

sfha publication

Fuel poverty Briefing

This document aligns with SFHA's 2021 Scottish Parliament manifesto asks regarding energy and climate change

sfha
Scottish Federation of
Housing Associations

We are housing Scotland

Purpose

This paper has been produced by SFHA to support the work of the Social Housing Resilience Group, with input from a number of SFHA members. It is intended to inform key priorities for social renewal in light of the Covid-19 pandemic as well as longer term government priorities including the updated Climate Change Plan¹, the draft Heat in Buildings Strategy² and the forthcoming Fuel Poverty Strategy. Earlier this year, the Social Renewal Advisory Board³ put forward various calls to action on how to deliver real change in Scotland in the wake of the pandemic. This highlighted the importance of a safe, warm, accessible and affordable home and argued that fuel should be a universal basic service. The recently published Housing to 2040 routemap⁴ also acknowledges affordable warmth as a key priority and the need to make fuel poverty a thing of the past.

In addition to the work to remove the poor energy efficiency of homes as a driver of fuel poverty in the social sector, the provision of energy advice is a key element of the social and economic activity SFHA members undertake to support tenants, and to promote tenancy sustainment. Our members have helped their tenants to save thousands of pounds by supporting them to change suppliers and eradicating fuel debt. This support helps tenants to access affordable warmth, including some of the most vulnerable in society who face impossible situations - including choosing between heating and eating – without this support.

1 <https://www.gov.scot/publications/securing-green-recovery-path-net-zero-update-climate-change-plan-20182032/>

2 <https://www.gov.scot/publications/heat-buildings-strategy-achieving-net-zero-emissions-scotlands-buildings-consultation/>

3 <https://www.gov.scot/publications/not-now-social-renewal-advisory-board-report-january-2021/>

4 <https://www.gov.scot/publications/housing-2040-2/>

Fuel poverty in Scotland: an overview

The Fuel Poverty Act (2019) set out statutory targets for addressing fuel poverty in Scotland. By 2040, no more than 5% of households should be in fuel poverty with no more than 1% in extreme fuel poverty. It is also proposed that the median fuel poverty gap of households in fuel poverty should be no more than £250 (in 2015 prices before adding inflation).

Following the draft produced in 2018, a final Fuel Poverty Strategy was due to be published in 2020 but this has been delayed due to the Covid-19 outbreak. The strategy is not expected until later this year, however Scotland's 2018-2032 Climate Change Plan⁵ confirms the Scottish Government's commitment to eradicating fuel poverty and meeting the statutory targets.

Despite the ambitious targets in place, as revealed by the most recent Scottish House Condition Survey, nearly a quarter of households in Scotland were in fuel poverty in 2019 (24.6%)⁶. Particularly high rates of fuel poverty were found amongst households in the social housing sector (37%), those living in remote rural areas (43%), households using electricity as a primary heating fuel (43%) and households with pre-payment meters (36%). There were also particular concerns about the levels of extreme fuel poverty in remote rural areas, where around a third of all households were estimated to be fuel poor.

5 <https://www.gov.scot/publications/securing-green-recovery-path-net-zero-update-climate-change-plan-20182032/>

6 <https://www.gov.scot/publications/scottish-house-condition-survey-2019-key-findings/>

The latest statistics also demonstrate the strong association between fuel poverty and household income noting fuel poverty rates of 96% and 60% for the two lowest income bands, respectively. The social housing sector represents a considerable proportion of these lower income households. However social housing stock is generally more energy efficient than other sectors with over half (56%) of social housing achieving band C or better under SAP 2012 compared to two-fifths (40%) in the private rented sector and owner-occupied sector (41%). This can be attributed to the higher minimum standards required for social housing through the SHQS and EESSH and reinforces the need to address the other drivers of fuel poverty in this sector: household income; energy prices; and how energy is used in the home.

