



Department  
of Energy &  
Climate Change

# Evaluation of the Big Energy Saving Network

Final report

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# Glossary of acronyms

BESN	Big Energy Saving Network
BESW	Big Energy Saving Week
DECC	Department of Energy and Climate Change
ECO	Energy Company Obligation, initiative to bring domestic energy efficiency improvements to vulnerable households and those with hard to treat homes. Funded by energy companies.
NEA	National Energy Action
SHU	Sheffield Hallam University
VCS	Voluntary and Community Sector

# Executive summary

## Introduction

The Big Energy Saving Network (BESN) is an outreach initiative which aims to engage and empower vulnerable individuals to make informed decisions on how to make their energy expenditure more affordable. Trust in energy companies is low across all population groups<sup>1</sup> and vulnerable consumers tend to be amongst the most disengaged in the energy market and the least likely to switch energy supplier or tariff<sup>2</sup>, often requiring more intensive support to engage.<sup>3</sup> As such, BESN was designed to deliver support to consumers using face-to-face contact through 'trusted intermediaries' (champions, volunteers and frontline workers).

BESN is funded by the Department of Energy and Climate Change (DECC), who in the first year of the programme (the focus of this evaluation) provided £900,000 in funding, and awarded grants to 94 voluntary and community sector (VCS) organisations. The aim being that these organisations would create a network to deliver advice and support to vulnerable consumers across Britain, helping them to consider actions to reduce their energy costs and consumption. The advice offered via BESN focused specifically on energy markets, tariffs and switching, as well as helping individuals to access the Energy Company Obligation (ECO).<sup>4</sup> This evaluation focuses on the delivery of BESN between September 2013 and the end of March 2014.

The programme was delivered using a 'cascade' approach to share knowledge and reach a broader range of vulnerable consumers. This involved individuals (from the 94 grant funded organisations), known as 'champions', taking part in national level training (provided by National Energy Action (NEA)).<sup>5</sup> Each champion was then responsible for coordinating and delivering training to additional volunteers<sup>6</sup> who worked alongside them to deliver advice to consumers on energy issues through workshops and one-to-one advice sessions. Together champions and volunteers were also responsible for passing their training on to frontline workers who could impart energy advice to vulnerable consumers in the course of their daily work.

## About the evaluation

Sheffield Hallam University was commissioned by DECC to conduct an evaluation of BESN. The evaluation began in February 2014 and data collection concluded in August 2014. Its aims were to gather evidence and draw conclusions in relation to the following:

- a) the impact of the programme on different types/groups of vulnerable individuals;
- b) the effectiveness of programme processes at each stage of the implementation;

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<sup>1</sup> Which? (2014) Consumer Insight Tracker. [http://consumerinsight.which.co.uk/tracker?d\[open\\_in\]=trust&v=61](http://consumerinsight.which.co.uk/tracker?d[open_in]=trust&v=61). See also, <https://www.gov.uk/government/collections/public-attitudes-tracking-survey>

<sup>2</sup> See Ofgem (2013) *Vulnerable Consumer Strategy*, London, Ofgem.

<https://www.ofgem.gov.uk/ofgem-publications/75550/consumer-vulnerability-strategy.pdf>

<sup>3</sup> DECC (2012) Ensuring a better deal for energy consumers: discussion document.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/65615/6996-better-deal-energy-consumers.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/65615/6996-better-deal-energy-consumers.pdf)

<sup>4</sup> The Energy Company Obligation (ECO) provides funding for energy saving measures in households, funded by a levy on energy companies. It is worth around £1.3 billion per year, with a dedicated pot of around £540 million per year going to low income households.

<sup>5</sup> A national charity responsible for delivering the initial training for BESN, whose organisational goal is to support the vulnerable and fuel poor with energy issues.

<sup>6</sup> In the guidance and training DECC suggested that two volunteers would be a good number to facilitate delivery.

c) the efficiency and cost effectiveness of the programme.

The evaluation was guided by a 'Theory of Change' (ToC) approach to explore and test the different assumptions behind the programme's delivery, understand the translation of programme design into actions/delivery across the different processes involved, and compare different routes, barriers and drivers of action.

The evaluation involved a combination of methods including surveys and in-depth interviews with champions, volunteers, frontline workers and participants, and the analysis of programme monitoring data to develop comprehensive insights into the theory behind BESN, how it was delivered in practice and what it achieved. The headline findings from this analysis are detailed below. See Chapter 2 and Appendix 2 within the technical annex for more detail regarding the methods applied and the representativeness of the data included in this report.

#### **a. The impact of the programme on different types of vulnerable individuals;**

BESN is estimated to have reached around 16,000 participants via workshops (exceeding the target of 15,000) and a further 78,000 through frontline workers (falling within the target range of 60-90,000).

BESN workshops were particularly successful at empowering consumers to get the best energy deal. The majority of those who responded to the survey reported feeling more informed and empowered as a result of their participation (73 per cent) and many went on to take subsequent action - from small-scale changes such as installing new light bulbs (32 per cent) to larger actions; nearly a third of participants (29 per cent) contacted their energy supplier about their tariff, 11 per cent switched supplier, and 5 per cent applied for an ECO assessment following BESN.

Discussion of the level of take up follows in the 'Delivering BESN' section of this report. Statistics on outcomes achieved by frontline workers for participants are not available but the qualitative data indicates that this route was also effective in securing a similar range of outcomes.

There were few significant differences in outcomes across the groups of participants. The only exceptions to this were non-white British and low income participants who were more likely to experience better outcomes relating to confidence and understanding of energy markets and energy efficiency.

Analysis at an organisational level revealed that certain organisations were particularly effective in engaging more of certain types of vulnerable consumers, including:

- National charities, Rural Community Councils and social housing providers, engaged more of those aged over 65 than other organisations.
- Rural Community Councils were better at reaching those off the gas grid.
- National charities reached greater numbers with disabilities.
- Local charities, a national advice organisation and social housing providers performed better at reaching benefits claimants.
- Development Trusts, national advice organisations and social housing providers were better at reaching those on pre-payment meters.

BESN workshops were successful in reaching a range of vulnerable groups including: those aged over 65; households with dependent children, those without access to gas and those without internet access. On the other hand, a comparison of the monitoring data obtained through workshops against national statistics reveal that overall BESN may have been less successful in reaching those claiming or entitled to means tested benefits and those with disabilities, mobility difficulties, chronic illnesses, those without previous experience of switching and those on pre-payment meters.

Positive outcomes were also reported by those involved in delivering BESN. Survey responses from champions, volunteers and frontline workers reveal that 73 per cent felt able to provide a better service to clients on energy issues as a result of their involvement with the initiative, suggesting that BESN has been successful in improving the capacity of staff within participating organisations to provide energy advice to their clients in the longer term.

## **b. The effectiveness of programme processes at each stage of the implementation;**

### **Setting up BESN**

Large numbers of applications for BESN funding were received from VCS organisations. The diversity of participant groups reached through BESN indicate that DECC were successful in appointing a range of delivery organisations that reflected the diverse characteristics of vulnerable consumers that BESN was intended to reach.

### **Training champions, volunteers and frontline workers**

Champions reported that the initial training they received from NEA was of a high quality, addressed a genuine knowledge gap and equipped them with the knowledge and confidence they needed to deliver BESN. Following training, champions reported a significant uplift in the knowledge required to deliver training and support on energy issues (27 per cent rated their knowledge as very good or good before and 92 per cent did so afterwards).

The cascade model, whereby champions train volunteers and then frontline workers was effective in ensuring that frontline workers were equipped with the knowledge and confidence they needed to deliver advice to consumers. This was gauged through the comparison of survey results from champions and frontline workers indicating their confidence to deliver BESN. However, the process was less effective for volunteers as half of those interviewed felt that the training they received was rushed and they had struggled to digest it. This was attributed by champions to the tight timescales for delivering BESN. The interviews with champions and volunteers suggested this did not, however, appear to impact to any discernable extent on outcomes for participants or the perceived quality of advice they received, as volunteers tended to work in partnership with champions who often took the lead in delivering advice.

Two areas for improving the training were identified. First, many of the champions interviewed felt that ECO was not covered in enough depth in training for them to grasp the details of what was regarded as a complex initiative, with the referral process and eligibility criteria cited as the most common concerns. This lack of understanding combined with an underlying sense of cynicism about the initiative amongst some champions meant that ECO was not always given much prominence in workshops. This may have contributed to the relatively low numbers of ECO referrals completed by BESN participants (five per cent of workshop participants).

Second, some champions felt that potential legal issues that may arise when helping participants to switch were not properly addressed. This was perceived to be a significant issue by two large funded advice organisations and one smaller organisation but was not the case in the majority of circumstances.

### **Delivering BESN**

Advice was delivered through two routes. Champions and volunteers delivered workshops with groups of vulnerable consumers, followed-up with one-to-one support wherever possible, and frontline workers advised vulnerable clients that they encountered through their daily work. It was hoped that more than 75,000 consumers would be engaged through BESN and this target was exceeded with an estimated total of 94,000 consumers taking part (estimated 16,000 via workshops and 78,000 via frontline workers).

The two routes of delivery (workshops and via frontline workers) both had their advantages and limitations, as summarised by the following table.



**Table 1: Strengths and limitations of the two routes of delivery**

Strengths	Limitations
<b>Workshops</b>	
Champions were able to boost attendance and engagement through more innovative and informal approaches.	Difficulties with limited attendance. Champions felt energy alone was not enough to attract consumers to specially convened workshops.
Champions could 'piggyback' on existing events and incorporate BESN into events with a broader focus which helped ensure larger audiences, target specific groups and engender trust.	Champions considered one-to-one support to be more effective than workshops in securing action. Although workshops were encouraged to include one to one sessions this was often constrained by the setting and time available.
This route reached a broader range of different types of vulnerable consumers than frontline workers were able to reach including those who are off the gas grid, are geographically isolated and for whom English is a second language.	Champions felt that the workshop format was not suitable for all vulnerable consumers, particularly those with limited English, people with literacy, confidence or mobility problems or chronic illnesses.
<b>Frontline workers</b>	
Frontline workers often had existing relationships with vulnerable clients and knowledge of their circumstances which engendered trust and enabled them to tailor advice to the consumer.	Reportedly reaches a more limited range of groups due to the incorporation of BESN advice into existing services.
This approach lent itself better to one-to-one support (this is how frontline workers tend to work)	
BESN was incorporated into a holistic advice service that meets a range of customer needs	
Frontline workers were generally better positioned to reach and engage with the most vulnerable, particularly those who work on an outreach basis and those who have existing relationships with vulnerable clients.	

The success of BESN in achieving many of the intended outcomes was underpinned by a number of factors including:

- The vast experience amongst champions, volunteers and frontline workers of engaging vulnerable groups.
- The tailoring of advice to the needs and capacity of the audience by champions and frontline workers.
- Interactive and informal workshops: participants found them more accessible, informative and persuasive than other ways in which energy advice is delivered (e.g. leaflets or advertising).
- The perceived impartiality and trustworthiness of champions, volunteers and frontline workers.
- The credibility of champions, volunteers and frontline workers which was boosted by the quality and clarity of the advice they gave. Credibility fostered trust.
- The provision of intensive, tailored one-to-one support, home visits and existing relationships between frontline workers and clients.

Areas where outcomes were less strong, such as switching on the day, can be attributed to the vulnerable nature of participants, the complexity of their circumstances (switching may not be possible for all and some may want time to discuss and consider the decision) and the possibility that the decision not to switch was an informed choice. Limited outcomes regarding ECO referrals can be traced back to a number of factors including an apparent lack of detail in the NEA training, the complex nature of the initiative, some scepticism amongst champions and frontline workers about the initiative (mainly regarding potential costs to recipients), regional variations in the availability of ECO and the limited eligibility criteria.<sup>7</sup>

### The efficiency and cost effectiveness of the programme

It was possible to make some basic calculations regarding the 'unit cost' of different elements of BESN. Using the total £900,000 allocated to BESN as the 'cost' for each delivery element. This is shown in Table 2, below. The table illustrates that BESN has a relatively low unit cost.

**Table 2: cost effectiveness of delivery**

<b>Element of delivery</b>	<b>Numbers engaged</b>	<b>Unit cost</b>
Customers engaged through workshops	16000	£56.25
Customers engaged overall	94000	£9.57
Customers achieving 'key' outcomes (workshops only) <sup>8</sup>	4640	£193.97

<sup>7</sup> Participants would have to meet a series of eligibility criteria in order to qualify for the ECO, including: being in receipt of certain means tested benefits, being a private sector tenant or home owner, having a property which would benefit from one or more of the measures available through ECO and living in an eligible area.

<sup>8</sup> As outlined in Section 6, 29 per cent of workshop participants went on to make a 'key action' by either: contacting their energy supplier; switching energy supplier; applying for an ECO energy assessment; or applying for another form of grant or loan.

# 1. Introduction

## 1.1. About the Big Energy Saving Network

BESN is an outreach initiative designed to engage and empower vulnerable individuals to make informed decisions on how to make their energy expenditure more affordable. The initiative was developed to address the concern that vulnerable consumers are amongst the most disengaged in the energy market and for a multitude of reasons are the least likely to switch energy supplier or tariff.<sup>9</sup>

The Network targeted consumers who are vulnerable due to their financial situation, access to information, poor health or disability, levels of literacy, geography, or age – and who, as a result, have limited awareness of and capacity to secure the best deals on the energy market. Nonetheless, the Network did not bar any groups of consumers from taking part, partly in recognition that ‘vulnerability’ can be defined in a variety of ways, as reflected in recent work by Ofgem<sup>10</sup> and DECC.<sup>11</sup> Ofgem define a vulnerable consumer as anyone whose *“personal circumstances and characteristics combine with aspects of the market to create situations where he or she is:*

- *significantly less able than a typical consumer to protect or represent his or her interests in the energy market; and/or;*
- *significantly more likely than a typical consumer to suffer detriment, or that detriment is likely to be more substantial.”*

In recognition of the fluidity of this definition of vulnerability, DECC placed trust in funded organisations to use their experience of working with vulnerable people to effectively target and engage such customers.

Ofgem’s Retail Market Review, categorised 19 per cent of consumers as ‘unplugged’ from energy markets: that is, they had not engaged in any way with energy markets in the previous 12 months.<sup>12</sup> A typical consumer in this category was classified as social grade DE, aged over 65, living in social or private rented accommodation and paying their bills by pre-payment meter or payment card. Evidence also points to significant barriers in engaging vulnerable groups on energy efficiency issues, particularly regarding trust and perceptions of the ‘hassle’ involved in undertaking energy efficiency works.<sup>1314</sup> Whilst trust in energy companies is very low across all population groups: research by Which? found that only a

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<sup>9</sup> FDS International (2011) *Vulnerable customer research*. London, Ofgem <https://www.ofgem.gov.uk/ofgem-publications/39714/ofgemvulnerablecustomersresearchfinal.pdf>

<sup>10</sup> See Ofgem (2013) *Vulnerable Consumer Strategy*, London, Ofgem.

<https://www.ofgem.gov.uk/ofgem-publications/75550/consumer-vulnerability-strategy.pdf>

<sup>11</sup> See DECC (2014) *Cutting the cost of keeping warm: a new fuel poverty strategy for England*, London, DECC. [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/335099/fuel\\_poverty\\_consultation.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/335099/fuel_poverty_consultation.pdf)

<sup>12</sup> Ofgem (2014) Retail Market Review Baseline Survey. London, Ofgem. <https://www.ofgem.gov.uk/ofgem-publications/89113/ofgemrmbaselinefinalpdf.pdf>

<sup>13</sup> DECC (2011) *Understanding potential customer response to the Green Deal*, London, DECC.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/43014/3586-green-deal-understanding-consumer-resp.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/43014/3586-green-deal-understanding-consumer-resp.pdf)

<sup>14</sup> DECC (undated) *Green Deal Panel for Hard-to-reach Audiences report*. London, DECC.

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/268249/Green\\_Deal\\_Panel\\_for\\_Hard\\_to\\_Reach\\_Audiences\\_Report.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/268249/Green_Deal_Panel_for_Hard_to_Reach_Audiences_Report.pdf)

fifth of consumers trusted energy suppliers.<sup>15</sup> The DECC Public Attitudes Tracker in February 2014 (at the time BESN was being delivered) indicates that 42 per cent of consumers trusted their energy supplier to inform them of the best tariff for them.

Vulnerable consumers are often 'hard to reach' by mainstream services, and thus tend to require more intensive support than non-vulnerable consumers in order to engage more confidently with energy markets. BESN was therefore designed to address these problems by delivering support to consumers using face-to-face contact through a 'trusted intermediary' (champions, volunteers and frontline workers).

In 2013/14 BESN was delivered by 94 organisations within the VCS using grant funding awarded by DECC<sup>16</sup>. The aim being to create a network of organisations to deliver advice and support to vulnerable people; to help them to consider action to reduce their energy costs and consumption. This advice focused on energy markets, tariffs and switching, as well as helping individuals to access the Energy Company Obligation<sup>17</sup> where appropriate. The scheme was managed by DECC with oversight and input from a steering group comprised of DECC officials and eight other organisations (AGE UK, Energy Savings Trust, National Energy Action, Citizens Advice Bureau, Community Energy Contact Group, Action with Communities in Rural England, Ofgem, and Consumer Futures).

## 1.2. The BESN delivery model

The programme used a 'cascade' approach to reach vulnerable consumers; and to 'up-skill' and share learning amongst those organisations and individuals delivering the programme. A key rationale for this was to increase the reach and cost-effectiveness of the programme. As Figure 1 below illustrates, this involved appointing individuals (from the 94 grant funded organisations), known as 'champions', who underwent formal training delivered by National Energy Action (NEA).<sup>18</sup> It was suggested that each champion would then coordinate and deliver training to around two volunteers, although it was recognised that this would vary depending on the structure and capacity of the organisation and champions recruited. Volunteers were then expected to work alongside champions to deliver advice to consumers on energy issues at dedicated workshops organised by the champions and through subsequent one-to-one advice sessions. During these workshops, it was intended that champions and volunteers would provide advice on switching and ECO.

Under the model champions received training on switching, ECO and domestic energy efficiency from NEA and passed on the knowledge gained to volunteers. Together the champions and volunteers were also responsible for passing their training on to frontline workers. Frontline workers were defined under the programme as those who have contact with vulnerable consumers in the course of their daily work and are therefore well positioned to pass on advice and support regarding energy issues.

