UsersTCP

Hard-to-Reach Energy Users

Subtask 2: Case Study Analysis

United Kingdom

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Dr Danielle Butler, National Energy Action

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Preface

This report was developed under the 'Users Technology Collaboration Programme[1] (TCP) by the International Energy Agency (IEA) Task on Hard-to-Reach (HTR) Energy Users'. The Task aims to provide country participants with the opportunity to share and exchange successful approaches identifying and better engaging HTR energy users. Under the Task, HTR energy users are broadly defined as *'any energy user from the residential and non-residential sectors, who uses any type of energy or fuel, and who is typically either hard-to-reach physically, underserved, or hard to engage or motivate in behaviour change, energy efficiency and demand-side interventions*'.

Outcomes from the Task indicate that HTR energy users involve, for example, renters and landlords; low- and high-income households; the MUSH (municipalities, universities, schools, and hospitals) sector; small to medium enterprises / businesses (SMEs / SMBs); and people exposed to intersecting and compounding vulnerabilities based on factors such as age, race, gender, minority status, geographic, linguistic, technological or social isolation.

The case studies presented in this report aim to offer insights into programmes that aim to better engage HTR energy users in the United Kingdom. Particular attention is given to design, implementation and behaviour change aspects. Other country case studies developed under the Task also include: Aotearoa New Zealand, Canada, Italy, the Netherlands, Portugal, Sweden and the U.S.

We would like to thank all participating countries, their authors, and the interviewees who provided insights into their programmes targeting the HTR. I would like to particularly like to thank our National Experts, Kira Ashby and Prof Luis Mundaca, who peer-reviewed all CSAs, and any national experts who undertook peer reviews.

All case studies can be found on thein the project's website.

Dr Sea Rotmann

Task Leader

Users TCP by IEA Task on HTR Energy Users

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[1] https://userstcp.org/

Executive Summary

The UK has a long history in research and policy focused on the technical, social, and economic dimensions of energy across the domestic and non-domestic settings. Within the social sciences this has included a substantial focus on hard-to-reach (HTR) or hard-to-serve energy users, including those experiencing energy hardship, vulnerability, and issues with access and affordability have dominated policy and research discourse. A key area of focus and one that runs through much of the work presented in this Case Study Analysis (CSA) is that which has focused on understanding and tackling energy poverty (widely termed *fuel poverty* in the UK context). The fuel poverty evidence base is well-established, dating back some forty years, and policy mechanisms have now been in place for more than two decades. Despite substantial efforts, more than one in ten households today are living with the detrimental impacts on health and wellbeing caused or worsened by fuel poverty (BEIS, 2021), and winter morbidity and mortality related to cold, energy inefficient homes is rising (NEA, 2021). The UK has one of the worst performing housing stocks in Europe, meaning that levels of fuel poverty are also comparatively higher than in other European countries, including those with similar climates (ACE, 2015).

We know from the evidence base that energy poverty is not experienced uniformly, and this is reflected in national policy with goals to prioritise the 'worst first' (BEIS, 2020). However, in current policy this is targeted towards the worst-performing properties, and arguably does not fully account for the manifold, overlapping and intersecting vulnerabilities faced by many households experiencing or at risk of energy poverty. Poor physical and mental health, remoteness and isolation, ethnicity and language barriers, among myriad other factors, are all indicative of groups that are considered HTR or those that have been overlooked and/or underserved to date. This HTR group also includes, however, small to medium businesses, high-income / high-consuming households, and commercial sector building operators (Rotmann et al, 2021).

Interlinked with the challenge of tackling energy poverty is the climate crisis. The energy inefficiency of buildings in the UK is similarly an issue across the residential and non-residential sectors, and as our literature review has highlighted (Rotmann et al, 2021), there is a need to better understand and support HTR groups in the latter as well as the former.

This case study analysis profiles four projects targeted towards, in the broadest sense, vulnerable domestic energy consumers considered HTR, and one that details a project focused on HTR energy users in a non-residential setting:

1. ***The Big Energy Saving Network (BESN):*** a nationally-led, locally delivered network of energy advice and support targeting vulnerable energy consumers and energy-awareness training for frontline workers.
2. ***Warm Minds:*** initially a collaboration between a fuel poverty charity and a mental health charity, this project involved training for frontline workers and direct support for individuals (and their carers) living with mental health issues, dementia/Alzheimer's, and learning difficulties.
3. ***Gluasad Còmhla (GC; Moving Together):*** a project aiming to strengthen interagency working to tackle fuel poverty, and the social determinants of health in rural and remote communities across the Western Isles in Scotland.
4. ***Empowered by Energy (EbE):*** a pilot project delivered by fuel poverty charity, *National Energy Action*, involving energy-awareness workshops for recent refugees and other migrant communities with limited English capabilities.
5. ***Promoting Sustainability in Business (PSiB) - A values-based approach:*** a non-residential case that presents a set of resources targeted towards low carbon and other intermediaries that work on promoting sustainability with small and medium-sized enterprises.

This selection of case studies describes the UK experience of how to engage highly-vulnerable and HTR groups from the perspectives of academia, Government, industry, community, and statutory and third sectors. All interventions described here are supported by relevant research experts and were

evaluated independently. We have drawn on interviews with programme managers and evaluators; websites; reports; media stories; and testimonials from participating households to inform these analyses. Each initiative has shown significant successes in targeting its specific audiences, and we have provided some constructive critiques and overall conclusions and recommendations.

This CSA will form a part of a wider *Cross-Country Case Study Comparison* (CCCSA) with seven other countries: Canada, Italy, the Netherlands, Portugal, Sweden, Aotearoa New Zealand, and the U.S. Overall, we will examine, in-depth, almost 25 international case studies of how to engage the HTR, in the residential and SME sectors.

We have chosen a framework developed by our HTR Task Project Partners, the *See Change Institute* (Karlin et al, 2021), called '*The Building Blocks of Behaviour Change*' to guide this CCCSC. The ABCDE Building Blocks are based on examining, ex-post, the focus of each case study on:

A. *Audience* characteristics and clear descriptions of target audiences
B. *Behaviours* targeted with interventions
C. *Content* of messaging and engagement strategies
D. *Delivery* of messaging (timing, messengers and medium)
E. *Evaluation* of interventions (process, impact, output, narrative etc.)

Utilising an overarching analytical framework such as this facilitates us being able to compare and contrast quite different diverse case studies, with different country contexts, audiences and engagement strategies. We have also asked each of our CSA authors to provide insights into the usefulness of this methodology.

Country background: United Kingdom

The UK Energy System

There are three components to the UK's energy system: generation, networks, and supply. Since the 1990's, energy suppliers of gas and electricity – the two main energy networks in the UK - have operated within a liberalised and competitive market (Pearson & Watson, 2010). At its peak in 2018, the UK energy market had more than 70 energy suppliers, but was dominated by six companies known as 'The Big Six' that serve more than 50 million, the large majority, of UK households and businesses (UK Power, 2021). The 2021 'energy crisis' has seen multiple energy suppliers in the UK ceasing to trade and therefore leaving the market; in a single month in 2021, as many energy consumers were affected by a supplier leaving the market as had been in the previous four years combined (Michael, 2021).

While in the early years of energy market liberalisation energy costs fell dramatically, this situation has since changed for the worse, in terms of energy affordability. Energy costs and energy price caps are now a major topic of discussion across the media, policy, and research sectors, with the most recent rises expected to push a further half a million households into a position of energy hardship and vulnerability. As part of the liberalisation of markets, price controls for consumers were abolished in 2002, but later reintroduced to provide price protection to more than 11 million energy consumers from increasingly unaffordable and escalating energy costs (Ofgem, 2019). In the UK, the energy markets and related price controls are regulated by the *Office of Gas and Electricity Markets* (Ofgem). Ofgem are, for instance, responsible for setting the price cap, designed to protect consumers on 'default' tariffs, compared to fixed tariffs, which are typically more costly. This system is therefore seen as penalising those who have less engagement with the energy market through switching suppliers or tariffs regularly. A longstanding criticism of this aspect of the system is the disproportionate impact it has on those who pay via prepayment methods. These customers are typically regarded as the most vulnerable energy consumers on lower incomes, and with fewer tariff options available (Rotmann et al., 2021).

Energy (Fuel) Poverty in the UK

The UK has a long history of research, policy, and practice focused on those unable to afford or access sufficient fuel for good health, comfort, and wellbeing in the home. In the late 1970s, Isherwood and Hancock (1979) were among the first to put the issue of energy hardship on the agenda examining households at risk – as they termed the 'victims of fuel poverty' - using national household data. Building on this early work, Boardman (1991) is credited with setting out the first formal definition of fuel poverty – the 10% measure[2] – which was introduced in UK energy policy in 2000, and is still a widely utilised measure within and beyond the UK today (see discussion in Rotmann et al, 2021).

In UK policy, the term 'Fuel Poverty' is most commonly used, though in research-related terms in line with international discourse, terms such as energy poverty, energy burden, and energy vulnerability or hardship, are also widely used. Fuel Poverty has been defined as "*a social problem that affects the poor, with its roots in the quality of the housing stock and the cost of fuel*" (Boardman, 2013, p.1) and it is a combination of these factors at play – low income, poor housing, and high energy costs – that are understood as the three drivers of the wider social issue. This does not address the deeper underlying structural issues of poverty, such as systemic classism, racism, sexism and ableism (Rotmann et al, 2021; Reames, Daley & Pierce, 2021).

The UK's first *Fuel Poverty Strategy* was introduced in 2001 and aimed to eradicate the issue for all households by 2016, with interim targets set to ensure that there were no vulnerable fuel poor households by 2010, and no fuel poor households within the social housing sector by 2012 (DEFRA, 2003). With the 2016 target unlikely to being met, the *Hills Review* was undertaken in 2011-2015, and resulted in a shift from the 10% measure to the *Low Income High Cost* (LIHC) indicator. Following

[2] Where, in Boardman's 1991 book, Fuel Poverty was defined as a circumstance in which a household needs to spend more than 10% of its income on energy costs.

consultation, this has subsequently been revised again in 2020 with the introduction of the *Low Income Low Energy Efficiency* (LILEE) indicator, which determines fuel poverty based on the energy efficiency rating of a property, and household income after housing costs and energy needs are accounted for (BEIS, 2021).

Fuel Poverty policy is a devolved matter across the UK nations, with only England adopting the LILEE measure described above. Estimates suggest that more than four million households are affected in the UK, however, proportionately, this varies dramatically across the four nations (NEA, 2021):

- England: 3,176,000 households (13.4%)
- Scotland: 619,000 households (25%)
- Wales: 155,000 households (12%)
- Northern Ireland: 160,000 (20%)

Certain dwelling and household characteristics indicate an increased risk of fuel poverty in the UK. For example, older, energy inefficient and largely solid wall properties (which make up a significant proportion of the UK housing stock) have the highest levels of fuel poverty. Properties in rural and remote areas, and therefore those most likely to be off the gas grid, are also disproportionately affected. In terms of housing tenure, those privately renting their home are most likely to be living in fuel poverty, compared to those in social rented homes or who own their own property (outright or mortgaged). In terms of household composition, young adult, older and single parent households, as well as those classed as living in a house in multiple occupations, are among the demographic groups with the highest levels of fuel poverty (BEIS, 2021). Given that low income is one of the key determinants, it is unsurprising that fuel poverty disproportionately effects those on the lowest household incomes, and consequently unemployed and economically inactive households are more likely to be fuel poor. Recent data, however, has highlighted that among the fuel-poor population, almost half are in employment and might be classified as the 'working fuel poor' (Howard, 2015).

Behavioural Change and Energy in the UK

Psychology offers valuable insights into the drivers, motivations, mechanisms, and challenges encountered in energy-related behaviour change. The discipline has been entangled in global efforts to better understand behaviour change in this context for more than 70 years, with those driving forward this work in collaboration with governments, policymakers, and myriad other key actors at national, regional, and local levels (Uzzell, 2012). Importantly, psychology provides a critical lens for understanding the limitations of behaviour change frameworks and interventions, particularly those situated within a 'nudge' framing where individuals are regarded as rational, predictable, and at times uniform in their responses, and are also seen as operating within the same set of circumstances, cultural sensitivities, and societal constraints, among other important factors (Uzzell, 2012). As Uzzell (2012, p.3) outlines:

> "*Behaviours are not always the product of rational, deliberative and individual decision-making. They are as likely to be based on opportunistic or emotional impulses, habits and cultural traditions, and social norms derived from family, friends, neighbours as well as a host of other contextual factors. Many behaviour change campaigns, however, start with the assumption that people make rational choices as a result of weighing up the costs and benefits of particular consumption decisions*"

With a focus specifically on energy consumption and behavioural change approaches, several key recommendations for developing and delivering effective behaviour change programmes have been set out (Uzzell, 2012). This includes a need to:

- Ensure that '*change programmes'* make sense and fit with '*the grain*' of people's lives and existing habits
- Develop tailored interventions that "*meet the needs and interests of different audiences in different situations at different times*" (p.1)

- Be aware that targeted action may be better focused on '*conditions which affect people's lives',* not necessarily energy
- Understand how different barriers may interact in positive and negative ways
- Meaningfully involve people in energy-related programmes and behaviour change interventions from the outset
- Provide *rewarding* and *reinforcing* feedback
- Focus on *environmentally-significant* actions not *environmentally-convenient* ones (avoid greenwash).

In the UK, a recognition of the role psychology can play in understanding and influencing environmental and energy-related behaviour can be observed in the work of the Government's *Behavioural Insights Team* (established in 2010. This has been particularly powerful in understanding how effectiveness of programmes can be enhanced where a change in behaviour fits with existing habits, or is introduced opportunistically at moments of change (e. g., moving house or having a baby, see Darnton, 2011). However, as Stern (2006) has argued, ambition, urgency and scale are fundamental, and behavioural changes must be environmentally significant, not just convenient.

In a 2012 review, the UK Government's *Parliamentary Office of Science and Technology* explored a range of factors and interventions that can influence energy use behaviour change. In addition to those noted above, feedback is understood as essential, beyond simple unidirectional information provision (Allen, 2012). Further, a mix of regulatory and non-regulatory interventions are seen to be most effective, for example, in the regulation of heating systems such as gas boilers alongside non-regulatory, non-fiscal programmes such as the smart meter rollout. Finally, the role of evaluation in understanding and building effective, long-lasting, and transferrable behaviour change interventions is regarded as a critical component. In particular, the review highlights the need to incorporate evaluation processes from policy design through the lifespan of the project and beyond in order to fully monitor behaviour change.

In the dual-policy context of tackling fuel poverty and addressing the climate crisis, there is widespread agreement on the critical importance of understanding how best to design and develop programmes focused on energy-related behaviour change. As the *Energy Research Partnership* (ERP; 2021) outline "*Reduction in carbon emissions required to hit the UK's 2050 Net Zero target will only be achieved if there is substantial and sustainable change in behaviour across society*" (p.4). While this includes changes in individual behaviours and practices, this must also be reflected in changes at the policy level where structural and societal constraints are taken into account. As Uzzell (2012) notes: "*People do not always have control over their environment*" (p.5), and this line of thinking can also be extended to income, housing circumstances, support networks, and other factors linked to vulnerability.

While the UK has reduced its emissions by 63% since 1990 through the reduction of coal-fired generation and increase in renewable energy, the ERP (2021) argue that more must be done. Drawing on the analysis of the *Climate Change Committee's* 25 actions, and specifically on the role of behaviour change in achieving legally-binding commitment to reach *Net Zero by 2050*, they define behaviour as an interaction of *capability*, *motivation*, and *opportunity*. The report investigates the key barriers, enablers, interventions, and policy mechanisms that exist and are required for achieving substantial but necessary changes in the domestic and commercial sectors. Several recommendations for future activities are set out (ERP, 2021), including:

- Behaviour change must be regarded as a critical element in low-carbon policies
- A mix of regulation, incentives, nudges, and penalties are required
- Prior to the introduction of policy-driven behaviour change, plans for how individuals and businesses can be enabled to take that action must be established
- Carbon reduction must be data-driven and digitally adept
- Government funding will be required

- Smart energy use and accessibility of smart home systems will play a key role
- Energy consumption and carbon footprint information must be available and easily accessible to a range of different audiences
- Policies must be ambitious and target-driven and future programmes must consider and address barriers across residential and commercial settings.

Reaching the HTR in the UK

This Task, developed under the 'Users Technology Collaboration Programme (TCP) by the International Energy Agency (IEA) Task on HTR Energy Users', aims to develop a better understanding of HTR energy users and to share and exchange successful approaches in defining, identifying and better engaging such groups. Under the Task, HTR energy users are broadly defined as: "*any energy user from the residential and non-residential sectors, who uses any type of energy or fuel, and who is typically either hard-to-reach physically, underserved, or hard to engage or motivate in behaviour change, energy efficiency and demand-side interventions*" (Rotmann et al, 2021).

In a review of the literature focused specifically on HTR characterisation (Ashby et al, 2020a), a total of 30 different demographic characterisations were identified. In the UK context, these included demographic characterisations such as disabilities, high and low incomes, renters, rurality, age, and groups that would fall under the commercial sector, such as small and medium sized enterprises. Developing this, the review outlines key barriers linked to the different groups identified in the literature. Considering the UK characterisations only, for those with disabilities or those living in rural and remote locations, the most common barrier to behaviour change is *access*, for high income households it is *lack of motivation* and *inadequate price mechanisms*, for low income households it is *cost* but also *trust* (e.g., in authorities, their landlord or utilities), for renters it is *split incentives* (between landlords and renters), and for small business it is *competing priorities* and *cost*.

Research exploring HTR energy users in the UK context has to date been limited. This is highlighted in a recent study by Ambrose et al (2019), which focuses on reaching the HTR through energy advice and related support. Drawing on insights from Citizens Panels, in-depth qualitative interviews, and workshops with a Stakeholder Reference Group consisting of policymakers, practitioners, and academics, the study argues that the term HTR is poorly defined, and use of umbrella terms like it risk implying homogeneity within groups (Brackertz & Meredith, 2008). Therefore, definitions of HTR must be 'context-specific' and the limitations in developing lists of groups that may or may not be targeted, or adequately supported with energy-related behaviour change must be acknowledged, alongside the strengths and benefits such as more efficient targeting and awareness raising. A useful typology of four broad user groups are proposed:

1. Those who are 'new to this' (experiencing energy-related crisis or hardship)
2. Those undergoing 'big lifestyle changes'
3. Those for whom life is a 'balancing act'
4. Those who 'can't do this alone'.

Developing this typology, the research outlines a set of overarching barriers experienced by HTR energy users:

- methods of involvement
- physical barriers
- attitudinal barriers
- financial/resource problems
- gender
- timing
- perceptions of relevance.

While the above draws attention to the challenges in defining HTR groups and the barriers they face, another key element, as noted, related to facilitate greater and more meaningful, effective reach of those classified as hardest-to-reach, or hard-to-hear. Ambrose et al (2019) point towards the critical role played by trusted, independent intermediaries, also referred to as 'Middle Actors' (see Parag & Janda, 2015), and who are typically frontline workers across third sector organisations, health settings, local agencies and support services, among others. Effective reach, for some, is also dependent on services being provided face-to-face and in the home, and therefore this form of provision must be protected and expanded. A focus on prevention, not reaction to crisis, is also identified as a key mechanism for effectively reaching those who most need support. Delivering support opportunistically at moments of change – discussed in relation to UK approaches such as *Making Every Contact Count*[3] – are also important. And finally, there is a clear need for energy suppliers to play a bigger role, alongside energy-related advice and support agencies, with utilities taking steps towards understanding the needs and barriers of their most vulnerable consumers.

[3] Making Every Contact Count is an evidence-based approach to improving people's health and wellbeing by helping them change their behaviour. https://stpsupport.nice.org.uk/mecc/index.html

Methodology

The Building Blocks of Behaviour Change

The overall methodology followed the co-designed CSA methodology and template (Rotmann et al, 2021). Our HTR Task follows a recently-developed research framework by See Change Institute, called 'The ABCDE Building Blocks of Behaviour Change' (BBoBC; Karlin et al, 2021). The ABCDE Building Blocks framework serves as a systemised and data-driven approach to designing, implementing, and evaluating behaviour change interventions, including for those aimed at HTR audiences. These Building Blocks include (see Figure 1 in Karlin et al, 2021):

- **A**udience: the pilot or programme's intended participants
- **B**ehaviour: the specific behaviour the programme intends participants to change
- **C**ontent: the programme strategy and approach
- **D**elivery: the mechanism and timing of the intervention (e.g., delivery may happen through door-to-door interactions or social media, etc.)
- **E**valuation: the way in which programme success is measured or otherwise assessed

Throughout the development of these case studies, it became clear that some of the building blocks applied more readily to these programme examples than others, as discussed in more detail in the General Discussion section of this document. As will become apparent in each case study, Content and Delivery are often closely linked. Given that certain content lends itself more readily to specific delivery channels, it can be a bit tricky to untangle which was content and which was delivery. The other building blocks, for the most part, proved more straightforward to apply to these concrete programme examples.

Methods of Data Collection for each CSA

The methodology to develop the case studies is simple, and is composed of the following elements.

First, the case studies were chosen based on the outcomes of previous activities undertaken by the Users TCP HTR Task. As indicated in the previous section, these activities aimed to identify and characterise HTR audiences in participating countries. To that end, a variety of data sources were used, including an international survey, interviews with experts and practitioners, and a literature review (for details, see Ashby et al, 2020a and b; Rotmann et al, 2021). We then reached out to our funders and other stakeholders to identify the most appropriate CSAs for the UK context.

This chapter presents five case studies of UK-based projects; four are focused on the residential sector, and one examines small and medium enterprises as HTR energy users in the non-residential sector. While reference to the UK context is made throughout, and energy policy and practice with UK implications are considered, it important to note that none of the five cases draw on or explicitly refer to work that is happening in Northern Ireland and are therefore only discussing cases in Great Britain. Of the four residential case studies, one operates at a 'national' level (however, this is delivered across England, Wales, and Scotland only), one covers a region of rural and remote islands off the northwest coast of Scotland, and two detail small-scale projects in different regions within England. The non-residential case study, as a small-scale project under development, has focused primarily on England, however, has relevance to a wider UK context and beyond. Some evaluation of this case in a non-UK context (Pakistan) has taken place and this is discussed. A brief overview of the five case studies included is set out below (Table 1).

Case Study		Year	Location	Target Audience
1	*Big Energy Saving Network*	2013 - present	England, Wales, and Scotland	Vulnerable energy consumers and frontline workers
2	*Warm Minds*	2012/13 and 2016/17	England and Wales	Individuals living with mental health issues, dementia/Alzheimer's, and learning difficulties (and their carers)
3	*Gluasad Còmhla (Moving Together)*	2018 - 2020	Outer Hebrides	Rural and remote communities
4	*Empowered by Energy*	2019 - present	UK	Recent refugees
5	*Promoting Sustainability in Business: A values-based approach*	2016-2019	UK	Small and Medium-Sized Enterprises

Table 1: Introducing the five cases

From an analytical point of view, the approach adopted the BBoBC framework developed (for details see Karlin et al, 2021; and Rotmann et al, 2021). Data gathering was guided by an interview protocol that addressed each building block, and the set of questions can be found in Rotmann et al (2021).

Interviews (lasting between 20-60 minutes) supported data collection and provided a deeper understanding of the chosen cases. These were conducted by the author of this report and the following people were involved:

- Jack Hope, Service Delivery Manager, Citizen Advice (July 2021)
- Rebecca Jones, Project Development Coordinator, National Energy Action (July 2021)
- Jo Boswell, Project Development Coordinator, National Energy Action (August 2021)
- Brian Whitington, Project Manager, Tighean Innse Gall (August 2021)
- Malcom Dove, Project Development Manager, National Energy Action (July 2021)
- Dr Sam Hampton, Research Fellow, Environmental Change Institute, University of Oxford (July 2021)

Finally, the case studies were supported by a review of official documentation and academic publications. This phase also included the analysis of information found on the websites of the five initiatives, and multiple (*ex-post*) evaluation reports and papers.

UK Case Study 1- Residential: The Big Energy Saving Network

Background

The first case study from the UK chapter examines the *Big Energy Saving Network* (BESN), which is a nationally-led, locally delivered community outreach project targeting energy advice and related support towards vulnerable energy consumers across England, Wales, and Scotland[4]. BESN is levy-funded, overseen by the UK government (specifically, the *Department for Business, Energy and Industrial Strategy*, BEIS) and coordinated by the national charity, *Citizens Advice*, who are the UK's statutory consumer advocate for energy.

