



Department
of Energy &
Climate Change

Technical annex

Big Energy Saving Network (BESN) evaluation

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Appendix 1: Research questions

Programme impacts

1. What impacts does the programme (including the role of trusted intermediaries) have in terms of targeting and reaching vulnerable individuals and achieving relevant behaviour change such as:
 - knowledge and confidence to engage with energy market issues
 - taking steps to switch supplier, tariff or payment methods (if appropriate)
 - take up of other government energy efficiency programmes such as ECO
 - other steps
2. To what extent are these changes likely to impact on energy savings and bills?
3. How and why have these impacts been secured and what explains any variation in performance across the network?

Programme effectiveness

4. How might the programme be improved in future in order to reach more vulnerable individuals?
5. What are the success factors and barriers to success associated with the initiative? How might these be built upon/overcome in future?
 - Which mechanisms and approaches have proved most effective in reaching target groups?
 - Have different mechanisms and approaches proved more effective in relation to certain groups? How and in what ways?
 - Which groups does the model work best for?
 - For which groups is it less effective and why?
 - How might the effectiveness of these mechanisms be maximised and improved further in future?
 - Are there any gaps in the programme design or delivery that if addressed would strengthen impacts?
6. What different approaches exist across the network in terms of a) the recruitment of volunteers b) the cascading of training between volunteers c) engaging vulnerable individuals?
 - What lessons and good practice can be identified?
7. How critical have trusted intermediaries in the form of trained champions, volunteers and the grant holding organisations overall, been to project success?

Programme effectiveness at each stage

8. How successfully has each stage of the programme been implemented across the network?
9. What are the most effective methods of delivery at each stage?
10. What has supported and what has inhibited implementation of the programme at each stage?
11. How have decisions and actions at each stage of the implementation of the programme affected effectiveness of the overall model?

Supporting grant holders

12. To what extent have grant funded organisations been successfully supported to deliver the BESN to the best of their abilities?
 - How has this varied across the breadth of organisations funded? What support packages work best for different types of organisation?
 - What further support would have helped maximise the ability of the organisations to reach more individuals and secure the best possible outcomes for them?

Efficiency and cost-effectiveness

13. How do the costs of the programme compare with the benefits to consumers (in terms of energy savings, bill savings)?
14. Which aspects of the programme, if any, could be refined to improve efficiency of the programme?
15. What lessons can be identified in relation to improving the cost effectiveness of the programme? (I.e. securing the same number of participants and quality outcomes, or better using less resources).

Appendix 2: Discussion of methods

Introduction

The approach to the research was outlined in brief in Chapter 2 of the main report. In this appendix, further detail is provided on the different data collection and analytical methods. To re-cap, the following research methods were used in the evaluation:

- Qualitative interviews with 7 key DECC officials responsible for the design, delivery and management of BESN plus a focus group with all Steering Group members. March 2014.
- Analysis of monitoring data collected by DECC from funded organisations relating to programme implementation (2,629 workshop participants and 1,139 frontline workers). Conducted during April/May 2014.
- Online surveys of champions, volunteers and frontline workers (total of 384 responses). May-June 2014.
- Telephone survey of workshop participants (400 responses). April-June 2014.
- In-depth qualitative interviews with 20 champions, 20 frontline workers, 40 workshop participants and 25 clients of frontline worker. June-August 2014.

More detail on each of these activities is now provided:

Qualitative interviews and focus groups with stakeholders (March 2014)

This included face-to-face interviews with DECC officials responsible for the conception and ongoing management of BESN (including policy officials, the Network Manager, communications and finance). These interviews helped the study team to understand the genesis, aims and operation of BESN and informed the Theory of Change (ToC) guiding the evaluation by outlining in detail how BESN was designed to operate and what it was intended to achieve. A focus group of all 8 Steering Group members was also convened to explore the views of the group on the efficacy of governance arrangements, the effectiveness of BESN, emerging impacts and their aspirations for the future of the project.

Analysis of monitoring data

During the course of BESN, funded organisations returned monitoring data to the Network Manager monthly, including information on: the profile of participants supported through BESN workshops (age, disabilities, means tested benefits, household composition, access to gas, access to internet, switching history, heating methods, energy payment methods etc.); type of advice issued (one-to-one or group and broad topic of advice); outcomes of advice (switching, ECO referral); training of frontline workers undertaken by champions and volunteers (number and types of frontline workers trained) and champions' own experiences of the training they received from NEA (extent to which knowledge on switching, ECO and energy efficiency increased following training).

This dataset provided monitoring data for a sample of 1,139 frontline workers and 2,625 workshop participants rather than for the full population. The data captured around 75 delivery organisations out of the total 94 that were funded by DECC. The data captures approximately

18 per cent of the full workshop participant population, which means that there is scope for a degree of 'error' in the data: a confidence interval of 1.8 percentage points where 50 per cent of respondents provide a particular response to a question (at 95 per cent confidence). There were some inconsistencies in the data, which appear to be largely owing to the fact that data was manually entered into a spreadsheet. These inconsistencies were largely confined to 'free text' responses, such as organisation names. There were also some different interpretations of type of organisation, which led to the evaluation team reclassifying the data. There were some instances of missing data. In some cases it was possible to fill the gaps (i.e if we knew the name of the organisation we could then fill in variables relating to the organisation). The cleaning process applied to this data is outlined in detail, below.

This extensive dataset enabled the study team to gain early insights in to who BESN had reached, some of the outcomes secured for participants immediately following receipt of advice and the reach and effectiveness of the cascading training model. These early insights were based on a single source of data, and covered a limited range of variables: hence the necessity for further research to triangulate data and expand the scope. However, analysis of this data set enabled the study team to begin to address the following questions which were critical to the evaluation:

- How many consumers did BESN reach? Who did BESN reach? What was the profile of participants and were any groups underrepresented?
- Who delivered BESN to participants?
- Which organisations were most successful at reaching which types of participants?
- What actions were pursued by participants immediately following the advice and what might have determined these actions?
- Which sorts of organisations trained what types of frontline workers?
- What sort of organisations did the frontline workers trained work for?
- How effective was the training received by champions?

The research team sought wherever possible to triangulate this data against other sources. This was done in two ways: First, by comparing the monitoring data to existing data on the fuel poor population (as defined by DECCs Low Income, High Cost definition adopted in 2012) to contextualise findings where available. Second, the validity of findings from the analysis of the monitoring data were tested against findings from the primary research activities undertaken (surveys and interviews), as part of the 'layering' approach described below.

Analysis of this dataset provided preliminary insights into the effectiveness of BESN and outcomes for participants which could then be built upon through subsequent research activities to help address the 'how' and 'why' questions left outstanding by the analysis of monitoring data.

Online surveys of champions, volunteers and frontline workers

In order to provide overall insights into the experiences of larger numbers of those delivering BESN than can be reached through other methods and to identify potential respondents for in depth interviews, online surveys were issued to champions, volunteers and frontline workers. Separate surveys were prepared for each group and issued via email. The surveys comprised of around 50 mostly closed questions with some open responses. The champions survey was combined with the volunteer survey with filtering built in to direct respondents to the questions relevant to them. The survey was issued to all champions, who were then asked to cascade the survey to volunteers they had trained. The surveys covered topics such as: motivations for getting involved with BESN, training, volunteer recruitment (for champions), engaging vulnerable consumers and other aspects of delivery. A total of 384 completed surveys were

returned across the three surveys which were issued to a total of 1,465 stakeholders (of a population of 6,011). The samples were identified based on those who had provided contact details during their involvement in BESN. This number of responses gives a confidence interval of around 5 percentage points for any analysis of combined responses across all respondents.¹

Taken individually, the survey response rates were more variable.

- The frontline workers survey was issued to 1,341 individuals and 281 responses were received (21 per cent response rate).
- The champions and volunteers survey was issued to 124 BESN champions and 103 responses were received (66 per cent of which were champions). The response rates and confidence intervals are summarised in Table 1, below.

Table A.1: Responses and confidence intervals for online surveys

Survey group	Population	Sample	Responses	Response Rate	Confidence Interval ²
Consumers (via workshops)	c.15,000	2,625	400	58% ³	4.8 ppts
Frontline workers	5,561	1,341	281	21%	5.7 ppts
Champions and Volunteers	450	n/a ⁴	104 ⁵	n/a	8.5 ppts
Champions only	c.150	124	66	53%	6.3 ppts
Volunteers only	c.300	n/a	34	n/a	15.8 ppts

¹ Confidence intervals express the likely 'margin of error' within a response to a particular question. For instance, 400 valid responses to the customer survey gives a confidence interval of 4.8 percentage points at the 95 per cent confidence level (that is, if 50 per cent of respondents select a particular response to a question, we can be 95 per cent confident that the 'true' value across all area is somewhere between 45.9 and 54.1 per cent). Generally speaking, fewer respondents results in a greater margin of 'error' in the data. It is also worth noting that the confidence interval varies according to the proportion of respondents that select a particular response: the confidence interval for 50 per cent is the highest point on this curve. By way of comparison, if 10 per cent or 90 per cent of respondents select a particular response in this example, the confidence interval would be 2.9 percentage points.

² Confidence intervals express the likely 'margin of error' within a response to a particular question. For instance, 400 valid responses to the customer survey gives a confidence interval of 4.8 percentage points (ppts) at the 95 per cent confidence level (that is, if 50 per cent of respondents select a particular response to a question, we can be 95 per cent confident that the 'true' value across all area is somewhere between 45.9 and 54.1 per cent). Generally speaking, fewer respondents results in a greater margin of 'error' in the data. It is also worth noting that confidence intervals change within a dataset depending on the proportion or respondents that select a particular response. 50 per cent is the point at which, statistically, the highest confidence interval is recorded. By way of comparison, if 90 per cent or 10 per cent of respondents in the same dataset selected a particular response, the confidence interval would be 2.9 ppts

³ This is based on the number of people contacted by the survey company in order to achieve 400 responses (692).

⁴ There was no sample for volunteers as this group were not captured in the monitoring data. Instead, champions were asked to forward on the survey to volunteers that they worked with.

⁵ This number is greater than for the sum of those that responded as either champions or volunteers because a small number of respondents did not indicate the nature of their involvement with BESN

There is a risk of self-selection or non-response bias with the online surveys. In this instance, the main risk is that those who responded to the survey are likely to have been more engaged with BESN than those who did not. This need not necessarily mean that the findings regarding perceptions are more positive or negative than they would be across the whole population, but it could suggest that estimations of numbers engaged and outcomes achieved via those delivering BESN might be higher than for across the whole population. However, we did not have any data regarding those who did not complete the online survey and therefore cannot compare those that did with those that did not respond.

67 per cent of survey respondents (70 respondents) agreed to take part in an in-depth interview. This provided ample contacts from which to draw a balanced sample of participants for the qualitative interviews. Seeking to interview those who had completed the survey had two main advantages: knowing that the respondent was willing to be interviewed and using the interview to build on survey responses, enabling the researcher to gain a greater depth of insight. Although it was only possible to draw a sample of respondents to interview from those who had agreed to take part in an interview, the large number of survey respondents agreeing to be interviewed ensured that we were able to select a broadly representative sample to interview.

Telephone survey of workshop participants

It was only possible to follow up on the experiences of participants reached through the workshop format as contact details were not available for those who received advice through frontline workers. However the views of participants reached via both workshop and frontline worker routes were canvassed through the qualitative interviews.

Due to the vulnerable nature of participants and potential lack of access to technology, an online survey was deemed inappropriate. Instead, a specialist external sub-contractor with extensive experience of working with vulnerable individuals was commissioned to conduct a telephone survey of 400 participants (giving a confidence interval of around 4.8 ppts when 50 per cent of respondents select a particular option).

Issues regarding possible non-response bias were briefly discussed in Chapter 2 of the main report (Research Approach). To re-cap, respondents were 'screened' to see if they remembered taking part in BESN: 239 of the 692 people contacted by the survey company did not recall participating. These individuals were then excluded from the survey. One assumption would be that those that could remember taking part were more likely to have achieved outcomes as a result of participation in BESN than those who did not. As a result, it is possible that the findings from the consumer survey offer an over-estimation of outcomes across the whole population. However, we cannot be sure of this. What we do know is that the characteristics of respondents were reasonably well matched to those covered by the monitoring data, suggesting that the survey results are at least demographically representative of the population of participants. The difference between the characteristics of the monitoring data and the survey responses are shown in Tables A.2 and A.3, below.

Table A.2: Age segmentation of monitoring data and survey respondents

Age group	Monitoring data (%)	Survey respondents (%)
16-25	8	5.3
26-40	20.3	18.3
41-50	13.9	13.3
51-65	20.8	21.3
Over 65	37	39.3
Not recorded	-	2.8
Total	100	100

Table A.3: Key demographic variables of monitoring sample and survey respondents

Participants that...	Monitoring data (%)	Survey respondents (%)
Have a disability	26	28
Receive means-tested benefits	37	34
Have children under 16	26	24
Have access to gas	84	82
Have internet access at home	65	70
Have switched in the last two years	24	23

The surveys comprised of ten questions covering topics including how they came to participate in the workshop, their experience of the event, the advice received and crucially, a number of questions designed to elicit any changes in behaviour in relation to, *inter alia*, switching and energy efficiency that have occurred as a result of participation. Indeed, this survey has been critical in building a picture of the additionally of BESN by providing a clear indication of the actions participants have taken or intended to take as a direct result of their involvement.

Cleaning survey data

Each of the surveys was conducted using SNAP survey software, using (mostly) closed questions and automatic routing. As a result very little cleaning of this data was required. Nonetheless initial exploratory analysis of the dataset was carried out to ensure that data had been correctly recorded: in this instance, no further cleaning was required.

Consumers who took part in workshops were given a unique identifier in the monitoring data: this was seeded into the survey responses for consumers, which allowed for the monitoring data to be merged with the survey data to provide more detailed insight in to individual respondents.