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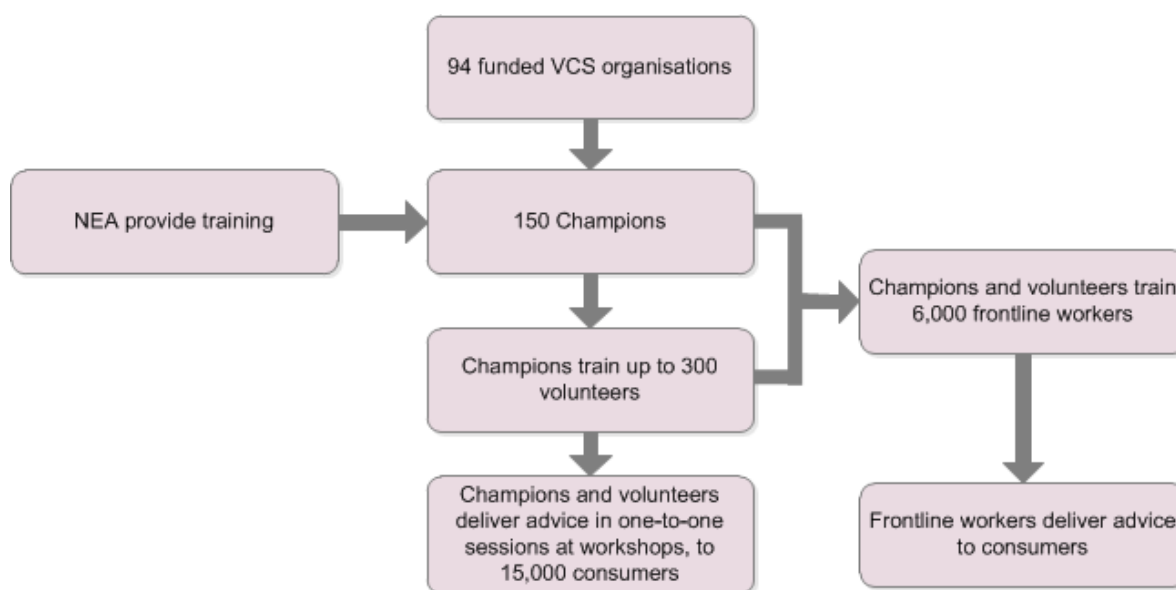
<sup>15</sup> Which? (2014) Consumer Insight Tracker. [http://consumerinsight.which.co.uk/tracker?d\[open\\_in\]=trust&v=61](http://consumerinsight.which.co.uk/tracker?d[open_in]=trust&v=61)

<sup>16</sup> The funding allocated to each champion was an initial £3,800 with an additional £300 or £900 payable on condition of meeting certain delivery targets.

<sup>17</sup> The Energy Company Obligation (ECO) provides funding for energy saving measures in households, funded by a levy on energy companies. It is worth around £1.3 billion per year, with a dedicated pot of around £540 million per year going to low income households.

<sup>18</sup> NEA is a national charity, which aims to eradicate fuel poverty and campaigns for greater investment in energy efficiency to help those who are poor and vulnerable. See [www.nea.org.uk](http://www.nea.org.uk).

**Figure 1: the BESN cascading model**



BESN set targets for numbers of volunteers and frontline workers recruited and trained and individuals directly engaged through workshops. These are shown in Table 3, below.

**Table 3: targets for training and engagement**

Group	Target
Champions	150
Volunteers	320
Frontline workers	6,400
Consumers via champions and volunteers	15,000
Consumers via frontline workers	60-90,000

### 1.3. About the evaluation

Sheffield Hallam University was commissioned by DECC to conduct the evaluation of BESN. The evaluation began in February 2014 and data collection concluded in August 2014. Its aims were to gather evidence and draw conclusions in relation to the following:

- the impact of the programme on different types/groups of vulnerable individuals and what explains these impacts;
- the effectiveness of programme processes at each stage of implementation, setting out what supports and inhibits effectiveness;
- the efficiency and cost effectiveness of the programme (as far as this can be ascertained).

The achievement of these aims was underpinned by the development and testing of a ‘theory of change’ model for understanding the overall design and delivery of the

programme: an important mechanism by which to uncover the different assumptions behind the programme's delivery; the translation of programme design into actions/delivery across the different processes involved; and different routes, barriers and catalysts to securing action amongst participants.

It was intended that the evaluation would help to shape and inform the design and delivery of future rounds of BESN and related initiatives concerned with vulnerable consumers and the energy market. The evaluation was also able to take advantage of the fact that it began at a point when BESN was still being delivered, which meant it was possible to attend BESN workshops and other BESN-related events to observe delivery. The timing of the evaluation also allowed for preliminary findings to feed into planning of the second round of BESN.

This report pulls together all of the analysis undertaken by the research team over the course of the evaluation to address the aims outlined above and the research questions guiding the evaluation (see Appendix 1 for a full list of research questions).

Detailed below are some key terms which appear throughout this report. The terms outlined below are used to describe the different changes and effects associated with BESN as identified through the evaluation.

**Table 3: definitions of key terms**

<b>Term</b>	<b>Definition</b>	<b>Key question</b>
Outputs	Products, events and services resulting from the project's activities (i.e. training, workshops, appointments).	What has BESN produced?
Outcomes	Changes, benefits, learning or other effects resulting from BESN (positive or negative, intended or unintended).	What has changed as a result of BESN?
Impact	Broader, longer term effects of BESN's outputs, outcomes and activities on people, organisations or the external physical, economic, political or social environment (i.e. changed ways of working, policy changes, and contribution to mitigation of climate change).	What has changed or is likely to change as a result of the aggregation of outcomes across individual projects?
Effectiveness	The extent to which BESN has achieved what it was designed to achieve using the intended processes and procedures measured by examining changes in outcomes.	Has BESN achieved what it set out to do in the way it intended to do it?
Efficiency	The extent to which the resources available through BESN have been used efficiently to maximise the desired outcomes.	Have the resources available to deliver BESN been used efficiently to produce desired results?
Cost-effectiveness	An estimation of the output level achieved by BESN using the inputs available.	Does the BESN model make the most effective use of the resources available?

Counterfactual	Effectiveness can be established by considering the change in outcomes that have occurred over and above what might have happened in the absence of BESN.	What would have happened in the absence of BESN?
Additionality	Considering the counterfactual, what has BESN achieved over and above what would have happened anyway.	What extra has BESN achieved?

The relationships and distinctions between these terms are also key in understanding the Theory of Change (ToC) approach that underpins this evaluation. This approach is explained in Chapter 2 below.

#### 1.4. Structure of the report

Chapter 2 offers a short account of the research design and methodology, including commentary on the robustness of the various data sources that this report draws upon. It also elucidates the theory-based approach that underpins the evaluation. The key findings to emerge from the evaluation are then detailed in Chapters 3 to 6. Each chapter focuses on a key element of the BESN model as set out in the Theory of Change (see Figure 2):

- Chapter 3: Key findings
- Chapter 4: Setting up BESN;
- Chapter 5: Training champions, volunteers and frontline workers;
- Chapter 6: Delivering BESN;
- Chapter 7: Outcomes for participants and those delivering BESN;
- Chapter 8: Impacts associated with BESN.

The report has been structured in this way to help the reader appreciate how the stages of the model are designed to build upon each other to generate positive outcomes for participants, champions, frontline workers and volunteers. Arranging the findings in this way will also highlight any weaknesses in the BESN model or external factors that may have disrupted it.

Each chapter begins with a summary outlining how the delivery of BESN was intended to proceed (assumptions), how it proceeded in practice (implementation) and key findings relating to that stage of the process. The remainder of the chapter presents the detailed evidence substantiating these headline findings.

## 2. Research approach

### 2.1. Theory-based evaluation

The evaluation takes a theory-based approach. That is, the approach is underpinned by the development of a theory or set of assumptions regarding how the project works to achieve its aims. This is then tested against the research findings. In this evaluation, a Theory of Change (ToC) approach has been used. The purpose of which is to set out and test whether the initiative was delivered as intended and explore how the components of BESN contribute to or hamper the efficiency, effectiveness and impact of the initiative overall.

The starting point for the development of a ToC model is to understand the overall set of assumptions behind the project. In other words, what was BESN intended to change and what outcomes and impacts was it designed to achieve? The fieldwork then sets out to test the veracity of the ToC and whether the assumptions behind BESN were borne out in reality. The research activities built an understanding of how BESN operated in practice, establishing what activities have been undertaken, with what specific aims and what outputs, outcomes and impacts have flowed from each type of activity.

A key focus for the evaluation and a key function of the ToC was to test the assumptions at each stage in the BESN model (set up, training, delivery) and its overall effectiveness (outcomes, impacts). DECC were also keen to identify any weaknesses in the model or external factors impacting upon it that might undermine or dilute the outcomes experienced by participants.

The BESN model used two distinct modes of delivery: engaging vulnerable consumers through workshops and also through frontline workers who encounter them in their daily work. Another key function of the evaluation was to compare and contrast these delivery methods to establish if and how they differ in terms of efficiency, effectiveness and outcomes.

The ToC developed for BESN is illustrated in Figure 2, below. The diagram represents BESN as it was designed to operate and is organised around the key stages of the BESN process (set up, training, delivery, outcomes, and impacts). It depicts:

- The 'inputs' which made BESN possible (consultation conducted by DECC to inform the design of BESN, financial resources and the funding of VCS organisations).
- The training process whereby the expertise and knowledge held by NEA was passed on to champions who then cascaded this down to volunteers and frontline workers.
- The two modes of delivery through workshops and frontline workers leading, ultimately, to a range of positive outcomes for participants, champions, volunteers and frontline workers.
- The potential challenges (including risks and external factors) that might threaten the model and expected outcomes.

Discussion of how the ToC has matched up to the reality of delivering BESN in practice is referred to throughout Chapters 4-6, which are structured around the main components of the ToC model.



## 2.2. Summary of methods

The evaluation employed a mixed-methods approach which involved:

- Analysis of monitoring data relating to programme implementation collected by DECC from funded organisations.
- Quantitative surveys:
  - Online surveys of champions, volunteers and frontline workers.
  - Telephone survey of workshop participants.
- Qualitative interviews:
  - Qualitative face-to-face interviews with key DECC officials responsible for the design, delivery and management of BESN, plus a focus group with all members of the multi-agency steering group guiding the initiative.
  - In-depth face-to-face qualitative interviews with champions, frontline workers, workshop participants and clients of frontline workers.

More detail on each of these methods is provided in the proceeding sections, and then in greater depth in Appendix 2 within the technical annex. A mixed-method approach allows for both the collection of headline quantitative findings across a relatively large sample of participants, alongside qualitative insights as to 'how', 'why' and in what context, outcomes were achieved.

## 2.3. Analysis of monitoring data

During the course of BESN, funded organisations returned monitoring data to the Network Manager monthly, including information on: the profile of participants supported through BESN workshops (age, disabilities, means tested benefits, household composition, access to gas, access to internet, switching history, heating methods, energy payment methods, etc.); type of advice issued (one-to-one or group or both and broad topic of advice); outcomes of advice (switching, ECO referrals etc); training of frontline workers undertaken by champions and volunteers (number and types of frontline workers trained) and champions' own experiences of the training they received from NEA (extent to which knowledge on switching, ECO and energy efficiency increased following training).

This dataset provided monitoring data for a sample of frontline workers and workshop participants rather than for the full population: 2,625 workshop participants (of an estimated 16,000 reached) and 1,780 frontline workers (of an estimated 5,561). The data captured around 75 delivery organisations out of the total 94 that were funded by DECC.<sup>19</sup> Because the data does not capture the full workshop population, there is scope for a degree of 'error' in the data, although this is relatively small for a dataset of this size: a confidence interval of 1.8 percentage points (at 95 per cent confidence). Furthermore, given that the data was self-completed and returns were not mandatory, it is possible that there could be inherent differences between those that completed the monitoring data and those that did not (for example in terms of level of engagement, or whether it was a positive or negative experience). Whilst it is not possible to draw conclusions on this using the existing evidence, it is worth noting this caveat when considering the subsequent analysis.

However, noting the drawbacks, this remains an extensive dataset which enabled the evaluation team to gain early insights as to who BESN had reached, some of the outcomes

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<sup>19</sup> The monitoring data was manually entered to a spreadsheet and was not always consistent with the names and descriptions of organisations. After cleaning 75 unique organisations were identified within the data.

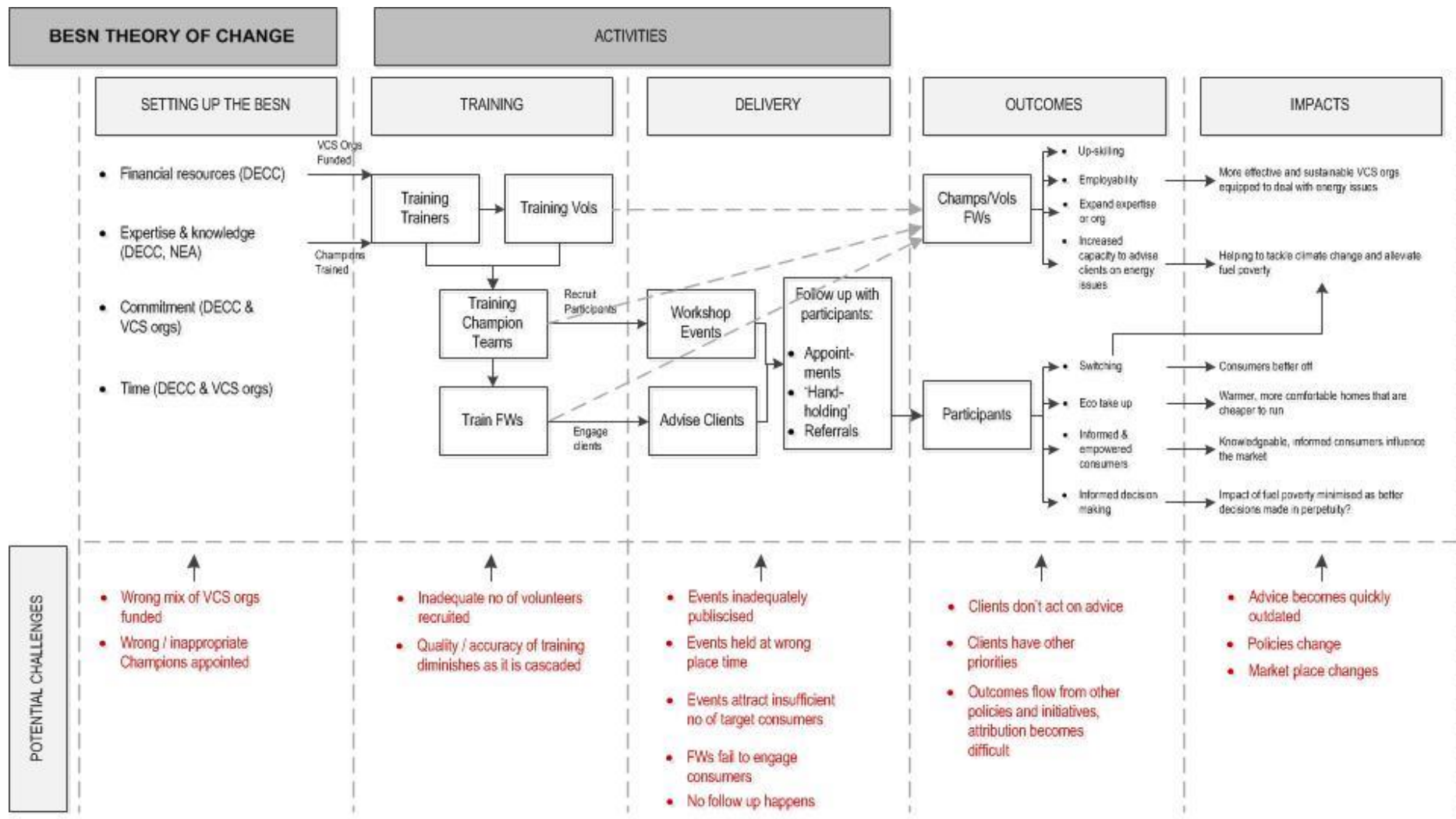
secured for participants immediately following receipt of advice and the reach and effectiveness of the cascading training model. It did not, however, provide detail regarding the full range of potential outcomes from the project. Findings from the analysis of monitoring data will be incorporated into the analysis set out in the main findings section of this report (Chapters 3-6) as part of an approach which seeks to 'layer up' all of the data gathered, both qualitative and quantitative, to offer detailed, comprehensive and rounded insights into key research questions.

## 2.4. Quantitative Surveys

The evaluation team carried out three surveys of (respectively) consumers reached through champions (and volunteers); champions and volunteers; and frontline workers. Contact data for consumers reached through frontline workers was not available for the evaluation and as a result, the evaluation could not survey this group. This makes it harder to compare overall outcomes between consumers reached by champions (and volunteers) and those reached by frontline workers. However, qualitative interviews were carried out across both groups, which allows for some points of comparison relating to 'outcomes in context': that is how, why and in what circumstances outcomes were achieved.

The sample group and response rate varied across the three surveys. This is discussed in greater detail in Appendix 2. It is worth noting here, however, that the variation in response rates means that differing degrees of caution need to be applied in interpreting the results. Table 4 outlines the different survey responses, populations (numbers of people within that group) and the confidence with which the findings can be generalised across the whole population of participants. The samples were based on those who provided follow up contact information, either within monitoring data or as part of the BESN registration process, however within the dataset it is not possible to account for any differences between the sample and the wider population. However, the strength of a mixed methods approach is that a comprehensive picture can be developed through pulling different strands of data together. Triangulation of this data with qualitative insights and the monitoring data therefore mitigates the weakness of the volunteer survey dataset alone.

Figure 2: A Theory of Change for BESN



**Table 4: survey responses and confidence intervals**

Survey group	Population	Sample	Responses	Response Rate	Confidence Interval <sup>20</sup>	Generalisable?
Consumers (via workshops)	c.16,000	2,625 <sup>21</sup>	400	58% <sup>22</sup>	4.8 ppts	High confidence
Frontline workers	5,561	1,341 <sup>23</sup>	281	21%	5.7 ppts	Medium/high confidence
Champions and Volunteers	450	n/a	104 <sup>24</sup>	n/a	8.5 ppts	Medium confidence
Champions only	c.150	124	66	53%	6.3 ppts	Medium/high confidence
Volunteers only	c.300	n/a <sup>25</sup>	34	n/a	15.8 ppts	Low confidence

As with all non-compulsory surveys there is some risk of 'response bias'. This risk is manifest in two main ways for these surveys. The first of these relates to the consumer survey. When conducting the survey, an initial screening question was asked to determine whether consumers recalled taking part in workshops or receiving advice through BESN. All those that did not recall taking part were then excluded from taking part in the survey. Just over one third (239 out of 692) of those contacted for the telephone survey fell into this

<sup>20</sup> Confidence intervals express the likely 'margin of error' within a response to a particular question. For instance, 400 valid responses to the customer survey gives a confidence interval of 4.8 percentage points (ppts) at the 95 per cent confidence level (that is, if 50 per cent of respondents select a particular response to a question, we can be 95 per cent confident that the 'true' value across all area is somewhere between 45.9 and 54.1 per cent). Generally speaking, fewer respondents results in a greater margin of 'error' in the data. It is also worth noting that confidence intervals change within a dataset depending on the proportion of respondents that select a particular response. 50 per cent is the point at which, statistically, the highest confidence interval is recorded. By way of comparison, if 90 per cent or 10 per cent of respondents in the same dataset selected a particular response, the confidence interval would be 2.9 ppts

<sup>21</sup> The sample consists of workshops participants who returned the monitoring data and consented to be contacted for follow up research

<sup>22</sup> This is based on the number of people contacted by the survey company in order to achieve 400 responses (692).

<sup>23</sup> The sample consists of those frontline workers who had provided contact information within the monitoring data

<sup>24</sup> This number is greater than for the sum of those that responded as either champions or volunteers because a small number of respondents did not indicate the nature of their involvement with BESN

<sup>25</sup> There was no sample for volunteers as this group were not captured in the monitoring data. Instead, champions were asked to forward on the survey to volunteers that they worked with.

category. It is therefore possible that the findings from the consumer survey offer an over-estimation of outcomes across the whole population.

The second risk relates to the online surveys and ‘self-selection bias’. In this instance, the risk is that those who responded to the survey are likely to have been more engaged with BESN than those who did not. This need not necessarily mean that the findings regarding perceptions are more positive or negative than they would be across the whole population, but it could suggest that estimations of numbers engaged and outcomes achieved via those delivering BESN might be higher than for across the whole population.

