

**Location:** Severn Wye Energy Agency, Highnam, Gloucester, GL2 8DN

**Date:** Thursday 19<sup>th</sup> October 2017

**Time:** 10:00-13:00

**Attendees:** Brian Canning, Severn Wye Energy Agency; Chris Gillet, South Gloucestershire Council; Clare Knapman, Citizens Advice Gloucester & District; Debby Paice, South Gloucestershire Council; Jess Watkins, Severn Wye Energy Agency; Maria Hickman, Stroud District Council; Matt Lennard, Gloucestershire VCS Alliance; Michael Hinchliffe, Forest of Dean District Council; Philip Thorneywork; Rob Hargreaves, Severn Wye Energy Agency; Sarah Whitcombe, Cotswold District Council; Victoria Boynton, Severn Wye Energy Agency (12 attendees)

**Remote involvement:** Helen Melone (HM), EAPN/Energy Action Scotland. HM was unable to attend the meeting due to a prior engagement but was consulted by telephone on both Wednesday 18<sup>th</sup> October 2017 and Friday 20<sup>th</sup> October 2017. HM will be attending the next meeting. HM is based in Scotland so much of the funding for stakeholder attendance will be used to secure her attendance at both the second and third steering group meetings. (1 member)

**Apologies:** Calum Allan, South Gloucestershire Council; Neil Penny, Gloucestershire Clinical Commissioning Group; Yvonne Hope, Tewkesbury Borough Council; Mark Nelson, Cheltenham Borough Council (4 members)

#### Attached documents:

- *Slides used to support the meeting*
- *Terms of reference*
- *Expenses form (please return with a fuel receipt if you would like your travel expenses covered)*

### Agenda

**Part 1:** What is ASSIST and how does it fit into Warm & Well?

**Part 2:** Progress, Plans and Practicalities

**Part 3:** Preparations for the Think Tank meeting

### 1. What is ASSIST and how does it fit into Warm & Well?



Figure 1: Introductory slide

Victoria Boynton (VB) welcomed the group and explained how the ASSIST project was funded. She introduced the two primary themes which are to:

- *Establish a network of volunteers to support consumers vulnerable to fuel poverty to improve energy behaviours and energy efficiency.*
- *Influence policy and activity at all levels.*

The partners involved were discussed including the role of

AISFOR, Italy as Lead Partner. The long term aim of establishing a network of volunteers beyond 2020 was received well in terms of supporting the sustainable provision of energy efficiency advice and support.

The ASSIST project within the UK will work within the Warm & Well <sup>1</sup>energy advice and support programme and aims to reach the most vulnerable consumers in the region. Although referral systems into the Warm & Well programme are being established it would be beneficial to have direct links within the community via the use of volunteers. Various alternatives were discussed including: attaching volunteers to existing organisations, or roles, within the community; training existing Environmental Health Officers (notably in Gloucester City Council); or training Citizens Advice staff/volunteers. It was noted that the volunteers need to 'add value'. The challenges associated with managing volunteers were discussed and these should be considered when selecting the role of volunteers: it is important that the role needs to be manageable.

The current project priorities for the UK partners were outlined. These include:

### 1. Vulnerable Consumers and Energy Poverty Report

- Review of current situation across the EU
- Includes:
  - *analysis of existing projects and research*
  - *Review of financial instruments and establishing a database*
  - *Overview questionnaires across EU countries*
  - *Stakeholder interviews*
  - *Consumer questionnaires x 2*

### 2. Determining the role, remit and training of the volunteers

- Stakeholder interviews
- VCSC meeting
- Think Tank – 16<sup>th</sup> November 2017
- Stakeholder workshop – December 2017

The stakeholder interviews have almost been completed and Karen Robinson, S.Wye, has begun to write the report. The challenges associated with collecting sufficient questionnaires were discussed and Clare Knapman, CA, offered Severn Wye the opportunity to complete questionnaires for Work Package 5 in the waiting room at Citizens Advice Gloucester & District. The wording of the questionnaire was too complicated; Severn Wye will adapt the wording of the questions (but maintain the same meaning) to make it more appropriate to vulnerable consumers.

**Action:** CK to check that S.Wye can visit Citizens Advice to complete questionnaires. CK to see whether volunteers at Citizens Advice can help to complete the questionnaires with clients.

**Action:** S.Wye to edit the wording of the Work Package 5 questionnaire.

**Action:** S.Wye to arrange dates and times to complete the WP5 questionnaire with CK at Citizens Advice.

## 2. Progress, Plans and Practicalities

The structure of the VCSC was discussed and the group agreed the Terms of Reference. An addition was made to the original Terms of Reference: if a member could not attend a meeting in the future, their views would be sought prior to the meeting and passed on to the group; a follow up call/skype



Figure 2: Member of the VCSC

<sup>1</sup> <http://www.warmandwell.co.uk/>

would take place after the meeting. This process has occurred with Helen Malone, EAPN/Energy Action Scotland.