In operation since 2013, BESN was developed from the success of a smaller energy advice scheme that commissioned local organisations to undertake outreach work with groups considered to be vulnerable and/or HTR. In its current, well-established and expanded form, it is delivered across two strands of funded activity, both focused on raising the awareness of and access to energy-related advice and support. The first involves a mixture of general awareness raising and more focused energy advice delivered by a network of annually recruited Energy Champions (ECs) who are based across local agencies and organisations; the second involves energy advice training for a wide range of Frontline Workers (FLWs) that is coordinated by a network of twenty regional leads.

The programme is designed to deliver support via these roles – ECs and FLWs (who are trained by the regional leads) - in recognition of their status as trusted intermediaries who have local knowledge and established links within the communities in which they work. The type of energy-related advice and support provided is that which may be considered 'lighter touch' compared to more detailed case work[5], and typically focuses on helping people with their energy bills by encouraging them to take actions, some of which relate to energy behaviours. This can include switching energy supplier, payment method or tariff, signing up for *Warm Homes Discount* or the *Priority Services Register*[6], or taking measures to reduce energy use and/or make the home more energy efficient.

Each year, around 20,000 people are supported by ECs as part of BESN. Alongside this, in the last programme year (2020/21), more 6,000 FLWs received energy advice training. Estimates suggest that each FLW trained goes on to support a further 10-15 clients with energy-related advice and support. In both elements, a 'cascade' approach is adopted where ECs and trained FLWs are encouraged to share their knowledge and skills with others, namely colleagues, resulting in greater overall impact and reach of support delivered as part of BESN.

Audience

Reaching vulnerable energy consumers through Energy Champions

BESN is targeted towards two key audiences: vulnerable energy consumers and FLWs. The programme reaches the former through the network of ECs who work for local agencies and organisations. ECs are recruited on an annual cycle to provide various forms of energy-related advice and support to individuals and communities. In the last scheme year, roughly 150 organisations across England and Wales had at least one EC in place (with around half of these organisations being locally based *Citizens Advice* organisations). Each organisation or agency that is involved can

[4] A separately funded and coordinated strand of BESN is delivered in Scotland. This CSA covers the England and Wales project only.
[5] The work of BESN sits alongside an in-depth service called the *Energy Advice Programme* (delivered via a different funding stream) that provides detailed casework. This service is more in-depth, covering a broader spectrum of casework, and is accessed via inward referrals from other services, including BESN.
[6] The `(PSR) is a register where energy suppliers and other relevant parties (such as the electricity networks and gas distributions networks) hold and maintain the details of customers who may require non-financial support due to their personal circumstances or characteristics. https://utilita.co.uk/help/priority-services-register#:~:text=The%20Priority%20Services%20Register%20(PSR,their%20personal%20circumstances%20or%20characteristics

have up to four ECs, who in turn have targets of reaching between 50-100 individuals. The funding allocated to each EC is limited in scope (set at £10,000 per EC per annum) and, as such, typically this role only constitutes part of a Champion's overall workload. It is important to note that ECs and the organisations they represent are not necessarily specialists in the provision of energy advice and support, or those working directly on energy or tackling fuel poverty. As the table below (Table 2) shows, an Energy Champion can be characterised in one of two ways:

Energy specialists	Agencies or organisations for whom involvement in BESN is part of a portfolio of energy projects that are being delivered.
Non-energy specialists	Agencies that are primarily funded to do other, non-energy advice or outreach work (e.g., financial capability), but who know enough about the role of energy and have access to and work with vulnerable groups in the local community.

Table 2: Characterising Energy Champions

Regarding the first target audience, the project intentionally adopts a broad characterisation of *vulnerable energy consumers* as *individuals or households that may be living in or at risk of fuel poverty*. At the national coordination level of BESN there is no rigid definition or pre-determined inclusion/exclusion criteria for which demographic groups or individuals are targeted. Rather, local agencies and organisations in which ECs are based are regarded as experts with the requisite skills, knowledge, and understanding of what creates and exacerbates vulnerability among the demographic groups and individuals they support in their local areas. This approach, whereby the programme adopts a bottom-up framing of vulnerability in determining the definition of the target audience, is perceived by the national coordination team as a key strength. As a representative of BESN told us, it provides:

> "*…a level of freedom to organisations at a local level to go and find new consumers that are vulnerable that they know about because of the expertise and local knowledge that they have*."

While audience profiling and approaches to targeting are determined by the local agencies and organisations where ECs are based, the national coordination team for BESN do undertake some high-level review of this at application stage and following the evaluation of the programme each year. As part of the application process, agencies and organisations are required to set out the demographic groups they aim to reach (their audience profile) as part of an EC's work, and, importantly, their proposed methods for reaching such groups (i.e., by attending local events and holding pop-up advice sessions in the community). A yearly evaluation (discussed later) then reviews the effectiveness of this work, post-hoc, providing the opportunity to set out key learnings and recommendations to shape delivery in subsequent scheme years.

Considering more specifically the demographics of the vulnerable energy consumers supported as part of BESN, in the most recent scheme year (2020/21), of the 17,000 people supported:

- 76% identified as white, 6% as Black, 5% as Asian, and 2% as mixed ethnicity
- 70% identified as female
- 58% reported a long-term health condition, 31% are disabled, and 14% have a mental health condition
- 59% are living in rented accommodation (44% social rented, 15% in the private rented sector) and 2% are living in temporary accommodation
- 60% are over the age of 55, 29% are aged 35 – 54, and 13% are under 34[7]

Psychographic data is not collected as part of the BESN evaluation.

[7] Figures are taken from the BESN annual evaluation report.

It is worth noting that the Covid-19 pandemic has impacted the profile of those supported in the last year. As the presentative told us, delivery of energy advice and support has changed significantly, with almost all provision, as with many other frontline services, being delivered on a one-to-one basis and remotely. As the 2020/21 evaluation report outlines, this has impacted the profile of those supported:

> "*BESN has engaged a younger group of consumers (18-54), and a smaller proportion of older clients (55+). This is likely a result of the move to a remote service, higher energy bills and increased local partnerships with community services such as food banks, who have been working with these groups of people*." (Citizen Advice, 2021, p.4)

Reaching frontline workers through regional leads

While ECs are recruited to provide direct energy-related advice and support to vulnerable energy consumers, there is also a network of twenty regional leads who coordinate training delivered to FLWs: the second target audience. Those that receive training are predominantly paid employees working in the charity sector, however, many others are based within local authorities or work in health professions.

Again, the pandemic has had notable impacts on the delivery of training as part of BESN in the last year. Certain organisations, such as the NHS, have had fewer staff trained than in previous years due to capacity issues relating to the demand associated with the pandemic. Noting a positive impact, however, in terms of the reach of BESN training:

> *"…the emergence of COVID-19 response hubs, and other local initiatives to address the pandemic and its consequences have also provided new opportunities for engaging some FLWs*" (Citizens Advice, 2021, p.38).

In the 2020/21 scheme year, more than 6,000 FLWs received training as part of BESN and, highlighting the 'cascade' approach noted earlier, modelling has estimated that each FLW trained goes on to 'reach' between 10-15 individuals, providing support with a range of energy-related issues.

The introduction of regional leads - whose role it is to reach the network of existing FLWs - is a key change and only a recently introduced element of the programme. Previously, ECs would deliver not only advice directly to vulnerable energy consumers, but also training to other FLWs. As outlined by the BESN representative, training and advice provision are recognised as two distinct skillsets and areas of expertise, thus leading to the decision to separate out these two elements of the programme. Regional leads each train an estimated 300 FLWs per year, but additionally they play a crucial coordination role at the regional level, organising meetings and managing communications (e.g., sharing examples of best practice) among the network of ECs, trained FLWs, and other key stakeholders in their region. The representative described this role as sitting between the national delivery team and the ECs, and a particularly valuable role for accommodating and supporting newly recruited ECs and their organisations into the Network. In terms of geographical coverage, there are two regional leads in each of the nine Government regions in England, and two further leads working across Wales.

Behaviours

BESN's overarching aim is to support vulnerable energy consumers. This necessarily contributes towards efforts to tackle fuel poverty and address a range of associated vulnerabilities such as those relating to health or finance, for example. The programme is, then, focused in a broader sense on the behaviours and other mechanisms that can reduce energy vulnerability.

In considering specific energy-related behaviors or targeted actions, BESN's work comprises predominantly of four key activities which includes supporting households to:

1. Switch energy supplier or tariff, therefore securing the best energy deal
2. Apply for the *Warm Homes Discount*
3. Register for the *Priority Services Register*
4. Take steps to improve the energy efficiency of the home.

While there are behavioural elements to all four of the main outcomes listed above (for example, switching could be classed as a behavioural in terms of having more regular engagement with the energy market), the fourth – taking steps to improve the energy efficiency of the home – is where behavioural change at the household level is most clearly identifiable, measurable, and actionable.

A representative from BESN explained that while there is some consideration of addressing energy efficiency through more substantial changes to the fabric of the home or the systems within it, this aspect of the project was much more focused on individual behaviours – reflecting the 'lighter touch' characterisation of BESN's advice provision. ECs and trained FLWs provide advice and information on a range of common everyday domestic behaviours that can be modified to reduce energy use. For example, the recommended use of heating systems, doing laundry, boiling the kettle, and benefits of adding small, often low- or no-cost measures, such as curtains or radiator reflective foil. While reducing energy use, and consequently the cost of energy and vulnerability as an energy consumer, is a key aim, an underlying goal of BESN is to generate more meaningful conversations about energy in the home – and as the representative explained, conversations about energy use is often a good starting point for achieving this. In terms of understanding this through the lens of motivations and benefits for households, as the BBoBC examines, this is typically pitched in terms of how to save money on energy bills, with some, albeit less prominent, environmental considerations, too. In BESN, health is less of a focus, likely due to the light touch nature of support compared to in-depth casework and was not discussed in detail by the representative. As the BESN representative did tell us, however, this approach has the potential to bring about not only short-term relief, but also longer-term behavioural change. For example, with advice and support on switching, in the short-term energy costs are reduced, however in the longer-term this can lead to greater awareness of, and confidence in engaging with the energy market.

This emphasis on behaviour change is similarly reflected in the training provision for FLWs where there is a focus on the energy efficiency of the home, and how to use energy more efficiently. Reflecting the other targeted actions noted above, FLWs are also trained on how to give advice on switching supplier or tariff, applying for the *Warm Home Discount*, registering for the *Priority Services Register*, as well understanding smart meters, and information on changing payment methods.

Ultimately, however, BESN is a programme designed to focus not on a specific energy-related behaviour or set of behaviours and is instead about reducing vulnerability as an energy consumer, often complicated by factors such as health, income, and the systems and structures surrounding energy efficiency, consumption, and markets. As demonstrated by the predominant areas of focus in BESN's advice and support provision, as well as the training delivered, this is not simply a focus on changing individual behaviours, but to also provide guidance as to how to avoid disproportionate cost, minimise related risks, and access policy-driven support mechanisms within the UK energy system.

Content

With regard to the content used to support the advice and information as part of the delivery of BESN, the national coordination team (at *Citizens Advice*) have developed a suite of publicly available resources[8]. Materials have been developed and refreshed over the eight years since 2013 in which the programme has been active. In developing the resources and deciding what content to include, the team draw on extensive experience across a range of projects centred on energy-related advice provision, as well as key insights from annual BESN evaluations. Programme content, therefore, is crafted not from behavioural science or theoretical insight, but from professional and practical expertise in the sector as to which engagement strategies have the greatest success and how best to optimise content.

Resources are designed in a way as to be easily adapted – and this is strongly encouraged by the national coordination team so that the content varies in a way that is most appropriate to the different forms of advice and information provided and individuals/groups supported. The publicly available resources are, then, to be treated somewhat like templates, to be adapted for a given geographical region, audience, or form of support provision. This approach supports the notion within the BBoBC framework that optimised content is that which is reviewed and revised. In addition, this further

[8] https://www.citizensadvice.org.uk/about-us/our-work/our-prevention-work/BESN/

speaks to the key principle that underscores the design of BESN, whereby a bottom-up approach, where localised expertise is highly valued and trusted, is adopted. The design and delivery of content, therefore, is crafted by the local organisations and agencies to provide that which can have the greatest impact and is rooted in the knowledge and expertise of ECs and FLWs delivering the programme of advice and support.

Available resources include presentation slides, printable handouts for activities, leaflets, and an online comparison tool for energy suppliers, and are developed for different audiences including the ECs, FLWs, and consumers. A range of topics are covered, such as how to secure the most appropriate and affordable energy contract/payment arrangement (see for example the 'Energy Best Deal'[9]), help with bills, and switching, as well as recently added advice related to extra support from energy suppliers during the Covid-19 pandemic. The latter resource, targeted at consumers specifically, details additional protections and mechanisms of support to mitigate the impacts of the pandemic in terms of income, health and keeping warm and well. Available resources can be shared electronically or printed, with some, such as the activity handouts, designed with that purpose in mind; the latter supporting the provision of advice in group settings, as was a customary element of BESN delivery prior to lockdown measures in response to the Covid-19 pandemic.

Relating to the focus on individual behavioural change noted above, one of the training resources focuses more explicitly on energy-related behaviours, looking at energy saving in the home. Designed as an activity to be completed in small groups, but able to be used also in one-to-one support, the exercise asks individuals to reflect on an image of the home and the different rooms, setting out different energy-saving behaviours. This is then supported with a follow-up discussion which can be one-to-one with an EC, or as part of a group energy awareness and advice session.

Delivery

As detailed, BESN is an annually refreshed, nationally coordinated, and locally delivered programme of energy advice and support, delivered predominantly face-to-face in previous years, with a shift to almost exclusive remote provision since the Covid-19 pandemic in 2020. BESN is delivered across England, Wales, and Scotland directly through the work of a large network of recruited and funded ECs, and indirectly via training for existing FLWs which is coordinated by a team of twenty regional leads.

Messengers and their Medium of Delivery

ENERGY CHAMPIONS

Approximately 150 local organisations are commissioned each year to deliver energy-related advice and support as part of BESN, specifically through the EC role. Each organisation can apply for funding for up to four ECs, each having a target to reach 100 individuals. In terms of practical delivery, the methods and mechanisms used to reach and provide energy-related advice and support are intentionally left to be determined by the agencies and organisations in which the ECs are based. As the BESN representative told us:

> "*We know that energy advice is needed, but a national organisation won't have access to the vulnerable groups, so the way to reach them is through the local organisations that do have access to those groups.*"

The work of the EC is largely embedded into wider activities undertaken as part of existing roles, whether specifically focused on energy or not. As such, BESN is not a new service or delivery mechanism per se but can be regarded as an added component that complements, strengthens, or expands existing provision and networks of support in the context of energy advice and support. As such, ECs are typically folding activity funded by BESN into their wider professional roles. For instance, it might be that a generalist advisor is unable within their current remit to provide elements of energy advice, but additional funding from BESN enables them to do so. For those already

9 https://www.citizensadvice.org.uk/Global/CitizensAdvice/Energy%20Best%20Deal/WEB_EBD_booklet_English.pdf

delivering energy advice, it can serve as a prompt to deliver slightly different forms of advice and support, for example expanding provision to underserved or previously unengaged-with groups.

A key element of the EC role involves establishing and maintaining local partnerships. As the BESN representative explained, the most successful (in terms of reach) delivery partners (organisations where ECs are based) are those with strong local networks and partnerships. For an EC, this element of the work involves raising awareness of the support available via BESN, for example by being a guest speaker at a local event. The idea being that what follows is an invitation to hold regular advice sessions in that trusted community setting. Another common approach is to hold 'pop-up' advice clinics in a range of community settings, such as foodbanks, health settings, libraries, community centres, etc.

Prior to 2020 and the introduction of lockdown measures associated with Covid-19, ECs delivered advice and support most commonly through these 'pop-up' advice sessions in the local community. The type of advice is typically regarded as low-level, or 'lighter touch' delivered through a combination of group advice sessions and one-to-one interactions. For more in-depth support, however, referrals are typically made into other services, both those locally based and operating at a national level.

For energy-specific in-depth, detailed, casework, one referral mechanism for ECs is the separately funded *Energy Advice Programme*[10], also delivered by the national *Citizens Advice* team. The *Energy Advice Programme* is modelled on what the BESN representative described as the 'traditional idea of advice' – that which is typically appointment based, in an office, involving repeated interactions and ongoing casework with clients, and accessed via referrals. This service requires much more detailed reporting, as the BESN representative outlined, with a much more rigid set of criteria in place around understanding the demography of those being reached. BESN, however, might be regarded as similar to outreach work, not in-depth casework. With this, there is much less focus on the specific demographics of those being targeted or supported, and more focus on broadening the reach of the service out into communities to support people who may not know about or have previously engaged with such forms of support. As the BESN representative told us:

> "*Lighter touch is an interesting phrase…from the point of view of the average BESN consumer, it is the most energy advice they've ever received in their life. That's the conceptual thing, from my perspective is one of the most challenging things…Because, yes, the in-depth casework solves really big things, so it is easy to see the value in that. But it is absolutely vital that you go out and try and find people that need help. Most people, for example, will have never switched*."

REGIONAL LEADS AND FLW TRAINING

The other main strand of activity as part of BESN delivery involves the training of FLWs. This, as noted, is coordinated and delivered by a team of twenty regional leads, who, in 2020/21, provided training on energy-related advice and support to more than 6,000 FLWs. In terms of the reach of this training, estimates suggest that each FLW goes on to support between 10-15 clients with energy advice.

Regional leads not only deliver training to FLWs but are also responsible for raising awareness of the courses available - identifying and engaging various agencies and organisations where training may be beneficial. While ECs might promote the work of BESN through local community groups or events, regional leads tend to build networks and local partnerships at more senior and strategic levels. For example, working closely with team or department managers in local authorities. Engaging new and existing FLWs in training is not without challenges, and with a shift to remote working in the last year, this has been particularly difficult in terms of establishing new partnerships where face-to-face contact has been seen as critical. However, a shift to remote delivery of training and advice is also viewed as a positive in terms of delivery being able to reach certain underserved communities, such as those in rural settings.

[10] An example of a local strand of the Energy Advice Programme can be found at: https://www.citizensadvicetelfordandthewrekin.org.uk/services-we-provide/the-energy-advice-programme

Training sessions are typically delivered in small groups. A range of topics are covered in training sessions, and this is largely similar to that included in consumer advice sessions. For example, improving home energy efficiency, switching, access to schemes like the *Warm Home Discount* and the *Priority Services Register*, and understanding and using smart meters. All content, as discussed in the previous section, is developed from experience of delivering such schemes over a number or years, with materials and methods reviewed each year following an evaluation. As with delivery of the consumer advice sessions, in the last scheme year, training has shifted to remote delivery.

Awareness-Raising

BESN is closely linked to a large-scale awareness campaign: the *Big Energy Saving Week*, which is a national campaign that aims to support people to cut their energy bills and ensure they are accessing all financial support they are entitled to. In recent years, this has been changed to a winter long campaign running from November to the end of January, and as such has been rebranded as *Big Energy Saving Winter*[11].

In 2020/21, the campaign did not operate at a local level as it had done in previous years, instead forming part of a national awareness campaign, mostly delivered digitally. The *Big Energy Saving Winter* campaign, which sits alongside BESN activity, offers signposting, free energy-saving items (i.e., temperature cards, radiator foils, etc.), tips for saving energy in the home, and is focused on raising awareness of support and the profile of BESN. Essentially, as with the aims of BESN, the campaign is about drawing attention to energy-related problems and advice and support available, and not necessarily the more in-depth casework that may be required to ameliorate a given energy problem.

Timing

The activities of ECs and trained FLWs as part of BESN operate on a year round basis, and as noted, are widely incorporated into existing roles and other aspects of support provided. Expectedly, there can be an increase in activity during winter months and around awareness-raising activity where the profile of such services is raised at a local level.

Evaluation

BESN is evaluated annually across delivery of the two strands of the programme (EC delivered consumer advice and FLW training). This is structured around four aims which set out to:

(1) assess the mechanisms and effectiveness of service delivery

(2) understand how needs are being met

(3) assess outcomes and impact, and

(4) consider ways in which the service might be improved in future years.

A multi-method approach to evaluation is taken, and in 2020/21 this drew on more than 13,000 feedback forms from consumers and trainees, face-to-face and telephone interviews and focus groups with delivery staff, and structured telephone interviews with more than 300 consumers.

In recent years, the evaluation has been undertaken internally by the *Citizens Advice Impact and Evaluation* team. Prior to this, evaluations were done by commissioning external social research teams. The BESN representative explained that, in line with the good practice and principles set out in the BBoBC, each evaluation cycle is used to review and adapt future provision. The shift to an internal evaluation process was seen to provide greater capacity to act upon recommendations and adapt service delivery as needed, whereas previously, with an external process, this was perceived to be restrictive.

Key outcomes and impacts from the most recent evaluation of the programme in delivery year 2020/21 were:

[11] https://www.citizensadvice.org.uk/about-us/our-work/our-campaigns/all-our-current-campaigns/besw/

- More than 70% felt the advice they had received had helped them to keep warmer at home (particularly among those that received advice on energy efficiency and energy saving)
- More than 40% switched supplier or deal saving an average of £123 on their energy bills per year
- More than 80% took at least one 'energy efficiency action' (behavioural change) following advice
- More than 50% signed up to the *Priority Service Register*
- More than 40% felt more in control of their finances and more than 50% found day-to-day life easier following advice
- More than 60% felt less stressed or anxious, more than 50% saw an improvement to their mental health, and more than 40% felt their physical health had improved
- More than 90% of frontline workers were positive about the energy advice training received and felt this would be helpful in the support they deliver. More than 90% also stated that they felt more confident in giving energy advice and making referrals onto specialist energy-related advice and support.

Conclusions

BESN provides a clear example of how a well-established, well-known scheme that is focused on alleviating energy vulnerability can operate at both national and local levels, drawing on the strengths of both in programme design and delivery. National coordination offers strategic oversight, funding security, breadth and depth from related larger-scale evaluation activity, and a higher programme profile – the BESN brand is trusted and well-known. Local delivery illustrates the strengths in taking a bottom-up approach to advice and support provision, which values and is directed by trusted Middle Actors who can effectively identify and reach a target audience, as well as optimise content and methods of delivery.

A couple of points are worth drawing out in the discussion here. Firstly, while BESN is widely regarded as 'lighter touch' energy advice and support, this does not necessarily equate to lesser impact. While such an approach may seem less impactful compared to in-depth, detailed casework-based services, however, it is important to note that, as the BESN representative told us, for many individuals a contact with BESN will be the very first point of access with a form of energy-related advice and support. And, relatedly, for many it may be the first experience of issues with energy, finances, housing, the welfare system, and so on. As such, contact with a BESN Champion, or FLW that has received BESN training, is likely to be significant. In this regard, BESN is reaching the HTR in terms of those that may have never needed to seek out or be aware of the existence of such services and schemes. This is not uncommon in energy, with many individuals never switching supplier, tariff, or payment method (Rotmann et al 2021). This 'lack of' engagement or awareness of how energy markets function in the UK leaves many facing disproportionately expensive energy costs, and at greater risk of fuel poverty and vulnerability.

Another critical element to the success of BESN is that it is modelled around delivery which is built upon a trust in local expertise, knowledge, awareness, and relationships established and maintained by organisations and agencies that make up the local partners. The programme is underpinned by a sense of trust and awareness that local organisations know how best to support people, but what is needed is training, coordination of networks, access to adaptable resources, and funding. As discussed, this championing of local expertise at the core of BESN is particularly important in identifying and targeting key audiences, and in developing content and delivering the service.

The BESN representative explained that to reach those that may be deemed the 'hardest-to-reach', (i.e., those that may otherwise not be aware of or choose to access energy-related support), it is critical that services and schemes have a presence in local communities and the places in which people live out their daily lives. In other words, effective delivery should aim to understand how best to ensure that advice and support reaches out to communities, not the other way around. With energy and energy-related problems, this is particularly important, as the BESN representative summarised,

because issues with energy are not seen as presenting with the same level of 'trigger' or indicator of crisis as other social welfare issues, such as threat of eviction or debt. In this way, seeking advice is believed to be less common, as we were told: "*people just get on with it…the implications are more severe than someone's living room being 14 degrees or whatever*".

While the provision of energy-related advice in the UK, particularly that which is local and focused on energy market support, has been described as extensive (Ambrose et al, 2019), there is no Government-led national service or coordination of energy advice. Mapping the energy advice landscape at a UK level is problematic due to a lack of available data (Klein, 2015), and is believed to be patchy with access to support regarded as a 'postcode lottery' and dependent on insecure funding (Butler, 2020; Centre for Sustainable Energy, 2020). As such, programmes like BESN (and the in-depth advice service) are critical, not only at providing the funding to resource much needed support, but also in terms of bringing together and coordinating some of the manifold agencies and organisations delivering energy-related advice and support. While not discussed in the interview or detailed in related materials, the data captured by this programme, in terms of which agencies are involved and the forms of support they provide, is a potentially vital source of information in addressing this lack of understanding and making some steps towards mapping existing energy-related advice and support provision.

