

## Wales & West Utilities Vulnerability & Carbon Monoxide Allowance (VCMA)

Project Eligibility Assessment (PEA)

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*WHAM (Warm Homes Advice and Money)*

*Centre for Sustainable Energy (CSE)*

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## Eligibility criteria for company specific projects (other than condemned essential gas appliance repair and replacement)

In order to qualify as a VCMA Project, a project must:

- a) have a positive, or a forecasted positive, Social Return on Investment (SROI) including for the gas consumers funding the VCMA Project;
- b) either:
  - i. provide support to consumers in Vulnerable Situations and relate to energy safeguarding, or
  - ii. provide awareness of the dangers of CO, or
  - iii. reduce the risk of harm caused by CO;
- c) have defined outcomes and the associated actions to achieve these;
- d) go beyond activities that are funded through other price control mechanism(s) or required through licence obligations; and
- e) not be delivered through other external funding sources directly accessed by a GDN, including through other government (national, devolved or local) funding.<sup>1</sup>

## Eligibility criteria for company specific essential gas appliance servicing, repair, and replacement

In order to qualify as a VCMA Project, unsafe pipework and essential gas appliance<sup>2</sup> servicing, repair or replacement must meet the following criteria:

- a) a GDN has to isolate and condemn unsafe pipework or an essential gas appliance following a supply interruption or as part of its emergency service role;
- b) the household cannot afford to service, repair or replace unsafe pipework or the essential gas appliance; and
- c) sufficient funding is not available from other sources (including national, devolved or local government funding) to fund the unsafe pipework or the essential gas appliance servicing, repair or replacement.

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<sup>1</sup> If part, but not full, funding is available through an external funding source for an eligible project, VCMA funding can be used for the remaining amount.

<sup>2</sup> Essential gas appliances are gas fuelled heating systems (including gas boilers and gas fires), and gas cookers.

## Information required for the registration of VCMA projects

Information required	Description
Project title	WHAM (Warm Homes Advice and Money)
Funding GDN(s)	Wales & West Utilities
New/ Updates PEA	<b>Updated</b>
Date of PEA submission	03/01/2024
VCMA Project contact name, email and number	Tom Robinson – <a href="mailto:tom.robinson@wwutilities.co.uk">tom.robinson@wwutilities.co.uk</a> <b>Updated December 2024</b> Rachele Verdini – <a href="mailto:Rachele.verdini@wwutilities.co.uk">Rachele.verdini@wwutilities.co.uk</a>
Total VCMA funding required (£k)	£997,900  <b>Updated December 2024</b> Additional funding – £57,364 New total funding - £1,055,264
Problem(s)	<p>WHAM was originally set up in 2016, covering Bristol and North Somerset, to support people in some of Bristol’s most deprived areas with more than just one-off energy advice. Centre for Sustainable Energy (CSE) has built up a partnership with six local organisations providing support and advice to vulnerable people that tackle all the underlying issues of fuel poverty.</p> <p>WHAM partners report rising demand for their services, as well as clients presenting with complex needs, who are often in greater crisis, with high levels of mental health issues and eviction notices. There is more scope to work with the health service. Safeguarding referrals (i.e. no heat situations) have risen and benefit applications are going to appeal as a matter of course. WHAM has a current list of 250 households (needing in-depth and ongoing support following an initial triaging call); demand is likely to increase for the next two years. Demand is so high that our debt agency partners are closed for referrals (other than WHAM clients) due to high demand.</p> <p>Thanks to existing funding from WWU (<a href="#">centre-for-sustainable-energy.pdf (wwutilities.co.uk)</a>), CSE has built up a network of organisations in Bath and North East Somerset ( B&amp;NES) who are seeking a more integrated partnership service and much greater capacity to deal with all of the underlying causes of fuel poverty. With an estimated 9,900 households in fuel poverty (12%), people in B&amp;NES also need substantially more in-depth support than the current single caseworker can provide.</p> <p>There is an ongoing need to address the systemic issues that contribute to fuel poverty to protect people with, or at risk of, health issues from living in a cold home. These include Chronic Respiratory Disease (including COPD), cardiovascular diseases (CVD), and mental illness in deprived populations in the WHAM area (within the most deprived 20% of the national population, IMD). CVDs are the second most common</p>