**Action:** VB to feedback to Helen Malone, EAPN/Energy Action Scotland on Friday 20<sup>th</sup> October 2017.

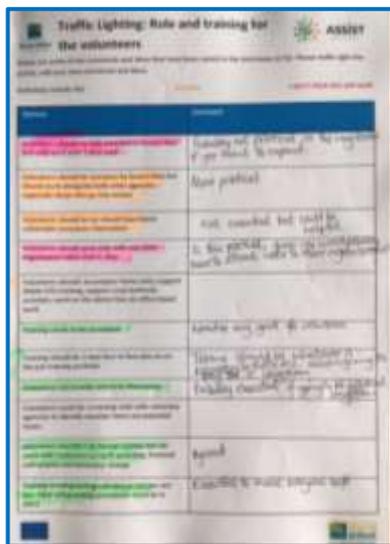
### 3. Preparations for the Think Tank meeting

#### 3.1 Traffic lighting

A wide range of ideas have been put forward from the stakeholder interviews. Group members undertook a traffic light activity to review some of these ideas to inform the role, responsibilities, and training requirements of volunteers.

#### 3.2 Attendance

Matt Lennard (ML) from Gloucestershire VCS Alliance is recruiting appropriate stakeholders for the Think Tank on 16<sup>th</sup> November 2017. ML agreed to follow up the invitations which have been disseminated via email and post. It was agreed that the following organisations should be contacted first:



- All community connector organisations
- Open House Stroud
- Citizens Advice Forest of Dean (CK to contact)
- Volunteer Gloucestershire
- Involve Gloucestershire
- Rural Community Council
- Friendship Café
- Age UK

**Action:** ML to follow up invitations to secure relevant stakeholders for the Think Tank meeting.

**Action:** Clare Knapman (CK) to contact Citizens Advice Forest of Dean to secure attendance at the meeting.

Figure 3: Traffic lighting about requirements for volunteers

#### 3.2 Structure of the Think Tank meeting

The Think Tank meeting was planned as follows:

Stage	Activity	Resources
<b>Seating arrangements:</b>	Clustered tables – mixed organisation working groups. Plan in advance.	Seating plan, labels, register.
<b>Introductory activity:</b>	<p>Introductory questions are on the table on an A3 sheet (space for responses). It is explained that this activity will feed into the rest of the event and a presentation will follow the activity. Groups discuss the questions in groups and summarise responses on the A3 sheet.</p> <p>Questions:</p> <ol style="list-style-type: none"> <li>1. <i>How do you work with vulnerable people currently?</i></li> <li>2. <i>What makes the biggest impact to these people?</i></li> <li>3. <i>How do you provide advice and support? (e.g. phone, home visits etc)</i></li> <li>4. <i>Who provides the advice and support within your organisation or do you connect with other organisations?</i></li> </ol> <p>Note: Names of organisations must be on the sheet</p>	<p>A3 sheet on tables including questions, space for responses, space for organisations involved to be recorded.</p> <p>Coloured pens.</p> <p>Welcome powerpoint slide displayed.</p>

Stage	Activity	Resources
<b>Feedback:</b>	Groups feedback outcomes to the group.	No resources
<b>Presentation:</b>	<p>Include a simple introduction to the project which focuses on using volunteers to get to the most vulnerable. No need to include information about funding/deliverables etc.</p> <p>Include summary of fuel poverty and its impacts for those organisations who are not familiar.</p>	Powerpoint presentation. Laptop, projector, screen.
<b>Mapping connections:</b>	<p>It is important for ASSIST to know how organisations connect and what stage they provide support, who for, and how long for. This is also useful for VCS alliance who will map the links after the meeting.</p> <p>Each organisation will map out their own links. An outline of the 'mapping connections' sheet is shown in <a href="#">Figure 4</a>.</p> <p>Links sheets are stuck up on the wall at the end of the activity.</p> <p>Allow time for some discussion.</p>	Mapping links sheet (A3) Blue tak Pens
<b>Identifying the remit of volunteers:</b>	<p>Introduce the aim of the next section which is to establish the role and remit of the volunteers and their training requirements.</p> <p>Ask groups:</p> <ol style="list-style-type: none"> <li>1. <i>What do you mean by 'vulnerable'?</i></li> <li>2. <i>What targets do you have (related to volunteers)?</i></li> </ol> <p>Introduce on a slide/list the potential options for roles and activities the volunteers could do. Emphasise that these are 'ideas'.</p> <p><i><u>Potential roles:</u> Work exclusively with the Warm &amp; Well Team; train a member of another organisation to undertake energy activities and work with Warm &amp; Well; Work under Warm &amp; Well but link closely with one more more other organisations (e.g. pairing for home visits, visiting offices etc); other....</i></p> <p><i><u>Potential activities:</u> Initial identification of issues on home visits; tariff switching support; advice about financial support and installations on offer for energy efficiency; support to change behaviours; attending events (stalls etc); supporting CPD training; support managing energy bills, heating controls etc plus follow up; hand-holding through the installation process; conducting home energy surveys (possibly with a trained advisor – double up for safeguarding and quality control); providing over the phone advice and support.</i></p> <p>Ask groups:</p> <ol style="list-style-type: none"> <li>1. <i>What role should the volunteers do?</i></li> <li>2. <i>What activities should be included in the remit?</i></li> <li>3. <i>What training would the volunteers require?</i> <ol style="list-style-type: none"> <li>a) <i>Content</i></li> <li>b) <i>Skills/qualities</i></li> </ol> </li> <li>4. <i>How should the training be delivered?</i></li> </ol>	<p>Questions for the centre of each table.</p> <p>Flip chart paper and pens for each table.</p> <p>Slides/lists with examples of roles and activities.</p>
<b>Feedback:</b>	Groups feedback outcomes to the group.	No resources
<b>Plenary – how could this</b>	Organisations individually complete expression of interest slips. Slips	Expression of interest slips