UK Case Study 2 - Residential: Warm Minds

Background

Warm Minds (WM) is the second UK case study. Delivered initially in 2012 as a small-scale pilot project in London, the Southeast and East of England, WM was a collaboration between *National Energy Action* (NEA), a fuel poverty charity, and mental health charity, *Mental Health North East* (MHNE). Through the training of frontline mental health professionals, the pilot aimed to mitigate the impact of fuel poverty and help support people with mental health issues, and their carers, to reduce energy consumption, promote more efficient use of energy, and achieve warmer, healthier homes. Scaled up in 2016, with funding from a UK energy supplier (*Eon*), the project was later delivered across several areas in England and Wales, and expanded to include more direct support to those with lived experience of specific conditions such as dementia, Alzheimer's, and learning difficulties.

As explained by the *Warm Minds* representative, the rationale for the collaboration was relatively simple:

> *"Frontline mental health professionals are in an ideal position to help their service users to manage their energy use and achieve warmer homes but often lack the basic knowledge of energy efficiency measures or available assistance."*

In research, practice and policy, there remains a relative dearth of projects centred on the experiences, impacts and challenges associated with energy, fuel poverty and mental ill-health and wellbeing. Evidence has shown that people with mental health conditions are disproportionately more likely to pay more for essential services (between £1,100 and £1,550 more), including energy, often falling into debt and failing to receive adequate support (Citizens Advice, 2019). In the 2011 *Marmot Review* of health inequalities and fuel poverty, the negative effects on mental health and wellbeing were well-evidenced, not only described as worsening existing health, but risking the onset of new mental health conditions and experiences of distress. A key factor, as noted in the *Review*, is the financial stress caused to households in fuel poverty. Adolescents are often regarded as particularly vulnerable. In a now widely cited statistic, 1 in 4 living in cold housing are at risk of multiple mental health problems compared to 1 in 20 who live in a warm home. Research has also found that children living in cold housing are more likely to experience common mental health disorders, such as anxiety and depression (Shelter, 2006), as well as facing significant challenges in terms of educational attainment, maintaining social ties, having space and freedom within the home (often referred to as 'spatial shrink'), and in relation to general feelings of happiness in family life.

Several studies have pointed towards the positive impacts of fuel poverty interventions on mental health, in many cases with suggestions that this can be as, if not more significant than the impacts on physical health (Howden-Chapman, 2015; Liddell & Morris, 2010; NEA, 2018). In 2018, for example, the evaluation of NEA's *Health Innovation Programme* found significant rises in measures of mental wellbeing for households following an intervention to improve the thermal comfort and condition of the property. Larger interventions (i.e., insulation) resulted in improved mental health for more than third of households involved, with smaller interventions resulting in improved mental health for more than a quarter of households. The work also set out a recommendation that future schemes where cold-related ill-health is a focus should seek to understand how best to target support to those experiencing mental health conditions – including those that may be under-represented, such as dementia (therefore extending beyond a dominant focus on anxiety and depression).

Warm Minds is an example of a practical project that sought to address this gap in understanding and provision, bringing together expertise on energy and fuel poverty with mental health to better equip and support frontline professionals and those they support in dealing with energy-related problems. The following sections go on to outline details of the project.

Audience

Definition and characterisation of the target audience

The *Warm Minds* representative described the target audience as:

> "*Frontline mental health professionals and those living with mental health issues, dementia, learning disability and learning difficulties (and those providing support to them).*"

As with Case Study 1 (CS1; BESN), access to the target audiences was largely coordinated by MHNE as the experts with established networks in reaching frontline workers providing support to those with mental health issues. The attendees for the training sessions in Phase One and Two, and the energy advice sessions in Phase Two, were identified and invited by the partner charity, MHNE.

There were no rigid criteria within the project as to which frontline mental health professionals would be included, and with a goal to reaching as many people as possible, a wide range of organisations were involved (44 in total across both phases of the project). Similarly, with the energy advice sessions in the second phase of the project, there was no fixed definition or set list of mental health conditions or issues that determined whether a person could be included. As outlined in the description above, the characterisation of mental health was broad and did not include or exclude based on certain conditions, diagnoses, or interaction with services. However, to some extent, and in response to an awareness of gaps in existing provision, the project did seek to actively consider and target 'under-represented' groups in the context of mental health and fuel poverty, such as those living with dementia or learning difficulties.

Audience demographics and psychographics

Demographic data for trainees was limited and mainly captured details of the organisations where people worked, their roles, and their perceived reach in the types of work they did.

For the individuals attending advice sessions in Phase Two, no specific demographic data was collected, unless there was an onward referral into more in-depth advice and support, but this sat outside of the Warm minds project activity.

In the absence of a formal evaluation, no data was collected relating to audience psychographics.

Behaviours

The focus of the activity in the delivery of the WM project, in both frontline worker training and the energy advice sessions, was similar to that found in many schemes and service aiming to alleviate energy vulnerability, and indeed includes some of those already noted in this case study analysis with CS1 (BESN). This difference in the case of WM is that this activity was focused on a very specific and previously under-represented demographic group – those supporting or living with mental health, which, as noted, was defined in the broadest sense.

As such then, the focus of training or advice focused on several key areas, some of which related to individual behaviours in the home, some related to market engagement, and others centred on changing behaviour in terms of raising awareness of and encouraging access to mechanisms of fuel poverty support.

Individual behaviours:

- *Improving heating, insulation and draught-proofing*
- *Controlling heating and hot water needs and appliances & understanding optimum temperatures for healthy homes*
- *Dealing with damp and condensation*

Market engagement and consumer-related actions:

- *Understanding energy bills and contacting suppliers about billing issues*
- *Getting a better deal on energy supplies - tariff switching and payment methods*

Accessing support:

- *Accessing the* Priority Service Register *(PSR) and* Warm Home Discount *(WHD) services*

- *Fuel debt support*
- *Accessing available schemes and services – incl. insulation/heating provision; utility trust funds; utility services*

Content

Engagement Strategy

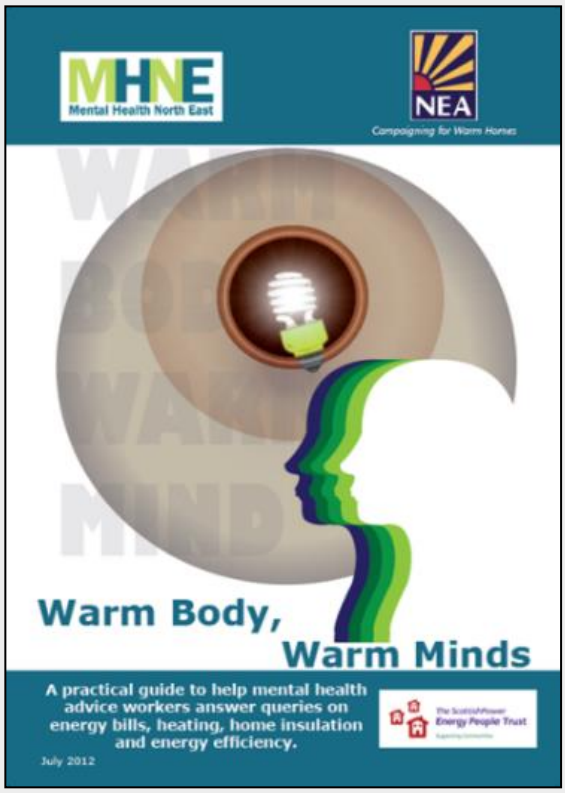
The role of MHNE in the initial 2012 rollout of the project was pivotal in engaging mental health professionals in the FLW training being offered. In the second, larger phase of *Warm Minds* (2016 rollout), NEA worked with key stakeholders across the regions involved to identify how best to engage mental health professionals for the training, who in turn identified households for the energy advice sessions. The WM representative explained that, in the absence of a formal evaluation, the specific processes and strategies used to raise awareness and access individuals at the time was not recorded. However, use of social media, member networks and mailing lists, flyers, and word-of-mouth at other meetings and events were all noted as typical strategies for raising the profile of a project, and ones likely to have been adopted in the delivery of WM.

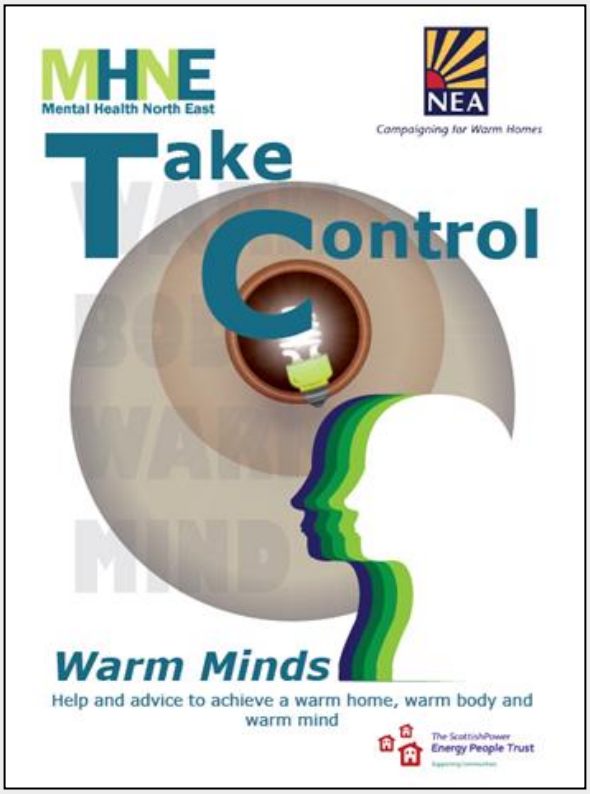
Developing resources

One aspect of the WM project that was highlighted as a notable strength was the development of tailored resources to be used in training sessions and distributed among those receiving advice – whether in the sessions as part of the project, or in advice delivered by the frontline workers who had attended training (evidencing another way in which a 'cascade' approach can be effective in rolling out interventions).

NEA worked with MHNE and other organisations with mental health expertise to "*identify and develop appropriate energy advice or awareness activities and information that best meets the specific needs of their service users/carers*" (NEA, 2013). Topics covered in the resources were varied but contained common elements such as those listed in the Behaviours section above (e.g., switching, energy efficiency, energy debt support, grant access, etc.).

Resources were developed in both phases of the project. Figures 1 and 2 below show two booklets created in partnership with MHNE for Phase One (2012) of WM: one targeted towards frontline workers to supplement their training, and the second for trained FLWs to use in their advice after completing the training.





Figures 1 and 2: Warm Minds (2012) Resources

Where training or education are central elements of a behaviour change or support scheme, it was considered hugely beneficial to provide takeaway resources, and implement other methods of making use of the information or training as easy as possible. This also give greater reassurance that the training provided will be lasting and stand a greater of chance of being embedded in ongoing service delivery. As detailed in an internal update report, one of the trainees commented:

> "*The guidance is great at answering all those things that don't stay in your head. The list of phone numbers is invaluable.*"

The WM representative did note some reflections relating to the resources produced, with one element they would change and two they would keep if a future scheme were to happen. Regarding what they would change, the representative explained that they would print fewer hard copies as production can absorb significant funding for a project and it can be difficult to calculate demand. In terms of aspects related to the resources that would be kept, it was noted that there should always be access to an online version of resources developed – but that this should not be the only way of accessing them. And, finally, that there should be an effort to share resources, where appropriate, outside of the project and with other agencies and services, especially as their development can be expensive, time-consuming, and excellent examples of best practice that draws on expertise that other service may not be able to access or benefit from.

With regards to the content delivered specifically in the training sessions, a similar reflection to CS1 (BESN) was noted. Demonstrating the importance of fluidity and flexibility, as set out in the BBoBC model, it is critical to create content that can be adapted to meet the needs of the group. As noted in the informal evaluation report:

> "*Each of the training sessions had a slightly different focus depending on the specific areas of interest of attendees. For example, those in health-related jobs took a particular interest in the health impacts of living in a cold home and were looking for practical solutions to address the problem such as understanding how to use a heating programmer and/or use central heating controls effectively and efficiently; how to refer service users to supplier* Priority Service Registers*; how to spot the signs of vulnerability etc. In contrast, those in advice roles*

showed more of an interest in how to calculate the cost of fuel consumed, interpreting fuel bills, the causes of and solutions to condensation and insulation methods to reduce service users' energy bills. In addition, discussions also focussed on the running costs of different appliances leading to lively discussions on energy bills, tariffs and switching suppliers."

In Phase Two (2016) of the project, a similar approach to developing and distributing resources was taken. Aligning again with principles set out in the BBoBC model, resources were developed, reviewed, and adapted with feedback from the first iteration of the project. For example, having access to online as well as hard copies of the training materials, including detail of all the training available were considered important changes to make. Additionally, and as is the case for most multi-year repeated projects, updates to policy, grants, schemes, and other notable energy-related information were needed.

Key resources produced by NEA in Phase Two included two *Top Ten Tips for Energy Saving* guides – one for England and one for Wales (Figure 3 below).

Figure 3: Warm Minds Affordable Warmth Guide

Taking this further to tailor resources with the needs of the target audience in mind and noting an example of innovative practice and impact from the *Warm Minds* project, specialist booklets (Figure 4) – or easy read guides – were developed. These focused specifically on two policies that are commonly identified as having low awareness yet have the capacity to provide much needed financial relief and support to energy consumers.

"As a development exercise the Warm Minds *project aimed to be responsive to the often complex needs of the target audience by producing and adapting resources to meet the disabilities/ learning needs of advice/awareness session recipients. NEA's ultimate aim was to enable and encourage service users (particularly in independent living situations) to take action on topics and/or apply for assistance or services where these were available. Initial scoping activities highlighted a need for clear and simple information on* Warm Home Discount *and* Priority Services Register *for service users with learning disabilities/learning difficulties. As NEA was unable to identify suitable available guidance from energy suppliers, we developed* ***two easy read guides on*** **Warm Home Discount** ***(i.e., 'How to get money off your electricity bill') and*** **Priority Services Register** ***(i.e., 'Extra help to manage your gas and electricity')****. NEA worked with sectoral specialists to hone appropriate language and*

imagery for these resources. The resources were verified by a focus group of individuals with learning disability/ difficulties prior to printing"

Figure 4: Warm Minds Easy Read Specialist Guide

Again, demonstrating innovative practice that draws on the expertise of partners, a range of additional resources and activities were tried and tested to make learning for those attending advice sessions as accessible, fun, and engaging as possible. As noted in the final project report:

> "*NEA has also been employing interactive activities such as* ***picture-based quizzes on energy advice topics, advice flash cards, energy usage games and energy-related craft-based work****. The latter has been very popular with those with more acute mental health, learning disability, dementia and brain injury issues as activities have provided a focus for discussion but also something fun and calming for those with anxiety or attention deficit issues*."

Overall, however, there was a sense that the project may have been too ambitious at times with its resources. Those delivering the content in the advice sessions found that the broad range in abilities between individuals, groups and organisations at times made it a real challenge, both in terms of how sessions were delivered, what printed resources were needed, and how these met the needs of individuals often with varied needs and challenges such as literacy problems and attention deficits.

Delivery

Delivery mechanism

While *Warm Minds* was a collaborative project between NEA and MHNE, NEA were the lead agency and predominantly responsible for delivery. Phase One (2012) centred on the delivery of energy advice training and related support (by NEA) to FLWs who were mental health professionals (identified and invited to participate in the project by MHNE). This initial pilot phase of the project established a range of key activities that included:

- The **design and delivery of twelve half-day courses** to train FLWs working in the mental health sector to deliver energy-related advice and support. Trainees were provided with a detailed guidance document to supplement the training they had received.

- The **development and distribution of additional resources** (as discussed), including advice guides. More than 6000 were distributed.
- **Access to a small number of support or crisis grants** which advisors could access for assisting service users in need of energy saving interventions, appliances or other measures to meet basic needs for warmth and comfort. The small grants funded a number of essential items including: thermal gloves, hot water bottles, blankets and duvets, window sealant, clothing, kettles, and, for one person, a cooker.
- The **establishment of a forum** to bring together those that had received training and the production of a series of e-bulletins to provide ongoing and updated content to support the professional practice of those trained.
- The provision on **ongoing low-level mentoring support** by telephone (however, requests for this were limited in practice)
- The organisation of **two half-day forums** with a focus on sharing best practice and policy updates on local and national mental health and fuel poverty issues. MHNE also used this an opportunity to feedback to Government on key issues. Resource bags ("freebies") were given to advisors at the forums, and included light bulbs, energy monitors, thermometers, etc. A policy briefing was prepared and presented on, and this was also made available on both NEA and MHNE's websites. The forums were also used an opportunity to gather feedback from trainees.

Brought together, the wide range of activities as part of the WM project was intended to move beyond a model of project delivery that simply involved a training session and no further engagement. A key aim, in this regard, was to use the pilot to explore how best to embed the skills and knowledge relating to alleviating energy-vulnerability into the everyday professional practice of mental health professionals and their organisations.

While the project was expanded significantly in Phase Two (2016) to be delivered across several regions and across England and Wales, there were minimal changes to the delivery mechanisms established in Phase One. The second phase of the project sought again to provide training to FLWs, but this time to also engage directly with the target audience of individuals living with mental health issues, dementia/Alzheimer's, and learning difficulties (and their carers). The aim was to better understand how best to engage this demographic group and address needs relating to energy/energy efficiency issues.

> *"The project aimed to help those living with mental health issues, dementia, learning disability and learning difficulties (and those providing support to them) to better manage their energy needs and use, and to achieve warmer more energy efficient homes."* (Internal Project Report, 2017)

This was achieved through a range of activities including:

> *"Common to all sessions has been the promotion of PSR and WHD service availability. Sessions have also covered basic energy advice hints and tips – including no cost/low cost behavioural changes (incl. not leaving appliances on stand-by), insulation and draught-proofing, how to use heating controls (incl. setting thermostats), healthy temperatures in colder weather, how to compare tariffs and get a better energy deal (incl. dealing with doorstep selling of energy and knowing your rights), reading energy bills, energy payment methods, pre-payment meter use (incl. particular discussion on gas PPM standing charges in summer), the smart meter roll-out, dealing with fuel debt, trust funds and how to deal with damp and condensation (particularly making the link between moisture production and condensation damp)."* (Project Report, 2017)

As well as covering a larger geographical region, there was also a much larger pot of funding made available for the support grants introduced in Phase One. This element of the project was able to support people in crisis and serious hardship, and in some cases provided an element of breathing space in which to engage with the energy advice being given. As the internal project report noted, this supported individuals who:

> *"…are on a low income (some with capped benefits), in hardship (many with significant debt) without alternative means to access items, and are living with a mental health condition, learning disability/learning difficulty or dementia."*

Some of the essential forms of support provided included:

> *"…a replacement boiler (and pipework) for an individual who had been without heating or hot water for over a year; white goods including washers and dryers for those with medical conditions unable to access alternative facilities, cookers, microwaves, fridges thermal curtains, thermal bedding, thermal clothes and carpeting to meet essential needs."*

Messengers and medium of delivery of messages

While the messages centred on practical and informational energy-related training and advice, much of which was tailored to meet the needs of those with mental health issues, the primary messengers in the *Warm Minds* project were mental health professionals working across various roles and agencies and organisations. As with the previous case study (BESN), they are trusted Middle Actors working in frontline roles who have local, demographic and/or topic-specific expertise. In this case relating to mental health and wider welfare.

As established well-networked organisations, the communication channels used were typical of those adopted by NEA and MHNE in the delivery of various other projects, including social media channels, newsletters, blogs, press coverage, and websites.

As mentioned, e-bulletins were another communication method used and were noted as a particularly valuable part of delivery in maintaining a level of ongoing contact with trainees and providing continued support. In total, five e-bulletins were produced and distributed in both phases of the project. Feedback from from trainees provided insights as to the content to be included and this covered aspects such as event promotion, fuel poverty policy updates, grant and related scheme promotion, tips for clients to keep warm and well, updates on the project, and key contacts.

Timing

Both Phase One and Phase Two were one-year projects, beginning in 2012 and 2016 respectively. Training and energy advice sessions were delivered year-round.

Evaluation

Evaluation, metrics and targets

Neither the 2012 nor 2016 phase of the WM project were formally evaluated as this was not an element included in the funding awards. Nonetheless, NEA as delivery lead conducted an informal evaluation of activity, producing two internal reports that sought to capture key insights, identify strengths and barriers in the project, and examine wider challenges and gaps in policy and practice impacting upon this demographic group.

In terms of metrics and targets, the following was achieved (Table 3):

Phase	Delivery mechanism	Target	Actual
Phase One 2012/13	FLW training	144	Worked with nine agencies 197 FLWs trained
Phase Two 2016/17	FLW training	320	Worked with 35 agencies Delivered 77 sessions 412 FLWs trained
	Energy advice sessions	330	Worked with 35 agencies Delivered 44 sessions (8-10) 496 individuals supported

Table 3: Warm Mind targets and metrics

Results

While no formal evaluation was completed, several key findings and conclusions were set out in internal project reports. A summary of these is provided below:

- Based on data gathered from training feedback forms, the **content and pace of delivery** were deemed to be appropriate, information was pitched at the correct level and that there were sufficient opportunities for questions and interactive discussion.
- Provision of **printed resources** to take away and use after training or advice sessions are highly valuable.
- In terms of the content covered in training sessions, as the project report outlined, "…*the most beneficial lessons learned were about **behaviour change and switching**. There was concern across the board about rising living costs and unaffordability and the knock on effect this was having in exacerbating people's mental health. They felt that by working with service users to take control of smaller more manageable details in their life it would encourage people to adopt changes that would last*."
- Understanding the **long-term impact** would be highly beneficial and informative for the future of similar schemes and interventions. This points towards the importance of evaluation, but more specifically that which is longitudinal. As the report outlined: "*It has been difficult to evaluate information retention and application by service users post interaction… (particularly for those with learning difficulties/dementia) as sessions have all been one-off without an opportunity to re-visit and evaluate in this regard. Also, NEA has been unable to ask for written evaluation feedback recognising the limitations of many service users."*
- Relating to the above point on the challenges of undertaking evaluation with different groups, it is important to consider **alternative methods and opportunities** to evaluate the usefulness of advice and support, other than use of surveys or interviews, considering "…*other evaluation techniques such as verbal and picture-based feedback and [to] employ these methods as appropriate with different service users/carers."*
- A **rapid turnaround** on decisions with applications to the hardship fund are essential – this can be the difference between sustained engagement with a client, or them withdrawing from any form of ongoing support.
- Carers are considered a **vital Middle Actor** and services that both include and specifically target support towards them should be developed and protected.
- **Ongoing, interactive, face-to-face support** is essential. As the report detailed: "*It is unlikely that many mental health service users will do anything with info you give them if left to do it themselves - due to confidence issues and other problems associated with poor mental health. There is a need to sit down with people and offer face-to-face advice and support, working through any forms they have to complete for services and help them to switch tariffs"*
- From the delivery of energy advice sessions, it was found that while there was some awareness of monetary forms of support, such as the *Warm Homes Discount* (a £140 rebate for certain vulnerable consumers), there was **little to no awareness** of other support mechanism within the UK's energy system, particularly with the *Priority Services Register* – a form of non-monetary support but nonetheless vital in terms of protecting those with health issues that can be impacted by energy, which is particularly stark, as the evidence shows, for those with mental health issues.
- Evidencing the potential reach and impact of programmes that facilitate FLW training, trainees reported (in short feedback forms) that in the year following the training they envisioned reaching, collectively, thousands of clients with energy advice. More than half believed this to be more than 20 clients in a year, and 10% felt that they would likely go on to support more than 60 clients with the skills they had learnt in the energy advice training.

Conclusions

Warm Minds provides a valuable example of a practical project that addresses both a gap in understanding and in provision for those experiencing (or at risk of) mental ill-health and energy vulnerability. Essentially a collaborative project, its effectiveness is rooted in an approach that brings together the expertise of national charities regarded as specialists in each of the two areas – an

approach that is arguably little seen in terms of addressing the needs of groups with multiple overlapping vulnerabilities and needs. This provided valuable insight at various stages of the BBoBC, from understanding the target audience, to developing resources, and through to delivery.

As with CS1 (BESN), WM highlights the benefit in focusing on FLW training in terms of maximising the reach of energy-related support. Similarly, the project was described as being strengthened by the 'cascade' model whereby mental health professionals who had received training were able to return to their organisations and, not only raise the profile of energy vulnerability awareness, but to also share knowledge, skills, and resources with colleagues and partners.