## Criteria

	<p>cause of early death among Bristol residents, which despite seeing a decline during this century, have levelled off in Bristol over recent years. Since lockdown, CSE’s work in the discharge units of three local hospitals was reduced, but we are inundated with requests for CSE to help ensure patients do not return to a cold home.</p> <p>CSE’s advice service supports between 1,000-1,300 vulnerable households per month across our whole area. We estimate a further 20% increase in demand from this winter. For WWU this means Bristol, North Somerset, B&amp;NES, Somerset, Swindon and Wiltshire (the part within WWU).</p> <p><b>Updated December 2024</b></p> <p>During the delivery of the original project, CSE has gained extensive experience with Somali clients who have been found to often have high energy bills, significant damp and mould issues and limited understanding of UK climate, housing and energy systems.</p> <p>There is a significant Bristol Somali population of just under 10,000, the 4<sup>th</sup> largest Somali population in the UK, who are predominantly living in overcrowded (63%) social rented properties (85%), that are flats, maisonettes or apartment (56%).<sup>3</sup> It is well documented that refugee communities are more likely than the average UK population to suffer poor quality, overcrowded housing, high energy costs and low income.<sup>4</sup></p> <p>CSE recognised the need to better reach and support Bristol’s Somali population and adapted their support offering by increasing the volume of outreach engagement, leveraging a Somali speaking staff member and adapting physical and online resources. As a result, demand for this support rapidly increased within the Somali community, outstripping CSE’s current capacity.</p>
<p>Scope and Objectives</p>	<p>CSE intend to deliver advice and support to 6,000 vulnerable households (c. 18,000 people) over two years from the westernmost tip of Somerset to Wiltshire and Swindon in the east, and all points in-between. It also builds community capacity through the support and development of volunteers which leaves a legacy of knowledge of skills far beyond the project.</p> <p>It is also significantly ambitious in the depth and impact of the support for each of those households, in that it will tackle all the causes of fuel poverty, particularly income (including a target of £450 average financial benefit per client), housing, behaviour and energy understanding confidence, and bringing together a unique style of partnership where caseworkers work within other organisations.</p>

<sup>3</sup> <https://www.bristol.gov.uk/files/documents/7020-population-profile-somali-population/file#:~:text=lf%20all%20people%20who%20identified,group%20in%20Bristol%20in%202021.>

<sup>4</sup> <https://www.tandfonline.com/doi/full/10.1080/14036096.2024.2413523#abstract>

## Criteria

	<p>On completion of the aforementioned Heat Ability project, in Bristol and North East Somerset, funded by WWU, WHAM will supersede this and continue to service these communities.</p> <p>WHAM has the following objectives:</p> <ol style="list-style-type: none"><li>1. To work together with vulnerable people to improve their financial skills and understanding, ensuring they are more confident and resilient around future changes in fuel prices and income.</li><li>2. Make homes warmer, with less damp and mould, particularly those with health conditions associated with living in cold and damp conditions.</li><li>3. Support an integrated partnership; an easy system for housing, social care, health and voluntary sector workers to refer clients to, with confidence that referrals are acted upon and result in positive outcomes.</li><li>4. Invest in local community capacity, particularly in the health care sector, to identify, refer clients with health conditions exacerbated by living in cold homes, so they can better deal with fuel poverty.</li></ol> <p>In addition, funding will support CSE's advice team across its whole area to achieve the following objectives:</p> <ul style="list-style-type: none"><li>• Increase CSE's capacity to support more vulnerable households with energy advice, because of advisors having more time, ensuring CSE can meet the expected significant demand.</li><li>• Target outreach on engaging households in rural and hard-to-reach areas of Somerset, Wiltshire, North Somerset and B&amp;NES.</li><li>• Reduce the financial hardship and stress of vulnerable households during and in the aftermath of the current crisis through more benefits advice capacity.</li><li>• Increase vulnerable household's confidence and understanding around bills, energy use and controls.</li><li>• Ensure all relevant clients are supported to get registered on the Priority Services Register.</li><li>• Increase the confidence and support from all those who refer their clients to CSE that they can continue to make referrals with assurance that they are acted upon and result in positive outcomes.</li><li>• Improve the long-term capacity of CSE and the local communities we serve, by recruiting, training and supporting volunteers to handle some of the advice and casework.</li><li>• Ensure, where relevant, all clients supported receive advice and support around carbon monoxide, to post or provide detectors as part of a visit and to refer on to gas safe where there might be an issue.</li></ul> <p><b>Updated December 2024</b></p>
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## Criteria