Cleaning BESN monitoring data

DECC supplied Sheffield Hallam University with two Excel files containing feedback data from consumers and frontline workers for the periods November to December 2013 and January to March 2014. This was self-completed by participants at the workshops and frontline workers at

their training sessions, with not all those involved returning the forms. For workshop participants the completed forms are likely to represent those who took part in one to one advice sessions after the event.

The following process was applied to clean this data in preparation for analysis:

- The first step involved combining the data for each group of respondents into a single Excel file, with a spreadsheet for frontline workers and one for consumers. Any substantially incomplete responses (e.g. test responses in Survey Monkey) were removed at this stage of the analysis so as not to distort the results.
- Any inconsistencies in the way the data were inputted (e.g. 'gas' and 'Gas') were rectified. IP addresses and personal details (e.g. names, email addresses) were removed from the dataset to protect the identity of respondents.
- In the consumer dataset the disability descriptions were consolidated into a more manageable list (e.g. 'breast cancer' was recoded as 'cancer') and a separate variable was created for each disability, to allow for instances where respondents reported multiple disabilities.
- The names of frontline workers' and champions' organisations were checked and any inconsistencies in spelling were rectified (e.g. 'Community Lincs Sleaford' became 'Community Lincs').
- There were discrepancies in the way that frontline workers and champions classified their organisations (i.e. two respondents from the same organisation might describe the organisation differently). Where necessary, discrepancies were resolved by checking the organisation's website for clarification.
- The classification of organisations used on the monitoring feedback form was limited, so the data were recoded using an expanded list of categories (e.g. national charity, local charity, development trust etc.) in order to enable finer grain analysis. Where required, the recoding process was supported by checking the websites of the organisations concerned.
- A similar approach was then used to recode the consumer feedback data, to ensure that organisation names and classifications used in the two datasets were consistent.

Qualitative interviews with champions, volunteers and workshop participants

The following target numbers of qualitative interviews with champions, volunteers and workshop participants were agreed at the outset of the evaluation:

- 20 interviews with champions (target achieved)
- 15 interviews with volunteers (12 interviews completed)
- 40 interviews with workshop participants (target achieved)

These targets were agreed on the basis that they balanced the need to achieve a diverse sample that was as large as possible within the constraints of available resources. In most cases the target numbers of interviews was met with the exception of volunteers (12 were interviewed against a target of 15), where low survey response rates made it difficult to identify respondents.

Once the champion and workshop participant surveys had closed, samples were drawn from those agreeing to take part in an in-depth interview. Using the survey responses and the monitoring data, champions were selected for interview in order to ensure that the sample of interviewees reflected a range of different types of location (urban/rural, representation of all regions of Great Britain), the nature of the organisation they worked for (to ensure that each type of organisations funded through BESN was represented), its target groups (to ensure that across the sample we captured the experiences of those working with a range of different vulnerable groups) and their experiences of delivering BESN (including a mix of those who reported positive/negative experiences, particular barriers encountered etc. through the survey). Interviews lasted between 45 and 85 minutes and involved detailed discussion around:

- Motivations for involvement in BESN;
- Previous experience of energy advice;
- BESN training;
- Cascading training to volunteers and frontline workers;
- Delivering BESN workshops;
- Engaging vulnerable consumers in workshops;
- Securing action (in terms of switching and ECO referrals);
- Outcomes participants, champions themselves and the organisation;
- The future: plans for taking forward what they have learnt through BESN.

Due to the small number of volunteers who responded to the online survey, selection for interview was based on the willingness of the respondent to take part. Interviews with volunteers covered a similar range of topics to the interviews with champions.

Workshop participants were sampled predominantly according to their location, age, household composition, their experience of BESN and the outcomes that have flowed from taking part, as indicated by the survey. These sampling criteria ensured that the sample comprised a mix of participants in terms of their demographic characteristics, location and experience of BESN. Participants were also selected for interview on the basis that we had also interviewed the champion running the workshop they attended. Linking respondents in this way enabled us to compare the champion's and participant's perception of the same event and to explore connections between workshop delivery and the outcomes experienced by participants.

Interviews with frontline workers and their clients supported through BESN

Frontline workers were selected for interview on the basis of the same sampling criteria applied to champions. Additionally, efforts were made wherever possible to select those who had been trained by one of the champions interviewed in order to better understand the effectiveness of the BESN cascade model. A total of 20 in-depth interviews were conducted with frontline workers. This sample size was determined in line with the reasons outlined previously (balancing the need to achieve a diverse sample, as large as possible within the constraints of available resources). It was possible in 12 instances to link frontline workers to the champion that trained them.

The only way to access clients of frontline workers, supported through BESN was through the frontline workers themselves. To this end, each of the 20 frontline workers interviewed was asked to, with the prior permission of the client; put the researcher in contact with two clients supported through BESN. In practice this proved difficult, predominantly because many frontline workers did not have contact details for their clients or were unable to trace them. As a result of

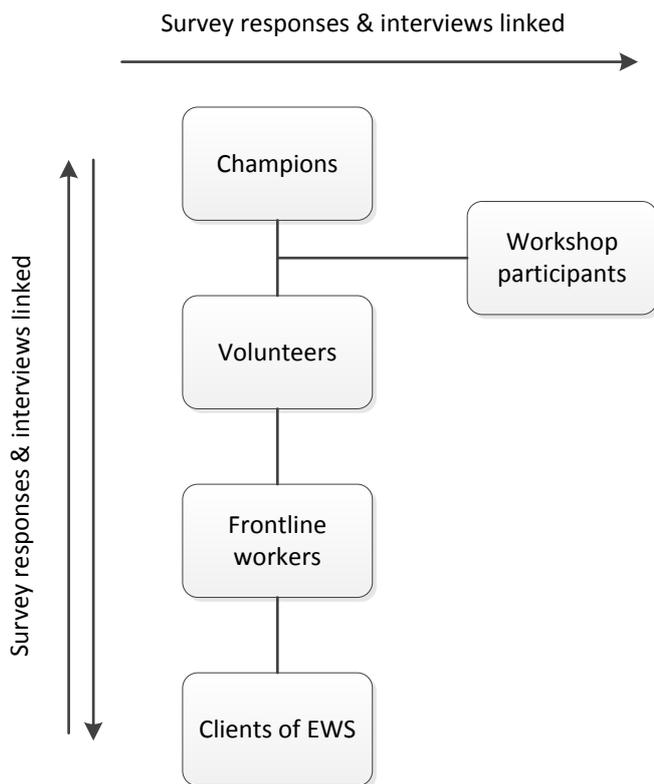
these difficulties only 25 (of an intended 40) interviews were completed. However, 25 remains a substantial number and the length and depth of these interviews ensures that the study team has access to good quality data in relation to these beneficiaries. Similar themes emerged from across these interviews building up a consistent evidence base that gave the research team confidence that this sample size was sufficient.

131 qualitative interviews were completed in total over the course of the evaluation (including the 7 stakeholder interviews with key DECC officials).

Linking respondents

A key objective of the evaluation was to understand the effectiveness of and additionality provided by the cascading model which sits at the heart of BESN whereby knowledge and expertise is transferred from NEA to champions who then pass it on to volunteers and frontline workers to enable them to deliver the initiative. In order to gain an appreciation of the merits, drawbacks and overall effectiveness of this approach, efforts have been made through the qualitative interviews and survey responses to gain detailed insights into the operation of the cascade model at each stage. In practice, this has involved attempting to, wherever possible, identify and interview the specific frontline workers trained by the champions and volunteers selected for interview and then proceeding to interview a participant supported by the frontline workers and if possible, another participant supported by the champion through a workshop. The following diagram summarises this approach.

Figure A.1: linking sets of respondents



Linking respondents

Due to the voluntary nature of participation, this linked approach was only possible in 12 cases. The findings from these 'sets' of results are reflected on further in chapters 3 to 6 of the main report. Additionally, three of these sets have been used to produce case studies highlighting a range of different approaches to the delivery of BESN and resulting outcomes, which can be found in Appendix 6 and also underpin some of the vignettes featured in the main report.

Appendix 3: Surveys

Online survey of champions and Volunteers

Background (ALL)		Options
1	In what capacity were you involved with the BESN project?	<ul style="list-style-type: none"> • Champion • Volunteer
2	What is the name of the organisation that you worked for during the BESN project?	OPEN
3	Which geographical area do you work in?	South East South West East Anglia East Midlands West Midlands London Yorkshire North East North West Scotland Wales
3	Did you work or volunteer for this organisation prior to your involvement in BESN?	Yes/No
4	Do you still work or volunteer for the organisation now that BESN is finished?	Yes/No
	Prior to your involvement in BESN did you provide energy advice part of your role?	Yes/No
Training (ALL)		
5	Who provided the training you received as part of the BESN project?	National Energy Action BESN Champion Don't know Other (specify)
6	Have you received any other training on energy issues outside of the BESN?	Yes (please specify)/No
	What was your main objective for taking part in the BESN training? (state one)	OPEN

Training (CHAMPIONS ONLY)		
7	How many volunteers did you provide training to?	NUMERICAL OPEN
To what extent would you agree or disagree with the following.... Before the BESN training that you received		
8	I understood the purpose of BESN	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
9	I had a good understanding of how to help clients switch energy provider/tariff	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
10	I had a good understanding of how to help clients access ECO support	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
11	I felt confident issuing advice on switching energy provider/tariff to clients	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
12	I felt confident issuing advice on ECO to clients	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
To what extent would you agree or disagree with the following statements? After my BESN training		
	The training met my main objective for taking part	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree

	The training met my expectations	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
13	I understood the purpose of BESN in order to effectively train volunteers	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
14	I had a sufficient understanding of switching energy provider/tariff to train volunteers and frontline workers	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
14	I had a sufficient understanding of switching energy provider/tariff to help clients to switch	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
15	I had a sufficient understanding of ECO support to train volunteers and frontline workers	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
	I had a sufficient understanding of ECO support to help clients access ECO	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
16	I felt confident providing training on switching energy provider/tariff to volunteers and frontline workers	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree

	I felt confident advising clients on switching energy provider/tariff	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
	I had access to the technology I needed to support clients to switch energy provider/tariff and make ECO referrals	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
17	I felt confident providing training on ECO to volunteers and frontline workers	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
	I felt confident advising clients on how to access ECO	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
18	I felt I had access to adequate supporting-information and training material to train volunteers and frontline workers	<ul style="list-style-type: none"> • Strongly agree • agree • neither agree nor disagree • strongly disagree
19	I learnt things from the training that I didn't previously know	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
	I found the training to be easy to understand and accessible	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree

20	<p>[If responded disagree to questions 13-19 above] Please specify the reasons for your answer? (tick 3)</p>	<ul style="list-style-type: none"> • The training assumed too much prior knowledge • There was not enough time to digest information • The training was poorly delivered. • Insufficient information given in training of switching process • Insufficient information given in training of ECO referral process • Insufficient information given in training of eligibility criteria for ECO • Insufficient information given in training of how switching may impact on other entitlements • Lack of access to supporting resources and guidance (e.g. detailed guidance documents) • Lack of ongoing support and guidance from Champion • Lack of ongoing support from supervisor • Other (please specify)
	<p>Are there any ways in which the training you received could have been improved?</p>	<p>OPEN</p>
	<p>BESN uses a cascading training model which involves champions like you being trained by National Energy Action and then passing their knowledge on to volunteers and frontline workers. To what extent do you agree that this is an effective way of training those delivering BESN?</p>	<ul style="list-style-type: none"> • Strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
	<p>If disagree, why?</p>	<p>OPEN</p>

TRAINING (VOLUNTEERS ONLY)

To what extent would you agree or disagree with the following statements?

Before receiving training from my BESN Champion

21	I understood the purpose of BESN	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
14	I had a sufficient understanding of switching energy provider/tariff to help clients to switch	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
23	I had a good understanding of how to help clients access ECO support	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
24	I felt confident issuing advice on switching energy provider/tariff to clients	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
25	I felt confident issuing advice on ECO to clients	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
<p>To what extent would you agree or disagree with the following statements? After my BESN training</p>		
	The training met my main objectives for taking part	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree

	The training met my expectations	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
26	I understood the purpose of BESN	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
27	I had a sufficient understanding of switching energy provider/tariff to help clients to switch	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
28	I had sufficient understanding of ECO support to help clients access ECO	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
29	I felt confident advising clients on switching energy provider/tariff	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
30	I felt confident advising clients on how to access ECO	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
31	I learnt things from the training that I didn't previously know	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree

	I found the training to be easy to understand and accessible	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
33	To what extent do you agree that your Champion gave you the information and support you needed to be able to advise participants on energy issues?	<ul style="list-style-type: none"> • Strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
32	[If responded disagree to questions 21- 26 above] What are the main reasons for this? (tick all that apply)	<ul style="list-style-type: none"> • The training assumed too much prior knowledge • There was not enough time to digest information • Training poorly delivered. • Insufficient information given in training of switching process • Insufficient information given in training of ECO referral process • Insufficient information given in training of eligibility criteria for ECO • Insufficient information given in training of how switching may impact on other entitlements • Lack of access to supporting resources and guidance (e.g. detailed guidance documents) • Lack of ongoing support and guidance from Champion • Other (please specify)
	Are there any ways in which the training you received could have been improved?	OPEN

	BESN uses a cascading training model which involves champions being trained by National Energy Action and then passing their knowledge on to volunteers like you and frontline workers. To what extent do you agree that this is an effective way of training volunteers?	<ul style="list-style-type: none"> • Strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
	If disagree, why?	OPEN