A final point to note on the data is that the majority of outcomes outlined in the findings sections relate to self-reported outcomes rather than observed outcomes: that is, they are based on what respondents told us they did. Self-reporting carries with it some degree of inaccuracy owing to the fallible nature of human memories and – in some cases – a desire among respondents to ‘please’ researchers by over-reporting outcomes.

In the analysis of the survey results the report sometimes refers to ‘significant’ differences or change. This has a precise statistical meaning. Statistically significant change or difference means that it is only in these instances that it can be said there is sufficient evidence to indicate that the difference between two variables (for instance knowledge of ECO before and after training) is not a ‘chance’ occurrence. Where statistical difference cannot be determined this means that there is not enough evidence to establish whether a difference is as a result of BESN – or elements thereof – or is a ‘chance’ appearance attributable to other external factors. In this report we use a 95 per cent level of significance as the threshold for a ‘significant’ finding. This means that the finding has a 95 per cent chance of being true.

## 2.5. Qualitative interviews

In-depth qualitative interviews were conducted with stakeholders, champions, volunteers, frontline workers and consumers. As noted above these interviews were designed to generate in-depth understanding of ‘outcomes in context’. 131 interviews were conducted in total, giving a rich dataset to draw upon. Table 6, below summarises the numbers of interviews completed across each group.

**Table 5: Numbers of interviews completed across target groups**

Target group	Number of interviews
Stakeholders (steering group members & key DECC staff)	14
Champions	20
Volunteers	12
Frontline workers	20
Consumers reached through champions and volunteers	40
Consumers reached through volunteers	25

In order to capture the ‘cascade’ of engagement involved in the BESN model, where possible interviews were organised in linked sets of champions, volunteers, frontline workers and participants. This was possible in 12 cases.

For further detail on the methods used, and robustness of data please refer to Appendix 2. To view the online and telephone surveys see Appendix 3 and the topic guides used during interviews can be found in Appendix 4.

### 3. Key Findings

The target numbers for those reached through the programme are detailed below alongside the estimated numbers actually reached through the programme. These figures are derived from monitoring data provided to DECC on a monthly basis by champions and frontline workers on numbers attending events. According to these returns, BESN met targets on engaging consumers, which is the key consideration in terms of understanding the success of the project in achieving outputs. The initiative fell slightly short on enrolling champions and frontline workers, but this did not seem to impede the overall numbers of consumers reached.

**Table 6: achievement against targets for training and engagement<sup>26</sup>**

Group	Target	Estimated numbers reached
Champions	150	147
Volunteers	320	441
Frontline workers	6,400	5,500
Consumers via champions and volunteers	15,000	16,000
Consumers via frontline workers	60-90,000	78,000 <sup>27</sup>

The evaluation found that the following key outcomes were achieved as a result of support delivered by champions and volunteers:

- Over half (54 per cent) of participants took some form of action relating to energy markets or energy efficiency after taking part in BESN.
- Nearly a third of participants (29 per cent) contacted their energy supplier about their tariff, switched supplier, or applied for an ECO assessment following BESN.
- Eight per cent switched on the day they attended a workshop and around 11 per cent switched in total.
- Around half of participants (51 per cent) reported that they now spend less on heating their home as a result of BESN.
- Seventy per cent of participants felt less stressed, happier or more satisfied with life as a result of taking part in BESN.

Participating organisations also benefitted from BESN, including in the following ways:

- improved skills and knowledge of staff regarding energy issues (84 per cent);
- being able to help new clients (75 per cent);
- being able to provide a better service to clients (73 per cent).

<sup>26</sup> Figures provided by DECC based on monthly returns from grant organisations. Note these estimations are based on self-reported data.

<sup>27</sup> DECC arrived at this estimate by applying the median number of customers that frontline workers who completed the survey reported having engaged to the full population of frontline workers involved in the programme. See Research Approach (Section 2) and Appendix 2 for a discussion of the robustness of this data.

### 3.1. Factors determining the success of BESN

The evaluation identified a number of factors associated with the design and delivery of BESN to which the overall success of the initiative can be attributed.

- BESN was carefully designed in consultation with experts in the engagement of vulnerable consumers.
- A wide range of organisations with the experience and opportunities to engage the most vulnerable consumers were appointed to deliver BESN.
- High quality, effective training was provided to champions by NEA, equipping them with the knowledge and confidence to deliver BESN and cascade their expertise downwards to volunteers and frontline workers.
- The recruitment of volunteers and frontline workers from within champions' own and partner organisations enabled expedient delivery and avoided recruitment problems.
- The two delivery routes had different yet complementary strengths: workshops reached a broader range of vulnerable consumers but frontline workers were better placed to reach the most vulnerable.
- One-to-one support was provided to participants wherever possible: frontline workers had better opportunities to do this than those running workshops.
- Delivery of BESN was incorporated into broader agendas around financial inclusion and quality of life recognising that energy alone is not sufficient to engage consumers.
- Champions, volunteers and frontline workers were trusted by participants and this was reinforced by their knowledge and professionalism.

### 3.2. Learning points

The evaluation also identified a number of learning points to inform the development of future rounds of the initiative, as summarised below:

**Table 7: Key learning points**

<b>Training</b>
Some volunteers reported not receiving adequate training from champions, possibly diluting their potential as key advocates of BESN within the community. Evidence suggests these groups would have benefited from greater flexibility in the timetable.
A number of champions felt that ECO should have received greater coverage in their training given their perception that it was a complex initiative to understand and explain.
It was felt by some champions that any possible legal issues associated with supporting consumers to switch energy provider were not adequately covered during the training.
<b>Delivery</b>
Champions felt that opportunities for the provision of one-to-one support should be maximised, particularly for the most vulnerable. Workshops dedicated solely to BESN were poorly attended and their open, public format made it difficult to target particular groups of vulnerable consumers.
Little is known about the characteristics of participants engaged through frontline workers and the outcomes they experienced.
Certain groups of vulnerable consumers were less well represented (e.g. those with chronic illnesses, those not paying for energy by direct debit, etc.)

There was great variation in terms of funded organisations' abilities to engage participants. The large numbers were achieved as a result of the efforts of a relatively small number of funded organisations, reflecting the variable capacities and strengths of funded organisations.

BESN was delivered under tight timescales and champions lamented a lack of 'lead-in' time. The network could have been broadened if champions had more time to recruit volunteers and frontline workers outside of their own organisations.

### **Outcomes**

The percentage of participants switching provider on the day that they received advice through BESN was relatively low.

The changes in attitudes and behaviour amongst BESN participants will only be sustained for as long as their knowledge remains current.



## 4. Setting up BESN

### Assumptions for delivery

- DECC work in consultation with key partners to input into the design of an initiative that empowers and supports the most vulnerable consumers to make informed decisions on how to reduce their energy spend and usage.
- DECC invest £900,000 in BESN, with grant funding allocated through a competitive process to appropriate VCS organisations to deliver the initiative.
- The required number and range of relevant VCS organisations are appointed to deliver BESN with champions in place ready to receive training from NEA.

### Implementation

Setting up the initiative proceeded as intended: the allocation of funding was carefully considered by DECC who successfully appointed a range of organisations that reflected the diverse characteristics of vulnerable consumers and which had the experience and opportunities to engage them. 150 champions were appointed across 94 VCS organisations: a typology of which can be found in 4.1 below.

### Key findings

- Detailed consultation with key partners on the design of BESN yielded an initiative for which partners felt there was great need.
- Appropriate organisations and champions were selected from a large number of applications.

#### 4.1. Selecting organisations to deliver BESN

Setting up the network principally involved assessing applications for funding received from VCS organisations and allocating funding to an appropriate range and mix of organisations. The champions, who would lead on delivery within that organisation were already nominated in the application for funding and an assessment of their suitability was made as part of the overall assessment of the application. DECC looked particularly for organisations with experience of engaging with vulnerable groups and with the opportunities to engage with them. They were less concerned about energy-related expertise as training would be provided to funded organisations through NEA.

The BESN was allocated a budget of £900,000, the majority of which was used to fund 94 VCS organisations who appointed a total of 150 champions (three of whom withdrew at various points, leaving 147). The 94 funded organisations comprised a balanced mix of organisation types including:

- advice organisations (part of large national networks such as Citizens Advice Bureau and local advice organisations);
- charities (local and national);
- social housing providers;

- Community Interest Companies (CICs);
- Community Development Trusts (CDTs);
- Rural Community Councils (RCCs).

Appointing the right mix of organisations with the experience and opportunities to deliver BESN effectively is, as identified by the ToC, critical to the success of the initiative and helps avoid a skewed focus on certain groups of vulnerable consumers, missed opportunities to reach a broader range of vulnerable consumers and frontline workers and to secure the best possible outcomes for participants.

DECC were deliberate in selecting a mix of organisations that reflected the heterogeneous nature of vulnerable consumers, recognising that different organisations have different opportunities in terms of the types of vulnerable consumer they are best placed to engage with. Moreover, distributing the funding over a broad range of organisations generates opportunities to learn, notably through this evaluation, which organisations and organisation types are most effective at engaging different types of vulnerable consumers in BESN and securing the best possible outcomes for them.

Chapter 5 provides insights into which types of organisations reached which types of vulnerable consumers.

DECC stakeholders expressed surprise at the number and range of applications for funding received and regarded this as an indication of the level of need and demand that existed for support with energy issues amongst vulnerable consumers. Champions supported this belief, consistently suggesting that energy costs, in particular, were a primary concern for the groups they worked with. As such, many champions welcomed the launch of BESN, hoping that it would help mitigate the impact of rising energy costs, particularly on the most vulnerable in society.

*There was a real need for energy advice in the area, people felt that energy costs were a concern to them and I think that underpinned our needs analysis...There's a high density of vulnerable people in this area that would benefit from this type of energy saving advice. (Champion, CDT)*

## 4.2. Motivations for getting involved

Analysis of responses to the online survey of champions revealed their main motivations for taking part which related to:

- supporting vulnerable people to reduce energy bills and save money;
- helping reduce fuel poverty;
- improving champions' knowledge regarding energy issues.

Just five of the 103 champions and volunteers that responded to the survey made a direct reference to empowering consumers and no respondents made reference to ECO. The survey results therefore suggest that a majority of champions were predominantly motivated by the prospect of helping their clients to save money and the related issue of fuel poverty reduction, whilst saving energy emerges as a background concern. In essence, BESN tended to be viewed as one component of a broader effort to reduce the impact of low and reducing incomes on vulnerable households.

*I've written a training course and incorporated some of the energy efficiency stuff from BESN into that, and it's how to tackle the effects of welfare reform in a practical sense, how can people on reducing incomes make their money go further, so it's through that interest that I was more than happy to do this project. It's one small thing and part of a greater issue, the*

*amount you're going to save on reducing your fuel bills is probably not going to be a vast amount but every little helps, it's a bit more food on the table for a lot of people. (Champion, CIC)*

Although many had 'dabbled' in it, very few champions had a specific remit around energy and were far more likely to have a debt advice/financial inclusion role and background or to hold roles which focused more broadly on all issues affecting particular groups (i.e. older people or rural communities). A number also held training roles within their organisations and BESN was perceived to be a logical fit with broader efforts to 'up-skill' staff. An exception to this trend were housing providers, many of which have well-developed energy related programmes aimed at reducing tenants' energy use and bills and employ staff to lead this work (all survey respondents working for housing providers had previous experience of providing energy advice). This did not hamper delivery as the design of the BESN model invested considerable resources in providing training to champions.

The effectiveness of the training in equipping champions with the specialist knowledge they needed to deliver BESN is considered in the next section.

## 5. Training

### Assumptions for delivery

- NEA train champions on switching, ECO, energy efficiency and delivering energy advice to vulnerable consumers.
- Following the training, champions are equipped with the skills, knowledge and resources to cascade their training to volunteers and then to frontline workers.
- Quality of training doesn't diminish significantly as its cascaded and volunteers and frontline workers.
- At the end of this process, champions, volunteers and frontline workers will be in possession of the requisite knowledge, skills and understanding to deliver advice to consumers.
- An adequate number of volunteers and frontline workers are recruited.

### Implementation

The initial training provided by NEA was effective, of a high quality, addressed a genuine knowledge gap and equipped champions with the knowledge and confidence they needed to deliver BESN. The cascade model was also implemented effectively and ensured that frontline workers were equipped with the knowledge and confidence they needed to deliver advice to consumers. However, half of the volunteers interviewed felt that the training they received by champions was rushed and they struggled to digest it. This was attributed by champions to the tight timescales for delivering BESN. This does not, however, appear to have impacted to any discernable extent on outcomes for participants or the quality of advice they received, as champions tended to lead on the delivery of advice.

Over 90 per cent of champions chose to streamline recruitment by selecting volunteers (94 per cent) and frontline workers (91 per cent) from within their own or partner organisations, or by using existing contacts.

## Key findings

- Key to the success of the cascading training model was the high quality training provided by NEA at the outset which champions them with the detailed knowledge and confidence they needed to deliver BESN
- Champions circumvented difficulties recruiting volunteers and frontline workers by recruiting from within their own and partner organisations.
- The tight timescales for delivering BESN undermined volunteers' experience of the training in some cases and champions acknowledged the rush to train them.
- The reportedly limited coverage of ECO in the initial training, combined with its complexity and cynicism about it amongst some champions had 'knock-on effects': ECO was not afforded equal prominence to switching in workshops. This may explain, in part, the relatively low numbers of ECO referrals completed (five per cent). The eligibility criteria for ECO are also likely to be a factor in this.
- Training reportedly gave little coverage to any possible legal issues that may arise when helping participants to switch. This led some funded organisations to offer only 'light touch' support on switching - a deviation from the more intensive support envisaged.

### 5.1. Overall effectiveness of the training received by champions

Analysis of project monitoring data relating to champions' experiences of the training they received from NEA gave firm indications that the training was effective, of a high quality and addressed a genuine knowledge gap. The data revealed:

- a significant uplift in the knowledge required to deliver BESN (through delivering training and staging events) following the training (27 per cent rated their knowledge as very good or good before and 92 per cent did so afterwards).
- that the training was considered to be high quality: 93 per cent rated the content and 95 per cent the style as very good or good. 97 per cent would recommend the training to others.

Results from the online survey of champions closely reflected findings from the monitoring data, clearly demonstrating that the training was accessible, had met participants' objectives and expectations and had added to their knowledge:

- 80 per cent of respondents agreed that the training had met their objectives;
- 76 per cent said the training had met their expectations;
- 89 per cent found the training easy to understand;
- 78 per cent learnt things from the training that they didn't previously know.

Critically, as Table 8 details, the survey results attested that the training had equipped champions with the knowledge, understanding and confidence they needed to deliver BESN. The most significant impacts of the training were around having the confidence and understanding to help clients with switching. Understanding of ECO and confidence in delivering ECO advice prior to the training was lower than for other variables, and the level of uplift from the training was also lower. Lower levels of understanding and confidence regarding ECO amongst champions both before and after training may have contributed to the relatively low numbers of ECO referrals completed by participants. This issue is explored further in Chapters 5-6.

**Table 8: Levels of understanding and confidence amongst Champions before and after training**

Indicator	Before training	After training	% increase
Understanding of the purpose of BESN	75%	94%	19%
Good understanding of how to help clients switch	73%	96%	23%
Confident advising on switching	65%	95%	30%
Good understanding of how to help clients access ECO	59%	77%	18%
Confidence giving advice on ECO	57%	69%	12%

Base: 63 - 64 respondents of a total population of approximately 150 champions

For a comparison of increases in understanding and confidence between champions and frontline workers, see Section 5.3.4 below.

Overall, the value of the training is underlined by the fact that, without it, the majority (66 per cent) of champions would not have been able to deliver the same level of support to BESN participants and would instead have embarked on the endeavour with fragmented knowledge that was not up to date. The online survey of champions found that:

- 34 per cent stated that they could not have been able to deliver the same support without the BESN training (the same number felt they could);
- 32 per cent felt they could have delivered some of the same support without it.

## 5.2. Learning points: training champions

Despite these positive perceptions, the in-depth interviews revealed a number of learning points in relation to the training that should be borne in mind in the development of future programmes. Issues identified include: the information packs provided to champions being too prescriptive; insufficient attention given to ECO (given the complex nature of the initiative); and little discussion of any legal aspects of offering switching advice.

The packs of pre-prepared presentations and accompanying hand-outs were widely praised by champions for helping to ensure that the training was cascaded in a consistent manner and for saving preparation time. However, these remarks were frequently qualified by the view that the packs represented a 'one size fits all' approach that wouldn't work for all of the groups they were expected to cascade the training to. Consequently, many champions spent time editing the content ahead of training sessions. It is hard to see how this approach could be altered given the diversity of groups the training was to be rolled out to and the imperative to maintain consistency of training throughout the cascade model. As such, a degree of tailoring of the material by champions seems unavoidable.

It is clear that NEA faced a distinct challenge in terms of striking a balance between ensuring that the training was delivered consistently without omitting any detail and accommodating the variable levels of prior experience and knowledge amongst champions. However, almost all participants learnt something that they didn't previously know through the training and it dispelled some myths and improved the accuracy of knowledge amongst those who had good levels of prior knowledge. In essence, the current training format ensured that regardless of knowledge levels at the outset, all champions left the session with more detailed and up to date information to support them in the task ahead.

Another concern raised by a number of champions related to a perception that ECO was not afforded sufficient coverage in the training, particularly for such a complex initiative. Although understanding of how to help clients access ECO increased by 16 per cent following training, at 69 per cent, post-training levels of understanding were significantly lower than for other indicators suggesting that the training had been less effective in this regard. In addition, of those who provided a negative response to questions regarding the quality of training, the most common responses related to ECO. 9 out of 20 said that they had received insufficient information regarding the ECO referral processes and 7 out of 20 said that they had received insufficient information regarding eligibility criteria for ECO. Comments were also made in relation to this issue during interviews with champions.

*It was strange cos the feedback forms had a whole page on ECO but we didn't go over hardly any ECO. (Champion, housing provider)*

The 'knock-on effects' of this can be seen throughout subsequent stages of the programme, in so far as, due to both this lack of understanding amongst some champions and cynicism about the initiative amongst some others, ECO was not afforded equal prominence to switching in advice sessions. The qualitative evidence suggested there was a lack of understanding of a number of aspects of ECO amongst champions, including: eligibility criteria and variations in regional availability of the scheme.

*It was on the presentations and we talked about it a bit but as a social housing resident you're not eligible for this but if you've got family or friends who are in private housing... but it wasn't something that we... we mentioned it but we didn't go into it in any detail. It's difficult for me to understand never mind if you're an 80 year old pensioner. (Champion, housing provider)*

Scepticism, expressed by some champions, seemed to relate to concerns about the potential costs for participants associated with taking up ECO. Three champions shared anecdotes regarding bad publicity that energy efficiency initiatives had received in their local area.

*I know in the days before the workshop there was a lot of bad publicity locally. There was about six men on the news last night saying they'd paid for boilers and they've never been installed. It just didn't feel like something we wanted to be recommending to our clients, something that might cost them money and that might not happen anyway, so we tended to give it a low profile. (Champion, advice agency)*

It is possible that ultimately this contributed to comparatively low numbers of ECO referrals being completed (five per cent of participants completed a referral). However, the limited eligibility criteria for ECO, which excludes social housing tenants<sup>28</sup>, for example, is also likely to be a factor here. This issue is explored in more detail in Chapter 6.