Another notable strength to draw out relates to the multi-faceted nature of delivery for the FLW training. This was described as intentional to deliver a project that had lasting impact. As discussed, this was a main aim in the initial phase of the project in 2012, where NEA, as delivery lead, explored how best to embed the skills and knowledge relating to alleviating energy-vulnerability into the everyday professional practice of mental health professionals and their organisations. In working to sustain a level of energy awareness and support for those who had received training beyond the training session itself, the project focused on mechanisms for building and strengthening a network of trainees. Two elements were particularly novel and regarded as effective. The first was the regular e-bulletin, distributed five times across each year of delivery, which provided up-to-date policy and practice information, events, related training, and other key information. They were also described as a way of keeping connected to the network, as well as staying up to date in terms of providing effective energy-related advice and support. The second mechanism was the ongoing mentoring support, and this provided FLWs (mental health professionals) with access to NEA's expertise on energy efficiency and related topics. Requests for this support were ultimately limited, but again, where contact took place, it was regarded as a valuable mechanism for staying connected to a network of energy specialists and those that had received training. The representative noted that while there were only a few individuals who contacted for support, several made contact to share details of events or provide input for other activities, and this enabled the project to reach a broader number of practitioners and service users from a variety of organisations than was originally anticipated.

A major learning from the project is that providing energy-related support to those with learning disabilities, mental health conditions, or capacity issues requires the development of new approaches and mechanisms. This is necessarily time consuming and challenging, but essential for delivering forms of support to groups that have been underserved – or typically considered HTR - in the past.

Warm Minds also provides a clear example of the challenges associated with defining or characterising HTR demographic groups. It underlines the heterogeneity of those living in or at risk of fuel poverty. Once demographic groups are examined at a more granular level, like those with specific mental health issues, challenges with design and provision become apparent. For example, with WM, content had to be revised for and during each session, whether this involved producing large print or picture-based materials, materials in different languages, or tailoring the messages and focus according to key issues experienced. As the update report noted:

> *"Advice provision has varied between groups given the range of abilities – from low level single issues to active discussion on a range of complex topics."*

This led, as discussed, to a sense that the project may have been too ambitious at times, particularly with the design of resources or delivery of sessions, where the profile of that group included a diverse mix of people living with a wide range of mental health conditions, each with different needs and capabilities. Key examples of challenges were linked to literacy problems, attention deficits, and digital literacy, among others. One mechanism for overcoming this, and unique to the WM case study, was to deploy gamification as an innovative and valuable approach in delivery. This approach to delivery has potential for engaging and better supporting HTR and under-served groups, not just those with mental health issues, but for example, those with limited or no English.

It is also worth drawing attention to the value of the small grants element of the programme which enabled trained FLWs to access a pot of funding for crisis provision in their work supporting service users. This funding provided people in hardship with a variety of items including thermal gloves, hot water bottles, blankets and duvets, window sealant, clothing, kettles, and, for one person, a cooker.

The importance of this fund extends beyond meeting an immediate need for essential items; it also has the capacity to provide an element of breathing space to allow for greater engagement with issues that may be regarded as less important in the immediate, such as switching energy supplier or discussing use of heating controls.

Lastly, with the WM project and indeed others included in this CSA, there is a missed opportunity in not undertaking a formal evaluation. Arguably, this is most significant in terms of not collecting data on and therefore better understanding the demographic and psychographic characteristics of those involved. There is great potential to inform, shape, and strengthen existing and future practice from these valuable insights. Here, as in other cases, the inability to conduct a full formal evaluation is down to not having the capacity or resource. This is considered a vital element in being able to understand the strengths and limitations of projects across all elements of the BBoBC, and to transfer these lessons to other schemes and services. For example, as noted above, understanding the reach of the project in terms of data on advice numbers and the organisation's individual reach would be extremely valuable. Again, relating to evaluation activity, the WM project also raises important questions around the methods and approaches adopted in evaluating projects like this, calling for more heterogeneity to meet that of the groups being targeted. In other words, it asks whether surveys and interviews, the most common method for collecting feedback and data, are most appropriate with different demographic groups, for example those with mental health issues. In response, we need careful consideration of what can strengthen not only project delivery, but also evaluation activity, with diversity in our evaluation methods in a way that is inclusive and sensitive to the needs and capabilities of different individuals and groups.

UK Case Study 3 - Residential: Gluasad Còmhla (Moving Together)

Background

The third UK case study focuses on the *Gluasad Còmhla* (GC) project which translates as 'Moving Together' in Scottish Gaelic. Delivered between 2018-2020, this initiative aimed to provide a mechanism for connecting health services (via referrals) to fuel poverty assistance (and other forms of support) across rural and remote communities in the Western Isles in Scotland. In doing so, GC built on existing relationships between *Tighean Innse Gall* (TIG)[12], a local housing and energy agency and the delivery lead for the project, and other partners across the Western Isles, including a GP practice, to develop an innovative approach to identifying and assisting people whose health is compromised by living in a cold or hard-to-heat home.

> *"A key driver for* Moving Together *was to explore how voluntary sector and statutory services could be integrated with primary and secondary health care to create meaningful and lasting changes in the health and wellbeing of some of the most vulnerable people in the Outer Hebrides."* (Sheriff et al., 2020, p.26)

Figure 5: The Western Isles

The Western Isles (Figure 5), also referred to as the Outer Hebrides, is a cluster of islands situated off the Northwest coast of Scotland. The area is distinctively rural and remote, and it is this context that supports a characterisation of the project as targeted towards those that may be considered HTR. Indeed, as Rotmann et al (2021) point out, rurality and geographical isolation is a common indicator of vulnerability in the context of energy, and one that can typically sit separate, or in addition to low income.

In the UK, the *Commission for Customers in Vulnerable Circumstances*[13] notes rurality as one of three markers of energy-related vulnerability, referred to as *location-based vulnerability*. Despite a recognition of this heightened vulnerability, a *rural energy efficiency gap* has been identified where small, isolated communities have had relatively fewer energy efficiency programmes targeted towards them, seen slower uptake of energy efficiency measures where schemes do exist (see for example, Winner *et al.*, 2018), and have not commonly been studied in research examining behaviour and energy efficiency (see MacDonald, 2020).

In the Western Isles, examining rurality and remoteness brings to the fore key challenges associated with connectedness, access,

[12] *Tighean Innse Gall* is a Community Benefit Society working across the Western Isles and operating principally across the housing, community group and small business sectors to support people to access homes and to help to make them comfortable and affordable, promote independent living and encourage businesses and communities to be energy-efficient.

[13] https://www.energy-uk.org.uk/our-work/commission-for-customers-in-vulnerable-circumstances.html

cultural norms and traditions, practices, and service provision. It is also regarded as more costly than non-rural life, for example in relation to the cost of fuel, where resources are more limited and thus more expensive to access. As Sheriff *et al* (2019)[14] note: "Islanders pay a premium for being remote".

Fuel poverty is a significant issue in the Western Isles. The islands have one of the highest levels of fuel poverty anywhere in the UK, with estimates suggesting almost two thirds (62%) of households are affected, with more than a quarter (26%) of those affected deemed to be living in what Scottish policy defines as extreme fuel poverty[15]. Three out of four households of pension age are believed to be living in fuel poverty, with 40% of this group falling into the extreme fuel poverty category. The higher levels of fuel poverty across the islands are regarded as a consequence of the age of the housing stock, the prominence of detached houses, and a lack of mains gas. As is widely accepted, this has a significant impact on householder health, making the routines and needs of everyday life more difficult and placing considerable burden on the health services.

The GC project had dual and interlinked aims of (1) tackling fuel poverty in the Western Isles, and (2) encouraging and strengthening partnerships between health services and other agencies. A recognition of the importance of health in the context of tackling fuel poverty, as noted, was the impetus for the project which was borne out of meetings between key agencies and partners in the Western Isles, including TIG. The focus in these early strategic discussions was how to improve living conditions and mitigate the consequent impacts of poverty (including fuel poverty) on health and wellbeing. Initially, this brought together TIG, the local authority, and the *National Health Service in the Western Isles* (NHS WI). Overlapping policy goals and local and national strategies and plans shaped these discussions, and resulted in recognition of TIG's unique strategic position as a local, trusted, housing and energy specialist who, critically, worked across the whole of the Western Isles.

Working alongside TIG, the local authority and NHS WI, delivery evolved to include several other fundamental project partners and stakeholders, including a GP practice (as planned from the outset), a drug and alcohol service, a local advice agency, a youth charity, the local job centre, and others. Within the project, links to models of social prescribing can be found, especially in the role of health-referrals into other schemes of support with a view to tackling the social determinants of health, in this case poor housing. Coordinated by TIG as the delivery lead, these actors came together to play instrumental roles in ensuring the successful implementation of the GC project. From the outset, a key objective was to foster better inter-agency working and the joining up of existing services and programmes of support. As the name indicates, the project was about agencies and services *moving together* towards common goals of alleviating (fuel) poverty, improving living conditions, and addressing health issues and health equity.

Audience

> "*…more likely that you'd knock on a door that was in fuel poverty than not.*" (TIG representative)

Given the extent to which fuel poverty is estimated to impact households living in the Western Isles (almost two thirds affected), from the outset the project had less concern with fixed inclusion and exclusion criteria, and more focus on maximising reach – both geographically, and in terms of the number of households supported. In other words, it was deemed critical that a fluid and flexible approach to targeting was adopted in order to reach as many households as possible across the areas covered.

Speaking with the representative of TIG, the project did, however, undertake and implement some form of audience profiling or characterisation beyond this. While *fluidity*, *flexibility* and *responsiveness* were all words used to describe the project's approach, all households supported could be characterised as 'vulnerable' in some way, and this was principally in relation to health, as noted, but other common markers included low-income, access to services and remoteness, caring needs or responsibilities, among others. As such, the profile of those supported could be understood as vulnerable *because* of existing health conditions, or *at risk* of worsening or the onset of new health conditions because of poor living standards. This encapsulated health and wellbeing in the broadest sense and, as reflected by the variety of project partners included (discussed later), it was seen as

[14] https://usir.salford.ac.uk/id/eprint/56800/1/2019-10-SHUSU-Moving-Together.pdf
[15] https://www.cne-siar.gov.uk/media/15423/outer_hebrides_anti-poverty_strategy_2019-2024.pdf

vital to include conditions which impact upon mental health, such as addiction and depression. Therefore, with health being at the centre of the project and a trigger for the referral network to kick in, a characterisation of the target audience is probably best described as individuals experiencing a risk to health or an ongoing or worsening health issue *and* living conditions (e.g., cold, damp, etc.). Age, to some extent, was described as playing a significant factor with the age profile of those living across the islands being disproportionately older than the mainland.

Importantly, a key aim for the project was to successfully implement a mechanism for targeting support to people who may have the most significant need for health services and related support. As the project representative told us, while this tends to be a much smaller pool of people, the extent of health issues and related needs can often mean that protecting and managing health is more expensive and comes with the greatest challenges. Therefore, in supporting those most severely impacted by poor health, the greatest benefits – to individuals and in terms of healthcare costs – can be seen. Indeed, from the local health service's (NHS WI) point of view, this was a key motivation for participating in the project.

While the *Gluasad Còmhla* (Moving Together) project did not have rigid inclusion/exclusion criterion, two aspects in relation to audience profiling are important to note. Firstly, TIG and the health bodies and partners involved in setting up the project boasted decades of experience in supporting those living in the Western Isles to live safer, more comfortable lives in a way that promotes and protects good health and wellbeing. This level of experience means that they have excellent knowledge of the health and housing status across local regions, as well as the key challenges and threats to good health and wellbeing, for example, cold, damp, and energy inefficient homes. This, as noted above, factored into decision-making around which partners and agencies to include, and how the inclusion of a wide range of partners (in terms of focus and expertise) was able to strengthen the offer of the project. Secondly, and relating to the first point, the project was built around a referral mechanism which drew on the expertise and knowledge of those agencies involved. This meant that the project partners, drawing on professional practice as a GP or a frontline worker for a charity supporting those experiencing homelessness, for example, made referrals based on their assessment of situations where living conditions were deleteriously impacting upon health. This meant that profiling had been done prior to referral into the project, aiding efficiency and freeing up resources to provide not only more in-depth support, but support to a greater number of individuals.

Audience demographics and psychographics

Access to demographic data for the households supported by the GC project was collected as part of project delivery and stored confidentially by TIG. That which was available to the CSA (mainly through the evaluation data collected as part of a household survey) was limited, but some detail can be found in the final project report, for example, on housing type and health conditions. Demographic detail from this data that highlights the level of fuel poverty risk includes:

- The majority lived in the hardest-to-treat and -heat solid stone wall properties
- The majority were on very low incomes (less than £16,500 per annum)
- The majority were in receipt of illness and disability related benefits (i.e., *Personal Independence Payments*, *Attendance Allowance*)
- The majority were owner-occupiers with no savings, and little to no capacity to invest in home improvements
- The most common health conditions among respondents included those affecting the nervous system and circulatory and respiratory conditions.

As part of the evaluation, qualitative data was collected that had some relevance to understanding audience psychographics. This mainly centred on values and cultural practices relating to 'island life', especially those surrounding heating and the use of peat:

> *"Experiences of fuel poverty and the challenges around energy use on the islands were to a large extent shaped by islanders' lived experiences and the distinctive history and culture of the islands, characterised by practices – albeit less common in modern times – that include*

> *crofting and the communal cutting of peat and its distribution to those in need."* (Sheriff et al. 2020, p.13)

A reticence to accessing support was also noted in both the interim and final evaluation reports as a factor shaping the delivery of the GC project and amplifying the importance of trusted Middle Actors in delivering such programmes of support.

Behaviours

The *Gluasad Còmhla* (Moving Together) project was focused on tackling fuel poverty in rural and remote communities by improving the living conditions for those experiencing or at risk of poor health and wellbeing. While the first two cases were somewhat limited to solely supporting 'lighter touch' and low- or no-cost behavioural change at the individual level, the GC project, in working alongside other teams within TIG, had the capacity to combine advice and support on using and saving energy (behaviours) with physical measures to improve the energy efficiency of people's homes (i.e., through insulation), and in some cases replacing heating systems or white goods. Across the literature reviewed and the interviews completed, not just with the TIG representative as part of this CSA, it was clear that both elements are critical, and projects and schemes that able to offer a combination of physical measures with tailored advice and support were regarded as most effective in tackling fuel poverty and housing-related ill-health.

Considering the behavioural elements of the GC project, however, as with the other case studies, common advice on behavioural change to save energy or use energy more efficiently was a feature of the GC project. Households supported had in-depth, in-home discussions with TIG advisors on more simplistic energy-saving measures, such as using less water in the kettle, laundry practices, use of heating systems, and switching appliances off. Other common aspects of energy-related advice and support also featured, including switching energy supplier, tariff, or payment method, access to grants and benefits, debt support, and income maximisation.

One example of behavioural advice that is particularly noteworthy in the case of the GC project relates to heating practices and advice targeted towards encouraging a shift from use of solid fuels (namely peat) to existing heating systems fitted within many of the homes of those supported. Peat cutting and use of peat for heating in the Western Isles has a long history and is embedded as a common heating practice in many homes, despite more modern, reliable, and sustainable heating systems having been fitted. This was, for some households, still the case after new systems had been fitted as part of engagement with the GC project. Advisors, in these cases, dedicated considerable time to supporting the household in understanding and using alternative or newer forms of heating, providing multiple forms of information and allowing plenty of discussion around the reasons behind and benefits of a shift. This highlights a very context-specific behavioural element – drawing out the sensitivities needed in understanding energy use and vulnerability among certain HTR demographics, here relating to those living in rural and remote (off-gas) communities.

Beyond the householder it is also worth noting that the GC project also aimed to influence and facilitate shifts in the behaviours of GPs and other allied health professionals, and other frontline workers – in other words, was focused on changing the behaviour changers. As will be discussed in more detail later, this predominantly centred on behaviours promoting better interagency working, helping to build awareness of the work that other organisations and agencies do to avoid duplication of efforts, maximise impact of funding streams into services in the area, and strengthen overall support networks. A key element of this was embedding referral systems into business-as-usual approaches, whether as part of a GP consultation – the initial focus of the project – or in the support provided by a drug and alcohol service or a homeless charity.

Content

Engagement strategy

The GC project aimed to establish an innovative networked initiative that better aligned the work and shared objectives of actors across housing and health. Initially, the project was focused on engaging GPs as a primary referral partner into a housing and energy agency (TIG) that can provide energy-

related advice and support, as well as access to low or no cost physical measures, to improve living conditions, and consequently householder health.

A major element of the project's engagement strategy was, therefore, with GPs and then later with other health professionals. At the outset, a single medical practice - *Langabhat Medical Practice* - which works across several sites on the Isle of Lewis (the most populated part of the islands) was selected as a pilot practice to allow the project to implement and refine its approach.

Engaging with GPs involved multiple visits to the main and satellite practices, distributing leaflets and posters, but more importantly, taking the time to talk to the GPs about the project and answer questions. A key actor in setting up and maintaining this relationship was, as the project evaluation identified, the practice manager, who became the central point of liaison between the GC delivery team at TIG and the GPs. **Identifying a single point of contact**, and if possible, a person who is responsible for administrative and/or strategic oversight in a health setting, not direct patient care, was seen as crucial.

The project found that GPs were overwhelmingly positive and highly engaged with the project. In interviews as part of the evaluation, they highlighted the critical need for such services in tackling the social determinants of health, and how their own expertise being narrowly medically-focused meant they were limited in the extent to which they could tackle poor health. They could do little in terms of improving housing conditions or addressing issues with income, for example. However, despite being highly engaged, GPs made few referrals into the GC project – *"I'm [a] really strong an advocate of it, and I'm a really poor referrer"* (Sherriff et al., 2020, p.21) – citing time constraints and patient demand as the main reasons.

Adapting the project in response to this, and demonstrating the fluidity deemed critical to success in the BBoBC, the referral pathway into GC was widened to **engage a range of healthcare professionals** (such as occupational therapists, COPD nurses, Parkinson's specialists) and other partner agencies, such as drug and alcohol services and housing teams. Additionally, a **self-referral mechanism** was added for those that they may have had no contact with local services.

The engagement strategy employed with agencies and organisations in the wider referral network was much the same as that with GPs. Identifying and **maximising opportunities for contact and project promotion** was key, for example giving short talks during other organisation's team or management meetings or providing short project summaries for various internal staff communications. Allowing the space to ask questions and **making the referral process as simple as possible**, as well as having **partner agencies sit on and regularly attend board meetings**, was also identified as important for sustaining engagement.

With regards to raising the profile of the project and encouraging greater engagement, the GC representative explained that to be successful the project needed to have a **presence in as many health and community settings** as possible. In practical terms, this involved using flyers and leaflets, stalls at community events, and contact with various forms of local media. As with the approach deemed successful in BESN, a critical success factor for developing engaging people in the GC project was to ensure that the promotion of the scheme was as **far-reaching** as possible and **present in spaces where people lived out their normal lives** (i.e., community centres, health clinics, job centres, libraries, etc.). A notable example of project promotion that worked well to prompt conversations between GPs and patients was the use of **flyers attached to prescription bags**. These would be delivered to people in their homes and were noted as a successful approach to starting conversations about housing and health in future GP-patient interactions, and consequently a referral into TIG.

Ultimately, however, once a referral into GC has been made, sustaining householder engagement with the service becomes most important. While the role of the trusted Middle Actor was fundamental in relation to referrals, as with other case studies, after a referral had been made, TIG became responsible for sustaining engagement. **Home visits, and regular and repeated contact**, were viewed to be vital in this regard in terms of building interest and trust in the service. Underscoring the engagement strategy, as the TIG representative explained, is an acceptance and understanding that there may be several points of contact to walk through the actions and steps needed to identify and provide support, and that trust and confidence take time.

Messages and resources

Several resources were developed to raise awareness of and engage households in the GC project. As an established organisation with a long history of supporting households with energy-related issues, TIG drew on effective techniques, styles and formats tested and adapted from other projects to develop resources for the GC project. This included relatively simple resources, including flyers, booklets, short videos, social media campaigns, contributions to other organisation's newsletters, as well delivering tailored presentations to professionals and members of the public in local settings. A combination of digital and non-digital resources was recongised as vital, given high levels of digital exclusion and lack of access among many living across the islands.

In developing the resources, it was noted that content must speak to the communities the project is trying to reach and having this understanding of the local areas and the challenges the communities faced was critical to success. In the case of the GC project, language was particularly important with much of the population only speaking Scottish Gaelic or this being their preferred language. This was similarly important in terms of ensuring that those representing the project were able to speak Scottish Gaelic during face-to-face visits, and that all communications were made available in multiple formats.

With regards to the focus or tone of the content, a valuable part of the process involved drawing on the expertise of health professionals, seeking feedback and input in an iterative way. Health professionals with links to the project would comment on resources under development, providing advice on how best to communicate energy- or housing-related support from a health angle. Use of phrases or health conditions to focus on, for example, were areas of feedback provided. Other partners involved, such as *Citizens Advice*, similarly provided vital feedback in constructing the messaging used and resources developed around, for instance, access to social security, particularly those paid to people with health issues or disabilities. This element of consultation with partners, drawing on their expertise, was described as a key aspect of optimising content and thus building an effective engagement strategy.

Another important factor in relation to messaging, as the representative highlighted in the interview, was that the project sought to ensure that the profile of mental health and wellbeing had as prominent a role or focus as physical health did. This had been identified in the landscape analysis as an area of focus overlooked to date, and a strategy that would take steps to ensure another overlooked or HTR group – those experiencing mental health issues – were targeted effectively.

Overall, then, the development of resources and materials used in the delivery of GC was an iterative and responsive process rooted in practical the experience of the organisations involved, including health partners and TIG as delivery lead, and direct feedback. Considering the BBoBC, content strategies used in the GC project, as with the other case studies presented so far, were built on real-world insights and expertise, not behavioural theory.

Delivery

Delivery mechanisms

The main delivery mechanism of the GC project was the one-to-one energy-related advice and support provided by the energy specialists working for TIG. This predominantly took place in people's homes following a referral into the service, and often involved multiple points of contact over several weeks or even months. Flexibility and patience were noted as key elements to delivery success:

> "*The service had to work collaboratively to fit the person and their needs at that time, not the person needing to fit the service. Hard-to-reach or simply that people don't fit a rigidly designed project or scheme?"* (TIG representative)

From within TIG, the GC project was delivered by a small team of energy specialists with expertise in providing energy-related advice and support. The team consisted of a project lead, considered pivotal (like the GP practice manager) as a single point of contact for the partners and households involved in the service, and two energy advisors. Funding was also available to have two further posts hosted within the local *Citizens Advice* service where related specialist support was provided (for example with debt and income maximisation support). The primary delivery team based within TIG completed

all the home visits and coordinated other contact and forms of support, including referrals onto other services.

Supporting HTR energy users in rural and remote contexts was recongised as distinctly challenging. It is time-consuming to move across the islands and more costly to deliver support. For example, as was highlighted in the final report (Sheriff et al, 2020), travelling to the most southern island involves several hours driving and two ferries. Nonetheless, physical presence in communities and through home visits was deemed essential to the success of the service and others like it, enabling hidden vulnerabilities to be identified and offering an environment in which many people feel more relaxed and able to engage with services (Sheriff et al, 2020). As well as the inclusion of home visits, another successful aspect of delivery related to an in-depth understanding and experience of the local context. The representative highlighted the importance of staff not only having local knowledge, but also the ability to speak Scottish Gaelic (as noted above) with householders and when working with project partners.

The direct support delivered by the GC project team was supplemented with other forms support to improve living conditions. This could involve an internal referral within TIG for physical measures (e.g., insulation), for example, or an external referral on to other services (e.g., for a benefit check or debt advice). The capacity to offer *holistic support* such as this, that was coordinated by a single point of contact, was one of the core objectives of the GC project - and was highlighted as a key strength in the evaluation.

Interagency working was at the core of the GC project and there were several ways in which the project brought key partners and healthcare actors together. For example, in project planning, it was decided that there would be monthly strategic and operational meetings. This provided the partners valuable opportunities to reflect on cases, share best practice, and seek support with emerging challenges. Another element of delivery involved cross-training of agencies brought together as part of the partnership. The training was described as basic energy awareness, and utlised as an opportunity to share detail of the GC project, the ways in which the team were able to support people, and how referrals worked.

