

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 3: Retrofit Assessment	<i>You could offer:</i> Internal Thermal Survey with or without air-tightness test Retrofit Assessor - Home Visit & Report Basic Retrofit Plan (white label tool eg Parity Projects) Referral to expert suppliers or use something like People Powered Retrofit tool for advanced Retrofit Plan	<i>Who is already doing what and where are the gaps in provision you can fill?</i> E.g. www.first-thermal.co.uk or Thermafy Eg CE group own label or People Powered Retrofit or EcoFurb/RetrofitWorks franchise – staff and/or freelancers Commercial partners in installer/consultancy network	<i>How can you fund the service?</i> ☐ Community Share Offer ☐ Fees ☐ National Lottery ☐ Awards for All ☐ Shared Prosperity Fund ☐ DESNZ ☐ Energy Redress Fund ☐ Local foundations
Stage 3 Measurement and Evaluation tools Client interactions: CRM database or Retrofit-focused customer/supply chain management platform			

Checklist of Steps/Actions to deliver:

Stage Three – Retrofit Assessment



Resource needed	Training needed	Next steps
Retrofit Assessors	Domestic Energy Assessor and Retrofit Assessor (Elmhurst Energy, Quidos, People Powered Retrofit etc.)	☐ Define service deliverables ☐ Work out budget needed to run service for at least two years ☐ Recruit depending on demand ☐ Get funding/investment ☐ Work out pricing based on salary versus funding/fees
Thermal Surveys – Thermal Imaging and Air-tightness Surveyors	Certified Thermographer – ITC is £1,500 to train Low cost thermal surveying training from eg First Thermal (franchisees only) or Thermafy? Air-tightness training CRM System training Service delivery process training	☐ Training and equipment plus expenses costs ☐ Recruit depending on demand ☐ Get funding/investment ☐ Book formal training ☐ Buy thermal imaging equipment and reporting software ☐ Work out pricing based on salary versus funding/fees ☐ Organise internal training on service delivery and CRM system
Basic Retrofit Plan – white label tool	Staff training on set-up and embedding into website Staff training on understanding the tool and advising customers how to use it and what to do next	☐ Get licensing cost ☐ Agree licensing deal ☐ Incorporate region data (Parity Projects) ☐ Embed in website ☐ Book/organise training
Expert suppliers for Advanced Retrofit Plan	People Powered Retrofit training to use tool and provide advice in order to refer? Staff – The Retrofit Academy or PPR or other courses in Retrofit Assessment and Retrofit Co-ordination	☐ Recruit trusted consultancies to whom to refer ☐ Use People Powered Retrofit Planbuilder ☐ Get funding to train staff or freelance resource as Advanced Retrofit Assessors/Retrofit Co-ordinators



Event team/marketing/ administration	None	☐ Define internal processes for service delivery ☐ Add content and Retrofit Plan tool to website ☐ Set up appointment booking ☐ Create marketing campaigns ☐ Book appointments ☐ Thermal Surveyors 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 appointments and create post-event online survey to track homeowner outcomes (for non-online clients, staff or volunteers could do this by phone.)
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Define what successful delivery of Stage 3 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 - Retrofit delivery.