Thirdly, a number of respondents expressed concern that the training did not offer enough information and assurance regarding the legalities associated with working through the switching process with clients or workshop participants. Although discussion of this issue was included in the syllabus delivered by NEA, coverage does not appear to have been sufficient to allay the concerns of two large advice agencies and one smaller organisation funded through BESN. These organisations had reportedly advised champions (3 of whom were interviewed) to refrain from recommending specific energy deals to clients and to avoid getting too involved in the process of switching for fear of legal reprisals. Champions following these instructions were not clear on what the specific legal implications might be

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<sup>28</sup> The Carbon Emission Reduction Obligation and Carbon Saving Community Obligation elements of ECO do permit insulation measures in social housing but this would generally involve housing providers engaging directly with energy companies rather than through a single customer referral.

but decided to apply caution and considered completing a switch for a vulnerable client to be 'dubious'.

*One of my big problems was where the boundaries lie between getting clients to actually switch and we discussed at [advice agency] what we weren't prepared to do. We agreed we would go through all the comparisons and things like that but then signposted them elsewhere if they needed help to actually go through the switching process. (Champion, advice agency)*

*We didn't actually get to the point where we could physically [switch them] cos we thought that was a bit dubious. (Champion, RCC)*

The BESN model intended that champions, volunteers and frontline workers would, if necessary and desirable to the participant, work through the switching process with them. The decision not to offer this level of support therefore presents a deviation from the intended model of delivery. As a result, participants supported by these organisations will have received 'lighter touch' support with switching which may have affected outcomes for some, particularly the most vulnerable who are likely to require more intensive support.

Although this issue was only cited by four respondents (from three organisations), two of these organisations were large and had received multiple grants through BESN. This issue can be relatively easily resolved by adding more detailed content to training in future.

No other champions raised this issue, suggesting that it was not a widespread concern. Moreover, many of those interviewed recounted supporting participants with switching and expressed no concern about potential legal issues. This may suggest that those organisations for whom this was a concern may be particularly risk averse, perhaps owing to the fact that, certainly in the case of the two large organisations identifying this as an issue, they work with some of the most vulnerable groups in society.

### **5.3. Passing training on to volunteers and frontline workers**

Once trained, champions were expected to pass their knowledge on to volunteers who would then assist them in training frontline workers. This section explores how effectively this cascading process was carried out.

Following the completion of their own training, champions felt ready and prepared to pass their training on to frontline workers: 98 per cent felt confident training frontline workers on switching and 86 per cent felt they had all of the information and training material they needed to pass the training on. A general sense of confidence also emerged from the in-depth interviews.

*I went to the initial training session and I probably learnt a lot, felt confident thereafter to go and communicate that certainly to the frontline workers and then to enlist the help of volunteers and partners to deliver the consumer sessions. (Champion, CDT)*

Slightly fewer (74 per cent) felt confident regarding training frontline workers on ECO.

#### **5.3.1 Challenges encountered in passing training on**

Champions repeatedly cited two key challenges encountered when training volunteers and frontline workers: training those with a greater knowledge than them and a reluctance to spare the time to participate in training amongst busy frontline workers.

In relation to the former, there were examples of instances where champions described not being prepared for or able to answer questions that weren't covered by the standard BESN material, particularly around saving energy in the home and some of the more technical aspects of this.



*I felt fairly confident [after the training]. When it came to working with the housing association they had a member of staff who knew more than us probably so it was handling that but I'm fine with it. I think I was a bit wary about the questions coming back but I'm a big believer of 'I don't know the answer and I'll try and find out'. But the majority of the information I was able to source from the information pack. (Champion, CIC)*

*We realised we had the knowledge to deliver the actual talks but when it came to the wider questions that people were asking, we felt a little unprepared. (Champion, RCC)*

BESN has a deliberately tight focus which prioritises empowerment and the promotion of switching and ECO. It is therefore to be expected that questions outside of these issues may arise during workshops and advice sessions. It may therefore be advantageous for champions to more clearly define the parameters of the advice session at the outset. However, these experiences did not appear to be pervasive and several of the champions that recounted them reported that a satisfactory response was to say that they would be back in touch with an answer.

A further difficulty cited concerned cut backs, particularly in public sector organisations, and the difficulties this caused in recruiting frontline workers. Despite high levels of interest in the training, increased workloads sometimes prevented engagement with BESN.

*We found all the groups are very stretched, housing associations, the local authorities, whilst they're really interested, because they've had to reduce staff so much cos of cut backs therefore they don't have the time to take on additional things. (Champion, charity)*

In essence, the problems of busy and pressured frontline workers struggling to find time for voluntary training exercises is unlikely to go away. However, longer lead-in times and perhaps greater efforts to highlight the potential long term benefits of participating to frontline workers and the organisations they work for may help.

### **5.3.2 Recruiting volunteers and frontline workers to train**

As a solution to problems of recruitment, a significant number of champions trained frontline workers within their own or partner organisations where they could exercise more leverage to ensure frontline workers attended their training sessions. 43 per cent of survey respondents reported using this method, with 71 per cent using existing links to partner organisations and networks. This was particularly the case amongst social housing providers and local charities. This approach may have been quite significant in helping champions to realise their targets for training frontline workers and also for creating a 'critical mass' of energy expertise across funded organisations.

Those who delivered training within their own organisation were more likely to find it easy or very easy to recruit: 56 per cent recruiting within their own organisation found it easy to recruit compared to 32 per cent of those that did not (a statistically significant finding at the 95 per cent level). Those recruiting externally, on the other hand, were more likely to experience difficulties. Recruiting from within their own organisation was clearly the favoured strategy for champions. Reflecting this, 30 of the 34 volunteers that responded to the survey were already involved in the funded organisation when they were asked to help deliver BESN. Experiences recounted by champions during interviews also supported this view.

*We advertised for volunteers but none came, certainly other organisations that delivered BESN found recruiting volunteers difficult unless they already had volunteers who could then slot into the new project. (Champion, local charity)*

Recruiting within their own organisation may have represented the most expedient option within relatively tight timescales and had a number of advantages including assuring the champion of the competence and prior experience of the volunteer. Exploiting existing

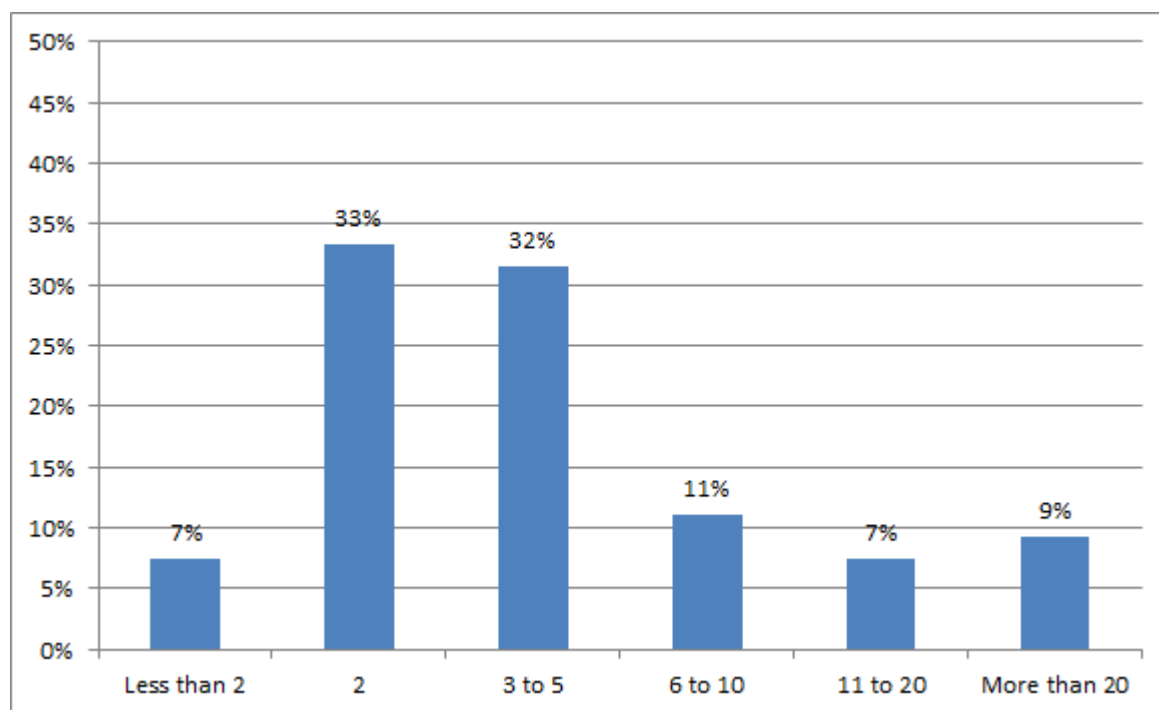
contacts was therefore a logical option favoured by many champions. This approach does not necessarily have any particular consequences for the BESN model as envisaged other than the possibility that it leads to the expertise created residing in a smaller number of organisations.

*I think the difficulty with the model is recruiting volunteers isn't guaranteed. You can advertise and get volunteers and you can advertise and wait months before volunteers come and that is problematic in the context of a short term project that has real targets. (Champion, advice agency)*

*We did it because we have a lot of contacts with organisations in this area both on the consumer side and on the frontline side, we already had lots of contacts that we could use to deliver the sessions. (Champion, local charity)*

Further reflecting champions' mixed experiences of recruitment, the number of volunteers trained varied hugely between them with two respondents reporting not training any volunteers, and one having trained 56. The range of responses is shown in Figure 3, below. The proposed model suggested that each champion should train around two volunteers and the median number of volunteers trained by each champion was three, demonstrating that, across the piece, this target was exceeded. These figures suggest that despite the task proving challenging for some, champions were successful at recruiting volunteers, exceeding (sometimes vastly) the target of training two. This success is likely to have been aided by champions recruiting within their own organisation or partner organisations.

**Figure 3: Numbers of volunteers trained by champions (reported)**



Base: 64 respondents of a total population of approximately 150 champions

### 5.3.3 Volunteers' experiences of the training received

Due to the difficulties of reaching volunteers to take part in the evaluation, it has not been possible to build a detailed or extensive picture of their experiences. However, the 12 in-depth interviews conducted with volunteers have provided insights into their experience of the training received from champions and their role in passing on training to frontline workers. Half of the volunteers interviewed felt that the training they received was rushed and struggled to digest the information they were given.

*Some of it was very complicated and quite hard for us to get our heads around, it could be mighty confusing and the language of some of the regulations and guidelines is not the most accessible. I didn't really feel prepared. (Volunteer, local charity)*

Champions attributed this to the tight timescales for the delivery of BESN.

*I think the other bit that was hard going was there was a lot to learn in the one day training, to then come away and think I've got to get on and train my volunteers and I'd probably booked them for their training session before I'd even been on the training myself. I gave myself very little time to digest it all and had to come back and go 'so we're going to do this now' and I know that you didn't get all the information that you needed but we just need to do it anyway. (Champion, advice agency)*

Despite this, volunteers were, in many cases, afforded a large amount of responsibility in the organisation of workshops, in particular. This does not appear to have impacted to any discernable extent on outcomes for participants or the quality of advice they received, as champions tended to take the lead in delivering advice to participants. It is, however, clear that the work of volunteers could have been made easier and more effective if more time had been allowed for their training prior to the commencement of delivery. Although, as the BESN model envisaged, volunteers would improve their knowledge by working closely with champions to deliver BESN; those who commented on this issue were explicit that they had not felt prepared to proceed to delivery following the training they had received.

#### **5.3.4 Frontline workers' experience of the training received**

A key test of the effectiveness of the cascade model is whether the training frontline workers received from champions was a) felt to be of a high standard and b) gave them what they needed to deliver accurate, high quality advice to clients. In both cases, the evidence suggests that the cascade model was effective in so far as the training received by frontline workers was felt to be of equal quality and accuracy to that received by champions. The evidence underpinning this view, and some of the exceptions to it, are explored below.

The online survey of frontline workers revealed insights into the baseline knowledge of frontline workers and their previous experience of energy advice:

- 24 per cent were general advice workers;
- 18 per cent were housing officers plus small numbers of debt workers, social workers and healthcare providers;
- less than 0.5 per cent of respondents occupied energy specific roles.

However, despite the prevalence of 'generalist' roles, energy advice was a part of the everyday role of 47 per cent of frontline workers that responded. This therefore suggests that levels of existing knowledge of energy issues were reasonable prior to undertaking the training. This further suggests that the frontline workers participating in the BESN training were experienced and well placed to deliver the initiative which brings the advantage that the BESN training would hone and build on existing knowledge and skills.

The survey of frontline workers revealed that the training was well received, increased their understanding of BESN, switching and ECO, and boosted their confidence to deliver advice on these issues to clients. Testimony to this, just four frontline workers, out of the 281 that completed the survey, felt that the training they had received had not met their objectives for taking part, with the majority (71 per cent) stating that the training had met their objectives in full. A series of 'before and after' questions built into the survey established that the training had achieved a considerable uplift in the knowledge and confidence of frontline workers, as illustrated by Table 9, below.

**Table 9: Understanding and confidence amongst frontline workers before and after training**

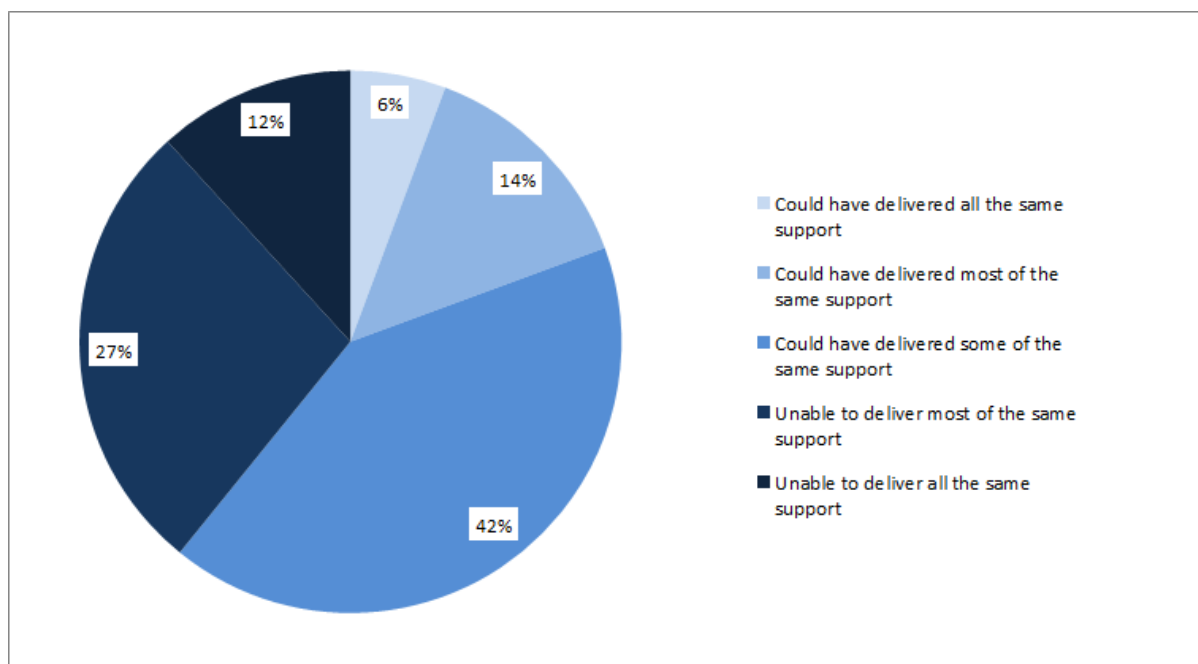
<b>Indicator</b>	<b>Before training</b>	<b>After training</b>	<b>% increase</b>
Understanding of the purpose of BESN	18%	82%	64%
Good understanding of how to help clients switch	31%	69%	38%
Confident advising on switching	37%	63%	26%
Good understanding of how to help clients access ECO	37%	63%	26%

Base: 225 – 229 respondents of a total population of approximately 5,500 frontline workers

Generally these findings depict lower levels of baseline knowledge than champions and greater uplifts in understanding and confidence following training in relation to understanding the purpose of BESN and how to help clients switch. However, reported confidence regarding advising clients on switching and understanding of how to help clients access ECO was lower at 63 per cent, suggesting that the training had been a little less successful in this regard. These findings suggest that the absence of detailed knowledge of ECO and reservations about it amongst champions translated into lower levels of understanding amongst frontline workers. However, other factors may also have been at work, for example: the availability of ECO by region or the pressure to tackle multiple issues in a single advice session (i.e. other issues such as switching may have been prioritised).

In terms of understanding the additionality of the training, 39 per cent of frontline workers stated that they could not have delivered the same support without the BESN training; 20 per cent felt they could and 42 per cent felt they could have delivered some of the same support without it. We therefore see that 81 per cent of frontline workers responding to the survey would not have been able to deliver the same support without the BESN training: a significant increase in their capacity. It is therefore highly likely that this increase in capacity has led to better outcomes for participants than would have been the case if training had not been provided as part of BESN.

**Figure 4: Extent to which champions felt they could have delivered the same support without BESN training**



Base: 64 respondents of a total population of approximately 150 champions

Remarks made in the qualitative interviews with frontline workers regarding the training they had received reinforced this positive experience. For some, the training acted as more of a 'refresher' or update of their existing knowledge but even amongst these more experienced respondents, there was a clear sense that the training had given them a more nuanced understanding of how to support their clients in relation to energy.

*I think he [champion] gave us a lot of information about different sorts of insulation grant, who to approach about what. We'd already had in general training, a certain amount of that, but it keeps changing and when I trained it was all something called Warmer Homes and then that initiative went so there was quite a lot which was more up to date which was useful. So it was pretty comprehensive. (Frontline worker, advice agency)*

*I already knew quite a lot cos I'd always switched myself and I like to empower people. But there were definitely things I didn't know like some of the nitty gritty I didn't know. (Frontline worker advice agency)*

## 6. Delivery

### Assumptions for delivery

- Champions, volunteers and frontline workers will provide advice to consumers about switching, ECO and energy saving.
- Champions and volunteers will engage groups of vulnerable consumers via a range of approaches and where appropriate follow-up with one-to-one support. Frontline workers will advise vulnerable clients that they encounter through their daily work. A minimum of 75,000 consumers will be reached through BESN.

### Implementation

- Both routes (Champions and frontline workers) succeeded in engaging large numbers of consumers and estimates suggest that overall, targets were exceeded; as anticipated frontline workers were able to engage with many more consumers (78,000 against a target of 60-90,000) than was possible through workshops (16,000 against a target of 15,000) .
- Workshops dedicated solely to BESN were generally poorly attended. As such, 75 per cent of champions opted to deliver BESN by 'piggybacking' on existing events.
- Champions for social housing providers and national charities were particularly effective in engaging the hardest to reach groups. Rural Community Councils were effective in engaging those 'off gas'.
- Workshops appeared to reach a broader range of vulnerable groups than frontline workers (although this can't be statistically verified due to the absence of data for frontline worker consumers). However, frontline workers generally felt better positioned to reach the most vulnerable, particularly those experienced in outreach and who have existing relationships with vulnerable clients.
- One-to-one advice was widely considered more effective than workshops alone in engaging vulnerable consumers and encouraging them to take action. Frontline workers had more opportunity to engage with clients on a one-to-one basis.
- The workshop format was felt to be poorly suited to: those who speak no or limited English, people with literacy, confidence or mobility problems or chronic illnesses.
- The approach taken to the delivery of the workshops and the level of trust placed in those delivering them was a key determinant the success of the event.
- ECO did not feature heavily in workshops or advice sessions with frontline workers.
- Some champions provided very 'light touch' support on switching fearing legal reprisals.