Volunteer recruitment (CHAMPIONS ONLY)		Options
34	How easy did you find it to recruit volunteers?	<ul style="list-style-type: none"> • Very easy, • quite easy, • Neither easy nor difficult • quite difficult, • very difficult
35	Which of the following best describe the MAIN methods you used to recruit volunteers (Tick up to two)	<ul style="list-style-type: none"> • using an existing pool of volunteers registered with the organisation • using existing contacts of the organisation • advertising and publicity • word of mouth • through partner organisation and networks • through professional or personal contacts • other (please specify)
Getting involved with BESN (VOLUNTEERS ONLY)		
36	What best describes how you heard about BESN? (tick one)	<ul style="list-style-type: none"> • I am a regular volunteer for the organisation • Through a volunteering agency • I responded to a request for volunteers • I was asked to volunteer by the Champion • I was asked to volunteer by another volunteer • Other (please specify)
37	What were your primary motivations for taking part in the BESN training? (tick 2)	<ul style="list-style-type: none"> • to help vulnerable consumers with energy issues • improve my own understanding of energy issues • to personally develop new skills and knowledge • to top up/refresh existing expertise • improve my prospects for

		<ul style="list-style-type: none"> • employment • interested to learn more about energy issues • to give something back to the community • don't know • other (please specify)
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Getting involved with BESN (ALL)

38	What do you feel have been the main benefits from your involvement in BESN? (select up to 3 of the following statements)	<ul style="list-style-type: none"> • I understand more about switching • I understand more about energy efficiency • I feel more confident in discussing energy issues with people • I enjoy my work more • I have switched energy providers and saved money • I have investigated or undertaken energy efficiency improvements to my home • I have introduced energy expertise to the organisation I work for • Other (please specify) • I have received no benefits
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Getting involved with BESN (CHAMPIONS ONLY)

39	Do you feel that your organisation has benefitted from BESN in any of the following ways? (Tick all that apply)	<ul style="list-style-type: none"> • Improved skills and knowledge of staff regarding energy issues • Able to help new clients • Helped you provided a better service to clients • Publicised your organisation and the services it provides • Introduced energy expertise to the organisation • Organisation has not benefitted • Other (please specify) • I have received no benefits
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Engaging clients (CHAMPIONS ONLY)

40	Which of the following vulnerable groups do you normally work with? (tick all that apply)	<p>those:</p> <ul style="list-style-type: none"> • facing financial hardship/in receipt of benefits • in poor physical health or disabled • with mental health issues • with low levels of literacy • who are geographically isolated • older people • families with young children • those who are off the gas grid • those who struggle to pay energy bills/heat home less than would like • those on a pre-payment meter • those with English as a second language • those without access to the internet • Other • Don't know
41	Which of the following groups has the organisation successfully reached through BESN? (tick all that apply).	<ul style="list-style-type: none"> • facing financial hardship/in receipt of benefits • in poor physical health or disabled • with mental health issues • with low levels of literacy • who are geographically isolated • older people • families with young children • those who are off the gas grid • those who struggle to pay energy bills/heat home less than would like • those on a pre-payment meter • those with English as a second language • those without access to the internet • Other • Don't know

Engaging clients (ALL)		
42	Of the following groups, were there any that you found it difficult to engage in BESN activities? Please select all that apply from the following.	<ul style="list-style-type: none"> • facing financial hardship/in receipt of benefits • in poor physical health or disabled • with mental health issues • with low levels of literacy • who are geographically isolated • older people • families with young children • those who are off the gas grid • those who struggle to pay energy bills/heat home less than would like • those on a pre-payment meter • those with English as a second language • those without access to the internet • Other • Don't know
43	What best describes your approach to recruiting participants to take part in BESN events? (Tick all that apply)	<ul style="list-style-type: none"> • Leaflet / Flyer • Local newspaper or newsletter • Through community groups (please specify) • Through a friend / relative • Through a local organisation's website (please specify) • Through a housing / council officer • Through a local advice organisation (e.g. CAB) (please specify) • using existing contacts of the organisation • word of mouth • (please specify) • through volunteers' personal contacts • 'piggybacking' on existing events • other (please specify) • don't know

44	Which of the above approaches did you find most effective? (Tick up to two)	<ul style="list-style-type: none"> • Leaflet / Flyer • Local newspaper or newsletter • Through community groups (please specify) • Through a friend / relative • Through a local organisation's website (please specify) • Through a housing / council officer • Through a local advice organisation (e.g. CAB) (please specify) • using existing contacts of the organisation • word of mouth • through volunteers' personal contacts • 'piggybacking' on existing events • other (please specify) • don't know
45	How easy was it to recruit participants for BESN workshops?	<ul style="list-style-type: none"> • very easy • quite easy • neither easy nor difficult • difficult • very difficult
46	[if answered difficult or very difficult] What best describes the reasons why it was difficult to recruit participants? (tick all that apply)	<ul style="list-style-type: none"> • Lack of interest in energy issues • Lack of or poorly targeted publicity for the event • People have more pressing concerns than energy • Lack of familiarity with the organisation running the event • Lack of trust in the organisation running the event • Other (please specify)
Delivery (ALL)		
48	What best describes the approaches you took to relay energy information to vulnerable consumers? (TICK ALL THAT APPLY)	<ul style="list-style-type: none"> • Presentation only, • Presentation with opportunities to ask questions, • Workshop (presentation and one-to-one discussion),

		<ul style="list-style-type: none"> • One-to-one discussions with individuals • Presentation followed up with separate one-to-one appointments • Other (please specify)
49	To what extent do you agree that participants trusted the energy advice they received from you?	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
50	Were there any energy related issues that participants' have wanted advice or support on that you were unable to help with because they were outside the scope of the BESN training?	Yes/No
	If yes, please state issue	OPEN
51	How often did you refer participants on to other advice agencies for further support with energy issues following the advice you gave?	<ul style="list-style-type: none"> • very often • quite often • sometimes • never
52	If you did refer participants on to other agencies, please specify who.	OPEN
53	How often did you feel you were unable to find a solution to participants' concerns/problems?	<ul style="list-style-type: none"> • very often • quite often • sometimes • never
54	How often did you need to make further appointments with participants outside of the event in order to address their issues in full?	<ul style="list-style-type: none"> • very often • quite often • sometimes • never
55	On a scale of 1 to 5 to what extent do you feel you could you have delivered the same energy advice and support to participants without BESN training?	<p>1= could have delivered all the same support</p> <p>2= could have delivered most of the same support</p> <p>3= could have delivered some of the same support</p> <p>4= could not deliver most of the same support</p> <p>5= could not deliver any of the same support</p>

Online survey of frontline workers

Background		Options
1	Which of the following best describes your job?	advice worker (e.g. CAB) debt worker housing officer healthcare provider social worker other (please specify)
2	Which geographical area do you work in?	South East South West East Anglia East Midlands West Midlands London Yorkshire North East North West Scotland Wales
3	What is the name of the organisation that you work for?	OPEN
4	Which of the following vulnerable groups do you normally work with? (tick all that apply)	those: <ul style="list-style-type: none"> • facing financial hardship/in receipt of benefits • in poor physical health or disabled • with mental health issues • with low levels of literacy • who are geographically isolated • older people • families with young children • those who are off the gas grid • those who struggle to pay energy bills/heat home less than would like • those on a pre-payment meter • those with English as a second language • those without access to the internet

		<ul style="list-style-type: none"> • Other • Don't know
5	Before your involvement in BESN was energy advice part of the service you offered to clients?	Yes/No
6	Are you a paid member of staff?	Yes/No
7	How long have you worked for this organisation?	OPEN - numerical

Engagement and Outcomes		Options
8	Who provided the training you received as part of the BESN project? (please name organisation and individuals if possible)	OPEN
9	What were your primary motivations for taking part in the BESN training? (tick 2)	<ul style="list-style-type: none"> • to provide support to a broader range of clients • to provide more detailed advice to existing clients on energy issues • to introduce energy expertise to the organisation • improve my own understanding of energy issues as this is of particular concern for clients • to top up or refresh existing knowledge or skills • to personally develop new skills and knowledge • improve my prospects for employment • encouraged/required by employer • interested to learn more about energy issues • don't know • other (please specify)
10	To what extent did the training meet your objectives for taking part?	<ul style="list-style-type: none"> • Fully • Partially • Not at all
11	Why was this?	OPEN
12	What do you feel have been the main benefits from your involvement in BESN? (select up to 3 of the following statements)	<ul style="list-style-type: none"> • I am better able to help clients with energy issues • I understand more about switching • I understand more about energy efficiency

		<ul style="list-style-type: none"> • I feel more confident in discussing energy issues with clients • I enjoy my work more • I have switched energy providers and saved money • I have investigated or undertaken energy efficiency improvements to my home • introduced energy expertise to the organisation • Other (please specify) • I have received no benefits
13	Which of the following groups has the organisation successfully reached through BESN?	<ul style="list-style-type: none"> • facing financial hardship/in receipt of benefits • in poor physical health or disabled • with mental health issues • with low levels of literacy • who are geographically isolated • older people • families with young children • those who are off the gas grid • those who struggle to pay energy bills/heat home less than would like • those on a pre-payment meter • those with English as a second language • those without access to the internet • Other • Don't know
14	Of the following groups, were there any that you found it difficult to engage in BESN activities? Please select all that apply from the following.	<ul style="list-style-type: none"> • facing financial hardship/in receipt of benefits • in poor physical health or disabled • with mental health issues • with low levels of literacy • who are geographically isolated • older people • families with young children

		<ul style="list-style-type: none"> • those who are off the gas grid • those who struggle to pay energy bills/heat home less than would like • those on a pre-payment meter • those with English as a second language • those without access to the internet • Other • Don't know
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Delivery of outcomes		Options
15	Have you received any other training on energy issues outside of the BESN?	Yes (please specify)/No
To what extent would you agree or disagree with the following statements? Before my involvement in BESN		
16	I understood the purpose of BESN	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
17	I had a good understanding of how to help clients switch energy provider/tariff	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
18	I had a good understanding of how to help clients access ECO support	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
19	I felt confident issuing advice on switching energy tariffs to clients	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree

20	I felt confident issuing advice on ECO to clients	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
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To what extent would you agree or disagree with the following statements?

After my BESN training

21	I understood the purpose of BESN	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
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22	I had a good understanding of how to help clients switch energy provider/tariff	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
23	I had a good understanding of how to help clients access ECO support	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
24	I felt confident issuing advice on switching energy tariffs to clients	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
25	I felt confident issuing advice on ECO to clients	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree

26	I learnt things from the training that I didn't previously know	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
27	[If responded disagree to questions 21- 26 above] What are the main reasons for this? (tick 3)	<ul style="list-style-type: none"> • Inadequate amount of training • Insufficient information given in training of energy market issues • Insufficient information given in training of switching process • Insufficient information given in training of ECO referral process • Insufficient information given in training of eligibility criteria for ECO • Insufficient information given in training of how switching may impact on other entitlements • Lack of access to supporting resources and guidance (e.g. detailed guidance documents) • Lack of ongoing support and guidance from champions • Lack of ongoing support from supervisor • Other (please specify)
28	Following your BESN training how many of your clients have you engaged on the topics you focused on in the training?	1-5 6-10, 11-20 21-50 51+
29	What best describes your approach to delivering advice through BESN? (Tick all that apply)	<ul style="list-style-type: none"> • delivering advice at your premises on a walk in basis • delivering advice at your premises by appointment • delivering advice in individuals' homes as a separate meeting • delivering advice in individuals' homes as part of a meeting about other issues • delivering advice at your organisational office as part of a meeting about other issues

		<ul style="list-style-type: none"> • delivering advice at a community centre (or other community building) as a standalone energy drop in service • delivering advice at a community centre (or other community building) as a part of another service/event • other (please specify) • don't know
30	To what extent do you agree that you were successful in engaging clients in BESN?	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
31	How easy was it to engage clients on energy issues?	<ul style="list-style-type: none"> • very easy • quite easy • difficult • very difficult • neither easy nor difficult
32	[if answered difficult or very difficult] What best describes the reasons why it was difficult to engage service users? (tick all that apply)	<ul style="list-style-type: none"> • Lack of interest in energy issues • Lack of or poorly targeted publicity for the event • Consumers have more pressing concerns • Lack of familiarity with the organisation running the event • Lack of trust in the organisation running the event • Other (please specify)
33	What did you understand to be participants' primary motivations for engaging with advice on energy issues? (tick up to two)	<ul style="list-style-type: none"> • they were unhappy with the customer service I received from my existing energy supplier(s) • their energy bills were too high • their house was too cold • they were concerned about wasting energy in my home • they were concerned about the environmental impact of my energy usage • they were concerned about rising energy prices

		<ul style="list-style-type: none"> • other (please specify) • don't know/can't remember
34	Were there any energy related issues that clients' have wanted advice or support on that you were unable to help with because they were outside the scope of the BESN training?	Yes/No (if yes, please state issue: OPEN RESPONSE)
35	To what extent do you agree that clients trusted or distrusted the energy advice they received from you?	<ul style="list-style-type: none"> • strongly agree • agree • neither agree nor disagree • disagree • strongly disagree
36	How often did you refer clients on to other advice agencies for further support with energy issues following the advice you gave?	<ul style="list-style-type: none"> • very often • quite often • sometimes • never
37	If you did refer clients on to other agencies, please specify who.	OPEN
38	How often did you feel you were unable to find a solution to clients' concerns/problems?	<ul style="list-style-type: none"> • very often • quite often • sometimes • never
39	On a scale of 1 to 5 To what extent do you feel you could you have delivered the same energy advice and support without BESN training?	1= could have delivered all the same support 2= could have delivered most of the same support 3= could have delivered some of the same support 4= unable to deliver most of the same support 5= unable to deliver all the same support

Legacy		Options
40	Do you feel you need further training regarding energy market and energy efficiency issues in order to effectively support your clients?	Yes/No
41	Would you like to take part in the delivery of future rounds of BESN?	Yes/No
42	[If no] which of the following options best describe the reason for this?	<ul style="list-style-type: none"> • I did not learn anything new from the training I received

		<ul style="list-style-type: none"> • I can gain the same knowledge and information from elsewhere • I did not feel supported by the Champion • I cannot spare the time to take part • energy issues are not important to our clients • I don't think that energy issues are relevant to my role • there is sufficient knowledge within the organisation already • the priorities of my organisation have changed • Other (please specify)
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Thank you for taking the time to complete this survey. We may wish to contact some people who took part in the survey at a later date for a more in-depth discussion about their involvement with BESN. If you are NOT happy for us to do so, please tick here...