	<p>In addition to the above scope and objectives, CSE will undertake the following activities to meet the demand for support in Somali communities:</p> <ul style="list-style-type: none"> <li>• Recruit and train one 0.6 FTE Somali speaking Energy Advisor, improving capacity to undertake outreach and casework support.</li> <li>• Dedicate an experienced Caseworker to provide ongoing support to each Energy Advisor including 1:1 reviews of cases, training and wellbeing check ins.</li> <li>• Recruit, train and provide ongoing support to three Community Champions who would deliver community-led support and work alongside CSE Energy Advisors. CSE’s training manager will deliver a series of training sessions on priority topics e.g. heating controls and damp and mould and CSE’s Volunteer Coordinator will provide ongoing support and coordination of activities.</li> </ul>
<p>Outcomes, associated actions, and success criteria</p>	<p>The benefits of the projects can be summarised as:          6,000 households will receive in-depth advice, specifically:</p> <p><b>Low household incomes</b></p> <ul style="list-style-type: none"> <li>• Average income gained for clients is £450 (from direct funding/grants, debt write off, energy efficiency measures, cheaper energy tariffs, behavioural changes).</li> <li>• 2,500 beneficiaries will receive budgeting advice to reduce their energy debt and make their finances more resilient.</li> <li>• 3,000 beneficiaries will receive an income maximisation check which will ensure they are accessing all entitlements.</li> </ul> <p><b>The cost of fuel</b></p> <p>Ensuring up to 1,000 households benefit from lower fuel bills, including accessing up to £296 in fuel vouchers (for prepayment meter customers), specific area-based funding for credit meter customers, or (if and when applicable) supporting clients to obtain cheaper tariffs.</p> <p><b>People’s behaviours and understanding of energy use</b></p> <ul style="list-style-type: none"> <li>• 4,700 will report increased knowledge and confidence of how to monitor, check and pay fuel bills and manage their energy use more effectively.</li> <li>• 4,700 will report that they feel more confident &amp; better able to keep their homes safe and warm.</li> </ul> <p><b>Energy Efficiency of the home</b></p> <ul style="list-style-type: none"> <li>• 4,700 will improve their physical &amp; psychological wellbeing through living in warmer homes and being less anxious about their energy and/or their finances.</li> <li>• All eligible clients will be referred to a retrofit scheme/project/installer for new energy efficiency measures (insulation and heating).</li> </ul> <p><b>Additional benefits</b></p>

## Criteria

- 2,000 low-income households across our area will be more knowledgeable about the risks of carbon monoxide.
- All eligible clients will be placed on the Priority Service Register (PSR), those not already registered, as a result of our support.

### Organisations becoming more knowledgeable on fuel poverty

- Following support, 50 local health/social care practitioners will report that they are more knowledgeable about fuel poverty, better able to support clients or refer them to WHAM for in-depth support.
- 500 referrals generated from primary care, hospital or other local health services.

