Two – Energy Efficiency Advice



Resource needed	Training needed	Next steps
Advanced Energy Advisors	NEA Course: Decarbonising Homes: Technologies, Impacts and Solutions (CQ11527 Level 4 Award) Other?	☐ Work out budget needed (including staff for home visits) ☐ Get funding ☐ Train Advanced Energy Advisors (must be staff) ☐ Book training ☐ Set up appointment administration (system and staff) ☐ Get insurance if additional is needed for home visits
Retrofit Assessors	Domestic Energy Assessor and Retrofit Assessor (Elmhurst Energy, Quidos etc.) May need additional training from eg National Retrofit Hub or The Retrofit Academy or People Powered Retrofit CRM System training Service delivery process training (internal)	☐ Recruit existing Retrofit Assessors if possible (but as these are thin on the ground...) ☐ Recruit DEAs or train DEAs or building surveyors and then get them qualified as Retrofit Assessors ☐ Recruit and organise training for home heat loss surveyors ☐ Work out budget for training and salaries ☐ Work out pricing structure or get funding, or investment in the service with fees paying back investment
DIY Draughtbuster Coaches - Energy Champions with practical skills in draught-proofing homes	Draughtbusters course? Or use people who have experience in draught-proofing homes to train others.	☐ Recruit ☐ Train ☐ Set up Volunteer management framework

Event team/marketing/administration	None	☐ Extend existing CRM System (hopefully you already have a scalable system) ☐ Design event format ☐ Find homeowners for demo homes if event format is in-home live, practical training ☐ Set dates and times ☐ Set up event ticketing ☐ Create marketing campaigns ☐ Book appointments ☐ AEAs and RAs 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) ☐ Track event ticket sales and create post-event survey to track homeowner outcomes ☐ DBS Checks for home visits
Energy Advice Definition		☐ Energy Advisor/Homeowner Questionnaires for Stage 2 advice, can help define the scope of the advice and design the service.

Define what successful delivery of Stage 2 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 need to move on to the next stage.