NAME:

PHONE NUMBER:

EMAIL ADDRESS:

How would you prefer us to contact you?.....

Training frontline workers (ALL)		Options
56	Did you provide training to frontline workers?	Yes / No [if no, route to next section]
59	Who was responsible for the delivery of training to frontline workers?	<ul style="list-style-type: none"> • Champion only • Individual volunteers • Pairs or groups of volunteers • champions and volunteers
60	What best describes your MAIN approaches to recruiting frontline workers to train? (tick up to two)	<ul style="list-style-type: none"> • targeting those within your organisation • through partner organisations and networks • using existing contacts of the organisation • advertising and publicity (please specify) • word of mouth • through professional networks • through personal contacts • Other (please specify)

61	How easy was it to recruit frontline workers to train?	<ul style="list-style-type: none"> • very easy • quite easy • neither easy nor difficult • difficult • very difficult
62	[if difficult] which of the following options best describes the reasons why it was difficult to recruit frontline workers to train? (Tick all that apply).	<ul style="list-style-type: none"> • Lack of interest in energy issues • Too high a workload already • Lack of or poorly targeted publicity • Energy issues not a priority for the organisations approached • Lack of familiarity with the organisation running the training • Lack of trust in the organisation running the training • other (please specify) • don't know
63	Were there any issues that frontline workers wanted advice or support on that you were unable to help with? (please state)	<ul style="list-style-type: none"> • Yes/ No (If yes, please specify)
Future participation (ALL)		
64	Are you interested in taking part in the delivery of future rounds of BESN?	Yes/No
65	[If no] which of the following options best describe the reason for this?	<ul style="list-style-type: none"> • I did not learn anything new from the training I received • I did not enjoy the experience • I did not feel supported by the Champion • I cannot spare the time • I am now in employment elsewhere • I am not interested in energy issues • Other (please specify)

Thank you for taking the time to complete this survey. We may wish to contact some people who took part in the survey at a later date for a more in-depth discussion about their involvement with BESN. If you are NOT happy for us to do so, please tick here...

NAME:

PHONE NUMBER:

EMAIL ADDRESS:

How would you prefer us to contact you?.....

Telephone survey of workshop participants

Introduction

- Viewpoint to introduce themselves (Viewpoint has standard text for this).
- In [MONTH] you attended a session where you were given advice about switching energy supplier and how to save energy in the home by someone from [ORGANISATION e.g. Dacorum CAB].
- Do you remember taking part in this event? [If YES, proceed] [If NO, provide more info using available monitoring data]: offer name of volunteer if available.
- **If they still do not recall the event then DO NOT proceed.**
- The advice session you attended was funded by the Big Energy Saving Network scheme run by the government. The government have commissioned Sheffield Hallam University to carry out research to find out how well the scheme worked and how it might be improved in future. As part of this research we are contacting people who took part to hear about their experiences of being involved.
- Issue assurances of confidentiality and anonymity and stress that they can talk freely and frankly about their experiences before seeking consent to continue.
- Can you spare 10 minutes to take part in a survey about your experience of attending the session?

Section 1: Engagement

The following questions are about why you attended the BESN session

How did you first find out about the energy advice event? (TICK ONE)	Leaflet / Flyer
	Local newspaper or newsletter
	Through a community group that I am part of (please specify)
	Through a friend / relative
	Through a local organisation's website (please specify)
	Through a housing / council officer
	Through a local advice organisation (e.g. CAB) (please specify)
	Other (please specify)
	Don't Know / Can't remember
	Refused
Why did you decide to attend the session? (TICK ALL THAT APPLY) FREE CODE	I was already going to attend an existing group's meeting
	I wanted information about how to save money on energy
	I wanted information on how to switch energy suppliers
	I wanted to know about the cheapest energy suppliers
	I wanted to know how to change the way I pay my bills
	I wanted to know about how to use less energy in my home
	I wanted to know about grants or loans I might be eligible for to help keep my house warm
	Someone came to my home
	I had no specific reason for attending
	Other (please specify)
	Don't know / Can't remember
Refused	
What was your biggest energy concern prior to attending the event? (FREE CODE?)	I was unhappy with the customer service I received from my existing energy supplier(s)
	My energy bills were too high
	My house was too cold
	I was concerned about wasting energy in my home
	I was concerned about the environmental impact of my energy usage
	I was concerned about rising energy prices
	No concerns
	Other (please specify)
	Don't know / Can't remember
	Refused

Section 2: Event experience and advice

The following questions are about what you did at the BESN session you attended

What advice did you receive at the event, or in a one-to-one discussion with a BESN advisor (TICK ALL THAT APPLY)	How to switch energy supplier
	Information about the benefits of switching energy suppliers
	Information about which energy supplier would be best or cheapest for me
	Advice about how to use less energy in the home
	Information about different ways to pay my energy bills
	Information about what additional financial help I might be eligible for to help heat my home
	Information about how switching might affect other support you are eligible for (e.g. Warm Homes Discount)
	Other (please specify)
	Don't know / can't remember
	Refused
Did you find the advice and information you received easy to understand?	Yes, all of it / Yes, most of it / Some of it / None of it
Is there anything that you would have liked to have received advice or information about that you didn't? (FREE CODE?)	Information about how to save money on my energy bills
	Information on how to switch energy suppliers
	What the cheapest/best energy tariffs for me are
	How to use less energy in the home
	Information about what additional financial help I might be eligible for, to help me heat my home
	Environmental impact of energy use
	How to reduce my overall carbon footprint
	Other (please specify)
	I received everything I wanted
	Don't know / can't remember
	Refused

BEFORE YOU ATTENDED THE EVENT had you received support or advice on household energy from any other organisations? (if not sure, PROMPT: for example, Citizens Advice Bureau, Energy Savings Trust, local council, housing provider/landlord, community group)	Yes/No
Did the BIG ENERGY SAVINGS NETWORK ADVISOR refer you on to any other organisations for further advice or support?	Yes/No
Do you think you could have received the same advice and assistance that you received through the Big Energy Saving Network from somewhere else?	Yes/No

Section 3: Outcomes

The following questions are about what you got out of the BESN session you attended

To what extent do you agree with the following statements?

Since I attended the BESN event....

I have a better understanding of the benefits of switching suppliers	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree
I have a better understanding of how to switch energy supplier	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree
I have a better understanding of how to access energy saving measures ,e.g. new boiler or insulation for example through the Energy Company Obligation	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree
I am more likely to switch energy supplier in future	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree
I feel more confident in dealing with energy suppliers	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree

I know more about how to keep my home warm	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree
I know more about how to reduce energy use in my home	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree
I am more conscious about how much energy I use in my home	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree
I know where to go for energy advice in future	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree

- For each of the following activities, please tell me if you have either:
- done this prior to being involved with BESN
- thought about doing it previously
- planned to do it following the BESN session or
- done it following the session.

(REITERATE OPTIONS WHEN YOU READ OUT EACH ACTIVITY) (TICK ALL THAT APPLY)

	Thought about prior to BESN event	Done prior to BESN event	Planned to following the BESN event	Done following the BESN event
Contacted my energy supplier to discuss my current situation	Yes/No/DK	Yes/No/DK	Yes/No/DK	Yes/No/DK
Contacted the energy saving Advice Service to discuss my current situation	Yes/No/DK	Yes/No/DK	Yes/No/DK	Yes/No/DK
Switched energy supplier	Yes/No/DK	Yes/No/DK	Yes/No/DK	Yes/No/DK
sought advice on how to keep my home warm	Yes/No/DK	Yes/No/DK	Yes/No/DK	Yes/No/DK
Organised an energy assessment of my home (through ECO or Green Deal)	Yes/No/DK	Yes/No/DK	Yes/No/DK	Yes/No/DK
Apply for other grant / loan to help with energy bills [please specify]	Yes/No/DK	Yes/No/DK	Yes/No/DK	Yes/No/DK
Taken any steps to save energy within the home (e.g. replacing lighting with more energy efficient ones;-;turning off lights; not leaving things on standby)	Yes/No/DK	Yes/No/DK	Yes/No/DK	Yes/No/DK
Install any energy efficiency measures (e.g. insulation; new boiler;	Yes/No/DK	Yes/No/DK	Yes/No/DK	Yes/No/DK

As a result of your involvement with BESN to what extent do you agree that.....

...your home is easier to keep warm?	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree
...you now spend less on energy for your home	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree
as a result of your involvement with BESN do you feel less stressed, happier, or more satisfied with your life?	<ul style="list-style-type: none"> • Strongly agree • Agree • Neither agree nor disagree • Disagree • Strongly disagree

Section 4: Background information

I'd now like to ask a few questions about your own circumstances. This helps us to understand who took part in the project

What is your gender? [may not need to read this out – but please record] (TICK ONE)	Male
	Female

How would you describe your ethnicity? (TICK ONE)	White British
	White Other
	Mixed: White and Black Caribbean / White and Black African / White and Asian
	Asian or Asian British
	Black or Black British: Caribbean / Black British: African
	Chinese
	Any Other Ethnic Group (please specify)

<p>Are you currently receiving any of the following benefits?</p> <ul style="list-style-type: none"> • Income support • Jobseeker's allowance • Incapacity benefit or severe disablement allowance • Disability Living Allowance • Personal Independence Payments (PIPs) • Employment and Support Allowance (ESA) • Council Tax Benefit • Free school meals • Universal Credit 	<p>Yes / No / DK / refused</p>
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<p>What was the total income of your household in the last 12 months, before any deductions for tax, etc.? (TICK ONE)</p>	<p>under £10,000</p>
	<p>£10,000 - £16,000</p>
	<p>£16,000 – £19,999</p>
	<p>£20,000 - £29,999</p>
	<p>£30,000 - £49,999</p>
	<p>£50,000 - £100,000</p>
	<p>over £100,000</p>
	<p>Don't Know</p>
<p>Refused</p>	

<p>In which of these ways do you occupy your home? (TICK ONE)</p>	<p>Own it outright</p>
	<p>Own it with a mortgage or loan</p>
	<p>Pay part rent and part mortgage (shared ownership)</p>
	<p>Rent it from the council or housing association</p>
	<p>Rent if from a private landlord</p>
	<p>Live here rent-free (including rent-free in relative's/ friend's property; excluding squatting)</p>

Appendix 4: Topic guides

Interviews with champions

Information for participants

Thank you for agreeing to be interviewed today. I'm a researcher working for Sheffield Hallam University and we are doing some research on behalf of the Department of Energy and Climate Change, who fund this project. They want to find out how well the Big Energy Saving Network project worked and are interested in hearing about your experiences of delivering it.

Everything you tell me about yourself or anyone else will be treated in complete confidence and will not be passed to any other organisation. We will not use your name or any personal details in any of the reports we write and we will not we pass them on to any other organisation.

If I ask you anything that you would rather not answer, please say so and we can move on to another topic.

I'd like to record the interview so that I'm not scribbling all the way through the interview. The audio file will be stored securely and is only accessible to members of the research team. Do you consent to me recording the interview?

1. Background:

Can you tell me a bit about the organisation you work for and the role you held at the time of receiving BESN training? [establish type of organisation i.e. charity, community development trust etc; what are the aims of the organisation? who does it work with? i.e. which types of vulnerable groups].

Is your current role any different to the one held at the time you received BESN training? [If so, establish when and how role has changed- are any changes related to BESN?]

[If not already covered] **Prior to your involvement in BESN was energy advice part of the service provided by your organisation?**

How much did you know about energy issues prior to getting involved in BESN?

Probe:

- If so, was it part of the mainstream service or part of a standalone project or separate initiative?
- Is it ongoing?
- Who held the expertise?
- What aspects of energy advice were covered?
- How was the respondent involved?
- How does this service compare to BESN?

Have you ever delivered training on energy issues to those inside or outside your organisation prior to BESN? [If so, when and in what scenario, who to? Did they feel confident in doing this? Any experience of training on any other topic?]

[If provided energy advice prior to BESN] how confident did you feel in doing this? [probe: how well informed did they feel? where did they get their information from?]

2. Getting involved with BESN:

What do you understand to be the main aims of BESN? [probe: understanding of what it's trying to achieve. Are these the right aims in their view and would they add additional aims?]

How did you first hear about BESN? [Invitation, through manager or colleague, word of mouth, advert, through own connections etc.]

Can you tell me a bit more about how you became BESN Champion within your organisation? [Were they nominated or did they volunteer? what was the organisation looking for in a Champion? was it something they were keen to be involved in?]

[If not already covered] **Why did you decide to get involved?** [required to, asked to by a colleague, want to expand skills/development opportunity, respond to a training need, respond better to clients' energy needs, increase in demand for energy advice etc. distinguish between individual and organisational motivations]

Did anybody else in your organisation take part in BESN? [probe: if so, establish the respective roles of each participant in delivering BESN. Did respondent provide training to them?]

3. BESN training:

These questions are about the Champion's experience of the BESN training they received from National Energy Action (NEA).

What were the main things you hoped to find out about through the training? [probe: why these things? linked to consumer needs?]

Were these things covered in the training you received from NEA?

Which aspects of the training did you find most useful?

What did you learn through the training that you didn't previously know? [Probe: what has been the net additional impact of the training, i.e. what new knowledge and skills have been gained? could they have gained this knowledge/skills anywhere else? If so, where and why did they choose to take part in BESN if this is the case?]

Do you think the training you received gave you what you needed to deliver advice on switching energy providers/tariffs to workshop participants? [probe: if not, why? what was missing?]

And what about ECO, did the training give you what you needed to be able to explain this to workshop participants and complete referrals if appropriate? [Probe: if not, why? what was missing?]

Do you have any suggestions for how the training could be improved in future?

Did you feel that you worked effectively with your volunteers as a team? [why/why not?]

4. Passing training on:

Who have you passed your training on to through BESN? [volunteers within organisation, volunteers outside of organisation, frontline workers etc. Formal or informal cascading?]