The fuel poverty figures cover the year prior to the coronavirus outbreak, however they highlight some of the particular areas of concern including cases where households have a restricted electricity meter, are limited in their choice of tariff or live in an off-gas area where fuel options are more expensive or more volatile. Some of these issues have also been exacerbated by the pandemic following reduction in incomes coupled with increases in the amount of time people have been spending at home and changes to heating patterns. Indeed recent modelling⁷, based on a range of different scenarios has shown that fuel poverty rates could increase to 29% (compared to the 2019/20 baseline of 24%). This is based on assumptions of increased unemployment, continuation of the furlough scheme and modelled increases in household energy use. While these are only estimated figures, the worst case scenario predicts that an additional 126,000 households could be in fuel poverty as a result of the pandemic with a further 68,000 in extreme fuel poverty.

7 Scottish Government (2020). [Experimental analysis of the impact of COVID19 on Fuel Poverty Rates: Report](#)

The Covid-19 experience and learning

In addition to the modelling exercise, in the early stages of the pandemic, there were reports of tenants experiencing increased fuel and energy costs, exacerbated by a reduction in levels of income and resulting in increased fuel poverty. SFHA members also provided examples of tenants struggling to access top ups for prepayment legacy meters and poor levels of customer service from some energy suppliers. For example, there were reports of long call wait times, tenants having to travel some distance to access paypoints and customers having to make use of emergency credit on their pre-payment meters and accumulating considerable amounts of energy debt. There were also reported inconsistencies between energy suppliers, particularly around accessing emergency top-ups.

SFHA members have been supporting tenants throughout the pandemic, through direct top-up funding and by assisting in the delivery of emergency funding (e.g. Supporting Communities Fund⁸). The Scottish Government has also recently announced a Winter Plan for Social Protection with £7m allocated to help those who are struggling to pay fuel bills over the colder months. SFHA will distribute £2m of this funding to members, through the Social Housing Fuel Support Fund. This additional funding is welcomed and should mitigate the impacts of the pandemic to some degree. However a longer-term approach for tackling fuel poverty is also needed given the number of issues which were present before the coronavirus outbreak.

SFHA has been working with the Scottish Government and other stakeholders to ensure impacts on fuel poverty are considered as part of longer-term strategies including the Heat in Buildings Strategy and Housing to 2040. This has included working alongside Energy Action Scotland and Citizens Advice Scotland to ensure Scottish Government's Heat Networks Bill is aligned with the proposed fuel poverty targets. SFHA has also been working in partnership with Changeworks to deliver research on the costs of meeting the Energy Efficiency Standard for Social Housing (EESH2). A key part of this work is to understand not only the challenges for landlords but also the impact on tenants including the modelled fuel bill savings and fuel poverty impacts.

8 Our recent [report](#) provides example of where the Supporting Communities Fund has been used to help households with their energy bills

Case Studies : Energy and fuel poverty advice services provided by SFHA members

Recent research by the MCS Charitable Foundation⁹ identifies the provision of effective advice and information on energy as a vital part of reducing carbon emissions and addressing fuel poverty. While standards vary across the UK, the report suggests a need for general 'information' alongside personalised 'advice', tailored to specific properties and household circumstances. It also suggests that energy advice can be particularly effective when delivered locally due to benefits in accessibility and links with local services and community networks.

Social landlords therefore have a potentially critical and impactful role in not only delivering emergency support to fuel poor households but also in the longer-term ambition to eradicate fuel poverty and address the wider climate emergency. Housing associations and co-operatives work hard to make their homes more energy efficient and to reduce the cost of heating them for their tenants. This includes significant investments in building fabric and heating system upgrades through EESSH and now EESSH2. However, they also help to address the other drivers of fuel poverty by providing direct support and energy advice to tenants who are struggling with their fuel bills.

In 2020, SFHA conducted interviews with members who currently provide energy advice services to explore the types of services offered and good practice which may be useful for the wider sector. Three organisations took part in the research with representation from: a large, national operator, a small, rural housing association and a medium-sized housing association working across a few local authorities. All of the case study organisations provide an in-house energy advice service to help support fuel poor tenants and while this model may not suit all social landlords, and other external organisations can also provide this type of support¹⁰, there are still opportunities for shared learning based on how these three case studies engage with their tenants.