Bringing partners together is not without challenge, however, and issues related to constraints and competing interests or funding streams, as well as the risk to duplicating work, were noted:

> "Moving Together *is thus part of the wider picture of doing health differently, rethinking how health services can be delivered through the alignment of a diverse range of organisations and initiatives, and how and where these reconfigured services can be best delivered to make the most meaningful impact. There is a need to find a balance between having a comprehensive offer of services offering distinct and morally reinforcing support and, conversely, a landscape of projects 'competing' to access the limited time of professionals who work with and build trusting relationships with householders. This balance has to be carefully considered and monitored to prevent fatigue or ambiguity."* (Sherriff et al, 2020, p.26)

It is also worth briefly discussing the practical elements of the referral mechanism into the GC project. For GPs, referrals were made using an online system that involved ticking a single box to ensure the process had as little burden on existing GP practice as possible. As the evaluation highlighted, however, referrals via this mechanism remained low throughout the project, and led to the widening of the referral network and the introduction of self-referrals. For referrals into the GC project from the wider network of partners and healthcare actors, this was done by email or telephone directly with the team at TIG.

With regards to delivery challenges identified, it is worth noting that with the GC project data sharing was similarly recognised as a barrier to providing efficient and effective support: *"no one has yet cracked the nut for data sharing for vulnerable people"* (GC representative). Detailing how, in the absence of a solution at the time of delivery, the data sharing issue was overcome, the representative told us:

> *"If you can't move data across organisations, then bring the organisations closer together so that each knows what the other does. Goal was that if anyone came into any part of that partnership, then it should be known which of the partners would be able to help that person –*

that was the point of moving together, that was the point of cross-training agencies so that they all understood what each other did."

In this regard, the GC project was viewed as a good example of how to effectively deliver this type of support while issues with data sharing still exist.

Messengers

At the centre of the GC project was an aim to foster better interagency working across health, energy, and housing to improve living conditions and householder health. The evaluation noted that a key strength of the TIG project was that it set out and effectively managed to break down siloed working among statutory and third sector support services across the islands. This involved a range of key partner agencies and healthcare professionals that not only enabled access to a wide range of individuals experiencing overlapping vulnerabilities (i.e., living in a remote setting and experiencing mental distress), but also positioned the project to cover as broad a geographical reach as possible.

An overview of the 'messengers' involved in the GC project are set out below (Table 4).

Agency	Overview	Role in GC
Tighean Innse Gall	A Community Benefit Society working across the Western Isles and operating principally across the housing, community group and small business sectors to support people to access homes which are made comfortable and affordably warm, promote independent living, and encourage businesses and communities to be energy efficient.	Lead partner – involved one project lead and two energy advisors.
Langabhat Medical Practice	A 6-site medical practice which covers most of rural Lewis	GP partner
Western Isles Citizens Advice Service (WICAS)	A local independent branch of the national network of Citizens Advice, providing free, impartial, and confidential advice. Offers debt support and income maximisation services. WICAS hosted staff employed by the Moving Together project who are embedded within WICAS to provide specialist fast-track advice to project participants.	Referral partner and host of two additional energy advisors as part of GC
The Shed	A drop-in centre for any adults who struggle with drug or alcohol use or have been affected by those who do.	Referral partner
Western Isles Foyer	Assists young people with tenancy management and sustainment through a drop-in service, the delivery of independent living skills training and support and training to assist young people to move into/on to education, training or employment. It also provides a supported accommodation service.	Referral partner
Western Isles Association for Mental Health (WIAMH)	A small locally based charity that provides practical help, emotional support, and fun from a drop-in centre and across the community in Lewis.	Referral partner

Table 4: Messengers in the *Gluasad Còmhla* project

As noted, as the project developed, the referral network was expanded beyond the partners above to include a range of other healthcare professionals including community nurses, Parkinson's nurses and those working in COPD clinic, among other roles.

Timing

GC was initially planned as a one-year project (2018/19) funded by the *European Social Fund - Aspiring Communities Fund*. However, part-way though year one of delivery, further funding was awarded to extend the project into a second year (completing early 2020). The funded extension to the project also included additional funding for further evaluation activity.

An important aspect to note regarding the temporal dimension of delivering projects like TIG relates to the time required for setting up a brand-new project – a key challenge communicated in the findings from the project, and reiterated by the GC representative for this CSA. Many projects of this sort, focused on tackling social issues including energy/fuel poverty, have relatively short funding periods, with a year not an unusual time frame to set-up, deliver and wind-down a project working to support people with complex needs and issues, who are often living in very challenging circumstances. Despite the lead organisation TIG being well-established and experienced in this area of work, setting up what was a brand-new initiative for the organisation was described as a challenging element of project delivery, and one that is often not factored into funding periods or project timelines in a realistic way. Time-consuming and time-sensitive activities at that set-up stage include employing and training new staff members, identifying and establishing professional networks and partnerships, developing resources and materials, and setting up internal processes and systems, among others. In the workshops completed as part of the interim report launch after the first year, other stakeholders echoed the implications of this challenge for later pressure around meeting targets and the impact this has on project delivery team's capacity to undertake a thorough and in-depth project set-up.

Project legacy and Covid-19

Although project funding ceased in 2020, various elements of delivery and interagency working have remained, and indeed have been of significant value in dealing with issues triggered by the Covid-19 pandemic. This demonstrates the legacy of the project, particularly in terms of the strength in the networks established, with examples including:

- The partner organisations and agencies involved still hold regular meetings, and basic energy-awareness cross-agency training has continued beyond project end (where resources and time allow as this is no longer a funded activity)
- In response to the Covid-19 pandemic, an *Energy Resilience Group* was set up with all key agencies from GC project. Throughout the pandemic, the group met fortnightly and were successful in securing redress funding to administer crisis fuel vouchers and white goods. These were issued to more than 500 people.
- A relationship with the foodbank network was established and all food parcels provided during the pandemic came with leaflets on energy efficiency, energy saving, switching, the crisis fuel vouchers, and access to white goods.

Evaluation

Evaluation methodology and targets

Differing from CS1 (*Big Energy Saving Network*) and CS2 (*Warm Minds*), an externally commissioned evaluation of the GC project was undertaken – a feature of the project that was built in from the outset and included in the original funding application. As the representative told us, bringing in the expertise of social researchers to undertake an evaluation of the project was deemed critically important, for both the successful learning and delivery of the GC project itself, but also to ensure impact in terms of guiding other agencies and organizations wanting to deliver similar schemes. There is also a dearth of research that has focused on HTR energy users that live in rural and remote settings meaning that in-depth evaluation of the project contributes valuable evidence and insight to this gap in understanding.

The evaluation was completed by the *Sustainable Housing and Urban Studies Unit* (SHUSU) at the University of Salford. Evaluation activity was embedded throughout the project, starting from the

outset with the development of an evaluation plan through to end-of-project events and other dissemination activities after project completion. At all stages, the evaluation partners, SHUSU, and the delivery team at TIG worked closely together to develop what was termed a *collaborative evaluation methodology* to review and revise not only evaluation activity, but to also feed into project delivery.

A mixed-methods approach to the evaluation was taken and this was completed in two stages, corresponding to the two periods of funding. Methods were predominantly qualitative involving in-depth semi-structured interviews with households, stakeholders, and project partners. A total of 20 householders and 23 stakeholders were interviewed as part of the evaluation. Interview data was supplemented with a householder questionnaire (administered by post and online) and operational data collated by the delivery team at TIG. The latter was pertinent for understanding demographic characteristics of the sample, as well as other key factors such as geographical spread of project delivery: "…*to understand and document the reach of the project spatially and socially."* (Sherriff at al. 2020, p.8).

Project targets were met, and, in total, 219 households were assisted as part of GC. Demonstrating several fuel poverty risk indicators, the majority of those assisted had at least one health condition, were on a low income, and living in a solid wall property.

Results

Two outputs were produced from the evaluation: an interim[16] and a final[17] report. The interim report, produced at the end of year one, was intended to draw on early learnings to feed directly into project delivery as well as provide guidance to other schemes and services with similar aims. Key findings set out in the interim report were structured around ten key lessons:

1. There is severe fuel poverty on the Islands, with distinctive features and drivers
2. Tackling fuel poverty on the Islands requires a sensitive and distinct approach
3. Home visits provide vital knowledge of patient context
4. A person-centred approach builds trust and allows support to be tailored
5. Trusted Middle Actors play a vital role
6. A multi-faceted approach to prescribing can offer holistic health support
7. Widening referral pathways and inter-agency and cross-sector collaboration broaden reach
8. Inter-agency working is enabled by the connectivity of partner organisations and stability of networks
9. 'Messy' outcomes can be hidden by narrow metrics
10. Time is required to build an approach that addresses complex conditions.

The interim report was launched with project partners and other local stakeholders at events in two different locations in the Western Isles (both where the project was in operation). Launching the interim report (and ten key lessons), the events involved deliberative workshops to understand, through facilitated discussions, to what extent the findings reflected professional experiences of support provision, and to review the evaluation process, identifying gaps and challenges that could be addressed in the second phase.

At project end in 2020, a final report was published (Sherriff et al, 2020). This built on the work of the interim report and included further data collection and analysis. Findings centred around understanding the need for and impact of support from the householder's perspective, as well as homing in on professional practice and networks of energy and health-related support in rural and remote settings. Below, some of the main conclusions from the final report are summarised:

[16] http://usir.salford.ac.uk/id/eprint/56800/1/2019-10-SHUSU-Moving-Together.pdf
[17] http://usir.salford.ac.uk/id/eprint/57055/1/Sherriff%202020%20Moving%20Together%20Final%20Report.pdf

- Partners involved, including those from the health sector, unanimously emphasised that involvement in the project had increased their *awareness of the impacts* of cold homes and provided them with a mechanism through which to act.
- The success of the project was in part attributed to the *creativity* and *generosity* of the stakeholders involved as well as the *unique blend of services* brought together by TIG as project lead. One element of success in this partnership working – in terms of avoiding duplication of efforts and building trust and action around shared goals - was having representatives from each of the organisations *sit on one another's boards*.
- The GC project, in bringing together voluntary and statutory services with primary and secondary health care, presents a way of *doing health differently*, and the same can be said for mechanisms of tackling (energy) poverty. However, despite key lessons for interagency working having been identified, there remains a need for careful consideration as to the balance between *avoiding duplication of efforts* and ensuring *sufficient access to trusted professionals* in frontline services. Streamlining support has notable benefits, as the GC project has illustrated, but such processes are not introduced without risks.
- Having an organisation like TIG, that is *well-established and well-trusted,* is paramount, not only in terms of successful take-up of support and measures among households and communities, but also in relation to the interagency working and broader support provision. This has a notable importance, as the findings indicated, when working in rural and remote areas that face distinct challenges and are arguably less well connected to services and schemes.
- The evidence provides clear and powerful examples of how improving living conditions has a positive impact beyond home comfort to drastically improve health and wellbeing. As the final report outlines, this included: "…*giving people confidence that their guests are comfortable, alleviating exposure to noise during storms, enabling people to stay in a home that they were previously considering leaving, reducing pain and discomfort associated with some chronic conditions, and alleviating financial stress – in one case to the extent of being able to buy a car and therefore able to shop independently and visit friends."* (Sherriff et al, 2020, p.26).
- An awareness of and ability to *mobilise around the myriad available resources* and funding streams was regarded as a notable strength in TIG's delivery of the GC project. At times, this this involved some contributions from householders themselves – but care is needed to identify where this is feasible and to remove pressure or risk of drop-out where it is not (the latter being most common).
- Person-centred and tailored forms of support are essential. With the GC project, this was grounded in *careful conversations* about *challenges, needs, wishes and aspirations*. Home visits play a critical role in delivering effective person-centred support allowing for otherwise hidden vulnerabilities to be identified. Supporting, and indeed training, health professionals to have these conversations is not only *pragmatic* but also evidences efforts to tackle the social determinants of health, here with a focus on living conditions.
- Where possible, projects should try to leverage existing *community assets*, and established *social networks* and *trusted Middle Actors* to promote and widen the referral pathways into support. Key examples highlighted in the GC project included *community events*, but also introducing a *self-referral mechanism*. Importantly, the evaluation warned of the exclusionary nature of self-referral mechanisms and advised that it should sit alongside and not instead of other referral mechanisms.
- While there were many notable successes in bringing health professionals into an energy-focused project, there remains work to be done to *better involve and support the sector* with connections to energy advice and support provision.
- Data sharing presents a key challenge but there are opportunities to improve the efficiency of delivery. Further investigations as to what *low level information can be reasonably shared without significant risk* are needed. Suggestions such as *clear data protocols* being developed

and used by all stakeholders may provide some assurance and a way forward. These would need to explore *what is and is not justifiable and beneficial to hold and pass on*.

- The underlying principles of 'social prescribing' offer a useful model to draw from in delivering schemes such as the GC project in that they focus on "…*tackling the social determinants of health, adopting a person-centred approach, and involving the collaboration of, and referral between, health and voluntary sector organisations.*" (Sherriff et al, 2020, p.27).

Summarising the value and impact of the GC project on householders directly and in relation to service provision across sectors and in challenging contexts, Sherriff at al (2020, p.27) conclude with the following:

> *"[the GC project] …has added to the evidence that making homes more energy efficient, improving heat systems, and helping householders to reduce their bills and manage their debts pays dividends in terms of and can boost wellbeing for those with long-term health conditions. Its specific contribution is to demonstrate the value, if not necessity, of focused and sensitive support on the basis of relationships of trust developed over time, particularly in the case of this cohort. This support can be essential in getting people to the point of accepting assistance and of being comfortable with unfamiliar contractors coming into their homes, and can be a lifeline in overcoming the challenges that stem from long-term conditions such as dementia, social isolation, Parkinson's, and limited mobility. Given the prevalence of such conditions on the islands and amongst the older population, this makes initiatives like Moving Together an important part of the public health infrastructure."*

Conclusions

The GC project clearly illustrates how a central focus on stronger interagency working can shape the design and delivery of effective interventions targeted at HTR energy users, in this case highlighting the positive impact this can have on supporting rural and remote communities – as a HTR group - to improve health and housing conditions. The project aligned actors from the health, statutory/local authority, and third sectors to a set of shared and overlapping goals in policy and practice – establishing mechanisms whereby local organisations are 'moving together'. This was primarily around improving housing as a key social determinant of health, and in doing so the GC project was able to avoid duplication, make more efficient use of resources, reach those that may not have engaged with services in the past, increase incomes, improve health outcomes, and undertake measures that resulted in warmer, safer, and healthier homes for islanders: a demographic group recongised as less well-connected to supply, services, and those far more constrained in terms of options to alleviate energy hardship. As the TIG representative explained, a service aiming to tackle energy poverty in the Western Isles is more likely to knock on the door of a household experiencing fuel poverty, than not.

The project's innovative approach to interagency working is what makes it a valuable example for inclusion in the UK CSA. Project partners built strong relationships and implemented practical steps to working together, not just in the delivery of the GC project, but in ways that has evidenced a legacy beyond the project's completion. As the TIG representative outlined:

> "*Part of the aim of the project was, in fact, to learn about what the other agencies are doing. Because, you know what, most agencies don't know what the other agencies are doing. And I think that that would be the case anywhere you went in the country. You have agencies around the corner form each other and they have no understanding of what they each do, how they work, and why they may benefit from working more collaboratively, ultimately, for the benefit of the individuals and communities they support. And I think that's a structural and systemic issue with both statutory and third sector agencies. Each has a remit, and they have their own bunker, which they fit in to deal with their client group.*"

Nonetheless, having an agency like TIG driving forward projects like this is essential to success. This illustrates the importance of ensuring there is a single point of contact, and the value in directing funding towards trusted middle actors with unique knowledge and experience of delivery in challenging contexts, in this case in rural and remote settings.

As with CS1 and CS2, the success of the GC is largely down to the acknowledgement of the role played by trusted Middle Actors. This, as with the other cases, is particularly with regards to local partners having the experience and knowledge in terms of identifying those who are vulnerable and likely to benefit most from the service being provided. Relatedly, having fluid inclusion criteria is highlighted again here as a key mechanism for reaching HTR communities. For the GC project this was about design a service that fit the needs of the individual, not expecting a person to fit the service: "*Hard-to-reach or simply that people don't fit a rigidly designed project or scheme?"* This is a critical element for the design of future schemes ands services.

Another key strength of the GC project is its links to social prescribing as a framework for understanding and identifying good principles and practices for tackling social issues that have a direct relationship to health – as is the case with fuel (energy) poverty. The TIG representative emphasised that while GC was "*not a social prescribing scheme, similar in ways",* the model of thinking and action around social prescribing has value because "*there is a direct correlation between fuel poverty, living conditions, and health, and vulnerability – and that's why we've brought all of these together. They are all inextricably linked*." In the context of energy poverty, behavioural change, and the delivery of schemes and services to support households, the landscape analysis found little evidence of social prescribing being applied to this context. With the positive impacts in the GC project, this highlights a possibly valuable gap in provision and evidence.

As the evaluation highlighted, however, working with the health sector in this context is not without significant challenges. The GPs involved regarded themselves as highly engaged yet poor referrers and this points towards the need to include, as TIG effectively did, a much wider body of health professionals in energy-related referral schemes. Additionally, a single point of contact, such as a GP practice manager, was found to be instrumental for coordinating such work with the health sector.

Other major challenges identified relate to data sharing and set-up time for projects. The former is not unique to the GC project, and indeed adds further weight to calls for the changes and protections needed around data sharing to be considered a priority in the context of tackling energy hardship and wider social issues. The latter, as discussed, illustrates a key issue with timescales of projects, especially where a scheme or service is offering something entirely new – whether this is new in terms of different to what an organisation has delivered before, the area in which their work covers, the approach being used, or the target group being supported. Additional time to undertake landscape analyses, develop new resources, and engage new messengers and recipients must be built in.

Lastly, it is clear that the GC project was strengthened by the formal evaluation that sat alongside delivery from the outset. This longitudinal, iterative, mixed-methods approach was rooted in what was termed a collaborative evaluation methodology with researchers, partners, and TIG working closely together to develop research instruments; understand, expand and strengthen available data and the analysis of that data; and, share ongoing insights - all ultimately aiming to not only leave a legacy of the project with key lessons for other organisations working with similar target audiences or in similar contexts, but to also shape the project as it was being delivered.

UK Case Study 4 - Residential: Empowered by Energy

Background

Empowered by Energy (EbE) is a unique energy awareness project which aims to empower 'recent' or 'new' refugees (individuals whose immigration status has recently changed from asylum seeker to refugee) in the UK. Refugees, and other migrant communities, represent a demographic group that have been regarded as HTR or underserved as energy consumers; they face unique and often severe vulnerabilities, struggling to survive on extremely low incomes, having to overcome language barriers, and having to understand new and unfamiliar energy systems.

EbE began in 2019 and is delivered by UK fuel poverty charity, *National Energy Action* (NEA). The project entails a series of workshops focused on building awareness of energy systems, processes, and support mechanisms, and therefore reducing fuel poverty risk and alleviating energy-related hardship. In its second year of delivery in 2021, the project was developed in partnership with and funded by UK power networks[18]. The rationale behind EbE is specifically driven by an awareness of the challenges faced by recent refugees as a distinct HTR, or underserved, demographic of energy consumers. Summarising the rationale and key activities, the project website[19] outlines:

> *"Coming from different climates, refugees won't automatically know how to keep a home warm, read their energy meter, set up an account or bleed radiators. The workshops build a self-sustaining support network to embed useful life skills and make communities more resilient. Without such support, refugees and asylum seekers can quickly find themselves owing hundreds of pounds to an energy supplier they didn't know they had. The workshops give them the confidence to contact their energy company and get the support they need, take control of their energy bills and join their* Priority Services Register*. For example, energy companies provide translation services and tariff support, such as the* Warm Home Discount Scheme*."*

There is a dearth of research that has investigated energy poverty and related vulnerability among refugees, asylum seekers, and other migrant communities in the UK context. This means that the specific challenges and experiences of this demographic group are poorly understood, with this being reflected in a lack of targeted support in policy and practice, despite some recognition of the vulnerabilities faced. In terms of targeted schemes, for example, few can be found - demonstrating the importance of projects like EbE.

One example of a similar targeted project is the *Warming Bristol Communities* project, completed in 2013 and delivered in the South of England. This focused more broadly on helping disadvantaged members of minority ethnic communities at risk of fuel poverty, but did include a large proportion of households who were refugees new to living in the UK. *Warming Bristol Communities* developed a suite of support services and workshops, and identified key markers of vulnerability among the target group including language barriers, isolation, poor physical and mental health, and a disproportionate likelihood to be living in poor quality, damp and energy-inefficient housing, and with an extremely low household income.

Limited but valuable insights can also be found in research. For example, in a 2010 study with refugees and asylum seekers by the *Scottish Refugee Council* (Lindsey et al 2010), a warm home and two meals a day were considered to be the most necessary factors in living a dignified life. As such, being able to pay for energy was deemed, above other household bills, a priority, and this was particularly the case for those living in damp homes. Sharing food – and thus sharing the energy-intensive practice of cooking food – was one of the most common coping strategies identified. The study also found that difficulties with energy affordability were linked to a lack of knowledge around the high cost of energy in the UK, not poor management of money; as Lindsey et al (2010) noted,

[18] The UK Power Networks involved include a Distribution Network Operator (DNO), *Scottish and Southern Electric Networks* (SSEN) and a Gas Network Operator (GNO), *Scotia Gas Network* (SGN).
[19] https://www.nea.org.uk/communityengagement/empowered-by-energy/

refugees and asylum seekers described adept mechanisms of coping with living on constrained incomes. As well as difficulties in understanding the cost of energy and payment processes, the bills issued by energy suppliers were viewed as particularly confusing – a finding that is echoed in research with many energy consumer groups, not just those unfamiliar with the UK's energy system.

While the evidence base is limited, it is widely accepted that refugees, and other migrant communities, are a demographic group at disproportionate risk of experiencing severe hardship and harm, whether related to fuel poverty, other aspects of housing-related harm, poor health outcomes and access to healthcare, low incomes, among other vulnerabilities. The EbE project sought to address a gap in provision and build awareness through the implementation of a practical project and by working with established, trusted Middle Actors to better target and develop tailored support for this underserved demographic group.

Audience

The EbE project initially set out to focus on individuals that could be classed as *recent* or *new refugees*: terminology used to describe individuals that, having claimed asylum in the UK, have been given leave to remain and whose status then changes from asylum seeker to that of refugee. Compared to other European and non-European countries, the UK has proportionately fewer refugees and asylum seekers (UNHCR, 2020). As a demographic group, however, in the UK and beyond, they face severe hardship and a wide range of vulnerabilities linked to low levels of income, barriers to healthcare, and inadequate housing – a problem compounded by the public health crisis resulting from the Covid-19 pandemic (Evidence Aid, 2020). In terms of fuel poverty levels in the UK, ethnic minority households have a higher likelihood of being in fuel poverty compared to white households (BEIS, 2021); however, the data used by the UK government relates to ethnicity and not immigration status so the extent to which ethnic minority households who are also refugees, who are living on some of the lowest incomes, is likely to be more severe.

The rationale for focusing on *recent* or *new refugees* relates in part to the rapid retrenchment of support that a person experiences when their immigration status is changed from that of asylum seeker to refugee with leave to remain in the UK. New refugees have 28 days to leave supported accommodation and access benefits and related services. Part of this includes moving from accommodation arrangements where utility bills have been covered, to new accommodation where for the first time, they are responsible for managing and paying for energy. In 2010, Lyndsey et al noted that in tackling fuel poverty as well as addressing wider vulnerabilities and inequalities, more support during and through this transition is needed. It is here that the EbE project plugs a gap in service provision.

However, in the early stages of the development of the project (landscape analysis as set out in the BBoBC), it became clear that immigration status was not what defined or characterised the vulnerability that EbE was trying to overcome or address. Instead, it was much more centred on language ability and the specific challenges associated with the complex language and systems that need to be navigated as an energy consumer in the UK. This view was supported by the experiences of partner organisations and agencies contacted in the initial stages of project set up and led to a reconsideration of the target audience and broadening of the project. As such, an early shift in targeting aimed to ensure that support reached not just recent refugees, but anyone engaged with the partner agencies who did not speak or understand English very well. As the EbE representative told us:

> *"…that is actually a very big, a very, very big problem in this country – because there is nothing on energy, for example on an energy company's website, that can tell people, how people with English as their second language can get help. And trying to get debt support, for example, when English isn't your first language is…impossible. And it's becoming a real issue for advisors."*

This example highlights a strength in the BBoBC model, specifically with regards to how efforts to define and characterise the target audience in initial stages can be valuable in refining overarching programme goals and understanding the gap in provision a project or service aims to fill.

Additionally, in early development and review of the target audience an opportunity was identified to not only support those with limited English, but to also offer support (using translators) to those with very little or no English, therefore intending to reach those who may be considered at greatest risk, least well-served, or hardest-to-reach. Initially, due to funding, the target audience was to only include individuals with a basic level of English – at least at conversational level to participate in the workshops with an English-speaking trainer. However, upon realising that funding constraints weren't as prohibiting as initially thought, the project was able to include translation services which meant that those with little or no English – arguably among the hardest-to-reach within this context – were not excluded from participation. This highlights that **sufficient or additional funding is essential** to address some of the most vulnerable or challenging of circumstances, and to echo discourse in UK energy policy, to address the worst first.