As a result of the training you received from NEA, how confident did you feel in providing training to volunteers and frontline workers on energy issues? [probe: if not confident, what factors are behind this- individual, organisational or lack of knowledge etc.]

Why did you decide to target these groups or individuals for BESN training and how did you go about recruiting them? [Did they go with the easiest to access i.e. colleagues, existing associates etc. or think more strategically about who was best placed to reach the target group?]

Overall, do you think that the 'cascading' model around which BESN is based is an effective way of delivering the initiative? [probe: why? why not? what are the alternatives, in their view]

5. Engaging participants in workshop events:

This section is about understanding the different approaches that champions have taken to identifying vulnerable participants suitable to receive energy advice through BESN and engaging them in workshop events. The aim of these questions is to establish the variety of different approaches adopted and what works best for which groups and also whether champions endeavoured to deliver advice to genuinely hard to reach groups or opted for 'low hanging fruit'.

Can you explain your approach to delivering BESN workshops? [prompt: 'piggybacking' or convened for BESN purposes? How publicised? How recruited? etc. Did approach vary between events? why?]

How did the BESN advice sessions that you were involved in running go? [Probe: make-up of the audience? what was their level of knowledge at the outset?]

Was the advice you gave well received? [why/why not?]

To what extent do you think you are trusted by those you have advised through BESN? [Were they already in a trusted position prior to BESN? why trusted? what impact does this have on their ability to engage clients and secure action?]

In your experience, what works best in terms of encouraging vulnerable groups to engage with the BESN workshop events you have run? [encourage to highlight best practice, how has this knowledge been gained? what worked in terms of a) getting them there and b) keeping them engaged once there?]

How easy has it been to engage vulnerable clients with the events? [probe: what other issues seen as higher priority? do the workshops respond to a clear need/demand for energy advice or does the workshop prompt consideration of energy issues?]

Have you found that different approaches are required for engaging different types of vulnerable individuals in BESN? [Probe: what works for who and why?]

Are there particular groups of vulnerable individuals that the workshop format works well for? [probe: which groups and why?]

And, are there any it doesn't work so well for? [probe: which groups and why? particularly explore suitability for the disabled and those with chronic illness/mobility issues and those who work during the daytime]

What are the most common energy issues that workshop participants raise? [probe: debt, cold homes, poor service etc. Expand on survey results- more detail of nature of issues]

Have the BESN workshops you have been involved with attracted people that are outside of the target group of vulnerable consumers? [probe: if so what sort of people? and how has this come about? Trying to establish whether people outside of the target group have benefitted]

After the workshop, is there any follow up contact to provide further advice and support to clients? [probe: if so, what's the purpose of this? switching support? further advice? and what form does it take? home visits, phone call etc]

If yes, was this follow up contact effective in securing action in terms of switching tariffs or providers and/or ECO referrals? [why/why not?]

Has taking part in BESN enabled you to reach and support vulnerable groups that you have previously been unable to help? [Probe: which groups, why previously unable to help and how has BESN addressed this?]

Have you encountered any clients that you weren't able to help with the energy issues they raised? [probe: what was the nature of their issue and what were the barriers to addressing it? explore links to the training and ongoing support available. What advice and support were they able to draw upon?]

6. Securing action:

This section is about establishing what works in terms of encouraging clients to take action to get the best energy deal and what barriers exist. BESN monitoring data suggested that a relatively small number of BESN participants decided to switch tariffs or energy provider or complete a referral for ECO on the day of the workshop event. Most deferred the decision until later.

What was your experience of trying to get clients to switch or change tariffs on the day of the workshop event?

Probe:

- Is this something they tried to do? why/why not?
- What were the barriers? i.e. need to check with a partner, didn't have the info needed on the day? Obstacles such as energy debt? Phone/Internet access?
- Did any clients switch- how did this come about and what led to this action? Try to unpick decision making process and role that respondent played in it.
- Did the respondent have the knowledge resources they needed to help the client take action?
- To what extent, in their view, is the decision not to switch based on an informed choice to stay on current tariff?
- Did follow up action play any role in encouraging action after the event? why?
- Is there a certain type of client that's more likely to take this action?

What was your experience of trying to get clients to complete an ECO referral on the day you advised them? [repeat probes above]

7. Outcomes for Champion:

This section is about understanding the ways in which champions may have benefitted both directly and indirectly from their participation in BESN and whether these benefitted could have been accrued outside of BESN.

How do you feel you have benefitted from your involvement in BESN?

Probe for:

- **'hard' outcomes** e.g. gaining energy expertise through training; moving into a new role? How long are the hard outcomes identified likely to last? Gaining new clients? applied knowledge gained to own situation by switching or making energy efficiency improvements?
- **'softer' outcomes** e.g. feeling more prepared, confident about giving energy advice? Feeling more employable? Feeling like a more informed consumer?

Do you think you would have experienced any of these benefits anyway without taking part in BESN? [through other training or initiatives, for example]

Did you experience any downsides to your involvement in BESN?

8. Outcomes for the organisation:

This section is about understanding the Champion's perception of the ways in which the organisation they work for may have benefitted both directly and indirectly from their participation in BESN and whether these benefitted could have been accrued outside of BESN.

Do you think the organisation you work for has benefitted from your involvement in BESN? Why?

Probe for:

- **'hard' outcomes** e.g. more clients, new clients, grant funding, new contracts etc.
- **'softer' outcomes** e.g.: increased client satisfaction, more skilled and confident staff re energy issues, trained staff pass on knowledge

Do you think that the organisation would have experienced any of these benefits anyway without taking part in BESN? [through other training or initiatives, for example]

Has the organisation experienced any changes in demand for energy advice either during or since taking part in BESN? [probe: if so, why do they think this is? what is behind these changes? how, if at all, is this linked to BESN?]

As far as you know, did the organisation experience any downsides to taking part in BESN?

9. Outcomes for participants:

This section is about understanding champions' perceptions of the impacts that BESN has had on their participants and how long these impacts might last.

Do you think that attending BESN workshops has been beneficial to participants? [Probe: increased awareness of energy efficiency advice, saved money by switching, increased their knowledge of energy issues, empowered participants to find the best energy deal] ***For each impact identified establish how long they think this impact will last (short/medium/long term).***

Is there any evidence to support this? [Probe: any other monitoring data, user satisfaction surveys, customer feedback etc **other than BESN monitoring data**]

Are there any ways in which you think the impact of BESN on workshop participants could be maximised? [Probe: promotional strategies, more resources, support from other agencies?]

10. The future:

Where does energy advice fit into your day-to-day work now?

If so, is this: a) a continuation of BESN like activities or b) mainstreaming of energy advice into existing services as a result of BESN? Or something else?

[If energy advice is still a part of their work] **What sort of energy advice do you provide?** [general or targeting specific groups (i.e. the elderly) or issues (i.e. switching). If targeted advice- why is this?]

Interviews with volunteers

1. Background:

Can you tell me a bit more about how you became a BESN volunteer?

Probe:

- how did they hear about it?
- what was the recruitment process? did they seek out the opportunity or were they approached?
- were they seeking a specific type of volunteering opportunity i.e. around energy or just more general opportunities?
- what were they doing at the time the opportunity came up? working or not? what as?

[If not already covered] **Why did you decide to get involved?** [asked to by a colleague or friend, want to expand skills/development opportunity, respond to a training need or skills gap etc]

[if not already covered] **Prior to your involvement in BESN did you have any experience of providing training or advice in relation to energy issues?** [If so, when? in what capacity? Did they feel confident in doing this? how well informed did they feel? what training received?]

What was your specific role in the delivery of BESN? [probe: involved in the delivery of events and training of frontline workers? supporting Champion: in what ways? any other roles or responsibilities?]

How much time did you spend working on BESN over the course of the programme? [establish scale of contribution whether intermittent or heavily involved throughout?]

2. BESN training:

These questions are about the volunteer's experience of the BESN training they received from their Champion which may have been formal or informal in nature.

What were the main things you hoped to find out about through the training? [probe: why these things? gaps in knowledge?]

Were these things covered in the training you received from your Champion?

Which aspects of the training did you find most useful?

What did you learn through the training that you didn't previously know? [Probe: what has been the net additional impact of the training, i.e. what new knowledge and skills have been gained? could they have gained this knowledge/skills anywhere else? If so, where and why did they choose to take part in BESN if this is the case?]

[if involved in the direct provision of advice to participants] **Do you think the training you received gave you what you needed to deliver advice on switching energy providers/tariffs to workshop participants?** [probe: if not, why? what was missing?]

[if involved in the direct provision of advice to participants] **And what about ECO, did the training give you what you needed to be able to explain this to workshop participants and complete referrals if appropriate?** [Probe: if not, why? what was missing?]

Overall, did the training you were given enable you to fulfil the duties you were given? [probe: if not, why? what was missing?]

Do you have any suggestions for how the training could be improved in future?

3. Engaging clients in workshop events:

This section is about understanding the different approaches taken to identifying vulnerable clients suitable to receive energy advice through BESN and engaging them in workshop events. The aim of these questions is to establish the variety of different approaches adopted and what works best for which groups.

Can you explain the approach taken to the delivery of the BESN workshops you were involved with? [prompt: 'piggybacking' or convened for BESN purposes? How publicised? How recruited? etc.]

How did the BESN advice sessions that you were involved in running go? [Probe: was the advice well received? make-up of the audience? what was their level of knowledge at the outset?]

In your experience, what works best in terms of encouraging vulnerable groups to engage with the BESN workshop events you have run? [encourage to highlight best practice, how has this knowledge been gained?]

How easy has it been to engage vulnerable clients with the events? [probe: what other issues seen as higher priority? do the workshops respond to a clear need/demand for energy advice or does the workshop prompt consideration of the issue?]

Have you found that different approaches are required for engaging different types of vulnerable individuals in BESN? [Probe: what works for who and why?]

Are there particular groups of vulnerable individuals that the workshop format works well for? [probe: which groups and why?]

And, are there any it doesn't work so well for? [probe: which groups and why? particularly explore suitability for the disabled and those with chronic illness/mobility issues and those who work during the daytime]

What are the most common energy issues that workshop participants raise? [probe; debt, cold homes, poor service etc. Expand on survey results- more detail of nature of issues]

[if involved in the direct provision of advice to participants] **To what extent do you think you are trusted by those you have advised through BESN?** [Were they already in a trusted position prior to BESN? why trusted? what impact does this have on their ability to engage clients and secure action? Are volunteers more trusted as 'lay' people?]

Have the BESN workshops you have been involved with attracted people that are outside of the target group of vulnerable consumers? [probe: if so what sort of people? and how has this come about? Trying to establish where people outside of the target group have benefitted]

After the workshop, was there any follow up contact to provide further advice and support to clients? [probe: if so, what's the purpose of this? switching support? further advice? and what form does it take? home visits, phone call etc]

If yes, was this follow up contact effective in securing action in terms of switching tariffs or providers and/or ECO referrals? [why/why not?]

[if involved in the direct provision of advice to participants] **Have you encountered any clients that you weren't able to help with the energy issues they raised?** [probe: what was the nature of their issue and what were the barriers to addressing it? explore links to the training and ongoing support available. What advice and support were they able to draw upon?]

4. Securing action:

This section is about establishing what works in terms of encouraging clients to take action to get the best energy deal and what barriers exist. BESN monitoring data suggested that a relatively small number of BESN participants decided to switch tariffs or energy provider or complete a referral for ECO on the day of the workshop event. Most deferred the decision until later. Are volunteers any better placed to secure action than champions?

As a volunteer, what role did you play in trying to get participants to switch tariffs or energy providers and/or complete ECO referrals at the events you were involved with?

[if involved in the direct provision of advice to participants] **What was your experience of trying to get participants to switch or change tariffs on the day of the workshop event?**

Probe:

- Is this something they tried to do? why/why not?
- What were the barriers? i.e. need to check with a partner, didn't have the info needed on the day? obstacles such as energy debt? Phone/Internet access?
- Did any clients switch- how did this come about and what led to this action? Try to unpick decision making process and role that respondent played in it.
- Did the respondent have the knowledge resources they needed to help the client take action?
- To what extent, in their view, is the decision not to switch based on an informed choice to stay on current tariff?
- Did follow up action play any role in encouraging action after the event? why?
- Are volunteers as 'lay' people better placed to secure action?

[if involved in the direct provision of advice to participants] **What was your experience of trying to get participants to complete an ECO referral on the day you advised them?** [repeat probes above]

5. Outcomes for volunteer:

This section is about understanding the ways in which volunteers may have benefitted both directly and indirectly from their participation in BESN and whether these benefits could have been accrued outside of BESN.

How do you feel you have benefitted from your involvement in BESN?

Probe for:

- **'hard' outcomes** e.g. gaining energy expertise through training; moving into a new job? How long are the hard outcomes identified likely to last? applied knowledge gained to own situation by switching or making energy efficiency improvements?

- **'softer' outcomes** e.g.. Feeling more employable? Feeling like a more informed consumer?

Do you think you would have experienced any of these benefits anyway without taking part in BESN? [through other training or initiatives, for example. How does BESN compare to other volunteering opportunities available?]

Did you experience any downsides to your involvement in BESN?

6. Outcomes for clients:

This section is about understanding volunteer's perceptions of the impacts that BESN has had on participants and how long these impacts might last.

Do you think that attending BESN workshops has been beneficial to participants? [Probe: increased awareness of energy efficiency advice, saved money by switching, increased their knowledge of energy issues, empowered participants to find the best energy deal] **For each impact identified establish how long they think this impact will last (short/medium/long term).**

Are there any ways in which you think the impact of BESN on workshop participants could be maximised? [Probe: promotional strategies, more resources, support from other agencies?]

7. The future:

What do you do now that BESN has come to an end? [has BESN had any impact on current activities? i.e. led to employment? or further volunteering activities? any links to energy in current work? Also establish future plans.]

Interviews with frontline workers

1. Background:

Can you tell me a bit about the organisation you work for and the role you held at the time of receiving BESN training? [establish type of organisation i.e. charity, community development trust etc; what are the aims of the organisation? who does it work with? i.e. which types of vulnerable groups].