9 <https://www.mcscharitablefoundation.org/energising-advice-report>

10 <http://www.scotland-excel.org.uk/contract.aspx?contract=1718&pageNumber=3>

Summary of findings

Table 1 provides a summary of the services provided by the three case study organisations. As shown, these activities cover all four drivers of fuel poverty by aiming to: increase their tenant's incomes, tackle high energy costs, create improved living conditions by both improving the physical fabric or heating system and supporting tenants to make changes to how they heat their home.

Table 1: Summary of case study activities

Household incomes	income maximisation
	welfare advice
	energy top-ups
	grant applications
Energy prices	supporting tenants to switch supplier or tariffs
	lobbying energy companies and governments
Energy efficiency of homes	ongoing maintenance of fabric, heating and ventilation
	complying with EESSH targets
	property surveys
	environmental/energy monitoring
Behaviours in the home	energy efficiency advice
	occupancy assessments
	environmental/energy monitoring

Summary of findings

Full details of the cases studies can be found in the appendix ([page 10](#)) which provides further insight into each organisation's approach and the benefits to their tenants. However, some examples of good practice which were found to be present in all of the examples include:

- **Delivering flexible referral systems which help to target those in need**
- **Offering holistic services which include both proactive and reactive support**
- **A customer centred approach where advisors focus on getting the best outcomes for tenants**
- **Ensuring energy advice staff are well trained both in supporting customers and up to date with new and sometimes complex technologies**
- **Working collaboratively both internally (e.g. across different departments) and with external organisations (e.g. NHS, funders and energy companies)**

A common theme throughout is that as community anchors, these organisations are well placed to **build good relationships** with individuals and communities and gain insight into what will work best for consumers and develop their services on this basis.

Our asks

We are calling on the Scottish Government to do even more to tackle fuel poverty in Scotland; the first step must be to publish the delayed Fuel Poverty strategy as a matter of urgency along with increased funding for fuel poverty and energy efficiency.

For the social housing sector, we want to see adequate support for social landlords to ensure the cost of meeting proposed energy standards in both new and existing homes is not passed on to tenants. We would expect our research with Changeworks on the cost implications of meeting the EESSH2, alongside the expected energy savings and impact on fuel poverty, to be considered in these discussions once available.

In line with findings of the case studies, we also want to ensure social housing tenants are able to access appropriate fuel poverty and energy advice and that the role of social landlords are adequately resourced to provide these services.

As part of the Existing Home Alliance, SFHA is also supporting calls for improvements to the existing housing stock across all sectors, supported by a legislative framework through a Warm Homes (Heat and Energy Efficiency in Buildings) (Scotland) Bill, targeted funding for a Just Transition, a 'Countdown to 2040 Delivery Plan' and programme of innovation to support Green Jobs.

Key asks of the Scottish Government:

1. Publish the final version of the delayed **Fuel Poverty Strategy** as a matter of urgency.
2. Review the **current level of grant subsidy** within the Affordable Housing Supply Programme, with a commitment to increase subsidy rates in line development costs over the next five years. This should reflect the increased costs of building homes to the required energy standards including the proposed changes to Building Standards (expected in 2021) and the forthcoming New Build Heat Standard.
3. Provide additional **funding for social landlords to support energy efficiency improvements and decarbonisation of heat** in the existing stock. This should build on schemes such as the Social Housing Net Zero Heat Fund with multi-year funding which supports the transition to net zero and ensures the costs are not passed on to tenants.

Our asks

4. Work with the sector to **understand how the current EESSH2 targets will impact tenants** and review the approach in line with emerging evidence to ensure these targets are in the tenant's best interest.
5. Ensure the **public engagement strategy** on climate change includes a national education campaign on energy efficiency and low carbon technologies. Social landlords should be a key delivery stakeholder in this strategy and supported to deliver high quality advice to social housing tenants in order to reduce fuel poverty and maximise the benefits of energy efficiency and heating upgrades

As part of the Existing Homes Alliance¹¹, we are also calling for:

6. A **Warm Homes (Heat and Energy Efficiency in Buildings) (Scotland) Bill** to give clarity and confidence. A legislative framework will provide the certainty needed to attract private investment, support Scotland's homeowners, landlords and supply chains whilst ensuring fairness and quality.
7. **Targeted Funding for a Just Transition**, significantly scaling up successful Energy Efficient Scotland programmes. This should include a 'Countdown to 2040 Delivery Plan' which shows how we will meet targets, including a package of support and incentives so we can convert over one million homes to zero or low emissions heating systems, in the most cost effective and efficient way, and without passing costs on to those who can least afford it.
8. A **Programme of Innovation to Deliver Green Jobs**, develop expertise and build confidence. Through investing in energy efficiency retrofit and low carbon heat, we can **create between 16,000 and 17,000 skilled jobs** over the next decade.

11

<http://existinghomesalliancescotland.co.uk/news/eha-manifesto-march-2021/>

Case study one: Hillcrest Homes (Scotland) Limited



**Hillcrest
Homes**



6,000
properties



1,200
tenants engaged
in 2019

Overview

Hillcrest are a mainstream housing provider operating mainly in urban settlements. They have over 6000 properties located across six local authorities including the cities of Aberdeen, Edinburgh and Dundee City and well as covering Angus, Fife, and Perth and Kinross.

The Hillcrest Energy Advice Team (HEAT) consists of three energy advisors who are employed directly by the housing association. One advisor is based in Perth and covers the Perth, Fife and Edinburgh area while the other two advisors cover Dundee, Angus and Aberdeen. In 2019 the team engaged with approximately 1200 tenants, the majority of these consisting of home visits.

Referrals

Tenants are referred to HEAT through a variety of different channels. They firstly have a proactive referral system which invites any new tenants and those moving into new build properties, as well as anyone who is receiving a heating upgrade as part of planned maintenance works, to take part in a visit with a HEAT advisor. They also receive reactive referrals for cases where, for example, tenants are struggling financially or experiencing other issues which HEAT can advise on.

Other roles within the housing association such as income management staff, maintenance officers, tradesman and housing officers, are able to refer suitable tenants directly to the HEAT advisors. They also receive referrals from supported accommodation sites and other external partners such as the NHS who may, for example, make referrals for those coming out of prison.

Services provided

All of the energy advice is delivered in-house by the HEAT team however they also work in close partnership with the housing association's welfare advice staff.

Hillcrest have previously worked with other external agencies such as Dundee Energy Efficiency Advice Project (DEEAP) however at present they find it more cost-effective to deliver their services in-house. It was also found that since many of the visits resulted in identifying repairs, which then needed to be referred back to the Hillcrest maintenance teams, it was more efficient to avoid using an external agency for advice visits.

A direct 'boots on the ground' approach with face to face interaction between Hillcrest staff and tenants was also noted to be the most effective approach.

HEAT also adapted their services around four years ago in order to cut down on the number of repeat visits to tenants. This is now a key principle of their service delivery and is achieved by taking a holistic approach which assesses all aspects of energy-efficiency as part of the initial visit.

This may include conducting an overall occupancy assessment and inspection of the property alongside assessing eligibility for grants and discussing the tenant's individual circumstances.



**Face to face meeting
were found to be the
most effective approach**

So for example if a tenant was facing financial difficulties and energy debt, the advisors would offer debt advice while also taking the opportunity to look at the physical aspects of the property such as the heating systems and level of insulation. Any issues could then be immediately identified and reported back to the asset management team.

The reciprocal relationship with other departments within the housing association was noted to be one of the key successes of the service as HEAT were able to provide intel on the properties (e.g. type of heating system, level of insulation) to the asset management team who could in turn arrange for heating or appliance upgrades for those experiencing fuel poverty.

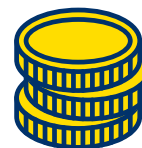
One of the key services delivered by HEAT involves ensuring tenants who are eligible for the Warm Homes Discount apply for and receive this funding. Eligibility is assessed as part of the initial visit meaning that HEAT can compile a list and then apply for the funding in bulk. Although this can be a time-consuming process which normally takes a total of two weeks, last year this work resulted in approximately £110,000 worth of funds for tenants.