## Key findings

Both routes had their advantages and limitations as a method of engaging consumers:

Success factors	Limitations
<b>Workshops</b>	
Innovative and informal approaches responsive to participants' needs and concerns.	Challenge attracting consumers to engage with energy issues and specially convened workshops were generally under attended
Incorporation of BESN into broader agendas to promote financial inclusion.	Securing action difficult in a workshop setting.
'Piggybacking' on existing events helped ensure larger audiences, target specific groups and engender trust.	
<b>Frontline workers</b>	
Frontline workers were generally better positioned to provide intensive support to the most vulnerable, particularly those who work on an outreach basis and who have existing relationships with vulnerable clients.	Reportedly reaches a more limited range of groups due to incorporation of BESN into existing projects services and the focus on particular groups.
More opportunities for one-to-one support (this is how they tend to work anyway)	
Incorporation of BESN into a holistic advice service.	

The next section explores the effectiveness of the delivery phase of BESN, which the previous section suggests champions, frontline workers and to a lesser extent, volunteers were well equipped to proceed to as a result of the training received.

### 6.1. Delivering BESN through workshops

According to BESN monitoring data, over 16,000 consumers attended BESN workshops in total. If this number is divided equally between the 147 champions then this indicates that each champion reached 109 consumers (exceeding their target of 100), although in reality, the monitoring data indicates that the performance of champions was much more variable in this regard.

While data is not available in relation to the numbers engaged by individual champions, the monitoring data does show a great deal of variation between organisations. Of 75 organisations listed in the monitoring data, 17 provided data for 5 or fewer workshop participants, while at the other end of the spectrum, 17 organisations provided data for 50 or more participants. Four organisations returned details of 100 or more workshop attendees. The median number of participants per organisation was 24, although it is not possible to ascertain the number of champions involved per organisation from this data. Although the key target of reaching 15,000 participants through workshops was reached, variable performance between funded organisations suggests that some organisations made a greater contribution to the realisation of these targets.

### 6.1.1 Who did BESN workshops reach?

Results from the online survey suggest that cumulatively champions were successful in engaging a broad range of different types of vulnerable consumers through workshops, as highlighted in Figure 5, below. At least three-quarters of respondents reported successfully engaging participants in the following categories:

- in financial hardship (92 per cent);
- who struggle to pay their energy bills (89 per cent);
- on pre-payment meters (83 per cent);
- in poor physical health or disabled (73 per cent);
- families with young children (75 per cent);
- older people (84 per cent).

Around two-thirds of respondents had also been successful in reaching those with mental health issues (64 per cent), low levels of literacy (63 per cent) and those without access to the internet (69 per cent).

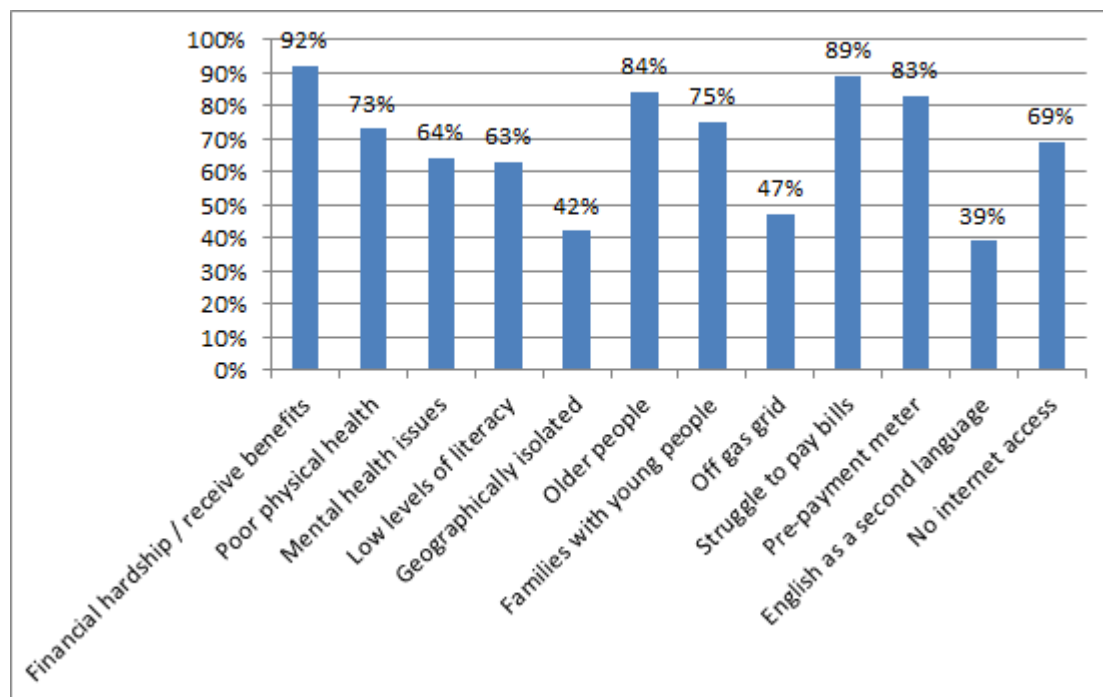
A smaller proportion of respondents (between 39 per cent and 47 per cent) had reached those:

- in remote areas;
- off the gas grid;
- with English as a second language.

This is perhaps unsurprising given that engaging with such groups tends to be achieved by more specialist organisations.



Figure 5: Range of groups reached by BESN workshops



Base: 64 respondents of a total population of approximately 150 champions

The monitoring data, which comprises data from a larger number of respondents than the online survey, provides more detailed insights into a) which types of vulnerable consumers were reached through BESN workshops and b) what types of organisations were successful in reaching which types of vulnerable consumers.

The table below presents our analysis of the monitoring data relating to the profile of BESN workshop participants and includes, where possible, comparator statistics relating to either the fuel poor population (Low Income High Cost definition)<sup>29</sup> or the general population in order to provide a point of comparison and to contextualise findings. Commentary is provided, offering opinion regarding the extent to which BESN appears to have succeeded in engaging the most vulnerable consumers in the initiative.

<sup>29</sup> Fuel poverty in England is measured by the Low Income High Costs definition, which considers a household to be in fuel poverty if: they have required fuel costs that are above average (the national median level); were they to spend that amount they would be left with a residual income below the official poverty line (DECC, 2013). For more details, see: [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/226985/fuel\\_poverty\\_report\\_2013.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/226985/fuel_poverty_report_2013.pdf) for information on this approach to defining fuel poverty.

**Table 10: Who did BESN reach? Results from analysis of BESN monitoring data.**

<b>Types of vulnerable consumers</b>	<b>BESN</b>	<b>Comparator statistics</b>	<b>Commentary</b>
Age	Strongest on: 65+(37% of participants) Weakest on: 41-50 (14%) 16-25 (8%)	n/a	Those aged 65+ account for 30% of the fuel poor population, so BESN is in line with the fuel poor population in relation to this variable. BESN was weakest in reaching young (16-25 and middle aged consumers (41-50) the latter of which account for a significant proportion of the fuel poor.
Disability	25% of participants had a disability. More than 52% of these were also aged over 65.	16% of working age adults and 45% over state pension age are disabled in the UK (ODI, 2014).	BESN has been successful in engaging a higher proportion of disabled consumers than exist within the general population. It has focused heavily on the disabled over 65 years old but this is in line with the broader population.
Means tested benefits (MTB)	63% of participants were not in receipt of MTB. 43% of those stating that they were not claiming benefits were aged over 65.	n/a	This figure is surprising and possibly suggests a lower than expected level of disadvantage amongst participants but may point to confusion regarding the definition of a MTB when completing monitoring forms or participants not claiming benefits they are entitled to.
Households with children under 16	25% of participants had dependent children.	27% of fuel poor households are couples with dependent children (DECC, 2013)	BESN is broadly in line with the fuel poor population in relation to this variable.
Those without access to gas	16.5% of participants are off gas.	National average is 13% and rural average is 36% (DECC, 2013)	BESN has therefore reached a proportion of off-gas households above the national average.
Those without internet access	35% of participants did not have access to the internet at home.	17% of the UK population do not have access to the internet at home (ONS, 2014).	BESN has reached a proportion of those without internet access well above the national average.
Type of disability	See Tables 6 and 7 for a breakdown.	n/a.	Given the focus on engaging the most vulnerable consumers, it might be expected that BESN would reach higher proportions of those with the most prevalent chronic illnesses.
Type of	19% of participants use	Nationally, 8% have	BESN reached a higher

heating	electric heating. 68.5% use gas.	electric heating. 65% have gas.	proportion of those reliant on electric heating than national average and was in line with it in relation to gas.
Method of payment	53% of participants pay by direct debit. 25% by pre-payment meter.	The fuel poor are least likely to pay by direct debit and most likely to pay by pre-payment meter or standard credit <sup>30</sup> .	A surprisingly high proportion of participants already pay by direct debit suggesting that over half of participants have access to better tariffs than might be expected.
Switching history	24% of participants had switched energy provider in the last two years.	Nationally, 24% have switched electricity provider in the last two years and 20% for gas <sup>31</sup>	Suggests that a quarter of participants have the capacity to switch or have had support to do so previously. Is BESN reaching those who face the most barriers to switching?

Base: 2,625 of a total population of approximately 16,000 participants

This analysis indicates that the workshops have been successful in reaching the following groups, all of whom are vulnerable to fuel poverty:

- those aged over 65
- households with dependent children;
- those without access to gas;
- those without internet access;
- those reliant on electric heating.

On the other hand, workshops appear to have been less successful in reaching those:

- claiming or entitled to means tested benefits;
- with disabilities;
- with mobility difficulties;
- with chronic illnesses;
- disadvantaged by the way they pay for their energy;
- without previous experience of switching.

Whilst it is understandable that workshops would be less appealing and accessible to those with disabilities, mobility difficulties or chronic illnesses due predominantly to the need to transport themselves to the venue, there is little evidence to explain why workshops were less successful in engaging the other groups listed above. This may, in part, be attributable to the open format of workshops whereby champions had little control over who attended, making it difficult to target specific groups. It is also possible that the tight timescales for the delivery of BESN led to a less targeted approach to publicising the workshops whereby

<sup>30</sup> Cutting the cost of keeping warm (DECC, 2013); <https://www.gov.uk/government/consultations/cutting-the-cost-of-keeping-warm-a-new-fuel-poverty-strategy-for-england>

<sup>31</sup>Retail Market Review Baseline Survey (Ofgem, 2014) <https://www.ofgem.gov.uk/ofgem-publications/89113/ofgemrmbaselinefinalpdf.pdf>

publicity was fairly general in nature and not targeted at particular groups. The qualitative data supports this latter point.

*If we'd had more lead-in time, we might have been able to look at who we really wanted to reach and then work out how to reach them but it was a mad rush to hit the targets. (Champion, housing provider)*

*I wanted to get press releases out early and build momentum but we ended up with about a week to do this, it's no good, local media do work last minute but you need to build them up. (Champion, CDT)*

*We advertised locally through radio and newspapers and things and we weren't directly targeting disadvantaged people but pretty much everyone. (Champion, advice agency)*

This was a commonly-cited explanation for the absence of a more targeted approach to reaching particular types of vulnerable consumers and this open approach to recruitment offers one plausible explanation as to why certain hard to reach groups may have been missed.

In summary, workshops appear to be more suited to consumers that do not face health related barriers to attending meetings and may be quite well suited to rural communities where there is perhaps a culture of dispersed communities coming together to meet.

*People are used to public meetings in areas like this. If they didn't attend them then they would be very isolated and find out very little. (Champion, RCC)*

However, it is equally clear that workshops are not suited to all groups and that the most vulnerable consumers may be less likely to attend, as the vignette in 6.1.2 below illustrates. As outlined in section 6.4, frontline workers appeared to be more successful than champions in reaching the most vulnerable consumers, particularly those suffering financial hardship, the disabled, those with low literacy and those who are geographically isolated.

### 6.1.2 Who reached who?

It was also possible to establish (to an extent), through the analysis of the monitoring data, which sorts of organisations were most effective in reaching different types of vulnerable consumers through workshops. The following organisations stood out as engaging more of certain types of vulnerable consumers:

- National charities (17 per cent of all over 65s reached through BESN), RCCs (17 per cent) and social housing providers (13 per cent) focused more on **over 65s** than other organisations.
- Rural Community Councils were better at reaching those **off gas** (22 per cent of off gas reached through BESN).
- National charities (15 per cent of those with disabilities reached through BESN) and social housing providers (15 per cent) were better at reaching those with **disabilities**.
- Local charities (18 per cent), a national advice organisation (16 per cent) and social housing providers (14 per cent) were better at reaching **benefits claimants**.
- Development Trusts (22 per cent), national advice agencies (17 per cent) and social housing providers (16 per cent) were better at reaching those on **pre-payment meters**.

To some extent these figures reflect which types of organisations engaged the most participants overall: national advice organisations (15 per cent), local charities (14 per cent) and development trusts (13 per cent) reached the most consumers. Another way of looking at this is the extent to which organisations focused on a particular group of consumers. The

figures here look similar in many instances, although social housing providers achieve more prominence in terms of their focus on particular types of vulnerability:

- National charities (51 per cent of their participants), Rural Community Councils (70 per cent) and social enterprises (70 per cent) had the greatest focus on **over 65s**
- Rural community councils were most focused on reaching those **off-gas** (43 per cent of their participants)
- Social enterprises (37 per cent), social housing providers (32 per cent) and national charities (31 per cent) had the highest proportions of participants with **disabilities**
- Community Interest Companies (54 per cent), local charities (47 per cent) and social housing providers (45 per cent) reached a greater proportion of people **in receipt of means tested benefits** than other organisations
- Development trusts (39 per cent of their participants); social housing providers (33 per cent) and Community Interest Companies (31 per cent) were most focused on people in **pre-payment meters**.

These findings highlight, amongst other things, the particular strengths of RCCs in reaching those without access to the gas network - a problem more common in rural settings. This point is illustrated through the following vignette and a full case study of a participant supported by a RCC can be found in Appendix 6 of the technical annex.

#### ***Vignette: reaching those off the gas grid through RCCs***

*The champion, an advice manager within an RCC, was aware that those in rural locations are less likely to have access to the gas network and were therefore more vulnerable to fuel poverty. He wanted to help them to save money on their energy costs but struggled to identify and reach those most in need of help due to the remote nature of the area covered by his organisation. BESN gave him the chance to identify and offer training to those who work more closely with vulnerable people locally. He trained a large team of frontline workers working on a scheme to promote the social and economic inclusion of older people. One of the trained frontline workers decided to try and make links with the most vulnerable individuals by visiting hospitals to promote BESN. This is how she found Olive (name changed), an elderly lady living in a mobile home and struggling to afford her heating bills. Switching wasn't possible as the owner of the mobile home park where she lived purchased oil on behalf of the whole site. The frontline worker and champion continue to work on findings a solution to Olive and her neighbours' problems.*

In addition, social housing providers and national charities appeared to be most effective in engaging a range of the hardest to reach groups. The apparent effectiveness of social housing providers and advice agencies in reaching and engaging the most vulnerable consumers is underlined at various points throughout this report but does, as previously mentioned, also reflect their dominance in terms of overall numbers of participants reached.

#### **6.2. How were BESN workshops delivered?**

A variety of different approaches to the delivery of workshops were taken and the exact approach depended on the nature of the groups champions were targeting, the location and venue of the workshop and, if 'piggybacking' on existing events, how long they had to deliver the session. In essence, there was consensus amongst the champions interviewed that there was no 'one size fits all' solution and that having the flexibility to do whatever they needed to do to reach vulnerable consumers was critical to the success of BESN.

The monitoring and online survey data gives a clear indication that there was no discernable relationship between the types of organisations delivering the workshops and outcomes for participants. As outlined in the remainder of this section, there is more evidence to suggest that the approach taken to the delivery of the workshop and the level of trust placed in the organisation and individuals delivering them were more significant in determining the success of the event than the type of organisation delivering it.

### 6.2.1 Innovative approaches to workshop delivery

One way in which the flexibility so valued by champions has been exercised is through the development of more innovative approaches to delivering workshops. It was widely felt that a more interactive format that went beyond a simple presentation was required to attract attendees and promote meaningful engagement with the subject matter.

*We started out doing formal presentations, but within a few months we realised that they're not coming, there were low attendances.* (Champion, housing provider)

*For consumers I do it pass the parcel style so I do questions on each present and you've got Eddie Grant, Electric Avenue playing, so you'll have a question like 'have you ever...are you worried about your energy bills?' and it gets a discussion going and then the next question would be 'have you ever switched your...did you know you could switch your supplier?'* (Champion, training provider)

More informal approaches were generally considered to yield better results in terms of levels of engagement but are less well suited to large audiences and are therefore less helpful to champions in terms of hitting their targets regarding numbers of participants.

There was also evidence of funded organisations going to great lengths to remove barriers to attendance and incentivising engagement with free gifts, food, competitions and securing venues as close to target audiences as possible. These activities reflect the firm and explicitly stated belief amongst champions that energy efficiency is not sufficient to attract consumers' interest in its own right.

*With the residents it has to be as near to their front door as it possibly can be. So we marketed directly to our own residents. We did one session at a community centre just round the corner and we have about 400 homes within a mile and a half of that. We offered them freebies, light bulbs, temperature things, we had food there and we would offer transport if people for any reason weren't able to walk there.* (Champion, advice agency)

### 6.2.2 'Piggybacking'

Many of the funded organisations saw BESN and energy advice in general as one strand of broader efforts to promote a better quality of life for the groups they worked with. As such, a number of champions explained how they had incorporated the delivery of BESN into larger events that offered attendees more holistic advice on various aspects of their finances and wellbeing. This reflected the common belief that energy alone was not a sufficient 'pull' to attract people to the workshops.

*Yeah we've found that works, rather than trying to do it (energy) as a stand-alone issue. We do take a holistic approach to all our work, we tend to try and deal with all people's issues, we help with parenting and we'll talk them through healthy eating and sort out their benefits, get them a food bank voucher if they need it, it's about all the issues and you build that relationship and they'll keep coming back to you for everything then.* (Champion, local charity)

Another way to engage those for whom energy was not a sufficient motivation was 'piggybacking' on existing events. In practice, this meant giving BESN one slot on the agenda of an existing meeting, allowing champions to present at a scheduled event such as

a luncheon club or parent and toddler group or setting up a stand at an event or on the premises of another organisation. This approach was very common (72 per cent of champions responding to the online survey had used it) and was viewed as a lower risk option than staging bespoke events which champions feared would be poorly attended and waste limited resources.

*We didn't directly organise any consumer meetings cos we weren't sure it was going to be a very effective way, you hire a room, say there's going to be an energy switching event... it just didn't seem to be the thing that lots of people were necessarily going to turn out to and I think we contacted and spoke to more people by going to events where people were going for another reason and that also enabled us to keep the cost down cos other organisations were paying for the hire of the premises (Champion, RCC).*

'Piggybacking' proved to be a good way of targeting particular groups (it was more difficult to control who attended dedicated workshops as they usually took place in public places), helped with trust and assurance, and provided an opportunity to offer an introduction to BESN which could then be built upon through one-to-one sessions with those who were interested in engaging further.

*And we do know it's difficult to get people out of their houses to come to something. So we made that decision very early on, to go to meetings where people were and we decided that we would try and look at the people who needed to know the information but wouldn't necessarily come across it normally. So we looked at clubs, places where older people were meeting in any case so whether that was church or part of our other projects we were running, we run a befriending scheme, so we already had a group of people who were meeting in any case. (Champion, CDT)*

However, it was widely recognised by respondents that attending an event or running a workshop was not sufficient on its own to promote meaningful engagement and foster action amongst target audiences. For this reason, presentations or talks given were followed up, wherever possible, by one-to-one advice sessions or separate appointments at a later date.