Another aspect of the audience definition work worth noting, and a feature that has emerged across all of the cases, is that while **audience profiling has clear benefits**, there are **risks** where services are designed for and delivered to demographic groups considered to be homogenous. For example, the EbE representative explained to us that even after broadening the service to include not only recent refugees, and having sufficient funding to support those with the least English through translation services, there were still significant challenges in delivery that required an awareness of heterogeneity in each of the participating groups:

> *"…while it may be a group of Arabic speakers, for example, there will be a group of quite different levels of English, and even with translation services, there could often be several dialects in the same room to be translated."*

In terms of practical delivery, this meant that often resources or messages would be altered and adapted in the moment, and that an element of flexibility in the moment and quick thinking is necessary.

Behaviours

EbE involves energy-awareness workshops designed for those with little or no English that are delivered by an energy specialist trainer. Attendees are identified and invited by partner agencies working to support recent or new refugees and other migrant communities, typically with non-energy support.

The main focus of the workshops, then, is not to target specific energy-related actions or behaviours, and instead to provide a general introduction to aspects of energy supply and billing in the UK system, as well as identifying areas of risks or common challenges. Ultimately, given the target audience, the project aims to, as the title outlines, *empower* energy consumers with limited or no English and who were unfamiliar or new to the energy systems and process in the UK.

As with the other case studies included in this analysis, the training and support provided was centred around a set of *common energy-related actions and behaviours*, including keeping warm, condensation and damp, safety (i.e., carbon monoxide awareness), reducing energy use, managing and paying bills, smart meters, switching energy suppliers, payment method, or tariff, and accessing grants and other forms of support.

Again, as identified in the other case studies, a **fluid and flexible approach was deemed essential** to project success. So, while the project was focused more or less on the common energy areas and topics noted above, if other questions or energy-related problems related to behaviour or action emerged in the groups then the trainer, an experienced energy advisor, was able to adapt and respond as required.

Content

Engagement strategy

There were two stages to engagement in setting up the EbE project. The first involved engagement with a range of partner agencies across the UK who worked with refugees and other migrant communities. Establishing these partnerships came about primarily by drawing on existing relationships, however the EbE representative explained that this initial stage of project set up also

involved researching and reaching out to organisations they had not worked with or come across in the past. This was highlighted as a poignant reminder at the start of the project that the service was addressing a gap, bringing together frontline professionals who work across tackling energy hardship and supporting those with limited or no English, typically from migrant communities.

In total, five different organisations were engaged in the first wave of the project:

- *Helen Bamber Foundation* - supports refugees and asylum seekers who have experienced extreme human cruelty, such as torture and human trafficking.
- *Refugee Council* – has provided crisis advice and practical support to refugees since 1951, to help them to integrate into new communities.
- *Manor Gardens Centre* - a multicultural, multi-ethnic health and wellbeing community hub based in London.
- *Sufra NW London* - addresses both the causes and consequences of extreme poverty, homelessness and social isolation in the community. Their emergency interventions provide a lifeline to people in crisis – empowering them to improve their wellbeing, learn new skills, find work and become financially stable.
- *New Routes Integration* – a small charity in Norwich working with migrants, asylum seekers and refugees, and their families, to support their well-being and ambitions.

The EbE representative discussed the benefits of engaging with a mix of smaller and larger organisations - the former typically having depth of knowledge and understanding at local levels, with the latter (e.g., national organisations) being able to utilise their higher profile for raising awareness of the project and more significant reach across larger geographical areas.

As part of the strategy for engaging partner agencies, NEA offered an **integrated training element** for frontline workers that provided the opportunity to complete an online CPD accredited course on domestic energy efficiency. This element – an additional training offer - includes a mechanism by which the project is able to widen and extend the reach of energy-awareness raising beyond the workshops delivered, with a view that this can be integrated into the ongoing professional practice of the frontline workers based in the partner agencies and organisations.

The second stage of engagement involves identifying and inviting individuals with limited or no English who are classified as new or recent refugees or from another migrant community and who are being supported by one of the partner agencies involved. Adopting the same bottom-up approach as found in other case studies, in the EbE project the process of identifying and engaging workshop attendees was left to the partner organisations who have good knowledge of, and work closely with the target audience. This again evidences the effectiveness of having local organisations and networks identify and 'reach' those in need of support, or who might be considered most appropriate for the forms of advice, information or support being offered. The role of **trusted Middle Actors** is again highlighted as critical to successfully engaging HTR groups, especially those whose needs may have been underserved or overlooked as energy consumers.

Utilising this approach, where partners coordinated attendance of the workshops, was also described as a way of **overcoming data sharing issues** between agencies – a key issue identified in CS3. With the partner agency handling all personal data, there was no need for the delivery lead, NEA, to hold this information. This does, of course, place greater demand on the partner agency but the EbE representative explained that, even in lieu of data sharing, there are ways in which agencies can be supported in this phase of engaging project participants, for example in drafting invitation letters, promotional materials, sign-up sheets, and giving clear and detailed information about the purpose, aims, and content of the activity.

In terms of raising awareness of the project and workshops, it is also worth noting that, for EbE, the decision was taken to **not use social media** and other similar forms of online promotion. The EbE representative told us that in pilot projects like this, where capacity and resource are tight, and demand largely unknown, there is a risk of not being able to set up and provide that service effectively. This again tied into the decision of employing an engagement strategy that worked closely

with partner agencies who were trusted intermediaries with good knowledge of the needs and access to the target audience.

Messages and resources

The EbE project involved a series of energy-awareness workshops that entailed presentations and interactive activities with an energy specialist (NEA as lead organisation). In developing the content delivered in across the workshops, the delivery team drew on longstanding experience and expertise in delivering similar schemes. The messages in the energy-awareness sessions centred around, as discussed above, common energy-related behaviours and actions to alleviate energy hardship and vulnerability. An overview of the content covered in the three workshops can be found below (Table 5).

Workshop 1	Workshop 2	Workshop 3
Explaining why we need to keep warm to keep healthy Who is affected by cold homes? What is condensation and damp Carbon monoxide awareness Working out how to keep our homes warm and reduce heat loss Interactive game to consider how to save energy and save money	Managing energy bills Energy tips in the kitchen Appliances and their costs Types of heating Types of meter including smart meters Payment methods	Getting a good energy deal and how to switch energy supplier Energy tariffs True/false quiz on switching Help available • UK Power Networks *Priority Service Register* • Energy suppliers *Priority Service Registers* • What to do in a power cut • *Warm Homes Discount* scheme • Trust funds • Local support/assistance including support from water companies • NEAs *Warm & Safe Homes* freephone service.

Table 5: EbE Workshop Content

Several resources were developed to support the training sessions with workshop attendees, and these were all provided as hard copies for use and reference after the workshop. Supplementing the training and awareness raising materials (i.e., leaflet and printed slide packs), workshop attendees were provided with 'energy efficiency packs' consisting of energy saving devices or items. As a project report detailed:

> *"Each attendee who participated in all three workshops received an energy efficiency pack and certificate. The packs contained a range of products with the intention of helping attendees to save energy and money at home. Items included LED light bulbs, a slow cooker, radiator reflectors and a thermometer card. Attendees were encouraged to use these products themselves and to also share how they help to reduce energy costs with their friends and families."*

Again, as noted in other case studies, developing content for the project was an iterative process, adopting a test and learn approach that was flexible and responsive to feedback and the needs of different groups that were participating. As the EbE explained:

> "*I've now finessed it…A big part of working with people not from this country is they ask really sensible and interesting questions – because they're not familiar with the system. And I've used that to finesse the training. For example, understanding which websites to use, which are safe. I've used all this to adapt [the resources]. Also, the conversations I've had with them about the ways in which they use energy. All that has fed into the resources that I've developed for them.*"

Delivery

Delivery mechanisms

The EbE project is delivered via three one-hour interactive energy-awareness workshops facilitated by an energy specialist working for national fuel poverty charity, NEA. While sessions were designed with face-to-face provision in mind, and initially delivered this way, the impact of the Covid-19 pandemic (as discussed below) meant that part way through the first wave of the project (after two workshops) provision was unexpectedly and rapidly shifted to remote delivery online (via Zoom). As noted, while the workshop sessions are designed and delivered by the energy specialist from NEA, the partner agencies identify and coordinate attendees from the target audience.

With both the initial face-to-face workshops and in the subsequent online delivery, each session consisted of roughly 10 participants. Based on the experience of the EbE representative, this was described as a good number of workshop participants to sustain engagement while being able to break off into smaller groups for more interactive participant-led activities. Again, however, flexibility and knowledge of the target audience is considered crucial. For example, one workshop group – referred to as the *Tamil Ladies Group* – consisted of a larger group of local and already well-connected women who wanted to complete the workshops together at the same time. Given that the group were already well-connected, this was easily managed and consequently contributed to one of the more vibrant and motivated workshop groups. As the EbE representative noted: *"when the groups know each other, it all works better".*

Delivery was also structured around and embedded within existing programmes of training or courses held by the partner agencies. This was a deliberate mechanism for delivery, again to encourage greater engagement and minimise disruption or demand on the attendees. Although not an issue with online delivery, holding face-to-face energy-awareness sessions at similar times to other training in local centres, such as English language lessons (as was commonly done), reduced burdens like travel time and costs.

To establish delivery mechanisms that maximises engagement, a function of the BBoBC, the EbE representative explained that it is important to take time to understand barriers that might restrict participation or result in withdrawal from a project. One example identified in the delivery of EbE related to childcare and the chance to attend workshops as a couple. In building an awareness of this, promotional content and coordinating partner agencies could highlight that attendees' partners and/or children were welcome to attend, ensuring a service that was as inclusive as possible.

Messengers

The messengers in the EbE project included the partner agencies, as set out above. However, the primary messenger was the energy specialist from NEA who facilitated the partnerships, designed the training, and delivered the workshops. Having a dedicated individual delivering and overseeing the project – a single point of liaison – was described as fundamental to project success, and the notion of effectiveness hinging on services and schemes that have a single point of contact is not new.

As is commonly noted across the literature on vulnerable or HTR communities, **trust** plays a central role in successful delivery, and the valuable role of trusted Middle Actors has been illustrated in the success of EbE, too. This was partly based on NEA's experience in supporting marginalised communities, where it was considered vital that engagement comes via trusted Middle Actors. As acknowledged, clients respond and engage with partner organisations whom they know and trust. As one of the EbE project reports noted:

> *"Recruiting and working through five trusted project partners ensured client engagement and attendance at the workshops. It also helped to overcome any barriers to engagement such as language or literacy needs, as the partner was able to provide guidance to NEA about their client needs."*

Another key messenger and one that is unique to the EbE project is the role of the **translator** in delivering the workshops, which as noted, has enabled the project to reach some of the most marginalised energy consumers. Working with translators, especially in an online context, was described as an extremely challenging in parts and a big part of learning in terms of project delivery.

One lesson has been to work with translators prior to delivering workshops to ensure unfamiliar phrases or terms, especially those used in language related to energy (e.g., gas central heating), are understood and effective explanations or supporting information is made available. The use of translation services was also valuable in developing supporting documents that needed to be translated into other languages or have explanatory guides developed in other languages to sit alongside existing documents (i.e., consent or authority to act forms).

Timing

The project started in 2019, running initially as a one-year pilot. With further funding, the project has been extended into a second year (underway at the time of writing), with a view to this continuing into future scheme years subject to further funding.

The project is delivered year-round and is opportunistic in the sense that it seeks to fit with the availability of the partner services supporting the target audience and working alongside NEA. For example, as noted above, some of the training has been delivered around ongoing English language courses to integrate energy awareness training into other provision, minimising disruption to training schedules and demand on those accessing the service.

Impact of Covid-19

There have been several impacts to the project as a result of the Covid-19 pandemic and related lockdown measures introduced in early 2020, the most notable being a complete shift to remote online delivery after two of three workshops in the first phase of delivery.

A shift to online delivery was regarded as a positive and a negative thing, presenting some opportunities to enhance the project or engage with the target audience in a slightly different way, but also raising challenges in delivering the same level of energy-awareness training envisioned at project inception. In ways, online was seen to make the project more accessible, able to reach people in their own homes and therefore having larger geographical coverage, as well as being able to be more flexible with delivery times. However, it is also less accessible for those digitally excluded in a variety of different ways, whether related to device or internet access or confidence in use. Taking some steps to overcome this, the EbE representative noted that some organisations would provide tablets to workshop participants, and for those lacking digital skills or confidence:

> "*Often you found that there would be a younger person in the background, helping to get them set up and then going off and leaving them to it. Which was really nice – there was a lot of everybody helping everybody else. And it did seem to work quite well*."

As with several other elements of the EbE pilot phase in year one, delivering online became a process of learning on the go, with several unanticipated obstacles and challenges emerging. For example, in the rapid shift to online delivery, interactive activities were embedded into the workshops, but these were designed with PC users in mind, whereas many workshop attendees accessed the session via smart phones. The difference in usability and consequent user experience meant that delivery had to be adapted on the spot for many activities.

However, noting a benefit of online delivery, the EbE representative outlined that having the workshops online meant people were able to reflect on their experiences while in their own homes. This resulted in instances of 'show and tell', where the trainer and workshop attendees would share personal stories and reflections while showing the group appliances or heating systems, for example. Screen share was also noted as a valuable tool, particularly in demonstrating how to use comparison websites or access bills online, for instance.

As well as in relation to project delivery, operating exclusively online and remotely was also viewed as a strength in terms of establishing partnerships in the early stages. As the representative noted:

> *"A lot of it was about relationship building…and lockdown helped with that massively because everyone was using Teams so I could have a meeting with one person from X and then they could say you want to chat my colleagues in such and such and such places because they will be interested. And because this initial sort of head honcho had a conversation with me she then felt confident in sharing that information, and so then I was, I then had a second meeting with the sort of equivalent delivery person doing a similar role to me. And that's how*

> *it gets set up. And I wouldn't have never been able to meet them because they live at the other end of the country, and they are a group of clients who are all very vulnerable, so they don't want to set up something with them that isn't going to be useful, that isn't' going to be practical."*

Despite these benefits, the message was clear with regards to what future delivery should look like: online should not be the only offer, with a blended approach that reintroduces face-to-face workshops deemed the best way forward for the success of the project. This was described as essential for reaching as many people as possible, but also for reaching those most vulnerable or considered most at risk:

> *"Whilst an online delivery approach worked incredibly well during the Covid-19 pandemic and was well received by participants, this does rely on participants having access to the internet and basic digital skills. It should be recognised that this method may not be appropriate for all age groups or for people without the confidence or capability to use digital technology. NEA would recommend a combination of digital and face-to-face workshops (Covid-19 permitting) to ensure all clients had the ability to engage and participate. Furthermore, travel costs to enable individuals to attend sessions in person should be built into any future project expansion."*

Evaluation

Evaluation methodology, metrics and targets

The project has had no formal evaluation to date but update/project reports for internal purposes and for funders have been completed. These have basic elements of evaluation included, and brief reflections will be summarised here.

The reports provide detail on the reach of the project in its first year. A total of 36 organisations were initially engaged; partnerships were developed with five of these who went on to be involved in promoting and delivering the project alongside NEA. A total of five sets of workshops (three workshops in each set) were delivered with these partner agencies reaching a total of 45 workshop attendees. Of the fifteen workshops delivered in total, only the first two with the *Helen Bamber Foundation* were completed face-to-face.

As noted, the project delivery team undertook some internal, low-level evaluation. This involved an online questionnaire for workshop attendees issued post hoc. The EbE representative noted that response rates were low, and this was attributed to not having the questionnaire translated (a change planned for year two of delivery).

Although not part of a formal evaluation strategy, sessions were observed or shadowed by other members of the delivery organisation. Following, discussions would allow for reflections on aspects that worked well or less well, providing an ongoing feedback loop to adapt the project delivery as appropriate, as well as providing the opportunity to online delivery and provide in-house training and support.

Results

While no formal evaluation has been undertaken, some key findings and reflections have been set out in the project update reports. These are summarised below:

- Feedback from workshop attendees, while limited, was very positive, and respondents noted how they planned to *share what they had learned with relatives and friends*, evidencing again the value in schemes that promote a 'cascade' approach.
- Key impacts reports by the attendees included *greater control, understanding, and confidence*: "*Participants reported they had learnt new information to enable them to take control, have a greater understanding of their energy bills and energy practices in the UK, as well as boosting their life skills and independence."*
- The project has highlighted a need for targeted policy and practical schemes to better understand and provide effective support to this audience, and drawing on the BBoBC model,

the importance of adopting a *'test and refine' approach* is recognised: *"Delivering the project as a small-scale pilot has enabled NEA to test and refine our approach to engaging with and delivering support to refugee communities."*

- Similarly, feedback from partner agencies and organisations was positive and the value of the scheme in addressing a gap in their current provision was recognised.

The update report also outlines several key outcomes:

- Refugee and asylum seekers *have increased confidence to take control* and manage their home energy independently.
- Workshop attendees will provide a *legacy* for the project, allowing HTR communities to be accessed and provided with a route for help within the community, thus establishing a *network of assistance* outside of official support and referral networks.
- Vulnerable individuals and families enabled to access *energy efficiency, income maximisation and fuel debt advice.*
- *Increased skills and knowledge of frontline staff* around domestic energy efficiency and fuel debt provision.
- *On-going partnerships and referral networks* established, in particular with the *Refugee Council, Helen Bamber Foundation* and another organisation *Voices in Exile*.
- *Greater knowledge and understanding* of the needs of refugee and asylum seeker communities and how to support them.

Conclusions

Empowered by Energy (EbE) presents a unique energy awareness project that aims to empower those with limited or no English as a HTR or underserved group of energy consumers. Initially targeted towards new or recent refugees, the project acknowledges that this group and wider migrant communities face unique and often severe vulnerabilities linked to income, language barriers, and navigating new and complex energy markets. The EbE project addresses a clear gap in provision and builds awareness through the implementation of a practical project and by working with established, trusted Middle Actors to better target and develop tailored support for this underserved demographic group. It also highlights a need for further research and targeted policy mechanisms for understanding and better supporting this HTR group.

Again, demonstrating the importance of flexibility in design and delivery of schemes, EbE used early landscape work in identifying and setting up partnerships to widen the definition of the target audience to not only focus on new or recent refugees, but more broadly to include those with limited English. This early decision was prompted and encouraged by partners which also illustrates the importance of establishing feedback loops from the outset, which draws on the expertise of those who have worked closely with the target audience, and not just doing so at project completion. This early audience work for EbE also highlighted the need for projects to acknowledge the heterogeneity of the demographic groups they are working with, as was noted with CS2.

The inclusion of translators, after identifying the required funding, is a notable success of the project in terms of reaching those that may be regarded as the most vulnerable, underserved, or HTR. It is novel and provides a vital service that is able to reach some some of the most marginalised energy consumers and those largely excluded from the energy market and related forms of support. Working with this type of messenger also provided the delivery organisation with a critical opportunity to understand and develop effective methods for working with translators in the delivery of energy awareness sessions, training, and wider support. This was not without challenges though, and delivery of support with translators requires additional set up time, particularly with the development of resources and online content.

The CSA has also identified that flexibility is important around aspects of project design that might dissuade or prohibit people from participating. For example, as EbE found, allowing couples to come and for attendees to bring children, as well as allowing larger groups to participate where requested,

all contributed to greater levels of engagement. This raises important considerations relating to designing services that are as inclusive as possible – an element that should be reflected in schemes adopting the BBoBC model.

Delivered via three energy awareness workshops, EbE evidences a scheme that works directly with the target audience. As with other cases presented, it highlights the importance of regular and repeated engagement with HTR groups, not only for ensuring complex support and training are delivered effectively, but also for building trust.

As well as direct support, training also features as a key part of EbE delivery. Through the integrated online training element offered to FLWs of the partner agencies, the project was able to widen and extend the reach of energy-awareness raising beyond the workshops delivered, with a view that this can be integrated into the ongoing professional practice of the frontline workers based in the partner agencies and organisations.

There were several factors perceived to have contributed to the successful delivery of EbE. Firstly, energy efficiency packs ('freebies') were seen as a useful offer to increase engagement and stimulate meaningful discussion around energy use and saving. This was viewed as particularly impactful where items were of practical benefit to the target audience, for instance with thermometer cards, LED light bulbs, and slow cookers. A second factor relates to the decision to ensure EbE, as with CS3, was overseen and delivered primarily by a dedicated individual – a single point of liaison – who was seen as fundamental to project success. The notion of effectiveness hinging on services and schemes that have a single point of contact is not new, but EbE adds further evidence to the strength of this role. Thirdly, the project highlighted the effectiveness of embedding delivery within existing programmes of training or courses held by local organisations. This was a deliberate mechanism for delivery to encourage greater engagement and minimise disruption or demand on the attendees. Lastly, it is worth noting again, the value in working with partner agencies in overcoming data-sharing issues. This related to partner agencies being best placed to identify and invite individuals to workshops, based on personal data already held. While this overcomes data-sharing issues, it must be acknowledged that this places greater demand on the partner agencies, who may well be facing constraints in delivery and funding, and potentially reliant to some extent on volunteers. Methods for supporting partner agencies, in circumstances where data is not shared, include drafting invitation letters, promotional materials, sign-up sheets, and giving clear and detailed information about the purpose, aims, and content of the activity.

EbE is the UK case study most impacted by the Covid-19 pandemic. The rapid shift to online provision after only two face-to-face session was viewed as a positive and a negative thing. Online provision made the project more accessible to some, able to reach people in their own homes and therefore covering a much larger geographical regions, as well as being able to be more flexible with delivery times. However, it is also less accessible for those digitally excluded in a variety of different ways, whether related to device or internet access or confidence in use. Consequently, findings from the analysis highlight that future delivery of similar schemes online should not be the only offer, and a blended approach that reintroduces face-to-face workshops is perceived to be the best way forward for project success. This was described as essential for reaching the HTR, and specifically for reaching those most vulnerable or considered most at risk.

UK Case Study 5 - Non-Residential: Promoting Sustainability in Business: A values-based approach

Background

The fifth and final UK case study shifts from domestic or residential settings to profile a non-residential example focused on Small and Medium Sized Enterprises (SMEs) as HTR energy users. Specifically, it details a programme of work behind the development of the *Promoting Sustainability in Business: A Values-based Toolkit* – a practical guidance and set of related resources targeted towards SMEs, and the intermediaries that support them, in engaging with sustainability. Setting the context and outlining the rationale for undertaking a programme of work targeted towards this demographic group, the project website[20] states that:

> *"SMEs will need to make significant, and in some cases radical, changes to their day-to-day operational practices and also to their longer-term trajectories. Smaller organisations, in particular, face a variety of barriers, which often slow the pace of change and, in some instances, block important technological and social innovations. Intermediaries such as professional associations, business advisors and economic development organisations can help SMEs make the transition towards a more environmentally sustainable, low carbon society. The primary aim of this project is to develop practical tools and approaches that support SMEs and intermediaries in their efforts to achieve this goal."*

Delivered across two funded projects, a pilot in 2017-18 (referred to as *Growing Greener*) and a larger follow-on project in 2018-19, the *Promoting Sustainability in Business* (PSiB) project involved a multidisciplinary team of academic and non-academic partners, including a climate change communications organisation. Gathering key insights though a series of workshops and primary research that engaged with SMEs and low carbon intermediaries, the project combined *"…leading-edge research on SME growth processes and environmental behaviours with practitioner expertise in SME engagement and climate change communication"* (Open University, 2021). In expanding and extending the reach of the project by focusing latterly on specialist SME intermediaries[21] - or Middle Actors (Janda 2013; 2014) - who have extensive contact with a wide range of SMEs, a series of practical resources were developed, including an online course, a practical toolkit, and step-by-step guide to completing values-based environmental audits of SMEs.

SMEs as a group of energy users have received relatively limited attention in policy, practice, and research to date, and this was a primary motivation for developing the PSiB project. However, the project does not only contribute to a gap in current understanding in terms of its focus on SMEs as a less well understood demographic; it goes beyond this to apply psychological theory to the development of practical resources that seek to better understand and embed in practice the role of values, attitudes, and beliefs, and how these shape and constrain energy-related behaviours.

Audience

In the simplest terms, the target audience in *Promoting Sustainability in Business* (PSiB) are SMEs. In the UK, this term encapsulates more than 99% of all businesses, of which there are more than 6 million (Ward, 2021). The UK Government (2020) defines SMEs as those that can be classified as:

> "…*micro (less than 10 employees and an annual turnover under €2 million), small (less than 50 employees and an annual turnover under €10 million) and medium-sized (less than 250 employees and an annual turnover under €50 million) businesses*."