The advisors also view the Priority Services Register as an important part of supporting tenants and they will seek to register those who are eligible as part of the initial visit. This may mean advising tenants on selecting energy suppliers who offer this service, even if they are not the cheapest provider. By obtaining third party authorisation as part of the initial visit, the HEAT team can also follow-up with suppliers, including checking Priority Services Register status, without requiring a further visit.

Hillcrest have also been top-up funding for pre-payment meters over the past 3 years. In the first year this was funded by a grant from Energy Action Scotland while in the second year the funding was gifted directly from Hillcrest. At present, this scheme is now part of the housing association's core funding and amounts to approximately £12,500 per year. Annually this helps to keep between 300 and 350 households on supply and helps to avoid delays with gas servicing as well as reducing cases of property abandonment (e.g. where the property has been abandoned due to energy supply cut off). This is noted to be a cost-effective approach by avoiding the costs normally associated with turning around an abandoned property. It can also help to prevent problems with condensation and dampness by ensuring that the property is not left unheated for a prolonged period.



**Priority Services Register
is viewed an important
part of supporting tenants**



£110,000

**of funds for tenants through
Warm Homes Discount**

Staff and training

The advice delivered to tenants is both general (i.e. a structured visit with key points and a checklist) and tailored to individuals depending on the specific circumstances or problems encountered.

All energy advisors are required to obtain the City and Guilds qualification in Energy Awareness however two of the advisors also hold a City and Guilds qualification in Advice and Guidance. The HEAT team have also participated in other relevant industry courses including training on smart meters and on-going professional development through wider housing qualifications. Hillcrest therefore place great importance in ensuring that those delivering energy advice to tenants are well informed and kept up to date with important developments in the sector.

In considering the key skills and characteristics of energy advisors, the importance of considering each individual case was highlighted alongside an open-mind approach where staff treat tenants in the way they themselves would like to be treated.

Follow-up and Impact

The impact of the HEAT service is monitored through follow-up with tenants, particularly in cases where the tenants have been facing financial issues or where there has been a physical issue with the building fabric or heating system. By completing an occupancy assessment as part of the initial visit, the advisors also have a baseline which can then be compared to a second occupancy assessment conducted after any intervention. In particular, this allows the advisors to determine whether the tenant has been removed from fuel poverty.

HEAT also calculate the estimated financial impact based on any fuel savings or successful grant applications (e.g. Warm Homes Discount). Their figures for 2019 suggest total savings of over £400,000.



£400,000
total savings for
tenants in 2019

Case study: Lochalsh and Skye Housing Association



Overview

Lochalsh and Skye Housing Association are a rural housing provider serving Lochalsh and the island community of Skye. They have over 700 properties within their stock however their two energy advisors, based in Skye, also provided support to the wider community including owner occupiers and those in the private rented sector.

Although the two members of staff are based at the housing association's head office in Skye, they often work remotely given the geographical spread of the properties and the demand for in-home face to face visits rather than telephone advice. The LSHA Energy Advice Service has therefore provided over 2000 home visits in its nine years of operation.

Referrals

Tenant referrals can be either proactive or reactive, however the majority of visits to tenants are part of ongoing inspections and stock surveys. The housing association has a rolling stock survey process which typically takes around three years to complete and while this involves a physical inspection of the property, it also provides an

opportunity to engage with tenants on energy efficiency issues and conduct affordable warmth checks where necessary.

All new tenants are also offered an 'induction' type energy advice visit at the beginning of their tenancy however it is noted that less than half of new tenants choose to participate in this.

The reactive element of the service involves more direct responses to queries from tenants who have a particular concern or require support. This type of reactive service is also offered to anyone living in Skye and Lochalsh. Services for these groups are however more limited due to lack of grant funding and typically involve sign-posting to other organisations such as Home Energy Scotland or ensuring that eligible individuals are placed on the Priority Services Register. This process can also work in reverse with LSHA tenants who initially contact Home Energy Scotland being referred back to the LSHA Energy Advice Service.



700
properties

Services provided

Aside from the aforementioned signposting for private households, energy advice is delivered in-house by LSHA Energy Advice Service. Their service has also evolved over time and while they initially provided fairly generic advice, they now focus on in-person visits and understanding property specific issues.

