



## Feedback Document – January 2020

### Introduction

This document provides feedback on common issues with applications to the Energy Redress Scheme. We strongly recommend that all applicants read through this document, to help ensure you submit the best possible application.

### Advice projects: Important Updates

The Energy Redress Scheme receives a high percentage of applications for projects that aim to deliver energy advice to energy consumers in vulnerable situations. This means that advice applications must work hard to stand out from the crowd. Assessors of Energy Redress projects will focus on the following questions when choosing which energy advice projects should be funded:

- Does the application demonstrate that the **advice provided will be high quality and meaningful?**
- Is the application **clear about how the advice will delivered** e.g. how many home visits, how many people advised over the phone etc?
- Is the project **cost effective?**

The application form has been revised to enable advice-based projects to provide the information needed to answer these questions. Each question is explained below, along with information about the relevant changes to the application form.

### Demonstrating quality advice

All advice projects should aim to deliver high quality advice that will have long lasting benefits to the consumers. As well as detailing the qualifications and experience of advisors, advice projects should provide information about the content of their advice. Projects should cover a wide range of energy related advice rather than focusing on a single issue such as switching suppliers, to help achieve the maximum benefit for each person advised.

#### Application form update:

The application form has been updated with a new section to help you demonstrate the quality and content of your advice. You only need to complete this section if you are delivering advice as part of your project:

**Scope of Advice** – This box provides space for projects to explain the different topics and/or activities that will be covered during their advice work e.g. home energy surveys, advice on switching energy suppliers, benefit checks, behavioural advice, referrals for larger energy saving measures or advice on understanding heating controls and energy bills.

## Demonstrating how advice will be delivered

The Energy Redress Scheme aims to fund projects that deliver energy advice in the most effective way for the beneficiaries. In many cases, face to face advice delivered in the home, your office or community venue is the best way to give in-depth energy advice that will achieve change for people in vulnerable situations. However, engaging people and delivering advice by other means such as telephone can also have a role in helping to reach more people cost effectively.

Many Energy Redress Scheme projects use lighter touch advice such as telephone or engagement at public events, alongside more in-depth advice appointments in the home or an office, this can be a very effective approach.

Unfortunately, many applications do not provide clear target figures for the number of people they aim to support via different advice interventions e.g. phone, email, home visit. This makes it very hard to assess the likely impact of the project and therefore cost-effectiveness.

**Tip for applications:** If you are planning to offer several different interventions e.g. telephone, events and home visits, please be as clear as you can about how these relate to each other. For example, if a project is reaching 1000 by phone and 200 people by home visits, assessors need to understand whether this is:

- 1000 phone calls to book 200 home visits (200 people advised)
- 1000 advice calls with 200 of those identifying need for a home visit and referring them (1000 people advised)
- 200 people being advised via home visit and an additional 1000 people given telephone advice (1200 people advised).

Keep the targets you set for your project straightforward and realistic, considering the number of people working on the project, the vulnerability and location of the target audience, the scope of the advice you are offering (energy advice can create lots of case work) and the length of the project. You must also ensure that you are able to easily monitor your progress in achieving the targets.

The application form has been updated to make it easier to provide clear information on this (see below).

### Application form update:

**Advice Targets Table** – A new table has been introduced to collect target figures for the number of households that will be supported with different levels of advice intervention e.g. via home visits, face to face appointments at other venues, over the phone.

Applicants only need to provide figures for the interventions they will offer (leave the other cells blank). The table includes a cell to collect the total number of unique households that will be supported over the course of the project. This can help to provide clarity where your project is delivering different types of intervention or contacting clients more than once.

The table also asks for an estimated cost per intervention (based on staff time and resources required). Please give your best estimate here, as it can be especially useful to assessors.

## Top Tips for all applications:

- Assume that the person assessing your application has no knowledge of your organisation and ensure the application explains your track record, systems and approach.
- Explain what systems you will use to monitor and record the progress of the project in the 'Targets' section of the application form e.g. Spreadsheets, CRM, sign in sheets at events, energy monitors.
- Explain how you will monitor and record the impacts of the project, including any health and wellbeing benefits, in the 'Targets' section of the application form. This could be through case studies, customer surveys, using social impact tools, energy monitors etc.
- If you are applying for capital measures, be specific about what the measures will be, the eligibility criteria you will use to determine who will receive them and how you will ensure measures are installed safely and to a high standard.
- If you want to include small grant funds that are distributed to vulnerable energy consumers, be specific about what the funds will be spent on, how you will determine eligibility, how you will distribute the money and what ongoing support or advice you will provide to the beneficiaries to ensure long lasting impact.
- If you have match funding from other sources towards your project explain where it is coming from in the 'Additionality' section of the application form and be clear about what elements of the project the match funding and the Energy Redress Scheme funding will cover.
- Applicants must acknowledge any other similar schemes or services operating in their area and explain how their project will interact with them for the benefit of residents. This could mean developing referral pathways between the projects, targeting different audiences or offering different levels of advice. If you cannot think of any relevant services, check Annex 1 in the guidance document, which lists some of them.
- Staff day rates should be calculated by splitting the annual cost of employing the person (including National Insurance, Tax and Pension) by the actual number of days they work for the charity. It is advisable to base this on the number of working days in a year (260) minus paid leave and bank holidays. Using this approach will ensure that you cover the full cost of the staff member.
- Commercial day rates are only chargeable by organisations whose services you have procured or will procure after the project has started. This is covered in more detail in the guidance document, Step 5.
- Overheads can be charged against each member of staff, up to 25% or can be shown separately in the 'Other costs' budget table. This money is to cover your central costs of delivering the project. If you are charging an overhead rate against your staff costs, **do not** include items that would normally be included in overheads, such as office rental or utilities in the 'Other Costs' budget section too.

**The Energy Redress Scheme Guidance is designed to help you complete the application form. You can view and download the latest guidance document here:**

<https://energyredress.org.uk/application-pack>.