[20] https://business-school.open.ac.uk/research/growing-greener

[21] Note: the use of the term intermediaries within this project is closely linked to that put forward by Janda and colleagues, where the role is regarded as more than simply that of a go-between, operating between policy makers and SMEs, and instead addresses notions of agency and capacity.

For the PSiB project, audience profiling work was built from several years of prior research and professional practice. In terms of the former (research undertaken prior to project inception), this was rooted in doctoral research[22] examining the experiences and challenges faced by SMEs in engaging in sustainability and the net-zero transition. This included an in-depth qualitative study involving interviews with 25 low carbon intermediaries. With regards to the latter, professional practice, the project lead outlined in an interview that, prior to and alongside this research and the consequent PSiB project, they had spent several years working as a low carbon intermediary themselves, supporting SMEs with energy audits and advice on low carbon transition and sustainability. As they noted: *"…that was really the rationale for this project, it very much built on something there already."*

Part of the challenge in working with SMEs as a target audience is that they are a vastly diverse group. This heterogeneity, as emphasised throughout related project reports, resources, and in the interview with the project representative, raises key challenges in defining, characterising, understanding, or developing support targeted towards this demographic group. It was also described as the distinguishing feature in what makes SMEs 'hard-to-reach':

> *"I think this is maybe important to capture in the hard-to-reach element – they are such a large group of organisations They are so heterogenous, it's a very unsatisfactory category. The first thing you say is - You know, 250 versus 1 have nothing in common. A car mechanic has nothing in common with a nail bar, etc., etc. So, heterogeneity is a real problem."*

There was some distinction offered in terms of 'which' SMEs may be considered more of a focus and consequently a higher priority in characterising the target audience. This was communicated in terms of a comparison between, for example, those whose business operations involve much greater energy consumption such as factory-based businesses versus micro, home-based businesses:

> *"And often, when it comes to energy, it's actually not so much those people we need to reach, because they might not have a very big footprint, it's the people who just run a big factory somewhere, like a big warehouse, and they don't need to do lots of networking. Because they just do what they do and they're a long-running family business, and those people are the ones we really want to reach, because they can reduce their footprint."*

Ultimately, however, the representative outlined that the project is targeted towards two audiences of 'change makers' or *"anyone who wants to create change in an organisation"*, principally an SME. This included business owners and managers, but also, as became the focus of the PSiB project, specialist intermediaries or Middle Actors. This, as the quote below outlines, primarily involved low carbon intermediaries. Characterising this group was again, however, not without challenge due to a diversity of backgrounds and professional expertise:

> *"…there are different types. And the classic, easiest ones are publicly funded. So, they might be funded by local enterprise partnerships in the UK or in Europe, they might be energy agencies. Usually regional or local, because that is the assumption that if you know the local area, that is the best way to reach the local businesses. They're not just publicly funded, they might also be people like their accountant. Evidence says that, of all the places SMEs go for advice, number one is their accountant. So, accountants are a typical intermediary. But you also get energy consultants that are actually for-profit, auditors. Or people linked with some kind of regulation, so maybe environmental protection or food standards or something, people that… Individuals who go into businesses and get access, one way or another."*

Audience Psychographics

As the title of the project indicates, a key factor shaping the design and implementation of the PSiB project is an awareness of *values*, encompassing attitudes and beliefs also – all rooted in the psychographic profile of SMEs as the target audience. The purpose of the project was, therefore, to develop resources, based on insights gathered in workshops with SMEs and specialist intermediaries, that can help to better identify and work with 'values' – or psychographic data - in a way that promotes more sustainable practice. Efforts to understand the psychographic profile of SMEs, and then

[22] https://ora.ox.ac.uk/objects/uuid:9294a103-5bbc-4cec-9b1e-b41d24ec166d

development of tools that are built around that awareness, are lacking, and this was primarily the gap the project sought to fill.

In the absence of a formal evaluation (being completed at the time of writing), no specific psychographic data from workshop attendees was available. However, developed from these insights, a step-by-step guide was produced as part of the project and this outlines three 'levels' – organisational, job role, and personal – of values that can be identified and understood among the target audience (see Figure 6).

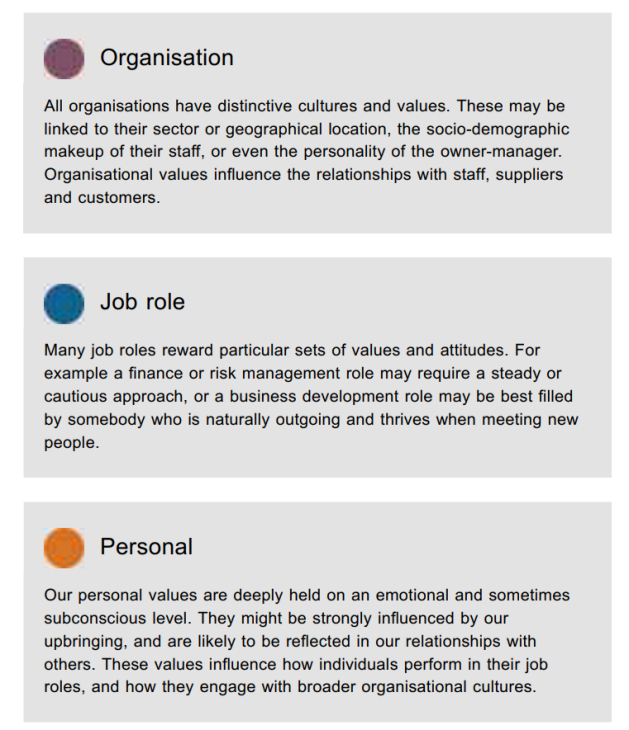


Figure 6: 'Values in the workplace' taken from the step-by-step guide for intermediaries

Behaviours

The PSiB project was focused, in the broadest sense, on promoting and encouraging SMEs to engage in *pro-environmental behaviours* and this pertained to all aspects of business operations. Given the heterogeneity of SMEs – ranging from large factory owners to mobile hairdressers to office managers – it was unsurprising that target behaviours were similarly described as hugely varied and person-, business- and context-specific. Acknowledging this, a shift away from prescribing actions against individual behaviours was a key aim of the project, instead seeking to engage in meaningful, values-based discussions about transitioning the business towards *Net Zero* carbon targets[23]. As the representative described this, this was perceived as a shift away from what the individual does or could do, to an understanding of the processes and systems required for the overarching 'journey':

> *"We were trying to do was move away from individual behaviours to the journey. So, what we were trying to do was say, 'The conventional support for business in this field is very one-off, and we'll come in, we'll do an audit, we'll do a payback assessment.' And of course, that payback assessment dates very quickly…It's all changing, and it's all very one-off. So, rather than individual behaviours, we were trying to get people to think about net zero – how does the intermediary help the business on a journey towards net zero? Of which individual behaviours like boiler replacement is one, but it's a shift from individual behaviours to a journey."*

[23] https://www.gov.uk/government/news/uks-path-to-net-zero-set-out-in-landmark-strategy

The project was described as focusing on behaviour in two ways linked to the two audiences involved: the intermediaries, and the SMEs they work with. The first level of behavioural focus, then, was to establish ways to feed into the behaviours adopted by intermediaries in their professional practice working with SMEs, with a key example being the way in which environmental audits are conducted. The intended impact of that shift to a more personal, values-based approach to environmental audits was that SMEs would be supported to adapt and modify their processes and practices and move towards a more sustainable business approach – the second level of behavioural focus. As the representative explained:

> *"There are two levels, aren't there? Because we are targeting behaviours at the intermediaries, and that is how to develop intermediary-type behaviours as in using values in your job. And then it's how that then cascades down to the SME and the behaviours that they are trying to introduce. So, yes, to take that first level, what we were trying to change in terms of their [intermediaries] day-to-day working practices was stopping them, discouraging them from just going in and telling them how much money they could save with energy efficiency, towards going in and talking about sustainability, understanding the actual- Just a bit about the business for the sake of it, for the sake of, "Who are you as a business, what are your missions, what are you trying to achieve? And how does that fit with your long-term future, and the long-term future of the planet as well?" So, yes, that behaviour was about the interaction really."*

Relatedly then, set lists of individual behaviours attached to ever-changing policy mechanisms or technological solutions were seen as limited in their impact. Instead, the challenge was to develop an approach, or a method of communication that moved beyond the specific actions to a confidence and competence in understanding how psychographics – namely values – shaped overarching behaviours in business. It was acknowledged, however, that this is not easily definable and is an unfamiliar approach, described as 'trickier' to adopt initially:

> *"Values and norms and cultures and practices, and all those things which are trickier but… Ultimately, once you've set somebody on that path, you no longer think in terms of the specific examples, right? You think in terms of, how can the business as a whole operate more…[sustainably]."*

Content

Engagement strategy

The first stage of the PSiB project involved establishing the inter-disciplinary team that brought together expertise in sustainability, environmental performance, business, and climate communications. Viewed as a key part of the overall engagement strategy, these partners broadened the scope of the project as well as providing unique opportunities to share knowledge and best practice. This was particularly the case in working with a climate communications charity, as the representative explained:

> *"…the other partner was* Climate Outreach*…they are a really interesting charity that specialises in climate communications…The reason we've really engaged with them is because they've done some stuff on hard to reach communities, or non-conventional communications."*

Co-design was at the heart of the engagement strategy in both phases of the project, and this motivated the decision to use workshops for gathering key insights into developing a values-based approach. Initially, as part of the smaller pilot project (*Growing Greener*) in 2017-18, this was with SME owners and managers directly. While the workshops were deemed successful in terms of understanding some of the key challenges and ambitions related to sustainability for SMEs, they were seen as limited in terms of their potential to engage with the 'hardest-to-reach' SMEs. This reflection, as the representative outlines below, prompted the shift towards a focus on intermediaries, and ultimately led to Phase Two of the project:

> *"So, what we did initially was put on some workshops with SMEs themselves. The trouble with that is that it is quite difficult to get SMEs to come to workshops. So, what we ended up*

> *with was kind of preaching to the converted…So, then we were like, "This has been interesting, but we haven't really reached those sceptics, the car mechanics and everything else." So, one of the things we did was recognise that, actually, the people we were talking to were intermediaries usually, and they have a lot of reach. So, we went back to the funder and developed a more substantial funding bit to put on workshops with intermediaries. Because we figured the reach would be further. If we went to an intermediary, whose job it is to reach out to hundreds of SMEs, then we might go a bit further."*

As well as being viewed as HTR in terms of heterogeneity, SMEs were also regarded as being, at times, hard-to-engage. Making connections and engaging with SMEs and the low carbon intermediaries that support them was described as challenging with perceived expertise playing a fundamental role. Specifically, the project lead having professional expertise – and relatability - as a low carbon intermediary was a key factor to success in early stages of engagement:

> *"It would have been difficult without my existing connections, basically. So, I worked for the local enterprise partnership as an advisor and…through that, I knew basically other people who ran similar programmes in other parts of the country. So, I knew a guy who ran a really big programme that covers Kent, Sussex and Essex. So, we met them in London and did a workshop with his whole team, which is about 15 people. And then we did the same thing in Manchester, and we did the same thing in the West Midlands. And then one in Oxford as well, because that is where my connections are. So, it was pretty much me. And if we hadn't got that industry insight- I was able to say to these people, "Look, I'm one of you, I am like you, I have the same job as you. And I really think you should come to this." And we pitched it as a professional development opportunity, to come and learn about a different way to do things. So, yes, quite difficult to replicate."*

Messaging

Messaging is at the core of the PSiB programme. The purpose of the project was to shift from a focus in communicating pro-environmentalism in technical, individualistic, cost-based terms to more personal, values-based discussions. As Hampton (2018, p.1) outlines, in working with SMEs to promote more sustainable business practices, to date this has been lacking or missing entirely:

> *"Establishing and sustaining engagements with SMEs on the topic of pro-environmental behaviours is a multi-faceted problem. Advisors typically approach businesses with promises of cost savings rather than using environmental messaging, and focus their resources on the provision of building energy audits and technical advice. Advisors rarely engage SMEs in values-based discussions, or by seeking to understand how and why energy is used in the course of everyday business practices."*

A key element in reframing the messaging used by specialist low-carbon intermediaries centred on identifying and unpicking certain *assumptions* relating to the aspirations, challenges, and motivations that SMEs linked to pro-environmental behaviours:

> "*…we wanted to challenge the intermediaries, to be aware of this. Because what they tended to do is go, "All they care about is money, all they want is my expertise. So, all I should do is go and look at their boiler and decide whether they need a new one. And look at their windows and decide- Give them a very technical and economic assessment of their needs. And what they're missing, in doing that, is actually talking to the business as a business and as a kind of culture. And actually, thinking about ethics and climate change, this is actually about a different way of being, as a business, and it's not just about energy efficiency. And if you talk about it in a transactional way, in a financial framing, then that is what you're going to end up with.*"

It is important to note that reframing or shifting the messaging around pro-environmental behaviours was "*…not about changing the SMEs' values but better understanding and working with existing values*". As the representative explained:

> *"It's not about you've got to become an environmental activist, it's actually saying, "You can have your traditional conservative values, if those are what you've got." Or on the other side, you can have the start-up values, which is all about fast-paced, moving, exciting innovation.*

> *That is all fine. It's about tailoring what an appropriate response to climate change is for those sets of values."*

The messaging in the PSiB programme is what distinguishes it from the other cases presented in this analysis. While it is framed by in-depth real-world insights (from professional experience and consultative workshops), as with the other cases presented, it is also theoretically driven in its application of values-based thinking. Providing a summary of how this application of theory has been adopted in the programme, the Climate Outreach (2019, p.4) communications guide notes:

> *"Values are a person's guiding principles (Schwartz, 2012). People's attitudes on different topics may change over time but there are certain psychological attributes that are less likely to change. These attributes help form the core of their identities and central among these are values. Researchers have identified two sets of opposing values. This finding has important implications for communicating about climate change. Some people favour 'extrinsic' values, such as wealth, power, ambition and social standing. Other people place more importance on 'intrinsic' values; social justice, equality, love of nature. These are important when communicating about climate change, as it has been found that 'intrinsic' values are consistently associated with concern about climate change (Corner, Markowitz, and Pidgeon, 2014). This means the way that different values are used by advisors and intermediaries when talking about energy and climate change matters, because promoting one type of value e.g., by talking about the economic rationale for energy saving (an extrinsic value) is likely to weaken the prominence of opposing values e.g., the environmental benefits of energy saving."*

Resources

Driving the PSiB project was a core objective to develop practical resources and approaches that can be used by intermediaries in, as the title suggests, 'promoting sustainability' among SMEs. As such, the resources developed are arguably the main aspect of the programme, and their development and use are critical factors in understanding its success.

Having identified and demonstrated the potential of the values-based approach developed in the initial pilot phase of the project, Phase Two (2018-19) involved working with groups of business advisors in consultative workshops to co-create several evidence-based and theoretically driven resources including:

- An open-access online course[24] consisting of five sessions
- A practical toolkit to guide a values-based environmental audit
- An effective communications guide[25] that provides practical guidance for low carbon advisors and others working with SMEs. The guide is structured around values and principles and is presented as a 'how to' guide (Figure 7).
- A step-by-step engagement guide[26] for adopting a values-based approach before, during, and after a visit as a low carbon advisor or other intermediary working with SMEs.

[24] https://www.open.edu/openlearncreate/course/view.php?id=3798

[25] https://www.open.edu/openlearncreate/pluginfile.php/318774/mod_resource/content/3/Effective_communication_guide.pdf

[26] https://www.open.edu/openlearncreate/pluginfile.php/321001/mod_resource/content/4/psib_step_by_step_engagement_guide.pdf

Figure 7: The PSiB 'how to' communications guide

Alongside these resources, academic publications, including a peer-review journal article (Hampton, 2018) and a conference paper (Hampton, 2019), were produced which provide more in-depth analysis of the policy context, and the conceptual and theoretical framing of the work.

In terms of the development of the resources, the representative noted the varied strengths of each of the partners involved and how this shaped the types and formats of the resources produced. For example, the climate communications organisation (*Climate Outreach*) had extensive experience of creating visual guides, and the academic business partners (at the *Open University*) were experiencing at producing practical online courses, including videos and interactive activities.

Accessibility and usability were key factors in ensuring the impact and success of the resources. With the online course, for example, it was critical that the resources was not only open-access, but also simple to use and follow. For the online course, all resources are downloadable, or available as interactive electronic publications. Considering the BBoBC, crafting optimised content involved iteratively developing a range of resources to meet the varied needs of the users and those they intend to reach, drawing on feedback of key stakeholders throughout the design process. Underscoring its development, though, was:

> *"…an objective to create a toolkit that would be practically useful. And we wanted it to have different components because, even intermediaries, there are lots of different types, and we wanted to appeal to different type- By providing different formats of the toolkit. So, like a really simple, three-page report, a kind of how-to guide, that they might print off and take with them to a meeting, versus a five-hour online course."*

Delivery

Delivery mechanism

The PSiB programme to date has been less about measurable or quantifiable delivery. It has been more focused on the development and impact of resources that can bring about cultural and

organisational shifts in the context of promoting sustainability in the non-residential sector, with SMEs being a recognised HTR group of energy users.

Delivery, then, can be thought of in two parts: the first being the design and development of the resources and the activities that constituted that part of the process, and second, the hopes for future activities resulting from the development of the resources and related work.

The first and main part of the programme – the design and development of the resources – took place across two funding periods between 2015 and 2019, and involved a range of activities (Table 6):

Phase One: ***Growing Green*: *SME perspectives on sustainable growth in a low carbon economy*** Engaging SME owners and managers (2017-18)
• Literature review • Questionnaire • Two in-depth workshops • Online webinar to disseminate findings • Research paper • Videos detailing participants experiences • Learning activity for undergraduate course
Phase Two: ***Growing Greener: Creating a New Values-based Environmental Engagement Toolkit for SME Intermediaries*** Working with business advisors (2018-19)
• Series of consultative workshops • ESRC Festival of Social Science workshop • Co-creation of online course • Co-creation of practical toolkit • Production of additional resources

Table 6: PSiB Activities

It is envisioned that beyond the development and dissemination of the resources (noted above), outputs from PSiB will be used by low carbon advisors and other intermediaries working with SMEs to shape their professional practice in promoting sustainability and pro-environmental behaviours in business. Delivery mechanisms for this aspect then have included interactions between SMEs and intermediaries providing advice or support in this area. In the most formal capacity, this has involved activities such as environmental audits – and this is specifically where the step-by-step guide is targeted. However, the potential reach for delivery is much broader, with, for example, the open-access training course that can be accessed by anyone, anywhere.

Messengers and communication channels

The primary messengers in the PSiB programme are low carbon advisors and other intermediaries working with SMEs, as well as SMEs themselves. As noted, intermediaries can be as diverse as the SMEs they are supporting, and the resources were developed with this breadth and diversity in mind.

In terms of promoting the resources developed as part of the PSiB programme, the core team have been central to raising awareness of the work and its benefits and value. As noted, their **expertise and relatability have played a critical role** in communicating the value of the resources and the wider aims and objectives of the work. This highlights not only the role of **trust in Middle Actors**, but also **perceived expertise**:

> *"You get that a lot with SMEs. Because the most common thing is, "You don't know, because you don't run a business, you don't know what it's like." And you get the same with intermediaries. They kind of channel that and they say, "You don't know what it's like, talking to businesses." To talk to businesses and to be convincing, you have to have a business head. And I think it is basically…You have to be able to understand the motive to the business, and that- But you don't need to have been a business owner to do that. And, as I say, that is part of the assumptions."*

In terms of communication channels, a key strength of the programme was that its development drew on the expertise of a **multi-disciplinary team of academics and non-academics** with backgrounds in environmental performance, business, and communications. The project delivery team also boasted a **diverse and far-reaching network of relevant contacts** who make up the target audience for the PSiB resources. The main communication channels for the PSiB project involved using those in which contact with the target audience was already established (mailing lists, network meetings, social media, etc.). One innovative and effective communication channel established as part of the project was a LinkedIn community for those that attended the workshops or have used the resources. This was regarded as particularly impactful in working with specific target audience – where low carbon intermediaries do not typically have strong or formal networks:

> *"…low carbon intermediaries are not really very formalised as a profession. And yet the literature and what we know is they are super important in all of this. And actually, they could really benefit from some kind of accreditation or professional body representation. And we at least wanted to provide that forum on LinkedIn."*

Timing

The programme of work was completed across two main funding periods between 2017 and 2019. Phase One, the *Growing Greener* pilot project, was completed in 2017-18, and Phase Two, during which the toolkit and related resources were developed, took place between 2018 and 2019.

While the funded elements of the project to date have now been completed, related activity is ongoing and, as with other cases profiled in this chapter, opportunities and funding are being sought to develop and disseminate the work further.

Evaluation

Evaluation and targets

At the time of interview for this CSA, the representative noted that no formal evaluation of the project has been undertaken but that this was planned, and that elements had been started already. The representative stressed that not having a formal evaluation strategy built into a project is unlikely to mean a completed absence of evaluation activity (as discussed in a similar way with CS2):

> *"It had an evaluative collaboration, co-creation model through. We were not just doing it and guessing it was going to work, it was very consultative throughout. So, we kind of know that it works in principle. But there is definitely scope for doing a more formal evaluation"*

In terms of targets, both phases of the project delivered on the objectives (namely to develop a practical toolkit and online education resource), and indeed went beyond these objectives to identify and take up further opportunities. This included an opportunity to implement a test-and-learn rollout of the project to a non-UK context (Pakistan), identified through academic links. This enabled reflection within the project team and highlighted key learnings for future expansion. For example, a need to adapt content and framing that is currently UK-centric was identified, however deemed unsurprising given its origin and application to date.

In the absence of a formal evaluation to date, feedback from workshop participants has provided some initial insights and enabled some early conclusions and reflections. While anecdotal, some of this early evidence indicates the value and impact of the resources developed with several attendees noting that *"…the workshops alone had inspired them to adapt their practice".* Evidence of use and impact has also been found via the LinkedIn community:

> *"…we posted on LinkedIn last week and said, "Has anyone got anything to report?" And someone we didn't know just said, "Yes, I've been using it." So, yes, there are, bit hasn't been formalised, it hasn't been adopted, and we'd like to see that."*

There has also been notable impact and interest in the project at the political and policy level in the UK:

> *"Policy makers must begin to recognise the strategic importance of this community of practitioners with more comprehensive forms of professional support and development. There*

> *are some signs of promise in this regard. The Growing Greener team has been invited to present the toolkit to civil servants in both the UK and Ireland, and to brief senior figures in a leading political party. Given the universal nature of the SVS, and the shared challenges faced by policy-makers in including SMEs in sustainability transitions, the toolkit has potential for global reach."* (Hampton, 2019, p.8)

The project delivery team are keen to take PSiB to the next stage, but in the absence of funding or dedicated resource this is challenging: *"…it's just one of those things, the funding ran out and we kind of moved onto other things."* Since completing the project, the team have published academic and non-academic outputs, given presentations, continued stakeholder engagement, and actively worked with partners to scope out opportunities to expand upon the work. When asked about the ideal next steps, the representative responded:

> *"…the ideal case is that we partner with a big organisation that would roll this out amongst their own intermediaries and evaluate it over a long period. Because I think the nature of the values thing is that it will be a slow burn. It's not about implementing measures and testing energy savings, it's about- I don't know, I don't know what metrics you would include. Obviously, emission savings has got to come into it, but it's kind of- Yes, something a bit longer term."*

Lastly, relating to the future of the project, the impact of Covid-19 was identified as a possible opportunity to further embed value-based thinking into the context of environmentalism, sustainability, and the environment:

> *"Also, we did some follow-up interviews with people during the pandemic, going, "What is different?" And it was really interesting, because we had people say, "Actually, attitudes towards the environment are changing with COVID. People are a bit more open to talking about the fundamentals and philosophies and ethics of business, which is nice."*

Conclusions

SMEs as a group of energy users have received relatively limited attention in policy, practice, and research to date, yet they account for more than 99% of UK businesses, with more than 6 million currently in operation. This highlights a critical gap in current understanding. Reaching *Net Zero* will require SMEs to make significant changes to their day-to-day operations and business planning, and, particularly for smaller businesses, this is against a backdrop of technological, social, and economic barriers. In this transition, intermediaries, as the PSiB project identified, play a critical role, as do the development and implementation of practical tools and approaches that can offer support.

A key finding in the CSA, and one noted not just with CS5, it that designing and implementing behaviour change interventions with SMEs is challenging, largely due to heterogeneity – as noted across the CSA. The vastly different qualities and elements of SMEs as a target group are what characterise them as HTR and this raises significant challenges in terms of defining, characterising, understanding, or developing support targeted towards this demographic group. As such, targeted behaviours are similarly hugely varied with a call for efforts to better understand how to establish behavioural change approaches that are person-, business- and context-specific.