The benefits of having two members of staff working full-time in this role were noted, not only from a workload perspective but also since this means the advisors can support each other and work collaboratively to resolve often complex problems.

In terms of the services provided, LSHA describe their philosophy as an 'Energy Care' approach whereby the housing association works in partnership with the tenants to deliver five key elements:

- **fabric**
- **ventilation**
- **heating**
- **people**
- **tariff.**



**Lochalsh and Skye
Housing Association
describe their
philosophy as an
'energy care' approach**

The fabric element involves ensuring that the property is sufficient insulated and in a good physical condition, while the ventilation and heating elements focus on ensuring good air quality and adequate warmth based on efficient and effective operation of the installed systems. The people aspect recognises the individual preferences, particularly around comfort, of those living in the property. Finally, the tariff element involves assisting with finding the most suitable provider and metering system. This may also involve registering those who are eligible onto the Priority Services Register.

A key point of this five-part approach is that the energy advisors provide an independent service and although part of the housing association, they can go back to other departments within the organisation and identify areas of improvement needed. They note that it is quite common to find cases where the problem is neither the tenant nor landlord's fault but rather a combination of both. There is therefore a need to work together to share the responsibility and resolve such issues.

The housing association's property management system also includes a section relating to energy issues and advice so that this data can be logged. The energy advice service and property services teams do have a close relationship however it was noted that this could be improved further in order prevent problems arising when, for example, a new heating system or kitchen is installed but the tenant not given appropriate advice on how to use the new system.



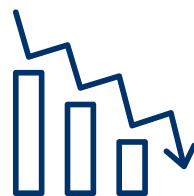
40-50

tenants take part in detailed monitoring each year

As well as advocating for in-home visits, LSHA also promote the use of real-world data gathered through metering readings and environmental data such as room temperature and relative humidity.

This approach has several benefits as not only do the energy advisors have a wealth of knowledge about the energy consumption trends of their tenants, gathered over eight or nine years, they also have evidence on the types of properties or heating systems which are more likely to have issues or higher running costs.

It also allows the advisors to provide an in-depth investigation of problems and discuss the outcome of the exercise with the tenants in order to work towards a solution.



Energy issues and advice are logged so that trends can be identified

For example, where an issue with dampness is reported, monitoring equipment can be installed to measure the internal property conditions and energy usage over a few weeks. Combined with a thermal imaging camera, the advisor can then provide a visual presentation of the issues using graphs of the measured data to demonstrate a build-up of moisture in particular rooms at a particular time of day for example. These tenants therefore receive highly tailored advice and it was estimated that between 40 and 50 tenants participate in this more detailed monitoring each year.

This in-depth data gathering processes also contributes to the housing association's wider decision making alongside other research outputs and lobbying activity. For example, LSHA have been able to demonstrate the level of energy rationing present in their community given the below average energy consumption figures calculated from property meter readings.

The temperature monitoring also allows the energy advisors to assess whether the properties achieve the theoretical design standards and thermal comfort levels assumed within SAP modelling. Furthermore, this work can help to determine the effectiveness of particular interventions (e.g. extractor fans, heating systems).

These lessons can in turn be used to inform the housing association's policy, and indeed some Highland wide design standards and policy, on particular installations. For example, LSHA no longer advocates the installation of patio doors, vaulted ceilings, restricted electricity meters and particular heating systems based on previous evidence about the problems these can cause.



LSHA no longer supports installation of patio doors, vaulted ceilings, restricted electricity meters and particular heating systems

Aside from supporting tenants on energy efficiency matters, the team are also involved in various other activities. For example, they inspect new build properties and work with the building contractors to identify any issues with cold bridging for example. This can involve thermal imaging surveys to identify any areas with insufficient insulation prior to handover thereby preventing potential issues with condensation further down the line.

The energy advisors are also actively involved in the Renewable Heat Incentive and make all of the housing association's RHI claims, noting that this equates to annual income of approximately £85,000.

LSHA also has its own heat network which has been running since 2008. LSHA also conduct all of their own EPC assessments and offer this service to private households as a further income stream.