Is your current role any different to the one held at the time you received BESN training? [If so, establish when and how role has changed- are any changes related to BESN?]

[if not already covered] Prior to your involvement in BESN was **energy advice part of the service provided by your organisation?** [Probe: If so, what energy expertise existed within the organisation prior to BESN? who held the expertise and what aspects of energy advice could they provide?]

Have you had any training in providing energy advice to clients before BESN? [Probe: if so, when? in current role and organisation or elsewhere? how did this come about? who provided it? what did it cover? was it useful? how does it compare to BESN?]

Were you involved in providing energy advice to clients prior to BESN? [if so, when, how frequently and what issues advising on? was this through a particular initiative?]

[If provided energy advice prior to BESN] **how confident did you feel in doing this?** [probe: how well informed did they feel? where did they get their information from?]

[if not already covered] **Where does energy advice fit into your day-to-day work now?** [probe: how this may have changed before, during and after BESN?]

2. Getting involved with BESN:

What do you understand to be the main aims of BESN? [probe: understanding of what it's trying to achieve]

How did you first hear about BESN? [Invitation, word of mouth, advert, through own connections etc.]

What is your relationship with the Champion that provided your BESN training? [did they know them prior to BESN?]

Why did you decide to get involved? [required to, asked to by a colleague, want to expand skills/development opportunity, respond better to clients' energy needs, increase in demand for energy advice etc. Probe both individual and organisational motivations]

Did anybody else in your organisation take part in BESN? [probe: if so, establish the respective roles of each participant in delivering BESN]

3. BESN training:

This section is about understanding frontline workers' experiences of the training provided to them by BESN champions and volunteers, whether it met their expectations and gave them what they needed to support their clients with their energy issues.

What were the main things you hoped to find out about through the training? [probe: why these things? linked to customer needs?]

Were these things covered in the training you received?

Can you tell me a bit more about the training you received through BESN? Probe:

- how was it delivered - face-to-face?
- group setting, etc.?
- how long did it take?
- formal or informal?
- what did it cover? (standard content or responded to level of knowledge within room?)
- Did it meet expectations?
- What was good/bad?

Which aspects of the training did you find most useful?

Do you have any suggestions for how the training could be improved in future? [Content? delivery? supporting resources? etc.]

What did you learn through the training that you didn't previously know? [probe: what has been the net additional impact of the training, i.e. what new knowledge and skills have been gained? could they have gained this knowledge/skills anywhere else? If so, where and why did they choose to take part in BESN if this is the case?]

Have you passed on any of what you have learnt to others within your organisation? [if so who and what is their role? and how? formally or informally]

Have you had any contact with the Champion since the BESN training? [probe: were they available for ongoing support, advice, information?]

As a result of the training, how confident do you feel in giving energy advice to clients? [probe: if not confident, what factors are behind this- individual, organisational or lack of knowledge etc.]

Overall, do you think the training you received gave you what you needed to deliver advice on switching energy providers/tariffs to clients? [probe: if not, why? what was missing?]

And what about ECO, did the training give you what you needed to be able to explain this to clients and complete referrals if appropriate? [probe: if not, why? what was missing?]

4. Engaging clients:

This section is about understanding the different approaches that respondents have taken to identifying vulnerable clients suitable to receive energy advice through BESN and engaging them. The aim of these questions is to establish the variety of different approaches adopted and what works best for which groups and also whether frontline workers endeavoured to deliver advice to genuinely hard to reach groups or opted for 'low hanging fruit'.

How often do you apply what you have learnt through BESN in your daily work? [probe: how does the need arise? do they broach it with clients or do clients raise energy issues? are they still using their knowledge now BESN is over?]

How have you engaged clients on energy issues as part of delivering BESN? [probe: incorporating into normal case load? run dedicated sessions or workshops? proactively contacted known vulnerable clients? any examples of creative approaches to engagement?]

To what extent do you think you are trusted by those you have advised through BESN? [Why/ why not? Were they already in a trusted position prior to BESN? why trusted? what impact does this have on their ability to engage clients and secure action? what techniques employed to engender trust?]

In your experience, what works best in terms of encouraging vulnerable groups to engage in energy issues? [Generally and specifically to BESN. Encourage to highlight best practice, how has this knowledge been gained?]

How easy or difficult has it been to engage vulnerable clients in energy issues? [Probe: what proportion of clients raise energy issues? are other issues seen as higher priority, such as welfare reform, for example? how does energy rank in terms of the other issues that clients are experiencing?]

Are there specific barriers to engaging different types of vulnerable clients?

Have you found that different approaches are required for engaging different types of vulnerable individuals in BESN? [Probe: what works for who and why?]

What are the most common energy issues that vulnerable clients report to you? [probe; debt, cold homes, poor service etc. Expand on survey results- more detail of nature of issues]

Have you advised people through BESN that are outside of the target group of vulnerable consumers? [probe: if so what sort of people? and how has this come about? Trying to establish where people outside of the target group have benefitted]

Has taking part in BESN enabled you to reach and support vulnerable groups that you have previously been unable to help? [Probe: which groups, why previously unable to help and how has BESN addressed this?]

Have you encountered any clients that you weren't able to help with their energy issues? [probe: what was the nature of their issue and what were the barriers to addressing it? explore links to the training and ongoing support available. What advice and support were they able to draw upon?]

5. Securing action:

This section is about establishing what works in terms of encouraging clients to take action to get the best energy deal and what barriers exist. BESN monitoring data suggested that a relatively small number of BESN participants decided to switch tariffs or energy provider or complete a referral for ECO at the time they were given energy advice. Most deferred the decision until later.

What was your experience of trying to get clients to switch or change tariffs following the advice you gave them?

Probe:

- Is this something they tried to do? why/why not?
- What were the barriers? i.e. need to check with a partner, didn't have the info needed on the day? obstacles such as energy debt? Phone/Internet access?
- Did any clients switch- how did this come about and what led to this action? Try to unpick decision making process and role that respondent played in it.
- Did the respondent have the knowledge resources they needed to help the client take action?
- To what extent, in their view, is the decision not to switch based on an informed choice to stay on current tariff?

What was your experience of trying to get clients to complete an ECO referral on the day you advised them? [repeat probes above]

6. Outcomes for frontline worker:

This section is about understanding the ways in which frontline workers may have benefitted both directly and indirectly from their participation in BESN and whether these benefitted could have been accrued outside of BESN.

How do you feel you have benefitted (if at all) from your involvement in BESN?

Probe for:

- **'hard' outcomes** e.g. gaining energy expertise through training; moving into a new role? How long are the hard outcomes identified likely to last? Gaining new clients? applied knowledge gained to own situation by switching or making energy efficiency improvements?
- **'softer' outcomes** e.g.. feeling more prepared, confident about giving energy advice? Feeling more employable? Feeling like a more informed consumer?

Do you think you would have experienced any of these benefits anyway without taking part in BESN? [through other training or initiatives, for example]

Did you experience any downsides to your involvement in BESN?

7. Outcomes for the organisation:

This section is about understanding the frontline worker's perception of the ways in which the organisation employing the frontline worker may have benefitted both directly and indirectly from their participation in BESN and whether these benefitted could have been accrued outside of BESN.

Do you think the organisation you work for has benefitted from your involvement in BESN? Why?

Probe for:

- **'hard' outcomes** e.g. more clients, new clients, grant funding, new contracts etc.
- **'softer' outcomes** e.g.: increased client satisfaction, more skilled and confident staff re energy issues, trained staff pass on knowledge

Do you think that the organisation would have experienced any of these benefits anyway without taking part in BESN? [through other training or initiatives, for example]

Has the organisation experienced any changes in demand for energy advice either during or since taking part in BESN? [probe: if so, why do they think this is? what is behind these changes? how, if at all, is this linked to BESN?]

As far as you know, did the organisation experience any downsides to taking part in BESN?

7. Outcomes for clients:

This section is about understanding frontline workers' perceptions of the impacts that BESN has had on their clients and how long these impacts might last.

Do you think sharing energy advice through BESN has been beneficial to clients? [Probe: increased awareness of energy efficiency advice, saved money by switching, increased their knowledge of energy issues, empowered clients to find the best energy deal] ***For each impact identified establish how long they think this impact will last (short/medium/long term).***

Is there any evidence is there to support this? [Probe: any other monitoring data, user satisfaction surveys, customer feedback etc.]

Are there any ways in which you think the impact of BESN on your clients could be maximised? [Probe: promotional strategies, more resources, support from other agencies?]

8. The future:

Now that BESN has ended, are you still advising clients on energy issues? [If not, why has this stopped?]

Can you suggest any ways in which BESN could be improved if delivered again in the future?

Interviews with workshop participants

1. Background

Establish some background information on the participant (use observation where possible):

- age
- who else lives with them?
- type of property
- tenure of property
- length of time in property
- employment
- any disabilities

2. Getting involved with BESN:

How did you first hear about the BESN event that you attended? [Invitation-from whom and how delivered? word of mouth, advert, through friends or colleagues etc.. Establish whether it was a trusted person or organisation?]

In the telephone survey that you took part in, you said that you decided to attend the event because STATE REASON(S) GIVEN. Can you tell me a bit more about that? [explore motivations in detail. If workshop incorporated into something they were already attending- did they even know that energy advice was on the agenda? Were they looking for energy advice prior to hearing about BESN?]

In the survey you stated that your biggest energy concern prior to going to the event was STATE CONCERN(S). Can you tell me a bit more about that? [establish exact nature of the concern and the impact of the problem (e.g. high bills, cold homes etc.) on their life?]

Prior to attending the event had you received any other energy advice from elsewhere/ sought help with your energy concerns? [If a specific problem motivated them to attend, had they tried to resolve it in any other way and what was the outcome? formal or informal, who, when, where and what was the issue they were seeking help with? how satisfied had they been with the advice received and what were the impacts? May have been contacted by current provider with advice as a result of Ofgem reforms]

Prior to attending the event, how much did you feel you knew about things like getting the best energy deal and making your home more energy efficient? [Try to establish baseline knowledge prior to advice session. If they had knowledge, how was this acquired?]

[If survey data indicates that they have switched] I notice that you have changed energy provider or tariff in the past before attending the BESN event. Can you tell me a bit more about that? [When? what motivated this? and what impact did it have? how easy did they find this and did anyone support them in doing it?]

[If survey data indicates that they have switched] I notice that you have made changes to your home to make it more energy efficient in the past before attending the BESN event. Can you tell me a bit more about that? [When? what motivated this? and what impact did it have? how easy did they find this and did anyone support them in doing it?]

3. Event experience and advice:

Can you tell me a bit more about what happened at the event you attended?

Prompt:

- was BESN the main event or one item on an agenda?
- who gave the advice? from which organisation?
- how was the advice given? Presentation/one-to-one or both?
- was it formal or informal?
- what sort of things were covered? switching? ECO? energy saving?

How easy was it to understand the energy advice being given? [if not easy, what was the issue? too complex? too technical? issue with delivery, dense material, etc. Was this raised? Was there an opportunity to ask questions and seek clarification? If easy, what made it accessible? one-to-one discussion?]

To what extent did you trust the person/people running the event and the advice they were giving you? [Why/why not? about the person or the organisation they represent? sufficiently qualified to give the advice?]

(If not already established) **Was there any opportunity to have a one-to-one discussion with someone at the event or after it about your energy issues?** [If so, was this helpful? what was discussed? what were the outcomes/what did it achieve? If not, would this have been helpful?]

How easy was it to recall the energy advice you were given after the event? [If quickly forgotten- why was this and what would have helped? If easy to recall- what helped with this? was material given out at the event to help with this?]

[If survey response indicates that respondent was referred on for further support or advice] **I can see from your survey response that you were referred on to another organisation for some further support and advice on energy issues. Can you tell me a bit more about that?** [who were they referred on to and why? was this helpful and what did it achieve/what were the outcomes? would they have gone to this organisation or service anyway?]

Did you learn anything new the event that you didn't know before? [If so, what and was this useful to know and relevant to them? If not then where had they acquired the knowledge they had?]

Were there any energy issues that you wanted to find more about but that weren't covered as part of the event? [why did they want to know more about this issue? Did they ask for advice on it at the event? what was the response? have they subsequently found out about this elsewhere?]

Did attending the event help with the main energy concern STATE CONCERN that you had before the event? [If so, how? was it resolved and has it remained resolved? If not, was it addressed to any extent? Did those running the workshop know about the concern and attempt to help? Has it been subsequently addressed? how and who helped?]

[If concern addressed at event] **Do you think you would have been able to get help with this concern anyway if you hadn't attended the event?** [If so, from where and why hadn't they sought this help prior to the event?]

Have you had any contact with the person or organisation that ran the event since you attended? [where, when, how many time and for what purpose? regarding energy issues or other?]

Overall, did you find the event to be a positive or negative experience? [what was good or bad about it? would they recommend attending a BESN workshop to friends?]

4. Taking action on switching and ECO:

BESN monitoring data suggests that a relatively small number of BESN participants decided to switch tariffs or energy provider or complete a referral for ECO on the day that they received energy advice. Most deferred the decision until later. We need to establish why or why not action was taken on the day and whether action was taken later.

Review responses to survey questions on actions and select most appropriate question from the following:

I notice from your survey responses that you switched energy provider or tariff at the event

- **Why did you decide to do this?** [was this an informed decision? what was appealing about switching on the day? support on hand? access to IT? found a really good deal? etc.?]

OR

I notice from your survey responses that you decided not to switch energy provider or tariff at the event

- **Why did you decide not to switch?** [was this an informed decision? current deal was best for them? what deterred them? hassle, feeling pressured, etc. What might have persuaded them?]
- **Have you changed your mind about switching since then?** [if so, why? and have they completed a switch?]