Resultingly, and shaping the design of PSiB, the focus was shifted onto intermediaries as key influencers and 'Behaviour Changers' (see Rotmann, 2016) working with SMEs. However, intermediaries are recognised as similarly heterogeneous, and consequently, also a HTR group in the context of energy and behaviour change. Despite this, the potential reach in working with intermediaries is much larger than working directly with the target audience – a finding that has been noted across the CSA. The PSiB model again adopts an approach that recognises the strength in behavioural strategies that can be 'cascaded', therefore having a wider and longer lasting reach beyond single-point intervention, such as a training or awareness session. In this case, this involves that knowledge being cascaded from intermediaries to the wide variety of SMEs they work with.

A unique element of the PSiB project is that it draws on psychological theory to understand behaviour change through the lens of values. Specially, to understand behaviours related to sustainability and the transition to *Net Zero* among SMEs as HTR energy consumers. The project is novel then in its

shift away from a focus on prescribing actions against individual behaviours, instead seeking to engage in meaningful, values-based discussions. In other words, a shift away from what the individual does or could do, to an understanding of the processes and systems required for the overarching 'journey'. The journey to a values-based approach is significant in the use and delivery of the PSiB resources, and as noted, it is not about changing people, their views, attitudes, or values, but about how best to understand and work with existing values.

A key objective of the project was, therefore, to work with a deeper understanding of psychographic data to develop practical resources that can be used by businesses and the intermediaries that support them in a way that promotes more sustainable practice. This utilisation of psychological theory to develop a behaviour change model is what distinguishes CS5 from the other cases presented: while the residential examples predominantly or exclusively draw on real-world insights, this example draws more so, and is rooted in, a theoretical frame.

The application of theory is particularly evident in the messaging used across the PSiB resources. As noted, the goal was to shift from a focus in communicating pro-environmentalism in technical, individualistic, cost-based terms to more personal, values-based discussions. A significant part of the process in developing this, and a feature of relevance to similar schemes, focuses on identifying and unpicking certain assumptions relating to the aspirations, challenges, and motivations that SMEs (or other HTR groups) linked to pro-environmental behaviours.

As with other cases presented in this analysis, a major strength of the PSiB project was that is drew on the varied and diverse expertise of a range of project partners, in this case a highly-skilled and experienced multidisciplinary team of academic and non-academic partners. This was, as with CS2, identified as a notable strength in developing effective practical resources that could draw upon the skills of those delivering the project. A clear example of this with the PSiB was the development of the online training course. As discussed, usability and accessibility are key factors determining effectiveness, for example ensuring that, where possible, resources are open access and simple to use. Making resources available in multiple formats is also vital.

Perceptions of skill and expertise were also regarded vital in terms of securing the trust and buy-in of the target audience being engaged. For PSiB this specifically related to the intermediaries, and the analysis has outlined the perceived importance the delivery teams having professional expertise in the area. Having past experience as an intermediary working specifically in this sector was seen to not only provide an established network of contacts and obvious route for the promotion and sharing of resources, but also resulted in a sense of relatability, and therefore greater engagement with the project.

Two final points are worth noting with regards to strengths of the PSiB programme that may have relevance to other schemes. The first is the route through which the project came about. Borne out of a doctoral research project, the PSiB is able to demonstrate a strong evidence-based rationale that highlights its contribution to a clear gap in existing work. From this, impact funding was secured to develop that knowledge into practical resources which have had real-world impact in working with SMEs as HTR energy users. This project clearly highlights that there is scope to work with early career researchers and practitioners in the field – identifying and supporting the development of similar work on behaviour change into scalable projects, and how certain funding streams are critical to this.

The second element to note is the value in identifying and taking up test-and-learn opportunities in other contexts and potentially with other HTR groups to understand the limitations and gaps in terms of transferability. The PSiB made use of such an opportunity in Pakistan, again working with early career academics, which has provided valuable insights to shape future development of the PSiB model so that it has wider reach. Testing such models in alternative contexts is particularly important in this case, and other models that draw on psychographic data, as language, values, approaches all differ that have an impact on effectiveness.

Lastly, it is important to note that, as with CS2, even without a formal evaluation process, evaluation activity is likely happening as part of behaviour changes programmes such as this. And, as the representative explained, the information and data generated can still be extremely useful in the absence of a formal process.

General Discussion

The CSA has profiled five UK-based projects (see below) examining behaviour change interventions and mechanisms of support for HTR energy users. Four of these cases have focused on the residential sector, with the fifth and final case study profiling a non-residential example of a project targeted towards SMEs.

1. ***The Big Energy Saving Network (BESN):*** a nationally-led, locally delivered network of energy advice and support targeting vulnerable energy consumers and providing energy-awareness training to frontline workers.
2. ***Warm Minds:*** initially a collaboration between a fuel poverty charity and a mental health charity, this project aimed to train frontline workers and provide direct support for individuals living with mental health issues, dementia/Alzheimer's, and learning difficulties (and their carers).
3. ***Gluasad Còmhla (GC; Moving Together):*** a project aiming to strengthen interagency working to tackled fuel poverty and the social determinants of health in rural and remote communities across the Western Isles (Scotland).
4. ***Empowered by Energy (EbE):*** a pilot project delivered by fuel poverty charity, National Energy Action, involving energy-awareness workshops for recent refugees and other migrant communities with limited English.
5. ***Promoting Sustainability in Business: A values-based approach (PSiB):*** a non-residential case that presents a set of resources targeted towards low carbon and other intermediaries that work on promoting sustainability with small and medium sized enterprises.

This section concludes the UK CSA, bringing together a summary, structured broadly around the BBoBC framework, of the key findings and recommendations for future research, policy, and practice.

Usefulness of the BBoBC Framework

Before providing a summary of the main findings, it is worth reflecting briefly on the methodological framework around the CSA, specifically the application of the *ABCDE Building Blocks of Behaviour Change (BBoBC) framework* by Karlin *et al* (2021). The framework has proved useful for the overall CSA as it has allowed a fresh, holistic, and critical perspective on the case studies which, despite commonalities identified and discussed, are relatively diverse. Use of the BBoBC framework has fostered the identification of successes, shortcomings, lessons learned, and provided the basis from which recommendations can be made.

Most notably, the framework, built around the five building blocks (audience, behaviour, content, delivery and evaluation), **offers a clear structure** to not only guide the literature searching, the interviews, and the analysis of multiple cases, but also in the presentation of the findings and recommendations as set out in this chapter. As the summary of findings will highlight, a number of strengths and shortcomings in existing practice and provision were identified in the process of working through each of the five building blocks, and these will be valuable in providing clear and manageable directions for future research or the development of future schemes. For example, the CSA has highlighted the wide range of actors involved in energy-related behaviour change, and also the benefits of understanding and establishing effective collaborative working in affecting positive behaviour change. Considering each of the five blocks independently, it is likely that **certain actors will have greater expertise, experience, or capacity to contribute to parts of a programme, not all of it**. Take CS2 and CS4 for example, where energy agencies have worked effectively in collaboration with other specialist charities and organisations, there have been notable strengths found in terms of identifying and reaching the target **A**udience and in developing optimised **C**ontent.

Across the five case studies, the **methods and engagement strategies** were very similar, with the **frontline professionals based across a wide range of organisations and agencies** being at the centre of successful delivery of programmes. Often this benefited from **proximity, local knowledge, holding a trusted position within the community, and established expertise** to engage and advise HTR energy users.

All five of the case studies **highlight the value of working with trusted Middle Actors** and the benefits are discussed across all of the five building blocks. Another strength drawn out by the BBoBC framework include **a need to better understand how to make services and programmes as inclusive as possible**, namely considering aspects such as developing resources in multiple formats and ensuring a level of flexibility in terms of delivery styles and inclusion criteria. This need for variation and diversity can also be thought of in terms of the most effective programmes will be those that have a level of acceptance from the outset that there is no one size fits all model, and no one actor or agency will be best placed to deliver a service in isolation. **Collaboration, flexibility, and diversity are key.**

In terms of shortcomings that have been identified as a result of structuring the analysis around the BBoBC framework, two are worth highlighting again here. The first relates to the critical role of evaluation (discussed later in this section). **Only two of the five cases had been formally evaluated**, and only one by an external ands arguably wholly impartial source. However, as noted, **the absence of a formal evaluation does not mean the absence of any evaluation activity**. What needs to be considered by the BBoBC model then is how best to support or shape this informal activity in the absence of a more formalised process, caused typically by a lack of funding or other resource in the interest of maximising the delivery of direct support. In other words, funding not spent on evaluation can be directed towards supporting or reaching more HTR households or business. This highlights a need for models such as the BBoBC framework to support efforts to make the case for the value in undertaking evaluation activity, for example in terms of developing a richer understanding of demographic and psychographic profiles – a gap identified in the UK's CSA.

The BBoBC framework highlighted that in the UK CSA there was a tendency for projects to draw more heavily on real-world insights and expertise, than social or behavioural theory. This is not to say that more in-depth theoretical work is not being undertaken, but that it is perhaps less accessible. Among practitioners and non-academics, **there may be little awareness or accessibility of traditional, theoretically informed academic research that, for example, seeks to understand overlapping and intersectional vulnerabilities or motivations, attitudes, and beliefs** (as discussed in CS5).

The second major shortcoming highlighted by the application of the BBoBC model is a distinct lack across all but one (CS5) of the five case studies to consider and adequately collect data on **psychographic indicators** (e.g., values, knowledge, attitudes, barriers, behaviours). Where this is done, as evidence by CS5, there is potential to develop a programme that is less focused on specific attributes or characteristics, but instead works with existing values, views and experiences to shape provision and interventions that have greater transferability, and consequently effectiveness in terms of the extent to which they reach not only a single HTR group, but many.

Summary of key findings

Identifying and defining the target audience

- A key finding of the UK CSA is that there are many HTR and underserved groups **where a dearth in research and targeted policy and practice** remains (see also Rotmann et al, 2021). All five of the examples included here evidence work that contributes to clear gaps in research, policy, and practice, where little is known about how best to target or work with different HTR groups with energy-related behavioural change interventions and schemes designed to alleviate vulnerability. In addressing **clear gaps related to accessibility, language barriers, (mental) health needs, rurality**, etc., the projects all build awareness through the implementation of practical projects, assessing specific needs and the most appropriate mechanisms of support and engagement with five diverse HTR audiences. The insights set out here also have relevance to HTR groups not discussed in the UK CSA.
- All five case studies highlight the importance of **landscape analysis** and **in-depth target audience work** as key elements of the BBoBC. With a focus on plugging a gap in provision and reaching those underserved or hardest-to-reach, this element of work in some cases led to a **crucial change or widening in definition** of the target audience from that which was outlined at project inception. For example, with CS4, this involved a shift from a focus on recent or new refugees to more broadly include those with limited English. An openness to

this is critical, and also highlights the importance of establishing a **feedback loop** that is built in from the start and draws on input from trusted partners with specific demographic expertise.

- Highlighted in all five cases is the **heterogeneity within specific demographic groups** and the implications this has for defining and characterising different HTR energy users. This is discussed extensively in the HTR Taskforce's literature review (Rotmann et al, 2021) and was further highlighted in the analysis here in terms of the challenges faced and the changes required when interventions begin with elements of presumed homogeneity. As such, examining and designing interventions targeted at a specific HTR group requires **ongoing landscape and stakeholder analysis** with a degree of reflection, adaptability, and flexibility throughout. CS2 provides a good example of this: examining the demographic group at a more granular level, identifying a wide range of different mental health issues and related needs, revealed a need for the development of different resources (i.e., large print or picture-based materials, materials in different languages, or tailoring the messages and focus according to key issues experienced).

Identifying and defining behaviours

- The interviews highlighted that due to the heterogeneity of the HTR groups profiled it was difficult and, in some cases, considered **ineffective to classify or clearly define target behaviours** within an intervention. What was found was a tendency to adopt a broader approach that included a set of common energy-saving behaviours, such as switching off appliances and lights and use of heating systems.
- A focus on behavioural change was often positioned as an **adjunct or less of a central focus** than steps to reduce or mitigate impacts on existing vulnerability. Given the recognised vulnerabilities of the four HTR groups in the residential examples, interactions with these groups were focused more so on **mechanisms of support** related to, for example, accessing affordable warmth and financial support, among meeting other needs. As such, targeted behaviours could be as varied as the characteristics of the HTR group and prompted a call for efforts to better understand how to establish behavioural change approaches that can be person, business, and context specific. Highlighting this clearly, CS1 outlined how it is not simply about a focus on changing individual energy-related behaviours, but also on providing guidance as to how to avoid disproportionate cost, minimise related risks, and access policy-driven support mechanisms within the complexity of the UK energy system.
- Throughout the CSA there are several examples where projects have effectively engaged in or established processes that result in **change among the behaviour changers** – a key element of work linked to the BBoBC model (see Rotmann, 2016). For example, in CS3 this centred on those working in the health sector and in CS5 with Middle Actors or specialist intermediaries working with business owners and managers in SMEs.

Effective design and delivery

- The analysis emphasised the **challenges in designing and delivering projects** that are targeted towards new or previously underserved groups. This is an important learning and has implications for all elements of the BBoBC model. Working with segments of communities that have not been effectively reached, supported or engaged involves **establishing new practices, resources, and mechanisms**, as well time needs to understand the needs and barriers faced by that group, and the **networks of support** that may exist outside of energy-related support. As discussed, this work is necessarily time-consuming and challenging, but essential.
- **Not all work with HTR groups will entail in-depth, repeated, and regular contact**. As CS1 highlighted, 'lighter touch' does not necessarily equate to lesser impact, and this is a valuable consideration for the development and design of schemes working with various HTR groups, especially those that may have had little or no engagement in the past.

- **Trusted Middle Actors** or intermediaries, as discussed at length in our literature review (Rotmann et al, 2021), play a vital role in the effective delivery or programmes. The success of all of the cases included in the UK CSA was attributed to the role of these actors, who can be as heterogenous as the HTR groups they work with and support. Nonetheless, greater awareness of, and commitment to working with trusted Middle Actors was understood as essential, primarily because of **the level of experience and context and demographic-specific knowledge** these actors hold. Across the CSA, the greatest benefit of working with Middle Actors related to their capacity to effectively and efficiently identify and engage with those most vulnerable. Central to this is their status as a trusted source of information and support.
- As well as trust, **perceptions of expertise** were also regarded as vital in terms of securing and sustaining engagement. For SME intermediaries and project leads, this was discussed in terms of past professional experience and expertise in a given area or in working with a given group – which was described as making a person more relatable, and therefore resulting in greater success in terms of engagement with a programme. This is an important consideration for the design of programmes in terms of understanding not just *how* best to deliver it, but also ***who* is best placed to do so**.
- Designing in **fluid inclusion criteria** was seen as a critical mechanism for reaching the hardest-to-reach. For CS3, for example, it was described as ensuring that a service or programme fits the needs of the individual, not expecting a person to fit the service: *"Hard-to-reach or simply that people don't fit a rigidly designed project or scheme?"* This flexibility can extend beyond criteria for entering a programme or accessing a service, and, as CS4 highlighted, plays a vital role also in terms of sustaining engagement and ensuring that programmes are designed as inclusive as possible. **Flexibility in delivery** might relate to services where children can attend, adapting group sizes of workshops, offering a mixture of one-to-one support and that which is open to couples and families, as well considering cultural and language barriers that might make it difficult or impossible for a person to participate.
- The BBoBC outlines how effective programme design can be developed from a combination of **real-world insights and expertise and more theoretically-informed framings**. The UK CSA leans more towards the former with all four residential examples drawing heavily and almost exclusively on the insights and expertise gained from delivering similar sorts of projects in the past. This means there is **limited use of or reference to behavioural science** or theory. CS5, however, offers an example of a departure from this, with psychological theory being drawn upon to understand and build a programme around how values inform and shape energy behaviours. This evidences how projects may effectively adopt a shift away from individual behaviours towards an understanding of the processes and systems. The key conclusion from the analysis of the values-based approach in CS5 is that such approaches are not about changing people, their views, attitudes, or values, but about how best to understand and work with existing values to achieve shared and individual goals.
- The CSA highlights the benefits of working at **different scales in terms of delivery and oversight** of programmes. For example, with CS1, a nationally-coordinated and locally-delivered scheme, key benefits were noted. As noted, national coordination offers strategic oversight, funding security, and a higher programme profile, while local delivery enables the programme to tap into trusted networks of Middle Actors who can effectively identify and reach a target audience, as well as optimise content and methods of delivery. This dominance of a bottom-up approach to delivery is highly regarded across all of the cases and makes the case for future projects to champion (and adequately fund) local organisations wherever possible.
- The significance of having a **single point of contact** featured across the analysis. This was both in terms of having a single point of liaison for partners and services working as part of a project or programme, as well as the powerful role played by a trusted contact for HTR groups directly. Where several (or as with CS1 hundreds of) organisations might be involved

in delivery of a programme, **having single agency driving forward that work** was regarded as essential to success, particularly in terms of coordinating efforts around **shared goals and objectives**. In terms of direct engagement with HTR groups, the significant role of the single point of contact is not a new finding, but the CSA further evidences the strength of this role.

- Another key finding relates to the effectiveness of programme design and delivery that is **shaped around health**. As CS2 and CS3 highlight, a focus on health and framing project design around health offers a lot of potential to better align policy objectives, strategies, local plans, and the work undertaken by a wide range of actors and organisations operating at local, regional, and national levels. CS3 specifically demonstrates the potential in framing efforts around social determinants of health, and models of social prescribing. As discussed, adopting a **health angle can provide a method of engaging a wider pool of actors** (including health professionals), as well as providing the opportunity for meaningful engagement with households. As research has found, those experiencing energy vulnerability may find discussion centred around health easier to have than those centred around energy and/or money (Butler, 2020). Health framings and the involvement of health actors is not without challenge though, and as CS3 highlighted, while health actors, such as GPs may support a project, it does not necessarily translate into active participation through mechanisms such as making referrals into schemes. This highlights that more work is needed in this area to understand the benefits of framing programmes around health and the challenges faced.
- In several places in the CSA, the strength of the **'cascade approach'** is noted, whereby programmes that involve training a wide cross-section of FLWs typically demonstrate the greatest reach. In simple terms, the potential reach in working with Middle Actors (who go on to support multiple service users) is much larger than working directly with the target audience, and in recognition of this even where programmes worked directly with the HTR group (as in CS2), often a training element was added.
- **Collaboration is essential**, and a focus on building **strong partnerships and interagency working** underscored all five of the projects. Bringing together expertise, for example those of two national charities or a range of local organisations, was positioned as a critical success factor and enabled programmes to better understand and address multiple overlapping vulnerabilities and needs, where energy was one. Collaboration shaped projects at various stages of the BBoBC, from understanding the target audience, to developing resources, and through to delivery. It also enabled projects to identify shared and overlapping goals in policy and practice, providing a stronger rationale for the need of a programme and ensuring duplication of efforts were avoided. Building strong partnerships and interagency working was also found to have a lasting impact after a programme has ceased, and with CS3 this had a hugely positive impact on local efforts to respond to energy vulnerability during the Covid-19 pandemic.
- The analysis highlighted the significant impact of several features of the programmes that were often not a main strand of delivery, or one initially included, but that were highly regarded and seen as contributing to overall project success. With relevance to other programmes targeted toward HTR energy users, these are worth emphasising again here.
    - Where there is a focus on training FLWs, the distribution of **regular e-bulletins** is highly valued in terms of providing a mechanism by which organisations can stay up to date with policy and practice in the field, for example in terms of knowing what grants or schemes might be available.
    - The offer of **ongoing mentoring** beyond a training session promoted and enabled longer lasting engagement with energy-related advice and support among wider professional practice in various FLW roles.
    - When supporting HTR and vulnerable groups, having access to a pot of funding for **small hardship grants** is hugely beneficial. This funding, as in CS2, provided people in hardship with items including thermal gloves, hot water bottles, blankets and

duvets, window sealant, clothing, kettles, and, for one person, a cooker. The importance of this fund extends beyond meeting an immediate need for essential items; it also provides 'breathing space' which results in the potential for greater engagement with issues that may be regarded as less important in the immediate, such as switching energy supplier or discussing use of heating controls. Where possible, projects should try to incorporate small grants as a way of providing breathing space.

- Another mechanism of securing higher levels of engagement involved the inclusion of **'freebies'**, or energy efficiency packs as described in CS2, for those involved in energy awareness or advice sessions. This offer is a useful tool to increase engagement and stimulate meaningful discussion around energy use and saving. Items noted in the CSA included those with practical benefit to the target audience, for instance, thermometer cards, LED light bulbs, and slow cookers.
- The inclusion of **translators** in CS4 is a novel approach for a project in the UK working with those who have limited or no English – a demographic group made up of some of the most vulnerable and underserved energy consumers in the UK. Translators also contributed to the development of more inclusive resources available in other languages.

- A major issue identified in the CSA relates to **data sharing** which was described as impeding the capacity of projects to deliver services as efficiently as possible and reduce the burden on vulnerable households and HTR groups. This sits alongside an awareness among all of the cases that while changes are needed in terms of more efficient use of and access to data, **protection of personal data is paramount**, and vulnerability and risk should not be exacerbated in any way. As noted, this adds calls for the changes and protections needed around data sharing to be considered a priority in the context of tackling energy hardship and wider social issues. **Working with trusted local partners who can identify and invite individuals** to energy awareness workshops and advice session was seen as one way of overcoming data sharing issues, however this can be resource intensive for the organisation. As CS4 outlines, there are **methods for supporting partner agencies** in such circumstances, for example, by drafting invitation letters, promotional materials, sign-up sheets, and giving clear and detailed information about the purpose, aims, and content of the activity.
- Across the interviews and documents analysed as part of the CSA, there was limited detail on the processes behind the development of content. All explained how resources had been developed based on **experience of past projects and schemes**. This meant that the form or design of materials were often lifted from past resources but adapted to fit with the focus or aims of the current project, meaning that the content itself was often similar. There is a gap here for work to assess more specifically the effectiveness of existing resources in terms of what works and what could work better or differently with regards to aspects such as format, reach and use beyond contact with a service.
- A final note on the delivery of programmes targeted towards HTR energy users relates to **online delivery**, which was viewed in both a **positive and a negative way**. On one hand, online provision made programmes more accessible, able to reach people in their own homes and covering much larger geographical regions, as well as greater flexibility with delivery times. On the other hand, online delivery can be less accessible namely for those digitally excluded in a variety of different ways, whether related to device or internet access or confidence in use. The analysis concluded that in the future online should not be the only offer, and a blended approach reintroducing face-to-face will have the greatest success in terms of reach and engagement.

The role of evaluation

- Only two of the cases included had fully funded evaluation - one externally commissioned, and one internally completed. CS2 and CS4 were able to provide evidence of internal

evaluation-style reporting but this was done in addition to delivery of the project and often without suitable resource or research expertise. The analysis highlighted that the absence of evaluation represents a **missed opportunity to understand the strengths and limitations** of projects across all elements of the BBoBC, and to transfer these lessons to other schemes and services. However, not undertaking a formalised evaluation is down to an **absence of funding and resource** which must be built into future schemes and programmes as a critical component.

- It is important to note, however, that the analysis identified that even in the absence of formal evaluation, **evaluation activity still typically happens** (as with CS2 and CS5) and that, while not necessarily as structured or coordinated, the information and data generated can still be extremely useful in the absence of a formal process.
- **Evaluation activity built in from the start** and **throughout the duration** of the project was seen as particularly beneficial with the potential to shape key stages of programme design and delivery through iterative, data-driven processes. This was most notable in terms of developing effective content and delivery strategies. As the BBoBC sets out, to optimise resources, "*a well-developed evaluation plan should be developed concurrently with programme development*" (Karlin et al, 2021).
- The analysis highlighted a need for more **in-depth longitudinal evaluation** to understand long-term impacts and benefits of programmes.
- Another key finding relates to the type of evaluation being done and suggests there may be a need to explore the use of **more diverse evaluation methods**. Typically, surveys and interviews are used but these were noted as not necessarily the most inclusive methods of gathering feedback. These methods were described as **failing to account for the specific needs** of certain vulnerable and HTR groups, such as those with learning difficulties, for example, and therefore could be excluding valuable insights. The use of more creative methods, such as those described in the delivery of CS2, may also be valuable in terms of evaluation methods. For example, **gamification and use of craft-based approaches** may provide an evaluation method that has potential for engaging and better supporting HTR and under-served groups, not just those with mental health issues, but for example, those with limited or no English.

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FURTHER INFORMATION

Contact Dr Danielle Butler (danielle.butler@nea.org.uk).