*Yeah we'd follow it up by giving one-to-one advice and especially if it was a vulnerable group, we'd do a presentation, go through the workshop, maybe individually go round each table to make sure they had a full understanding of what we did and left details if they wanted one-to-one support so they can get in contact with us. (Champion, housing provider)*

*We realise the workshop is quite a short format, telling people what the possibilities are, removing those barriers to them, maximising their disposable income and offering, at a later date, more detailed interaction if they required it. (Volunteer, local charity)*

Despite the conviction amongst most of the champions interviewed that one-to-one support was required to promote genuine engagement and engender action, many felt that the limited resources available to them, particularly in terms of time, meant that one-to-one support was only possible with limited numbers of participants. Also in relation to time, some expressed the view that a longer lead-in period with more time to publicise workshops, may have improved turnout and increased the number of consumers reached.

*I think really as soon as you get notification that you've got this contract you need time to get your publicity material out to people and I think they need three months to put into their schedule, rather than we had days, we had to do the whole thing in three months. (Champion, carers' organisation)*

On the other hand, an equal number of champions felt that no amount of publicity or advance notice would improve turnout, particularly for workshops purely concerned with energy.

*I direct mailed 273 homes and we had three residents turn up and I don't think anything would change that. (Champion, housing provider)*

Tight timescales also contributed to a widespread approach of concentrating efforts on whichever organisations or groups were willing to listen as opposed to a more targeted approach.

*In terms of how we chose them, we were struggling at one point to get interest so it was a case of going to whichever vulnerable groups would have us really. (Champion, advice agency)*

### **6.3. The effectiveness of workshops and 'piggybacking' for engaging consumers**

A key assumption underpinning BESN, as depicted in the ToC, was that workshops would involve an element of working one-to-one with participants to advise them and support them to switch or complete an ECO referral, for example. However, in practice, a number of champions held the belief that although 'piggybacking' can help ensure a good sized, appropriate audience, there is unlikely to be the opportunity for one-to-one consultations with any significant number of participants within this setting. For these reasons, 'piggybacking', like dedicated workshops, was widely viewed as a way of raising awareness of BESN to be built on at a later date through separate one-to-one advice sessions in a more private setting where participants had access to all the information they needed to reach an informed decision.

*There's just not the time, we've had workshops where there's been 45 people come, you struggle to give one-to-one to five people at a workshop event and people don't have all the information you need to be able to help them so in our opinion I think the workshop is great for saying this is what's out there and if you want to come and see us to take it further we can do, but I don't think the workshop is a practical vehicle for switching people. (Champion, advice agency)*

*I think the notion of going to such a meeting and delivering the script and answering questions and getting your face known as a first initiative with some follow up in the same setting for individuals who wish for follow up has something to commend it, so too does following up on people's individual queries and dealing with them in ways that are comfortable for them which is probably somewhere else and might be in their own home. (Champion, housing provider)*

All respondents interviewed acknowledged that helping people through the process of switching is time consuming and generally involved intensive one-to-one working over a period of time. Therefore, the view was widely held that any expectation that switching would take place on the day of the workshop was unrealistic in most cases. The monitoring data supports this revealing that switching on the day of the workshop was achieved in 8 per cent of cases. Again, the need for one-to-one support either in addition to or as an alternative to workshops was underlined.

There is therefore sufficient evidence to suggest that, in many cases, workshops are not an appropriate environment for one-to-one working due to the potential for large numbers of attendees, the lack of privacy, the fact that participants may not have the information they need to hand, and will need time to consider their choices before taking action. The assertion was made by a number of champions that workshops were better suited to raising awareness of BESN and generating referrals for separate one-to-one advice sessions.

Questions were raised by one champion in particular regarding the extent to which it was realistic to engage the most vulnerable consumers in the initiative through public events.



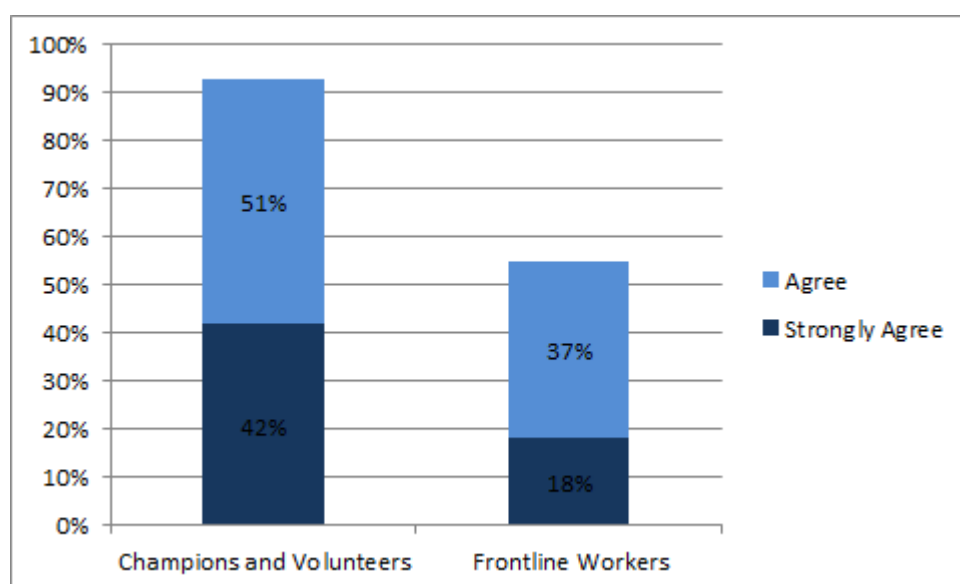
*The difficulty is that a lot of our aims are to reach the most vulnerable cos they're hard to reach, but they're hard to reach for a reason and that's cos they don't come to events that are planned or they don't answer the door or even the phone, that's why they're called hard to reach. (Champion, housing provider)*

### 6.3.1 Trust

Whilst trust was widely felt to be critical to the success of workshops in terms of the level of engagement achieved and the likelihood that action would follow, it was also considered harder to foster in a group setting.

The vast majority (92 per cent) of champions and volunteers felt that the advice they provided in the workshops was trusted by consumers, which is particularly marked when viewed in contrast to frontline workers' perspectives (55 per cent) as highlighted in Figure 6 below.

**Figure 6: Extent to which respondents felt that their advice was trusted**



Base: 101 champions and volunteers of a total population of approximately 450 champions and volunteers / 212 frontline workers of a total population of approximately 5,500 frontline workers

These differences may reflect lower levels of confidence in delivering advice by frontline workers who were less confident in delivering advice on switching. While 94 per cent of champions and volunteers felt confident delivering advice on switching tariff or supplier, 77 per cent of frontline workers felt the same (this is statistically significant at the 95 per cent level).

Housing providers were the most likely to feel that they were trusted by participants. This was felt to be due to the often intensive relationships that exist between social landlords and vulnerable tenants. Large advice organisations also felt they were trusted by participants due to their recognised and trusted brands.

*I think that's easy for us because we did it all under the [advice agency] brand, it's usually really easy for us to gain the trust of the public. (Champion, advice agency)*

*Yeah people have got to give us their financial information- how much they're spending, but we already have an existing relationship with them, they know who we are, they trust us with that information so I do think that makes a big difference. (Champion, housing provider)*

The value of 'piggybacking' was also underlined in relation to trust in so far as participants are more likely to trust an organisation or individual invited in by the coordinator of a group to which they belong, know and trust. Offering advice to participants in a familiar environment where they may also have access to their support networks was also considered an advantage in terms of fostering trust.

*They were in a room they were familiar with where they've had sessions with my colleagues but I didn't particularly know the group and my colleague didn't but they were with a support worker who they knew and an environment that they knew and it was their regular meeting but this was dedicated to energy. (Champion, advice agency)*

However, in further support of the case for placing more emphasis on one-to-one support within the BESN model, several champions' asserted that, particularly in an advice context, trust needed to be built up over time and cannot be developed over the course of a short public meeting.

*I was the stranger, and I think particularly for a one off session that's quite an impediment. If you're saying 'I'm here and I'll come back next week, next month' that's a bit different, you're beginning to develop a relationship but we weren't in a position to do that. (Champion, advice agency)*

#### **6.4. Delivering BESN through frontline workers**

The qualitative evidence suggests that frontline workers may be better placed to influence their clients than champions for several reasons, as follows:

- The client is more likely to have proactively approached them for help, resulting in them being more receptive to the frontline worker's advice and suggestions than they might be if, for example, they heard about BESN through a club they attended.
- There is more likelihood that the frontline workers will have detailed prior knowledge of their client and their circumstances or will gather this during the advice sessions and can therefore offer tailored advice.
- Advice sessions often involve frank discussions in a one-to-one setting where clients' inhibitions will be lower than in a group setting.

However, frontline workers are a heterogeneous group and these statements will be more true for some than others but certainly, the arguments frontline workers make as to why they are well placed to deliver BESN are convincing and supported, to some extent, by the points made by champions regarding the importance and value of intensive one-to-one support.

##### **6.4.1 How many consumers were reached by frontline workers?**

The BESN monitoring system did not gather data regarding the number of consumers reached through frontline workers. However, analysis of data from the online survey of frontline workers enables an estimation of the number reached through this channel. The survey asked respondents to select a size band indicating the number of clients reached through BESN. We therefore identified the mid-point of each of the size bands (taking 51 as the number of people reached by those that selected 51+); this yields an estimate of a minimum of 3006 people reached by the 247 frontline workers who answered this survey question. This gives an average of 14 people reached by each frontline worker. This average can be used (with caution) to estimate the total number reached by all participating frontline workers. It is believed that over 5,500 frontline workers received BESN training. Assuming that they each supported an average of 14 clients suggests that in the region of 78,000 consumers could have been reached through this route.

It is important, however, to insert a caveat here: the likelihood is that there was a degree of 'self-selection' in responding to the survey. That is, those who achieved greater outcomes may have been more likely to respond to the survey than those who did not.

**Table 11: numbers of clients reached by frontline workers**

<b>Number of clients reached</b>	<b>Frequency</b>
1-5	97
6-10	42
11-20	32
21-50	20
51+	23

Base: 247 respondents of a total population of approximately 5,500 frontline workers

Unfortunately, it is not possible to glean any further insights into the characteristics of the consumers reached by frontline workers. It is also not possible to verify the accuracy of these figures or the vulnerable status of the consumers reached. However, if this estimation is taken to be accurate, it suggests that, as intended, the approach of cascading BESN training to frontline workers has resulted in BESN advice being delivered to very large numbers of consumers, in excess of the number it has been possible to reach through workshops (estimated to be 16,000).

The remainder of this section is dedicated to exploring the approaches frontline workers have taken to the delivery of the initiative and constructing a picture using survey and interview data of the effectiveness of delivering BESN through frontline workers.

#### **6.4.2 Who did frontline workers reach?**

In the previous section, evidence was presented to suggest that, across the piece, champions had been successful in engaging a broad range of different types of vulnerable consumers through workshops. The results of the online survey of frontline workers suggest that they have not been quite as successful at reaching the same diversity of vulnerable consumers. In particular, they reported being less successful in reaching those who are off the gas grid, are geographically isolated and for whom English is a second language. Table 12, below, highlights the differences between the successes reported by champions and by frontline workers in relation to the engagement of particular groups of vulnerable consumers.

**Table 12: Successful engagement of different vulnerable groups: frontline workers and champions**

	<b>Frontline Workers (%)</b>	<b>Champions (%)</b>
Those facing financial hardship/in receipt of benefits	77	92
Those in poor physical health or disabled	54	73
Those with mental health issues	41	64
Those with low levels of literacy	42	63
Those who are geographically isolated	24	42
Older people	61	84
Families with young children	47	75
Those who are off the gas grid	14	47
Those who struggle to pay energy bills/heat home less than would like	61	89
Those on a pre-payment meter	46	83
Those with English as a second language	25	39
Those without access to the internet	42	69

Base: 231 frontline worker respondents of a total population of approximately 5,500 frontline workers / 64 champion respondents of a total population of approximately 150 champions

Frontline workers were less likely to say that individual groups were difficult to engage with. This likely reflects the fact that their roles involved focussing on particular population groups (for instance older people or rural communities) and they had an existing contact base, rather than because they found it difficult to engage with different groups.

**Table 13: Respondents reporting of different groups as difficult to engage**

	Frontline Workers (%)	Champions (%)
Those facing financial hardship/in receipt of benefits	15	20
Those in poor physical health or disabled	15	23
Those with mental health issues	29	33
Those with low levels of literacy	22	29
Those who are geographically isolated	9	26
Older people	19	20
Families with young children	14	19
Those who are off the gas grid	10	18
Those who struggle to pay energy bills/heat home less than would like	14	11
Those on a pre-payment meter	19	22
Those with English as a second language	26	36
Those without access to the internet	23	28

Base: 185 frontline worker respondents of a total population of approximately 5,500 frontline workers / 90 champion and volunteer respondents of a total population of approximately 450 champions and volunteers

Outside their existing contacts, it was certainly the case that frontline workers had less scope to target particular sub-groups of consumers through BESN due, in part, to the absence of any dedicated funding to support their delivery of BESN. Instead, as the model intended, they were expected to impart energy advice through their day-to-day-work with vulnerable consumers. The survey results reflect this, indicating that the majority of frontline workers delivered BESN as an adjunct to other services and issues that they were working on with clients.

However, there were examples of frontline workers attempting to reach out to particular groups of vulnerable consumers through BESN. Examples include issuing letters to existing clients and tenants, home visits and door knocking. There were also several examples of advice agencies that already ran energy advice drop-in sessions incorporating BESN into these sessions, discussing the possibilities of switching and ECO with clients attending.

Incentives were also used to try and engage particular types of clients and the Warm Home Discount (WHD) was mentioned a number of times in this context. Signing clients up for WHD was a 'quick win' that then made them more receptive to discussing other aspects of their energy costs.

*I think the idea of the Warm Home Discount was a bit of a carrot for people. (Champion, housing provider)*

In the main, however, it was assumed that frontline workers would simply raise the issue of energy costs with those they encountered in their day-to-day role.

*We did try some group stuff through our outreach places but most of it was just people when they had an appointment, we had to ask them about this [BESN]... are they going to switch, have they heard of ECO? (Frontline worker, advice agency)*

The general view amongst frontline workers interviewed was that it could be difficult to engage clients in energy issues and proactive efforts rarely yielded much response. On the other hand, it was reported by several frontline workers that where clients approached them regarding issues within a link to energy including any kind of financial difficulty, it was much easier to engage them with the prospect of switching.

*Whatever I've gone round for, I bring it up. If I think they're paying a lot, quite often they've had a bill handy so we've gone through a bill, we've gone on the website, we've done it together and gone through it and nearly every time they've been able to save money that way. (Frontline worker, housing provider)*

### **6.4.3 Effectiveness of one-to-one engagement through frontline workers**

Frontline workers were also acutely aware that different support needs existed amongst their clients and therefore tended to adopt a more bespoke approach depending on the capacity of each client and more intensive one-to-one support was reserved for those least able to engage with the market. There was a firm belief amongst the majority of frontline workers interviewed that, where the most vulnerable consumers were concerned, intensive one-to-one support was the only way to improve understanding and encourage informed action.

*What works best with vulnerable groups? It's the hand holding service, taking them through each step. (Frontline worker, housing provider)*

*When you're in the home you can see what's going in, it's part of what we do anyway, that's not to say we didn't do the workshops, we did, but personally I don't think the workshops work as well. (Champion and frontline worker, advice agency)*

Something that emerges clearly from the qualitative data is that some types of organisation are better positioned to deliver BESN through frontline workers than others. In terms of knowledge of their clients and their ability to provide a holistic range of support services to them, social housing providers are particularly well placed. It is clear that for some such organisations, BESN has galvanised their existing efforts to promote financial inclusion and energy saving. Organisations like this are often in close contact with their most vulnerable tenants due to often complex support needs. They are therefore well placed to add energy advice to the agenda when visiting tenants for other reasons.

*You aren't just there for energy, I'm a housing officer at the end of the day, most of the people I went to see were tenants so you're able to discuss their tenancy and have that knock on effect. You can go back to the maintenance team if there's a problem, you need to send someone out, and they'd been living with some repair issues for a while, never reported it, so you can follow different things up. Then we've got our income management team, they're chasing people who are in rent arrears. So if there are financial worries, I can say 'hang on, Jane's here', let's get her in to help'. So energy discussions fit in naturally with that. (Frontline worker, housing provider)*

BESN comfortably fits into the comprehensive support systems that exist within many social housing organisations. Housing officers are therefore ideally positioned to pass on energy advice to tenants and have incentives to do so in terms of improving the financial situations of their tenants. It is therefore possible to appreciate how a visit to a tenant with the sole purpose of delivering BESN would not be as effective.

Frontline workers working within established advice agencies were also well placed to broach the topic of energy with their clients due to their knowledge of their circumstances as a result of prior visits. However, the disadvantage that advice workers face in terms of engaging vulnerable consumers, that housing providers do not encounter, is that they have no mandate to speculatively contact their clients and instead have to wait for the clients to contact them.

## 6.5. Cost effectiveness

Although the evaluation did not have access to a breakdown of how grants were allocated in terms of proportions intended for different elements of BESN – training champions, training frontline workers, delivering workshops and so on – it is possible to make some basic calculations regarding the ‘unit cost’ of different elements using the full £900,000 as the ‘cost’ for each delivery element. This is shown in Table 13, below. As can be seen, taking the core indicators of engaging consumers, BESN performed well. It is harder to comment on the other costs owing to the partial nature of the available data.

**Table 14: cost per unit of delivery**

	<b>Numbers engaged</b>	<b>Unit cost</b>
Consumers engaged through workshops	16000	£56.25
Consumers engaged overall	94000	£9.57
Consumers achieving ‘key’ outcomes (workshops only) <sup>32</sup>	4640	£193.97

## 6.6. Champions and frontline workers working together

The roles of champions and frontline workers are not necessarily mutually exclusive and can work effectively in tandem. As previously outlined, many champions chose, for various reasons, to pass training on to frontline workers within the same or partner organisations. According to BESN monitoring data, 30 per cent of frontline workers were trained by somebody within their organisation and this was most prevalent amongst housing providers. Where this occurred it meant that a two prong approach to the delivery of BESN was possible. This involved reaching vulnerable consumers through both workshops and on a one-to-one basis through frontline workers. See case study one in Appendix 6 of the technical annex for an example of this.

Champions and frontline workers felt that one-to-one support was vital in terms of promoting meaningful engagement and securing action, therefore a model whereby champions can raise awareness of BESN through workshops and then refer individual consumers on to frontline workers for one-to-one support seems a good arrangement. Those organisations that had adopted this approach cited benefits including reaching a larger number and broader range of consumers and creating a legacy for BESN by equipping frontline workers to pass on energy advice to their clients beyond the lifetime of the initiative.

*We were targeting the groups but running alongside that we were capturing people in their own homes so we broadened the umbrella (Champion and frontline worker, housing provider)*

*I think it's particularly effective delivering it to frontline workers because you get a chance of a longer term benefit to it and you catch more people than putting on some events. Also they tend to be the trusted groups that vulnerable consumers go to, they're already engaging with them so I think it's valuable from that point of view. (Champion, CIC)*

<sup>32</sup> As outlined in Section 6, 29 per cent of workshop participants went on to make a ‘key action’ by either: contacting their energy supplier; switching energy supplier; applying for an ECO energy assessment; or applying for another form of grant or loan.