OR

I notice that you decided to go away and think about whether to switch energy provider or tariff after the event

Probe:

- **What prevented you from making a decision on the day?** [explore barriers: had to check with partner? nervous to take action? didn't have all info they needed to switch?]
- **Did you end up switching in the end?** [If so, when and how? what motivated action? did anyone support them in this? who and to what extent?]

At the event, did anyone talk to you about whether you qualify for free or reduced cost improvements to your home to make it warmer and cheaper to heat? [this question refers to ECO]

[If so and they are eligible] **Did you complete a referral form to arrange an assessment of your home for these improvements?** [If not, was this offered to them? what put them off? sounded complicated, no time, hassle factor, didn't understand what it was? What might have persuaded them to complete a referral? If so, what persuaded them to do this? support on hand? access to IT, sounded a good deal? etc.]

5. Outcomes for participants:

Overall, what have been the main benefits for you from attending the workshop? [Probe: saved money by switching or changing the way they pay? had energy efficiency improvements through ECO? savings energy around the home? increased awareness of energy efficiency advice, increased their knowledge of the energy market, more empowered to find the best deal. If no benefits, why do they say this?]

Were there any downsides to attending the event? [probe: didn't meet expectations; didn't get out of it what they hoped to? disrupted their normal activities; hadn't wanted to attend etc.]

Are you doing anything differently as a result of the advice you received through BESN? [prompt: keeping an eye on energy bills, looking out for best deals, thinking more about energy use around the home and encouraging others to do so etc.]

[If not already addressed] **Do you feel you know more about how to get the best energy deal as result of the advice you received?** [if so, what have they learnt? have they acted upon this? Do they feel more empowered as consumers?]

[If not already addressed] **Do you feel you know more about how to make your home warmer and more energy efficient as a result of the advice you received?** [if so, what have they learnt? have they acted upon this?]

Do you think the help and advice you received will help you in the future? [*Probe whether they think it will help them pay closer attention to their energy bills, ensure they get the best deal, stay out of energy debt, raised awareness of help available, know what to do if they experience energy problems again, are they now trying to save energy?*]

Do you have any suggestions about how the support you received could have been improved? [*Probe: nature and form of advice, ongoing support etc.*].

Interviews with clients of frontline workers

1. Background

Establish some background information on the participant (use observation where possible):

- age
- who else lives with them?
- type of property
- tenure of property
- length of time in property
- employment
- any disabilities

2. Getting involved with BESN:

Ask these questions to those who received energy advice through a BESN trained frontline worker:

How did you come to receive the energy advice from NAME FRONTLINE WORKER OR ORGANISATION? [*Establish whether actively got involved or received advice unwittingly.*

prompt: came up in an appointment they had about something else? someone mentioned it to them (i.e. housing officer or community development worker? contacted directly about it by an advisor (i.e. advice worker, housing officer etc), saw an advert- where? etc.]

[If sought advice] **Can you tell me a bit more about the reasons why you sought energy advice through BESN?** [explore motivations in detail. Did they seek it at all or did it come up in an appointment about something else? Were they looking for energy advice prior to hearing about BESN?]

[If received advice unwittingly] **Did you have any particular concerns about energy matters at prior to receiving energy advice from NAME FRONTLINE WORKER?** [Prompt: cold house, high bills, problems with energy supplier etc]

What were the main energy concerns that you raised with NAME FRONTLINE WORKER (e.g. high bills, cold home etc.)? [establish exact nature of the concern and the impact of the problem (e.g. high bills, cold homes etc) on their life? If they didn't have any particular concerns, did any occur to them during the session?]

Prior to receiving the energy advice, had you received any other energy advice from elsewhere/ sought help with your energy concerns? [If a specific problem motivated them to attend, had they tried to resolve it in any other way and what was the outcome? formal or informal, who, when, where and what was the issue they were seeking help with? how satisfied had they been with the advice received and what were the impacts? May have been contacted by current provider with advice as a result of Ofgem reforms]

Prior to receiving the energy advice, how much did you feel you knew about things like getting the best energy deal and making your home more energy efficient? [Try to establish baseline knowledge prior to advice session. If they had knowledge, how was this acquired?]

Prior to receiving energy advice from NAME FRONTLINE WORKER, had you ever changed energy provider or tariff to get a better deal? [If so, when? what motivated this? and what impact did it have? how easy did they find this and did anyone support them in doing it?]

And, had you ever made any improvements to your home to make it easier to heat or to save energy? [If so, when? what motivated this? and what impact did it have? how easy did they find this and did anyone support them in doing it?]

3. Experience of advice:

Can you tell me a bit more about what happened during your meeting with NAME FRONTLINE WORKER where you discussed your energy issues?

Prompt:

- where did it take place?
- who gave the advice? from which organisation? someone they already knew?
- did the person giving the advice seem knowledgeable?
- **were energy issues the main thing discussed- what issues were covered?**
- how was the advice given? one-to-one discussion? both? looking at websites together?
- was it formal or informal?
- what sort of things were covered? switching? ECO? energy saving?

How easy was it to understand the energy advice being given? [if not easy, what was the issue? too complex? too technical? issue with delivery, dense material etc. Was this raised? Was there an opportunity to ask questions and seek clarification? If easy, what made it accessible? one-to-one discussion?]

Did you learn anything new during the advice session that you didn't know before? [If so, what and was this useful to know and relevant to them? If not then where had they acquired the knowledge they had?]

Did the advisor refer you on to another organisation for any further support and advice on energy issues? If so, Can you tell me a bit more about that? [who were they referred on to and why? was this helpful and what did it achieve/what were the outcomes? would they have gone to this organisation or service anyway?]

Were there any energy issues that you wanted to find more about that the advisor couldn't help you with? [why did they want to know more about this issue? Did they ask for advice on it? what was the response? have they subsequently found out about this elsewhere?]

You mentioned earlier some of the energy concerns that you had ahead of the advice session. Were you satisfied with how these were addressed during the session? [If so, how? was it resolved and has it remained resolved? If not, was it addressed to any extent? Did those running the workshop know about the concern and attempt to help? Has it been subsequently addressed? how and who helped?]

[If concern addressed at event] **Do you think you would have been able to get help with these concerns anyway if you hadn't attended the advice session?** [If so, from where and why hadn't they sought this help prior to the event?]

Have you had any further contact with the person or organisation that advised you since your appointment? [where, when, how many times and for what purpose? regarding energy issues or other?]

To what extent did you trust the person/people running the event and the advice they were giving you? [Why/why not? about the person or the organisation they represent? sufficiently qualified to give the advice?]

4. Taking action on switching and ECO:

Were you offered the opportunity to switch energy tariffs or provider during the advice session?

[If yes] **did you take up this opportunity?** [Why/why not? was this an informed decision? what was appealing about switching on the day? support on hand? access to IT? found a really good deal? etc.? If not, what deterred them? hassle, feeling pressured, had to check with partner? nervous to take action? didn't have all info they needed to switch? etc. What might have persuaded them?]

[If no] **would you have liked this opportunity?** [any insights into why it wasn't offered?]

[If didn't switch on day] **Have you changed your mind about switching since then?** [if so, why? and have they completed a switch? what motivated action? did anyone support them in this? who and to what extent?]

At the event, did anyone talk to you about whether you qualify for free or reduced cost improvements to your home to make it warmer and cheaper to heat? [this question refers to ECO]

[If so and they are eligible] **Did you complete a referral form to arrange an assessment of your home for these improvements?** [If not, was this offered to them? what put them off? sounded complicated, no time, hassle factor, didn't understand what it was? What might have persuaded them to complete a referral? If so, what persuaded them to do this? support on hand? frontline worker did it for them? access to IT, sounded a good deal? etc.]

5. Outcomes for participants:

Overall, did you experience any benefits from receiving energy advice through BESN? [Probe: saved money by switching or changing the way they pay? had energy efficiency improvements through ECO? savings energy around the home? increased awareness of energy efficiency advice, increased their knowledge of the energy market, **more empowered to find the best deal. If no benefits, why do they say this?**]

Are you doing anything differently as a result of the advice you received through BESN? [prompt: keeping an eye on energy bills, looking out for best deals, thinking more about energy use around the home and encouraging others to do so etc]

[If not already addressed] **Do you feel you know more about how to get the best energy deal as result of the advice you received?** [if so, what have they learnt? have they acted upon this?]

[If not already addressed] **Do you feel you know more about how to make your home warmer and more energy efficient as a result of the advice you received?** [if so, what have they learnt? have they acted upon this?]

Do you think the help and advice you received will help you in the future? [*Probe whether they think it will help them pay closer attention to their energy bills, ensure they get the best deal, stay out of energy debt, raised awareness of help available, know what to do if they experience energy problems again, are they now trying to save energy?*]

Do you have any suggestions about how the support you received could have been improved? [*Probe: nature and form of advice, ongoing support etc.*]

Overall, did you find the meeting with NAME FRONTLINE WORKER to be a positive or negative experience? [what was good or bad about it? would they recommend seeking energy advice from that organisation to friends?]

Appendix 5: Case Studies

Case study 1: A Community Development Trust working in a deprived urban community

The Champion's perspective: The Champion had a background in energy advice and was already working within the organisation to support advice workers and educate the community on reducing energy consumption and energy bills. BESN was therefore a perfect fit with this agenda and boosted the Champion's efforts to improve the organisations capacity to deliver energy advice by training frontline workers and volunteers.

Despite his existing knowledge and the fact that the Champion was already considering launching a switching campaign, BESN provided the impetus to launch this sooner and helped structure that programme of work:

"We were already talking about switching..... BESN helped to structure sessions around that agenda. The other part of my role is to build capacity in the community through working with volunteers. So the model of having the champion train community volunteers really fitted in."

Like many participating organisations, this CDT deployed existing volunteers to BESN who already had some background knowledge of energy issues that could be built upon.

"We already had a small team of volunteers working on a solar panels project and another project on energy behaviour change so that was quite useful to have another project that would provide training and the two volunteers that were involved in BESN sessions we were already working with so we didn't have to recruit and they already had a bit of a background."

The Champion particularly praised BESN for its focus on building capacity and knowledge of energy issues within the community through the training of volunteers.

"I think that a really good aspect of this programme was that it wasn't just about a member or staff or organisation delivering sessions, it was about training and supporting volunteers to do that."

The Frontline Worker's perspective: The frontline worker who was trained by the Champion was a general advice worker with limited expertise in relation to energy. She therefore welcomed the training which updated and augmented her existing knowledge.

"When you learn through experience you pick up little bits, some of them might be a few years old and some of them aren't quite right, where if you have a bit of stand-alone training that's up to date, it's a reminder of the bits that you thought you knew but you weren't quite sure of and it clarifies bits and reassures you that the stuff you know is up to date and that's still going on, cos things do change with energy."

She reported that most of her clients came to her with financial problems and she was pleased to add switching to the range of solutions she could offer to help reduce her clients' outgoings. She pointed out that awareness of switching was very low within the community.

"It was useful to provide someone to one assistance with switching sites. Knowledge is low so it was useful that people were aware that you could switch. A lot of people think if you're on pre-payment it's not possible, so it was quite useful to engage with people around that even if it

wasn't the first thing that person might want to do when in financial difficulties. Within this organisation, the Champion, frontline worker and volunteers worked together to deliver BESN workshops. Like many other funded organisations, they found that the sessions were more engaging if kept informal and guided by the audiences concerns.

The way we tended to structure the sessions was tried to keep the presentation as snappy as possible and then have a session structured on what people identified as their needs or questions and did the one-to-one support a fair bit too. People don't want to listen to a long lecture and are quite sensitive to being hard sold anything. We did things like had a quiz and tried to make them a bit more fun.

As was common amongst many of the funded organisations studied, attendance at workshops was very variable and 'piggybacking' worked better.

We had zero for some sessions, we had up to 15 people. Where sessions worked much better was when they were in venues where there was already something else going on, for example in the Salvation Army centre there was a weight watchers event so we did something after that.

This organisation offered home energy assessments as a complement to BESN. They found that this was a big step for their clients and generally only came when they were ready to take action. As such, BESN workshops were identified as an important first step in establishing a relationship with clients that may eventually lead to action.

Promoting a home visit service you'll get people who are really keen to do something but it's quite a big step to have a home visit. I would prefer to meet someone first actually. We do offer a home visit service but it tends to be for those people who've already engaged in a drop in session or come to something like a BESN workshop.

The Client's perspective: Marcia (name changed) is 55 years old and has severe osteoarthritis. Her condition means that she needs to keep her home warm at all times. This combined with the fact that she is on a pre-payment meter means that she cannot keep up with her energy costs and has got into debt. This in turn has meant that a considerable proportion of the money she is feeding into her meter goes towards debt repayment leaving her little credit to heat her home. She sought help with this problem from the CDT through one of their general advice sessions.

What I wanted more than anything was to have my meter changed as possible cos I just didn't have the money to put in it every day cos the bill was so high, every time I put £5 in they take £3 so I didn't have enough heat.

Due to the urgency of Marcia's situation a two prong approach was taken to resolve the immediate problem and to reduce her energy consumption in future. She was referred for a home visit from the Champion where he explored all aspects of her energy provision and use and the efficiency of the property. In parallel to this the frontline worker liaised directly with her energy provider and agreed to have the meter removed. Crucially, the frontline worker also applied for various grants to clear Marcia's energy debt. Marcia was very pleased with the speed at which action was taken.

[Champion] came to my house and he had a look at my heating system and how old the house was and told me other ways to use it. He was brilliant, we talked about even the lighting bulbs I had and how to save energy. The first lady [frontline worker] had phoned up the gas board straight away and she said this lady needs to have her meter taken out as soon as possible, that was Tuesday and on Thursday they came and took it out, she just done it and I couldn't believe it.

In the weeks that followed Marcia's initial contact with the frontline worker, her meter was removed and she was switched to a better credit tariff, her energy debt was paid off through a

charitable grant secured by the frontline worker and Marcia was referred to another charity who arranged for her boiler to be replaced with a more efficient combi boiler. The result is that Marcia feels less stressed and worried about running out of heat.

It's taken the stress off me, not have to constantly feed the meter and worrying that I go to bed and when I get up there's no heating, no power and it was happening all the time.

