

Community Energy Efficiency Toolkit

Home advice visits

A trained professional or volunteer energy adviser visits people in their homes to assess their energy use and provide tailored advice and support to the customer to reduce bills and save energy. This guidance is based on the experiences of 7 community projects working under the Big Lottery Communities Living Sustainably programme.

Useful for

- Developing trusted relationships with householders
- Tailoring advice specifically to people's own fuel bills and circumstances
- Delivering home energy advice to vulnerable people or tackling fuel poverty
- Supporting large, area-based energy efficiency retrofit schemes
- Encouraging uptake of expensive energy efficiency measures such as wall and floor insulation
- People for whom there is a language barrier (if delivered by a relevant support organisation or an adviser speaking the same language)
- Ensuring energy saving measures are fitted
- Gathering accurate data about customers and their energy use over time.

Success factors

From the Home Advice Visits homepage you can download an overview of how other communities have delivered home energy advice visits.

Things to consider

Resource, skills and risk

This is a resource-intensive approach. It takes time and effort to find customers and carry out home visits. A visit can take anything from a couple of hours to half a day, depending on what services you provide. To fit draught-proofing measures (popular low-cost measures) can take several hours.

It can be difficult to deliver this service using volunteers because of the time, expertise and social skills required. The personal safety of volunteers and customers must be ensured, so proper risk assessment is important. It is usual for two advisers to carry out home visits for this reason. Advisers must be insured and properly trained, both in giving energy advice and in working with vulnerable adults. As the responsibilities are significant it may be best for communities to work with an appropriately-skilled partner to deliver.

Referrals for energy saving measures

Ideally, advice visits will refer customers into schemes to install energy saving measures, as well as providing behavioural advice. Whether referring people into an existing scheme, such as ECO, or setting up a new scheme, you must be very clear about:

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- What is the referral fee mechanism? Will your community group be paid for referring customers to installers? On what terms? Are you clear about this with customers, so that they understand that you have a relationship with an installer/scheme?
- Who owns responsibility for customers? If you refer customers to an installer will you retain a relationship with the customer to check they have received good service? Who will they go to if they have a problem- who is best placed to help them? Who will be liable if the measures they install go wrong or cause damage?
- Ongoing relationship with scheme/installer. How will you check on the progress of referrals and ensure that you find out when customers have had their work done and what they have had installed?

See the section on partnerships and contracts, below.

Follow-up

The real value in home advice visits is in follow-up with customers. Repeat visits can be difficult to arrange as people may not want further contact, change phone numbers or move house. If planning to do repeat visits this should be discussed with the customer during the first visit and, if possible, arranged there and then.

Partnerships and contracts

One key to success with this approach is to use the right partners to help you reach potential customers and deliver real benefits to them. Be very clear from the outset who will do what and how you will work together. Clearly defined partnerships work better than vague ones. Ensure that customer data is properly gathered and managed, in compliance with the Data Protection Act 1998 (see the [Monitoring and Evaluation section of the Hub](#) for more information). For ideas about the sorts of partners that could help and examples of what to put in tenders and contracts, see the list of resources for download on the Home Advice Visits homepage.

Resources and tools from Big Lottery's Communities Living Sustainably programme available for download from the Home Advice Visits homepage

- Sustainable Sunderland/Age UK's Financial inclusion checklist
- Sustainable Sunderland/Age UK's Home Energy Check survey
- Sustainable Sheppey's Green Doctor survey
- Sustainable Sunderland/Age UK's consent form to act on behalf of a householder
- Sustainable Sheppey's home visit questionnaire and 2nd visit questionnaire
- Sustain Eden's example Invitation to Tender and contract documents
- Sustain Eden's questionnaire used for draught proofing visits
- An overview of how communities working under Big Lottery's Communities Living Sustainably programme delivered home energy advice visits.