<p><b>work support your organisation?</b></p>	<p>should include:</p> <ol style="list-style-type: none"> <li>1. Name of organisation</li> <li>2. Contact name and email address</li> <li>3. Would you be interested in being involved in this programme either now or in the future? (Y/N)</li> <li>4. If yes, how?             <ol style="list-style-type: none"> <li>a) We'd like to partner with you in the use of volunteers which would be based within Warm &amp; Well.</li> <li>b) We'd like to use our staff or volunteers and train them to become members of the network.</li> <li>c) We'd like to establish referral systems between our organisations and CPD train our frontline staff to recognise fuel poverty to support the referral process.</li> <li>d) We'd like to establish referral systems between our organisations.</li> <li>e) Other (please specify): _____</li> </ol> </li> <li>5. If no, please explain why.</li> <li>6. Additional comments: _____</li> </ol>	
<p><b>Practicalities</b></p>	<p>See if any organisations can complete some T5.2 vulnerable consumer questionnaires (e.g. 10 each) – provide a pre-paid addressed envelope.</p> <p>Travel expenses can be claimed as long as a fuel receipt for the month is provided. See if anyone wants one.</p>	<p>T5.2 questionnaires plus stamped/addressed envelopes.</p> <p>Travel expense forms</p>

**Action:** Severn Wye to create resources and finalise plans for the Think Tank event.

**DRAFT Mapping connections: Who do you work with and how does your organisation connect?**

Who are your clients?  
Mark 'x' in all boxes that apply. Add extra details where necessary.

Groups	Disabilities	Carers	unemployed	Single parent families	Ethnic minorities	Health issues	Others	Male	Female
Children									
Teenagers									
20-29									
30-39									
40+									

Comments:

Which organisations do you connect with?  
Add organisations which refer to the purple boxes and those you feed on to to the green boxes.

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graph LR
    subgraph Purple_Boxes [ ]
        direction TB
        P1[ ]
        P2[ ]
        P3[ ]
        P4[ ]
        P5[ ]
    end
    subgraph Green_Boxes [ ]
        direction TB
        G1[ ]
        G2[ ]
        G3[ ]
        G4[ ]
        G5[ ]
    end
    Purple_Boxes --> Org[Your organisation:  
Entry point (e.g. emergency):  
Length of support:]
    Org --> Green_Boxes
  
```



Figure 5: Matt Lennard (VCS Alliance) and Clare Knapman (Citizens Advice) planning the mapping connections for the Think Tank event

Figure 4: Draft mapping connections for the Think Tank meeting

#### 4. Other considerations

During discussion the following points were made:

- Safeguarding is really important on both sides. The volunteers would need DBS checks if they came into contact with clients.

- 'Liability' needs to be considered. What happens if a volunteer gives the wrong advice? It is important that the volunteers have a high level of training and that their activities are monitored to avoid issues. Also, doing detailed technical work may be less appropriate.
- Volunteers need a lot of support so this must be built in to the plan.
- More than 6 volunteers should be recruited as drop out rates are high.
- The age and profile of potential volunteers was discussed. They are often young and using the experience to secure future employment or retired.
- As there could be a high turnover of volunteers, it is important that 'face-to-face' training is not too long and that there is capacity to repeat it regularly. Training should include face-to-face training, a portfolio, and interim monitoring.
- Whilst it would be good for training to be formally accredited, this would be expensive. Members agreed that it would be a good idea to put committed, long term volunteers through the NEA City & Guilds L3 qualification as a reward (after two years?)
- Whilst it would be ideal to have vulnerable consumers as volunteers, this can be tricky.

## 5. Future meetings

The next VCSC meeting will take place in April 2019.

Members are welcome to attend the Think Tank on 16<sup>th</sup> November 2017. Please contact VB to register.

**Please contact Victoria Boynton on [victoriab2@severnwyne.org.uk](mailto:victoriab2@severnwyne.org.uk) for further discussion or information.**