Another common benefit realised by passing training on to frontline workers is that they tend to be closer to and more trusted by vulnerable consumers and are therefore better positioned to pass on tailored, contextually specific advice to them and engender action.



## 7. Outcomes

### Assumptions for delivery

- Effective delivery of BESN will lead to an increase in: informed and empowered consumers (soft\*); switching and saving energy (hard); referrals for a home energy efficiency assessment through ECO (hard).
- Effective roll out will depend on the ability of champions and frontline workers to support and encourage consumers to act on the advice they have received by contacting their energy supplier, switching, completing an ECO referral, adopting energy saving behaviour.
- Those organisations delivering BESN would experience the following outcomes: up-skilling, greater expertise within the organisation relating to energy, increased capacity to advise clients on energy issues.

\*Hard and soft outcomes are defined in 7.1 below.

### Implementation

The workshops were successful in securing the following outcomes:

- Informing and empowering consumers (over 73 per cent felt more informed and empowered as a result of participating in BESN).
- Encouraging participants to take some form of action including saving energy around the home or contacting their energy supplier for a discussion (54 per cent).
- Saving energy around the home is the area in which participants are most likely to take action: 32 per cent had taken steps to do so as a result of BESN.
- Encouraging participants to take action to improve their energy deal (29 per cent) but switching on the day of the workshop was less common (8 per cent of workshop participants did this).

Only 5 per cent of participants signed up for an ECO assessment.

Frontline workers had also been effective in informing and empowering consumers and securing action on switching and saving energy. Clients of frontline workers were also more likely to return to them for further help in future.

## Key findings

### Who benefitted?

- There were few significant differences across the groups of participants in terms of outcomes.
- Non-white British and low income participants were more likely to experience better outcomes relating to confidence and understanding of energy markets and energy efficiency. Those delivering BESN were able to provide a better service to clients on energy issues as a result of their involvement in BESN.

Positive outcomes were also reported by those involved in delivering BESN. Survey responses from champions, volunteers and frontline workers revealed that 73 per cent felt able to provide a better service to clients on energy issues as a result of their involvement.

### Success factors:

#### The following factors contributed to positive outcomes for participants:

- The strong prior experience of champions and frontline workers in engaging vulnerable groups and the ways in which they tailored their advice to the needs of their audience have been key to success and more important than the format of the advice session (i.e. workshop or otherwise).
- Participants appreciated the interactive nature of the workshops and found them more accessible, informative and persuasive than other ways in which energy advice is delivered (e.g. leaflets or advertising).
- The opportunity to ask questions of someone impartial was valued by participants as was the peer support that occurred in some workshops.
- Many participants commented that they found champions and frontline workers credible due to the clarity and quality of the information they provided, fostering trust.
- The provision of intensive, tailored one-to-one support, home visits and existing relationships between frontline workers and clients appear to have been key to the success of frontline workers in securing positive outcomes for their clients.
- Both modes of delivery have their strengths with each being better suited to different types of consumers with different levels of vulnerability.

### Challenges:

Areas where outcomes were less strong such as switching on the day can be attributed to the vulnerable nature of participants, the complexity of their circumstances (some may want time to reflect on this decision and switching may not be possible for all) and the possibility that the decision not to switch was informed.

Limited outcomes regarding ECO referrals can be partly explained by the lack of detailed knowledge of the initiative amongst champions and frontline workers and also to scepticism amongst some. However, the limited eligibility criteria for the scheme and regional variation in its availability are also likely to be factors.

## 7.1. Outcomes for BESN participants

References are made within this section to 'hard' and 'soft' outcomes:

- Hard outcomes are clearly definable and quantifiable results that show progress towards achieving the desirable outcome (e.g. switching, ECO referrals).
- Soft outcomes are intangible and hard to measure directly. They represent intermediary stages on the way to achieving hard outcomes (e.g. more informed and empowered consumers).

### 7.1.1 Informing and empowering consumers

The majority of respondents to the workshop participant survey felt that taking part in a BESN workshop had improved their understanding and confidence regarding the energy market and switching suppliers, particularly with regards to:

- understanding how to switch suppliers (79 per cent);
- becoming more confident dealing with suppliers (75 per cent).

There was also considerable evidence from the qualitative data that, where participants had engaged with the workshops, they had emerged more informed and consequently felt empowered to take various forms of action. Key to this sense of empowerment was a greater awareness amongst participants of their rights as consumers and their options regarding suppliers and tariffs, leading to greater confidence to enter into more informed conversations with energy providers.

*I'm armed with that information now, cos these energy companies are quite unscrupulous so if you don't have certain information I think they'll just turn you over. So the workshops were good in arming me with certain facts for myself.* (Female supported by local charity, 26-40, claiming MTBs, disabled, has internet access, has switched previously)

*I'm constantly looking, at the end of every month I've been recording what my bills have been and I go online and look at the different offers all the time so I'm very aware of it now, before I'd get a bill and it would just be I've got to pay that.* (Male supported by housing provider, 41-50, has electric heating, a PPM, claiming MTBs, has internet access, has never switched)

There was also sufficient qualitative evidence to suggest that, where these changes had occurred in participants' attitudes and behaviour, they were likely to be sustainable and applied in future, at least as long as their knowledge remained current. A key challenge here will be ensuring that their knowledge remains up to date and accurate in the context of rapid and frequent policy change.

*I'm going to ring [energy provider] and find out if my arrears are paid and if there is a cheaper supplier I'll change and I guess when we move I'll do the same, I'll shop around for the better price which I wouldn't have done in the past.* (Female, 57, owner occupier, long term limiting illness)

*I'll always use it in each house now, cos when you're moving house it's not always the provider you have so you think does this provider save me any more money than these do, to get advice before you decide. So it's something I will use long-term definitely.* (Male, 27, 2 children, unemployed)

Qualitative data relating to outcomes experienced by clients of frontline workers gives a clear indication that they too experienced improvements in their knowledge and confidence following the receipt of advice through BESN-trained frontline workers. Despite a lack of

survey data to test how widespread this uplift in knowledge and confidence is amongst this group, the consistently positive nature of the testimonies shared by clients of frontline workers allows us to state confidently that the experiences reported below are fairly typical of those helped by frontline workers as a whole.

There was also a clear sense amongst the respondents that heightened levels of awareness would be sustained in the longer term, as with workshop participants, as long as knowledge is kept updated. However, in contrast to workshop participants, there was far more suggestion amongst clients of frontline workers that they were more likely to return to the frontline workers for support if they wanted to make changes to their energy provision in the future, rather than investigating this independently.

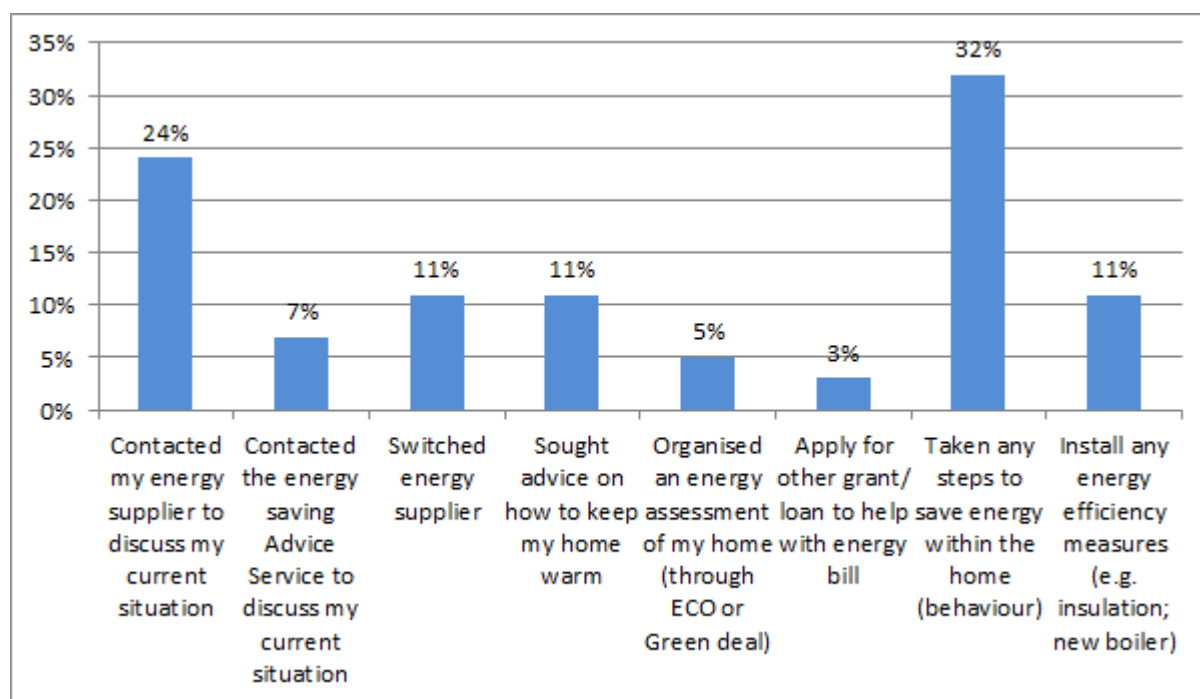
*If anything [bills] goes up we will come and see [frontline worker]. Yeah I'd go and get advice, I wouldn't do anything on my own even though I know what I'm doing now. I still would rather have the advice. (Female, 65, gas heating, pays by Direct Debit)*

These quotes are indicative of a general sense that clients of frontline workers felt less confident and empowered as a result of the advice received than workshop participants. When asked why they wouldn't attempt to switch supplier or resolve energy related problems themselves in future, the common refrain was that they did not feel confident doing so. It is possible that due to longer standing relationships between frontline workers and their clients (i.e. housing officer and tenant) and/or the more vulnerable nature of those reached by frontline workers, there may be a greater degree of dependency on frontline workers amongst their clients.

### 7.1.2 Encouraging participants to take action (switching, ECO and saving energy)

As previously outlined, the survey of workshop participants indicates that greater knowledge and empowerment amongst this group translated into some form of action in 54 per cent of cases. Figure 7 below, summarises the results relating to action taken.

**Figure 7: Actions taken by workshop participants following involvement in BESN**



Base: 400 consumers respondents of a total population of approximately 16,000 consumers

As the figure demonstrates, the most common actions taken by workshop participants were:

- taking steps to save energy in the home (through small-scale measures e.g. changing light bulbs - 32 per cent);
- contacting their energy supplier to discuss their current situation (24 per cent).

Perhaps more significantly, 29 per cent reported that they had carried out a 'key' action directly related to the project aims by either:

- contacting their energy supplier (24 per cent);
- switching energy supplier (11 per cent);
- applying for an ECO/Green Deal energy assessment (five per cent);
- applying for another form of grant or loan (three per cent).

The fact that 24 per cent of respondents had contacted their energy supplier to discuss their current situation is particularly significant as a key indicator of the success of BESN, as a core aim was to empower participants to take considered action.

It is also possible that, as a result of contacting their provider, participants switched *tariff*, rather than provider, something not captured by the survey.

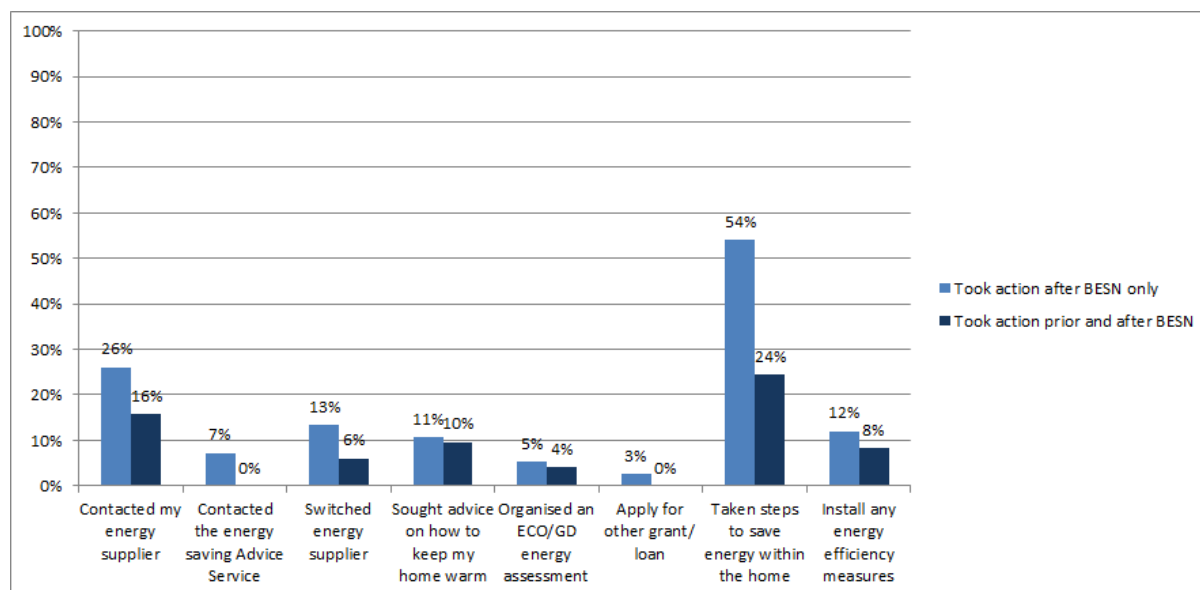
Overall, the levels of action taken represent a successful set of outcomes compared to action among vulnerable groups more generally who are shown to be the least engaged in the energy market<sup>33</sup>. Figure 8 below shows, the percentage of participants who took action *only after* taking part in a workshop, and those that took action both prior to and after taking part in a workshop. In all cases, there was a greater level of action among those that had not previously taken action than those that had previously. Again, this points to the considerable success of BESN in galvanising action amongst those least likely to take it. BESN workshops had been particularly successful in engendering the following actions (all of which are directly related to BESN's aims) amongst those with no previous history of action in these areas:

- saving energy within the home;
- contacting their energy supplier;
- switching energy supplier;
- seeking energy advice.

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<sup>33</sup> See Ofgem (2013) *Vulnerable Consumer Strategy*, London, Ofgem.

**Figure 8: Participants that took action before and after BESN or only after taking part in BESN**



Base: 303 – 375 respondents of a total population of approximately 16,000 consumers

The survey also explored the effects of BESN on respondents' understanding of energy efficiency in the home, including knowledge of how to access ECO. The results present a very positive picture regarding the success of the programme in informing consumers with regard to reducing their energy consumption. In all cases more than 70 per cent agreed that BESN had made a positive difference in the following areas:

- understanding of how to access energy savings measures (e.g. getting a new boiler or insulation through the ECO) (73 per cent);
- understanding of how to keep their home warm (77 per cent);
- understanding how to reduce energy use in their home (76 per cent);
- awareness of how much energy they use in their home (76 per cent).

Raising awareness of how energy can be saved around the home has been a key success of BESN and is (as outlined above) the area in which participants are most likely to take action: 32 per cent of survey respondents had taken steps to save energy in the home as a result of BESN. The levels of understanding and action achieved suggest that BESN was effective in delivering advice that was clear and easy to implement on this matter.

Moreover, it appears that acting upon this advice has yielded a range of benefits for respondents relating to the warmth of their home, reducing energy bills and improving general wellbeing, as presented in Figure 9 below. In each instance a majority of respondents agreed that participation in BESN had made a positive difference. Perhaps the most surprising finding in this regard is that 71 per cent of respondents went as far as to say that taking part had impacted positively on their general wellbeing.

Feelings of greater wellbeing as a result of taking part in BESN were evident in the qualitative interviews to some extent, in so far as, a number of those respondents interviewed reported feeling less stressed, particularly about their energy bills, following the receipt of advice through BESN. The vignette below provides an illustration of this and more detail on this particular case can be found in Appendix 6 of the technical annex.



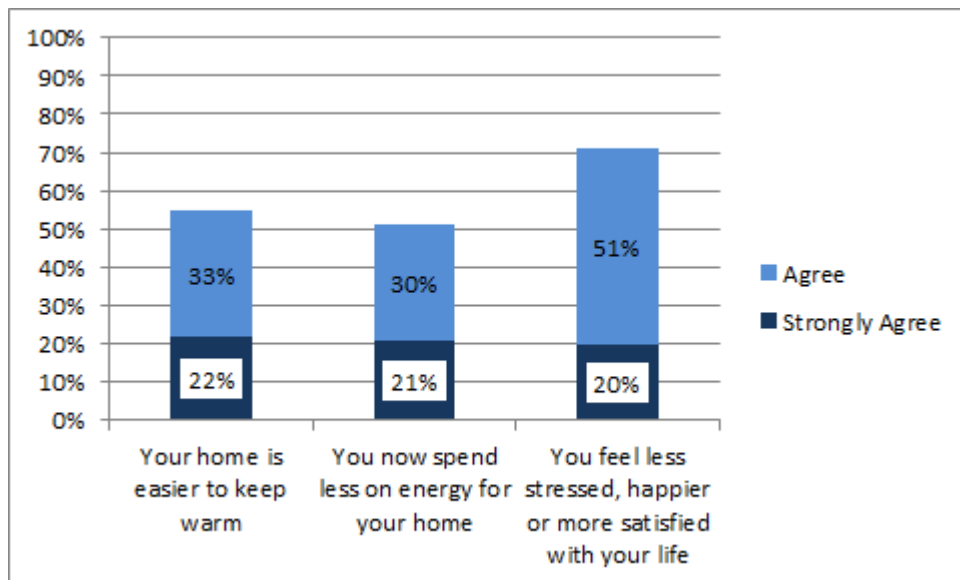
**Vignette: client experiencing a reduction in stress following BESN support:**

Marcia (name changed) is 55 years old and has severe osteoarthritis. Her condition means that she needs to keep her home warm at all times. This, combined with the fact that she is on a pre-payment meter, means that she cannot keep up with her energy costs and that most of the money she was feeding into her meter went towards debt repayment. She sought help with this problem through her local CDT where she spoke to a BESN trained advice worker.

In the weeks that followed Marcia's initial contact with the frontline worker, her meter was removed and she was switched to a better credit tariff, her energy debt was paid off through a charitable grant secured by the frontline worker and Marcia was referred to another charity who arranged for her boiler to be replaced with a more efficient combi boiler. The result is that Marcia feels less stressed and worried about running out of heat.