£85,000

**annual income from the
Renewable Heat Incentive**

Staff and training

Both energy advisors hold a City and Guilds qualification in Energy Awareness and they have also completed EPC assessor training. They also regularly attend courses on specific topics (e.g. damp in buildings) and are active members of the Highlands and Islands Housing Associations Affordable Warmth group who meet regularly to discuss common problems and share information on the specific issues encountered in rural areas.



Energy advisors hold a City and Guilds qualification in Energy Awareness

In terms of the characteristics of a good energy advisor, the importance of being able to sit down with tenants in their homes was highlighted alongside the need to be friendly and non-threatening. The ability to present information in a simple way, using visual prompts such as images and graphs was also mentioned as well as taking time to understand individual circumstances and preferences.

The complexity of issues facing rural tenants was however noted as a barrier, particularly in terms of restricted meters, and the advisors often find it frustrating not being able to offer an easy solution to those who need it most.

Follow-up and Impact

The Energy Advice Service does seek to follow-up with tenants, particularly where they have been advised to make a change such as switching supplier. The team will contact between 50 and 100 tenants per year, based on those who were predicted to make significant savings and confirm whether these savings were realised. They will also follow-up with those who reported major issues with unmanaged humidity or damp and mould and this year they have received additional funding to support some of these households with a further intervention (i.e. dehumidifiers) and monitoring.

As previously mentioned, the organisation also makes an impact through lobbying activity, using the knowledge they have gained through tenant engagement and detailed stock surveys to inform these discussions. For example, they have contributed to discussions with Ofgem regarding the restricted meter remedy and with the Scottish Government regarding creating a unified network and equalised network charges.

They also initiated the Homecare pilot project which has since been developed by Home Energy Scotland and they have also contributed to several other papers and workshops concerning fuel poverty, EESSH2 and related topics.

Case study: The Wheatley Group / Glasgow Housing Association

Overview

The Wheatley Group is a national housing provider and owns or manages over 81,000 homes across Scotland. The group consists of seven Registered Social Landlords including:

- Glasgow Housing Association
- Cube Housing Association
- Loretto Housing
- West Lothian Housing Partnership
- Dunedin Canmore
- Barony Housing Association
- Dumfries and Galloway Housing Partnership.

Overall the Wheatley Group delivers services to over 200,000 residents in 19 different local authorities.

Energy advice services are currently provided by seven fuel advisors who are part of the wider money advice team which includes a further 23 welfare advisors. The money advice team also works alongside the Universal Credit team, a debt recovery team and staff working in strategic and policy related roles.



81,000
properties

The existing fuel advice team is primarily based in Glasgow while one advisor is based in Edinburgh. There are however plans in place to expand to a team of 10 advisors in addition to new project co-ordinator role. The new members of staff will cover Cube Housing Association and Loretto Housing Associations.

Referrals

Customer referrals can come from a range of sources however the majority come from housing officers who will regularly engage with and visit tenants. The housing officers are often the first point of contact for those who are experiencing difficulties with their heating systems or struggling with their fuel bills and these cases will be passed to the fuel advice team.

Referrals are also generated from calls to the organisation's 24/7 customer call centre. Those who require fuel advice are given an appointment with a fuel advisor, usually within a week unless there is an emergency situation which requires a more immediate response.

The majority of the advice provided, typically 80%, is given face to face as part of a visit to the customer's home. Alternative procedures including videocalls are however being implemented at present due to the coronavirus pandemic.



80% of advice is given face to face as part of a visit to a customer's home or currently as a videocall

The Wheatley Group has also recently received funding as part of the Energy Redress fund and they have developed a specific referral system for this scheme which can be accessed by all staff in the organisation. This funding is used to provide additional support customers, including those with pre-payment meters. Other funding streams have included an emergency response fund supported by the Scottish Government.

In addition to reactive referrals, the fuel advisors actively engage with all new tenants and will conduct an initial home visit to show them how to use their heating system efficiently, discuss their energy supply and resolve any outstanding issues such as existing debt on the meter.