To learn more about how she and her family and friends can reduce energy use and costs, Marcia also attended several BESN workshops and felt she learnt a great deal.

I've been going to all these training sessions which were really great cos they show you things that you wouldn't even think, like you've got the kettle and the toaster, which one burns up the most?

Marcia was very pleased with the service she received from the CDT and is now passing what she has learnt on to others.

I'm so pleased that they done it very nicely and discreetly without making me feel inadequate in any way, I think they were brilliant, and I've passed on my advice to other people.

After BESN: Since BESN has ended, the CDT have continued to hold outreach workshops but these now have a broader focus on financial inclusion. However, these workshops now include advice on getting the best energy deal which they did not prior to BESN. Like the majority of funded organisations, this CDT found that incorporating switching into broader workshops is more effective in terms of attendance and engagement.

Now BESN has ended, we are doing outreach workshops but not focused so much on switching. They are part of a financial awareness community outreach programme but part of those workshops is about getting a good deal from your energy supplier which we've added in since BESN. So we're not doing sessions that are just about BESN, but we've incorporated some of the content which works better.

The volunteers trained through BESN are now helping to deliver these financial inclusion workshops and can talk confidently about getting the best energy deal as a result of their BESN training.

What has been a really good outcome is that the two volunteers that were trained to deliver the BESN sessions are now helping deliver financial awareness sessions which have a component that is similar.

Case study 2: Delivering BESN in a rural community

The champion's perspective....

The Champion is a manager within a Rural Community Council (RCC). His role includes coordinating the advice element of the council's work. Even prior to BESN, he was aware of the acute need for advice on energy costs and energy saving within the rural communities he works with. Recognising this need, the RCC have 'dabbled' in energy initiatives but BESN represents their first concerted effort in this regard.

Our history in terms of fuel poverty, energy saving is mixed, we've been doing a bit of work looking at community energy projects but also identifying rural fuel poverty particularly highlighting the needs of people who are off gas who rely on things like coal and wood and heating oil, particular cost problems about buying heating oil and also people who are using pre-payment meters who have difficulty cos they have to travel to charge them. Also the plight of people in park homes, mobile home parks who tend to be off gas and they have to buy their energy direct from the site owner

His experience of delivering energy advice prior to BESN has been limited and his knowledge of relevant agendas was fragmented and largely self-taught. Like many champions and frontline workers involved in BESN, his background is in more general advice work and promoting financial inclusion and BESN has provided an opportunity to develop more specialized knowledge in the field of energy advice.

My mainstay is welfare benefits and needs of poorer people so the only formal training I had, I went to a [local advice agency] workshop, I assisted in it and that helped me, that was in 2011, other than that it's all been self-taught and based on my experience until BESN.

Despite being glad to have the opportunity to access training through BESN and feeling it was professionally delivered, the respondent felt there were some gaps in the training in so far as it didn't cover some of the energy issues commonly affecting rural consumers. He felt the training assumed that most consumers were connected to the gas network.

He did his best but there were a lot of unanswered questions which those questions were then raised by consumers and frontline workers as we embarked on the delivery.

He did, however, feel that he could not have accessed detailed training comparable to BESN anywhere else. Ultimately he was pleased with the training received and felt it equipped him with a standard training session that he could roll out to frontline workers and consumers.

The training was the icing on the cake, I could have run a basic course for frontline workers and consumer advice but I would have had to put quite a lot of time into preparing for it, so this off the shelf approach was very handy.

Echoing the views of many other champions interviewed, he felt that delivery of BESN was very time pressured and regretted not having time to recruit and train volunteers to support delivery.

We didn't have time to recruit any volunteers so I delivered it and had some input from one other member of staff who helped one of the sessions who had some background knowledge of the issues but she was only on a temporary contract so it was all on me really.

In light of these pressures, he opted to deliver BESN predominantly through 'piggybacking' on existing events where there was a 'captive audience', as he put it.

We've tried to go to events that are being held with a captive audience so a lot of group sessions where it might be a village lunch or there's a social club meeting. So this will be a captive audience of interested people wanting to hear about it and have a discussion. So there are things going on that we're trying to connect with rather than say we're going to be here on Tuesday, come in and attend this talk. The drop in type idea can work but you shouldn't expect high numbers.

This Champion had gone to great lengths to deliver BESN training to frontline workers in touch with some of most vulnerable consumers in the county. In the quote below he describes a 'two-prong' approach to reaching a particularly vulnerable group by running a workshop and training frontline workers.

We've got quite a few sessions to do through physiotherapists in the cottage hospital for example, who run sessions for people with pulmonary obstruction, so these are people with severe breathing difficulties who need to be kept warm in the winter. So we briefed the physios who will pass on and signpost to advice and we'll be meeting client groups in the hospital too.

It was through this approach of training frontline workers in touch with the most vulnerable that he came to train the frontline workers that we then interviewed as part of the evaluation who is one of 60 'way finders' who works with vulnerable and isolated older people across the county to enable them to access all the information they need to make informed decisions about their future. The role is Local Authority and NHS sponsored.

The Frontline Worker's perspective....

The frontline workers had no previous experience of offering energy advice to clients prior to BESN and her only relevant knowledge was gained from her own experience of switching. The Champion attended a team meeting of the way finders at which she was present. This was the first she knew of BESN. The session was brief; lasting just an hour but there was reportedly plenty of time for questions and discussion afterwards.

A man from [the RCC] came and talked to us about it for about an hour and he took questions and afterwards he provided a written copy of what he said as well for reference which was useful. He attended all three team meetings, so all 60 way finders will have had the training.

The above quote demonstrates just how many frontline workers the Champion was able to reach through three one hour sessions. This example underlines the point made in the main body of the report that training frontline workers is a very effective way of reaching large numbers of consumers, as long as the training is adequate for frontline workers to be able to offer credible advice. Although light touch, the frontline workers felt the training was adequate for her to advise her client on switching and energy saving and left feeling confident and that there were no major omissions from the training.

Very confident, I'd always been pretty confident but I felt very confident after the training.

As the frontline workers explains below, following the training BESN was added to the 'checklist' of issues that way finders work through with their clients regardless of the 'presenting' issue.

We tend not to get dedicated energy advice referrals, but whenever we go anywhere we have a checklist of things, so even if they think they've rung us about one thing we go prepared to look at the whole picture.

She is still broaching the issue of energy with her clients even now BESN has come to an end. It has become a standard part of the service she provides.

It's ongoing, it's just part of the job, but just one part of it, we give information about anything.

The frontline worker also undertook specific work to try and promote BESN using the same techniques she uses to promote her service more broadly by 'hanging about' in places where the most vulnerable are found. It was in doing this that she was put in touch with the client that we interviewed as part of the evaluation.

I offered a leaflet on BESN to someone who was waiting for a hospital appointment and she said 'I'm sorted for all that' but then she said 'but I do have a neighbour who can't get this Warm Homes Discount and it's quite wrong' and we got talking and so I said 'if you don't mind entrusting me with his name and number I'll look into that and ring you back' and that's how I got the lady who you're going to see tomorrow.

The client's perspective....

Like many consumers living in rural locations, Olive's (name changed) situation regarding energy provision was not straightforward. She lives on a mobile home park where she and other residents pay the owner of the site for their energy and do not have their own account with the energy provider. Her problem was twofold. First, despite having a well-insulated home, she was struggling to keep up with her energy costs and wanted to claim the Warm Homes Discount (WHD) but had been told she couldn't due to her landlord being the account holder.

[energy costs] has a big impact on all pensioners because we have a limited income to live on every week and they're paid once a month and I'm paying nearly £200/month fuel bills with the electric and gas so it doesn't leave much to live on.

Second, she felt she should be able to exercise more control and choice over who supplied her energy as the site owner did not consult on this.

As the frontline worker acknowledged these were difficult and unusual issues with no obvious solution. Certainly, the BESN training had not prepared the frontline worker for this sort of problem. However, BESN had provided the frontline worker with a clear referral route for issues beyond her expertise. She referred the client back to the Champion who, recognising that this problem will affect many living on mobile home sites across the county, worked with the client to gather evidence and develop a case study which was submitted to central government.

Unfortunately there is no easy solution to this unusual case and although the Champion is seeking a solution and lobbying for a policy response, Olive's situation remains the same and she feels hopeless.

I can't see how anyone can help us, like [Champion] or [frontline worker], cos if there was a way I think I would have found it, unless we all go back to candles and fires, go backwards instead of forwards.

On this occasion, none of the solutions on offer through BESN were suitable. However, the frontline workers engagement with Olive served to highlight the plight of many mobile home residents across the country and enabled the Champion to pursue this with policy makers.

Case study 3: a local charity working to promote independence in older people

The champion and frontline worker perspective: Both the champion and frontline worker already worked for the organisation, which had a history of working with older people, including on energy related issues such as keeping warm in winter.

The champion had previously undergone training as an energy champion through a City and Guilds course. BESN provided an opportunity to update the information and skills developed through this training. They learnt a lot from the training provided by NEA and in fact at one point felt overwhelmed by the amount of information they received. This feeling subsided once they began to deliver the project, however

I remember coming back and saying I think I've learnt something, but something had got to grow quickly, but I feel a lot more confident now and I've learnt a lot and until you start putting things into practice then you don't learn.

The training was useful and brought home the difficulties that vulnerable people face in dealing with energy suppliers, and the need for support:

there's a lot of choice out there, the routes to go down, the different payment methods ... if you're a vulnerable elderly person who is completely bamboozled by jargon and information and thousands of tariffs and payment methods then it's a minefield to work through so it definitely needs a facilitator to pass on that information.

The project was delivered through a combination of workshops and one-to-one advice in homes. The champion was concerned that many of the people within their target group – particularly those that might be deemed as very vulnerable - would not be able to come to a workshop so they “*broadened the umbrella*” by going into people’s homes. Delivering advice in homes was also seen as a more effective way of getting an understanding of participants’ circumstances: “*I'm sure you get a better feel about a person and their energy spend and requirements when you're sitting on the sofa saying 'are you warm enough?' and your teeth are chattering*”.

The champion and frontline worker had trained 42 other frontline workers as well as a number of volunteers, although they were not sure on the exact numbers of volunteers. They felt that the cascading model worked well with champions, but had some reservations about the level of ‘ask’ for volunteers:

Perhaps not [such a big ask] if it was purely about hitting targets of this many people need the overall brief as opposed to actually making a difference which was the bit that was most important ... when you've done a workshop, and there will be somebody at the workshop who needs to talk to you after and you're then doing a one-to-one really even though it's not in the home but you can't see everything cos you're not in their home, if you're asking a volunteer to then ascertain that person's whole situation because it's not just about energy, it's bigger and you need to look at the whole picture. We're [employees of organisation] in that position cos I've worked here a lot of years and you have that knowledge and know what to look for, what to ask ... whereas if you've solely got a volunteer that's awareness raising about energy are they really going to understand all of that? And it's too much to ask for that person anyway.

Similarly, the champion felt that having someone in a full-time role of delivering support to older people within the organisation (the frontline worker) allowed for a more integrated approach with greater added value.

They felt that the workshops were well received by participants. However, they did feel that the workshop approach did not give sufficient time to offer in-depth support to those in need, particularly to carry out energy switches:

...where there's been 45 people come, you struggle to give one-to-one to five people and people don't have all that information you need to be able to help them, so in our opinion I think the workshop is great for saying 'this is what's out there' ... but I don't think the workshop is a practical vehicle for switching people.

They thought that a dedicated switching event as a separate activity would work better. In this instance they would advertise for participants to bring their bills and energy supply data to an event where they could have a number of people ready to carry out a market sweep and assist with switching where appropriate.

In addition to workshops and follow-up one-to-one support, they took referrals from frontline providers, such as local housing associations and Trading Standards (within the local authority). This route worked because the charity already took referrals from statutory providers as part of their day-to-day 'case work' with older people. Having existing infrastructure and networks in place to engage with older people made a big difference to their ability to effectively deliver the project, and meant that they were able to concentrate squarely on delivery as opposed to marketing and engagement.

In conclusion, the champion felt that BESN had worked well, because they had been able to 'match' the funding with their own in-kind funding (providing time to engage in additional support). But the most valuable element to the project was the training received: *"we had some really good outcomes ... I think you've had real value for money out of what we've achieved here. If I was doing a full cost recovery it would be a hell of a lot more than the money we've had ... but it wasn't so much about the money, it was about the training and the peer support that was the big draw"*.

The Client's perspective: the client was a former teacher who had suffered from mental health problems and now volunteers at a horticultural project.

The client's support worker found out about BESN through the frontline worker. Her support worker told the frontline worker that she had been having difficulties with her energy provider. She was on an Economy 7, quarterly billed tariff but her energy provider continually sent her incorrect bills. This led to her getting *"in a bit of a mess and needed some support"* with dealing with the situation. This was resolved prior to her involvement with BESN, but the experience had left her wanting to change supplier, but also wary of undergoing the switching process: *"it was minefield, they didn't give me a yearly project to put into your comparison site for your average Jo Bloggs it's a minefield, never mind somebody who's had mental health difficulties"*.

She contacted the frontline worker and made an appointment to see her. They then discussed the client's switching options. She already had a supplier in mind, who she had heard had a good customer service record. The frontline worker was unable to *recommend* the supplier, but she helped the client to consider the different factors involved in deciding which supplier to switch to, and then telephoned the energy companies involved on the clients support:

...when I get bombarded with lots of information it's difficult to process and she asked f if it was okay for her to talk on my behalf and I said yeah, and she managed to interpret all the different data and figures and she managed to interpret it for me in simple language. I certainly couldn't have managed the switch without her; she'd been brilliant ... if I hadn't met [frontline worker] I'd be stuck with [energy supplier] and battling away.

The client was already very conscious about how much energy she used – and already had cavity wall and loft insulation installed - and the switch was more about finding a supplier with better customer service than the one she had been with previously. Similarly, she would not look to switch in the future unless there were customer service problems.

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