*It's taken the stress off me, not have to constantly feed the meter and worrying that if I go to bed I'll wake up to no heating, no power and that was happening all the time.*

**Figure 9: Participant perceptions of change as a result of BESN**



Base = 391-396 respondents of a total population of approximately 16,000 consumers

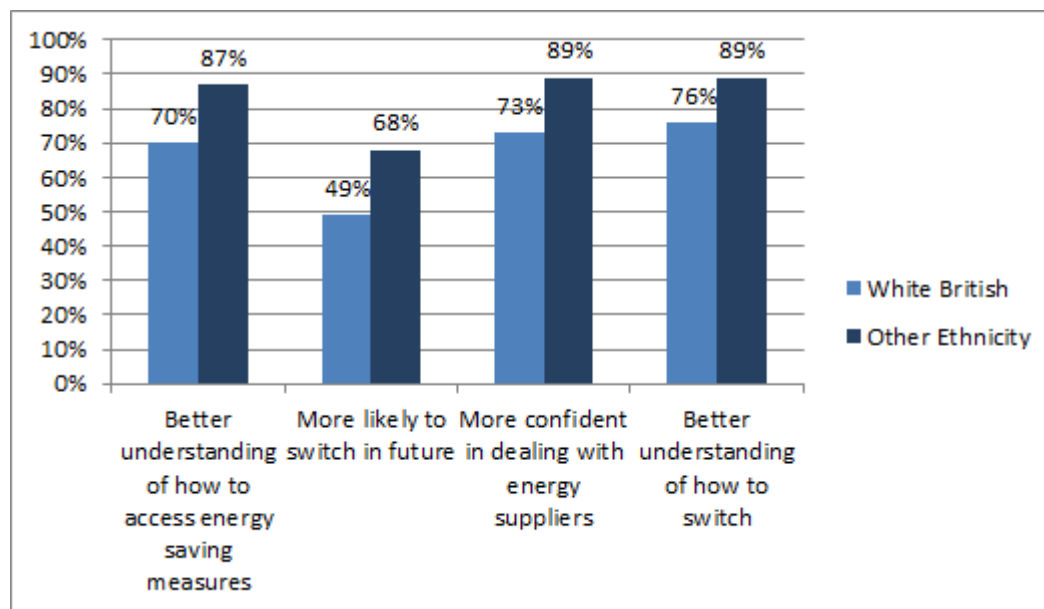
Considered against the ToC, these findings indicate that the outcomes experienced by participants have gone beyond those anticipated and have already, just months following participants' engagement with the initiative, contributed to financial savings, warmer homes and improvements in wellbeing and quality of life.

**7.1.3 Who has benefitted from BESN?**

The outcomes discussed so far depict considerable success for BESN. However, it is important to consider the extent to which these positive outcomes were achieved across the different groups of people taking part. The participant survey data was analysed for differences in outcomes across the following categories: tenure, ethnicity, income (household income under or over £16,000), whether in receipt of means tested benefits and age.

This analysis revealed few significant differences across groups within these categories in terms of actions taken, but some variances were apparent in terms of outcomes relating to confidence and understanding of energy markets and energy efficiency. This was particularly marked in the case of ethnicity (white British against non-white British), where responses were more positive across all questions amongst non-white British participants. A selection of these results is shown in Figure 10, below.

**Figure 10: Differences in 'soft' outcomes by ethnicity**



Base: 308 – 311 (white British) / 61 – 62 (Other Ethnicity). Population totals not known; from a total consumer population of approximately 16,000.

Those with low incomes were also more likely to respond positively to this set of questions; as were those living in private or social rented housing compared to owner-occupiers. This reflects well on BESN workshops in terms of their ability to secure positive outcomes for the most marginalised participants. The question of how such positive outcomes have been secured is explored further in the next section.

#### 7.1.4 How have outcomes been achieved?

The qualitative data collected through interviews with workshop participants provide the best insights into what participants perceive to be the 'success factors' that encouraged them to take action and improved their levels of knowledge and confidence. The imperative to ensure brevity meant that no questions relating to this were included in the survey, but it was explored in detail through the qualitative interviews.

The following key success factors were identified in relation to workshops and are explored in more detail below:

- interactive workshops;
- credibility and impartiality of those delivering the workshops;
- peer support;
- champions and volunteers with the right skills and qualities.

Overall, the success factors identified appear to stem more from the ways in which champions, drawing on their vast experience of engaging vulnerable groups, have chosen to

deliver and tailor the workshops rather than anything specific to the workshop format (with the exception of peer support). In this sense, these findings vindicate the BESN model whereby workshops are delivered by those with experience of engaging vulnerable consumers and suggest that ensuring the advice is delivered by the right person is possibly more important than the format through which it is delivered (i.e. workshop or otherwise). The high quality training received from NEA equipped champions with the knowledge to talk credibly about energy issues and respond to questions, building respect and trust which placed them in a strong position to encourage participants to take action leading to positive outcomes. The success factors listed are explored in more detail below.

Participants appreciated the interactive nature of the workshops and found them more accessible, informative and persuasive than many of the other ways in which energy advice is delivered (e.g. leaflets or advertising). This was particularly valuable to those, such as the participant quoted below, who do not have access to the internet and therefore cannot access information as readily.

*We get lots of leaflets but mostly chuck them in bin, but when someone's talking to you, you think 'I've got that problem' and they ask questions and it clicks.* (Female, pays by Direct Debit, claims MTB, disabled, no internet, has switched before)

*I find it better listening to somebody sharing it rather than trying to decipher what's on the pamphlets.* (Female supported by advice agency, 51, pays by PPM, claims MTB, lives alone, has not switched before)

The opportunity to ask questions of someone impartial, particularly regarding their own situation was highly valued, as was the peer support that occurred in some workshops whereby problems and potential solutions were discussed amongst participants.

*Well you get talking to other people and they talk about any problems they've had....so you can pick up information from other people sometimes* (Female supported by housing provider, pays by Direct Debit, has internet access, no dependents and hasn't switched previously)

It was also evident from the qualitative data that the vast majority of participants felt that those running the workshops were credible due to the clarity and quality of the information they were providing. This in turn fostered trust and confidence and assuaged fears that switching would have negative impacts.

*It's that reassurance that someone's there for you to help, a lot of people were scared of switching and it being a big mess up. Getting people to actually think, information was the key thing and the good information they gave made a good impression on people.* (Male supported by housing provider, cash payer, claims MTBs, has internet access, has not switched before)

The fact that the quality of the information and advice offered by those running the workshops was so widely acknowledged by participants is testimony to both the skills and professionalism of those delivering the workshops and the quality of the training they received. Clearly, the appointment of champions and volunteers with the right skills and personal qualities to create a credible yet relaxed and friendly session has been key to many of the successes reported here.

*It was a very comfortable, informative event. I do think it helped that the person delivering it wasn't selling energy, wasn't trying to make you do anything, but she was saying that you could do it. She was very organised but also very kind to the people who were there who were very much a mixed bag. She dealt with everybody very kindly and didn't try to make*

*people change their minds.* (Female supported by RCC, 51-65, oil heating, pays by Direct Debit)

Frontline workers appear, on the basis of the qualitative data, to have been equally effective in securing positive outcomes for clients in terms of knowledge and empowerment, switching and saving energy. The following factors appear to have been key to this success:

- intensive and tailored one-to-one support;
- home visits;
- existing relationships with vulnerable clients.

Echoing the sentiments of workshop participants, clients of frontline workers emphasised their professionalism, their knowledge, credibility and personable qualities as being key in persuading them to take their advice on board.

*[Frontline worker] says 'you want to save money on your bill, I'll come to your home and talk to you', I got all the bills ready and she phoned British Gas and she got straight through, don't know how, some influence there, straight through and she's so calm and efficient and she ran rings round this chap but still polite, it was amazing to hear, and she got him to say 'yes you're on the wrong tariff so we'll be altering the tariff' so I was pleased.* (Male and female, pensioners)

However, they also pointed to two factors which are specific to how and where the advice is delivered, namely: the importance of one-to-one support and home visits, both of which are more closely associated with the frontline worker model than workshops. These findings indicate that there are specific benefits associated with the frontline worker model in terms of offering participants tailored and intensive support. Arguably, there is more need for this intensive form of support under the frontline worker model because, as previously outlined, frontline workers are more likely to be engaging with the most vulnerable consumers who face the most barriers to taking action. In this sense, it would be unreasonable to claim that one mode of delivery has been more effective than the other in terms of securing outcomes for participants. Instead, it is more reasonable to suggest that each mode of delivery is better suited to different types of consumer with different levels of vulnerability. These success factors are now explored in turn.

First, the intensive and tailored support offered by frontline workers to their clients has clearly encouraged vulnerable clients to take steps to reduce their energy costs when they would otherwise have been unlikely to act. Sometimes this intensive support has gone as far as frontline workers switching or applying for support on behalf of the client or taking them through the process step by step.

*I have an internet connection here and (frontline worker) came and we spent two or three hours sorting everything out and helped me apply for Warm Homes Discount. I'm on the council register with social services with being blind and (frontline worker) photocopied all the originals I had which were sent off as proof to the energy suppliers and they sent me a letter acknowledging they'd got all the information and a decision would be made later and I forgot all about till last week when (frontline worker) said 'did you get that money' and I had.* (Female, 56, disabled)

The quote above highlights another aspect of the approach taken by frontline workers that appears to have secured positive outcomes: home visits. The survey of frontline workers revealed that 64 per cent of BESN advice sessions were delivered in the homes of clients where, as the interviews with workshop participants emphasise, many consumers feel more comfortable and have access to the information they need. The way many frontline workers work lends itself to home visits. Indeed, 42 per cent of frontline workers that responded to

the survey stated that they offered BESN advice when visiting the homes of clients for other reasons.

The third factor which helped frontline workers secure outcomes for participants was the fact that frontline workers were, in many cases, known to their clients prior to BESN and this was especially true of housing officers and advice workers. This existing rapport appears to have been important in terms of engendering trust between clients and the frontline workers, encouraging them to take on the advice being offered.

### 7.1.5 Outcomes for funded organisations

Overall, the evidence from the survey of champions and volunteers (as representatives of funded organisations) is clear that participating organisations feel they have benefitted from their involvement with BESN in a number of ways. Underlining this, only one respondent to this survey felt that their organisation had not benefitted from their involvement with BESN. In particular, respondents reported that their organisation had benefitted from:

- improved skills and knowledge of staff regarding energy issues (84 per cent);
- being able to help new clients (75 per cent);
- being able to provide a better service to clients (73 per cent).

Accessing these benefits appears to have engendered a sense of enthusiasm towards BESN within the funded organisations ensuring that, in many cases, they have implemented it fervently and continue to impart the key principles and messages beyond the lifetime of the funding, securing a legacy for BESN.

The qualitative data reinforces and adds detail to the survey results. Many champions commented that both the training and the experience of delivering BESN has heightened their appreciation of a) the difficulties their clients face in relation to energy issues b) their own understanding of the energy market. As a result they felt better placed to support clients with these issues.

*I better understand the challenges a lot of people face in dealing with such a simple issue as their energy supplier, so I have a better insight into people's difficulties and a better understanding of the energy sector. (Champion, local charity)*

Many champions also emphasised how the training received had expanded the expertise of their organisation, enabling them to support clients with a broader range of issues.

*I've certainly gained a lot more knowledge personally about it and I think as an organisation we've gained another string to our bow. (Champion, RCC)*

The same was true of frontline workers and BESN was frequently cited as adding to the range of issues they could support their clients with as part of a holistic support service.

*It's just been another tool to try and remind me of, I can put into my little kit box to try and help people, so it's prompted it and made it remain on my agenda of what I'm dealing with. (Frontline worker, housing provider)*

The above quote also alludes to BESN having been effectively 'mainstreamed' in so far as it appears to have been incorporated into the day-to-day work of funded organisations and frontline workers in many cases.

*So now it's more included in our main thing whereas before it was one of those bits that sat at the side. (Champion, carers' organisation)*

Partly, the key to these successes in terms of mainstreaming are attributable to the complementarity between BESN and the broader financial inclusion agendas being pursued by many funded organisations. BESN has, for many participating organisations, put energy issues on the agenda where they were not previously and brought about a realisation of just how significant the issue of energy costs and the myriad corollaries can be for their clients and target groups.

*Yeah, financially as well, I switched myself. So absolutely, the breadth of knowledge around this specific area I think has helped in my understanding of why it's an important area for us to be addressing in the local area. (Champion, CDT)*

## 8. Impacts

Impacts are the broader, longer terms effects of an initiative or intervention. It was envisaged that BESN would contribute to the following impacts:

- the creation of more sustainable VCS organisations, more effective in dealing with energy issues;
- helping to tackle climate change through reductions in energy use;
- the alleviation of fuel poverty through more efficient homes and lower energy bills;
- informed and empowered consumers influencing the energy market.

The longer term effects of BESN are difficult to identify with any certainty at this point for two key reasons:

- It is difficult to pinpoint the impact of a relatively small initiative on broader issues such as climate change.
- It takes time for impacts to become apparent and the six months since the completion of the initiative is not sufficient for impacts to manifest.

However, there is sufficient evidence to suggest that BESN has made the positive (yet small scale) contributions which are explored briefly below.

### 8.1. Alleviation of fuel poverty through more efficient homes and lower energy bills

It would also be very difficult to isolate and identify the contribution of BESN to any reductions in fuel poverty that may occur in future. It is possible, however, to comment with more confidence on the impact of BESN on the realisation of more efficient homes and lower energy bills, two contributors to fuel poverty. As detailed previously, the majority of BESN workshop participants were more aware of what they could do to reduce energy costs through switching and using less energy as a result of their participation. It has been established through this evaluation that 29 per cent of participants have taken action as a result of their participation and are therefore likely, to varying degrees, to reap benefits from the changes they have made. It is difficult to estimate the extent of these benefits and whether savings will be sufficient to lift participants out of fuel poverty or prevent them from falling into it but they will certainly make a positive contribution.

Moreover, as BESN was often delivered as part of broader programmes to promote financial inclusion, participants were likely to benefit from a more comprehensive advice package including income maximisation. The combination of saving money on energy bills and income maximisation measures (including applications for WHD and grants to cover energy debts, for example) is likely to make a contribution to the alleviation of fuel poverty amongst households who have acted on the advice received.

### 8.2. Informed and empowered consumers influence the market

There is little doubt that many participants are more informed and empowered following their involvement with BESN and that participation has improved their understanding of the energy market, their rights and the options available to them. However, in terms of influencing the market, action would need to be on a greater scale to start impacting on levels of competition within the energy market and improving the offer to consumers. However, the extent to which BESN has been successful in informing and empowering consumers is a considerable achievement which may result in more consumers challenging their energy providers further down the line, upon notification of a price increase, for

example. It can therefore be argued that by empowering consumers and in some cases prompting switching or engagement with energy providers, BESN has contributed to the drive for market reform.



## 9. Conclusions

### 9.1. Reflections on the overall success of BESN

BESN has achieved considerable success when considered against its core aims of reaching out to and empowering vulnerable individuals to make informed decisions on energy measures and promoting energy saving behaviour.

The initiative has been successful in engaging large numbers of consumers through the two main routes of engagement: workshops and frontline workers, exceeding its target of engaging 15,000 consumers through workshops (16,000 were reached) and reaching many more (estimated at 78,000) through BESN trained frontline workers. This is a particular achievement when considered in the context of the vulnerable and hard to reach nature of the consumers targeted through the initiative. Equally impressive is the extent to which BESN workshops have succeeded in informing and empowering participants and encouraging over half of them to take some form of action to improve their energy situation. Although there is no data available to enable comparisons between these outcomes and those experienced by participants supported by frontline workers, qualitative evidence gives a clear indication that they were also successful in informing and empowering participants and securing action on switching and saving energy. It is also apparent that, due to the fact that frontline workers tend to work on an outreach basis, they were more likely to be engaging with some of the most vulnerable and hard to reach consumers through BESN, more so than those running the workshops.

There is also evidence that this inaugural round of BESN has left a legacy by increasing the capacity of those organisations involved in its delivery to advise clients on energy issues and that, for many participating organisations, this has now become part of their core offer to clients and the groups they work with.

Overall, when implementation is compared to the original ToC for BESN, it is evident that the initiative has, with some exceptions, been delivered as intended and has yielded most of the expected outcomes for consumers and participating organisations. Areas where implementation of the initiative did not match the assumptions set out in the ToC are identified in section 9.3 below, but first some of the key factors identified as underpinning the many successes of BESN are set out.

### 9.2. Factors underpinning the successes of BESN

The evaluation identified a number of factors associated with the design and delivery of BESN to which the overall success of the initiative can be attributed, including:

- BESN was carefully designed in consultation with those expert in the engagement of vulnerable consumers.
- A wide range of organisations with the experience and opportunities to engage a broad range of the most vulnerable consumers were appointed to deliver BESN.
- High quality, effective training was provided to champions by NEA, equipping them with the knowledge and confidence to deliver BESN and cascade their expertise downwards to volunteers and frontline workers.
- The recruitment of volunteers and frontline workers from within champions' own and partner organisations enabled expedient delivery and avoided recruitment problems.
- The two delivery routes had different yet complementary strengths: workshops reach a broader range of vulnerable consumers but frontline workers are better placed to reach the most vulnerable.

- One-to-one support was provided to participants wherever possible: frontline workers had better opportunities to provide this than those running workshops.
- Delivery of BESN was incorporated into broader agendas around financial inclusion and quality of life recognising that energy alone is not sufficient to engage consumers.
- Champions, volunteers and frontline workers were trusted by participants and this was reinforced by the knowledge and professionalism they displayed during advice sessions.

### 9.3. What would have happened in the absence of BESN? (the counterfactual)

Overall, there is clear evidence that BESN has delivered a range of outcomes for participants and those delivering BESN that would not have otherwise occurred. The box below highlights a number of these key outcomes.

#### **BESN: the counterfactual**

- Without BESN many participating organisations would not have developed expertise in energy advice and expanded their offer to clients, this is particularly true of frontline workers (over half had not previously provided energy advice).
- BESN has, for many participating organisations, put energy issues on the agenda where they were not previously.
- Without the training provided by BESN, the majority of champions (66 per cent) and frontline workers (81 per cent) felt that they would not have been able to deliver the same level of support to participants and secured the same outcomes for them.
- Had they not taken part in BESN, participants would not have been as informed and empowered to get the best energy deal (73 per cent felt more informed and empowered).
- Moreover, 54 per cent were empowered to take some form of action as a result of their involvement in BESN. Whilst other campaigns with similar aims exist it is highly unlikely that they would achieve action in over half of all cases.
- Despite being relatively low, it is unlikely that the same levels of switching or ECO referrals would have taken place in the absence of BESN, particularly given the multiple barriers faced by participants.

### 9.4. Learning points

The evaluation also identified a number of learning points to inform the development of future rounds of the initiatives, which are summarised below:

<b>Training</b>
Some volunteers reported not receiving adequate training, possibly diluting their potential as key advocates of BESN within the community. Evidence suggests these groups would have benefited from greater flexibility in the timetable.
A number of champions felt that ECO should have received greater coverage in their training given their perception that it was a complex initiative to understand and explain.
It was felt by some champions that any possible legal issues associated with supporting consumers to switch energy provider were not adequately covered during the training.

**Delivery**

Champions felt that opportunities for the provision of one-to-one support should be maximised, particularly for the most vulnerable. Workshops dedicated solely to BESN were poorly attended and their open, public format made it difficult to target particular groups of vulnerable consumers.

Little is known about the characteristics of participants engaged through frontline workers and the outcomes they experienced.

Certain groups of vulnerable consumers were less well represented (e.g. those with chronic illnesses, those not paying for energy by direct debit, etc.)

There was great variation in terms of funded organisations' abilities to engage participants. The large numbers were achieved as a result of the efforts of a relatively small number of funded organisations, reflecting the variable capacities and strengths of funded organisations.

BESN was delivered under tight timescales and champions lamented a lack of 'lead-in' time. The network could have been broadened if champions had more time to recruit volunteers and frontline workers outside of their own organisations.

**Outcomes**

The changes in attitudes and behaviour amongst BESN participants will only be sustained for as long as their knowledge remains current.

<b>Outcomes</b>	
<p>The percentage of participants switching provider on the day that they received advice through BESN was relatively low.</p>	<p>There are many reasons why this may be the case including participants switching tariffs or making an informed decision not to switch. However, more one-to-one support may also help more participants overcome barriers to switching.</p>
<p>The changes in attitudes and behaviour amongst BESN participants will only be sustained for as long as their knowledge remains current.</p>	<p>Opportunities for refresher training should be offered to funded organisations via champions that can then pass this on to as many volunteers, frontline workers and participants as possible. At the least, funded organisations should be made aware of how they can access up to date information.</p>