### A strong partnership of organisations

- 1,000 beneficiaries will receive, in addition to energy advice, support from another specialist partner around finances, debt, repair, or housing.
- 300 beneficiaries in B&NES will have access to additional Care & Repair, Debt advice and housing advice from a partner organisation.

To maintain a focus on progress toward the outcomes listed above, WWU and CSE will form a steering group, meeting quarterly discuss and identify ongoing risks and mitigations. WWU would expect to see approx... 12% of each target achieved each quarter, for example 300 of the 2,500 beneficiaries to receive budgeting advice etc... In addition, WWU will request case studies and client testimonials to further demonstrate the success of the initiative, throughout the project term.

### Updated December 2024

In addition to the above, the Somali expansion will result in a mixture of in-depth energy advice (plus casework) as well as light touch support (presentations, energy advice factsheets, videos etc.).

The project expansion will support an additional 880 households (4,400 individuals), of which 380 households will receive in-depth support and 500 will receive light-touch support. The 380 households are forecasted to gain £250,800 in total savings.

The breakdown of the additional expansion targets is as follows:

Service	No. of households reached (individuals)
Direct Reach	880 (4400)
Other Income Maximisation/Debt Advice	175 (875)
Vouchers	100 (500)
Energy Efficiency Advice	379 (1895)
CO Awareness	500 (2500)
PSR Referrals	55 (275)
Hours of Volunteering (3 community champions)	120

## Criteria

	<table border="1"> <tr> <td>Draught Proofing - Door &amp; Gaps</td> <td>4 (20)</td> </tr> <tr> <td>Home Improvement (Energy related)</td> <td>16 (80)</td> </tr> <tr> <td>Electric Blanket</td> <td>16</td> </tr> <tr> <td>Warm Packs (CSE)</td> <td>6</td> </tr> </table>	Draught Proofing - Door & Gaps	4 (20)	Home Improvement (Energy related)	16 (80)	Electric Blanket	16	Warm Packs (CSE)	6
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Project Partners and third parties involved	<p>This project is being funded by Wales &amp; West Utilities and delivered by our principal partner Centre for Sustainable Energy. CSE will work alongside various agencies across their footprint, including:</p> <ul style="list-style-type: none"> <li>• Local Citizens Advice Bureau's</li> <li>• WE Care Home Improvements</li> <li>• North Bristol Advice Centre</li> <li>• AMS Electrical</li> <li>• North Somerset Council</li> <li>• Bristol City Council</li> <li>• Southmead, Weston, Royal United Hospital</li> <li>• Various GP Surgeries</li> </ul>								
Potential for new learning	<p>This project has the potential to provide insight into the levels of support required in what can be considered prosperous areas. We may also be able to understand the quality of the service provided by organisations such as CSE, and what skills and techniques can be adapted and applied to business-as-usual activities at Wales &amp; West Utilities. In addition to this, we can also look to engage further with the target group of this project, to understand how our general work impacts their livelihoods.</p>								
Scale of VCMA Project and SROI calculations, including NPV	<p>We have taken the forecasted numbers expected by C&amp;RC for the two-year delivery period and calculated the following SROI over a 5-year period:</p> <p>Total Gross Present Value = £11,486,243          Net Present Value = £10,508,178          SROI per £1 spent = £10.74</p> <p><b>Updated December 2024</b>          We have taken the forecasted numbers expected by CSE and calculated the following SROI over the two-year delivery period using the latest GDN shared SROI model and rulebook:</p> <p>Total Gross Present Value = £4,586,042.99          Net Present Value = £3,577,089.12          SROI per £1 spent = £3.55</p>								
VCMA Project start and end date	<p>This project will begin in January 2024 and end in January 2026.</p> <p><b>Updated December 2024</b>          January 2024 – March 2026</p>								



## Criteria

Geographical area	Bristol, B&NES and North Somerset local authority areas for WHAM. As well as outreach, volunteer support and casework in Somerset, Swindon and Wiltshire (those parts within WWU area).
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