More recently the advisors have also been assisting with setting up utilities in temporary accommodation and properties which are being let to the local authorities in order to support those facing homelessness.

The fuel advisors also have some proactive involvement in planned works such as heating system upgrades however this is generally limited to large scale projects and usually led by the housing officer for that area. The fuel advisors are therefore not typically involved in an individual heating system upgrade or other planned maintenance work unless the tenant reports a particular issue which requires support.

Services provided

The Wheatley Group provides an in-house energy advice service in the areas where the advisors operate although they do work with other partners such as Energy Action Scotland and the Wise Group. Partnership working has become particularly important as part of the Energy Redress scheme and going forward the Wheatley Group is exploring options for delivering services to other parts of the business such as their mid-market properties.

However at present the majority of the day to day work and face to face energy advice is delivered by the in-house fuel advisors and this is seen to be highly beneficial from a customer service perspective. The fuel advisors, and wider money advice team, are also viewed as a critical part of the organisation and the executive team recognises the value of supporting tenants on these issues and the potential benefits and wider impacts of this service.

The services provided typically include assisting tenants with finding the best energy deal, debt management (including debt write off) alongside energy saving tips. The fuel advisors can also assist those who are eligible to apply for schemes such as the Warm Homes Discount and the Priority Service Register.



Tailored advice is key to the service, with relationships with tenants built over years

A key part of the service is that the advice is tailored to individuals and developed based on an understanding of the customer's lifestyle, occupancy patterns and personal circumstances. The fuel advisors often build and maintain relationships with tenants over several years and during the pandemic the team have been providing welfare calls to those are known to be elderly or have previously engaged with the team.

The advisors will also speak to energy suppliers on the customers behalf, in cases where the customer give permission for them to do so, in an effort to resolve issues with billing and payments.

Staff and training

All of the fuel advice staff participate in the City and Guilds Energy Awareness course. They also take part in regular energy related events such as the quarterly Energy Action Scotland forum. This provides a platform for sharing good practice, making new contacts and keeping up to date with the latest developments. Regular team meetings also allow the advisors to share their experiences and discuss any problems with their colleagues.

Furthermore, the Wheatley Group also offers an online training service for staff and this includes courses on specific practical skills such as communicating with tenants or dealing with challenging conversations.

It was noted that those working in the role have to be passionate about energy advice and want to make a difference for their customers. They also have to be knowledgeable in their field, particularly in terms of dealing with complex systems and the wide variety of meters, tariffs and technologies as well as knowing where to turn when they don't know the solution to a given problem.



Staff maintain skills through training, events, forums and team meetings

In addition to this technical knowledge, the importance of the soft skills in navigating difficult conversations (either with customers or utility companies) was also acknowledged.

Impartiality was also highlighted as a key skill in being able to facilitate a positive outcome while maintain a level of choice for the customer.

Follow-up and impact

All of the customer information is stored on a central system (Advice Pro) and this system is also used to log specific outcomes such as a successful Warm Homes Discount application or debt write off. By recording this information, the fuel advisors were able to demonstrate total savings of £504,000 during 2018/19 following engagement with around 4000 tenants across the Wheatley Group.

The advisors will also continue to communicate with the customer until a particular issue is resolved. There is an ongoing relationship with tenants, particularly in cases where they receive the Warm Homes Discount as the advisors will follow-up the next winter in order to ensure those who are eligible receiving the funding.

Another element of the Wheatley Group's work with regard to impact is their active engagement with energy suppliers. There has been an attempt to build relationships between those delivering on the ground advice to tenants and the major utility companies such as Scottish Power and SSE. Through face to face meetings the fuel advice team have been able to raise particular issues and work with the energy suppliers to resolve these. This is an ongoing process but has so far been welcomed and seen as an innovative approach to working towards solutions for customers.



£504,000
total savings for
tenants in 2018/19



4000
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across the Wheatley
Group in 2018/19

Fuel poverty

Briefing

The paper has been produced by SFHA to support the work of the Social Housing Resilience Group, with input from a number of SFHA members.

Click here to read the SFHA Manifesto for the Scottish Parliamentary 2021 elections:

[Building our social and economic recovery](#)

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