



Phase II Report – Gloucestershire Warm and Well Scheme

1. Project Summary

Aims and Objectives

The Gloucestershire Warm and Well scheme aims to improve energy efficiency in the home and reduce the levels of associated health problems in Gloucestershire, through:

- * raising awareness of the issues and appropriate action
- * providing specific and appropriate advice to each householder that comes into the scheme
- * enabling physical actions to be implemented through referral to grants and discounts

The central issues addressed are the links between energy efficiency (and affordable warmth), cold living conditions and health, for example through:

- * cardiovascular illness
- * condensation damp, respiratory illness and allergic conditions
- * appropriate levels of ventilation and knowledge of carbon monoxide risk

The target groups for the project are, in descending priority:

- a) households in Gloucestershire with members vulnerable to health problems associated with, or exacerbated by low indoor temperatures.
- b) households in Gloucestershire likely to be living in fuel poverty, and unable to afford adequate heating
- c) the general public in Gloucestershire, to promote awareness of energy efficiency and the related issues of ventilation and the avoidance of condensation damp.

Outline Methodology

The aims are achieved by working both directly with the target group, and indirectly through those that support them, including health and social care professionals and agencies in the voluntary sector. The latter are encouraged to make referrals into the scheme, through the provision of referral packs and briefing sessions.

The scheme is managed from a central enquiry and advice point at the Gloucestershire Energy Efficiency Advice Centre, with a freephone advice line, freepost and email address.

Energy efficiency measures are financed through a combination of:

- a) For those that can afford to pay: a bulk discount scheme (enhanced by Scottish Power Energy Efficiency Commitment funding)
- b) Referrals to the government Warm Front scheme
- c) Local authority grants for vulnerable householders excluded from Warm Front

Warm and Well is closely linked to the “Affordable Warmth Strategy for Gloucestershire and South Gloucestershire”. This strategy was launched in October 2001 and signals a long term commitment to dealing with the problem of hard to heat homes throughout the county. The local authorities of

Gloucestershire and South Gloucestershire are committed to the eradication of fuel poverty and the provision of affordable warmth for all households within the next ten to fifteen years. To ensure progress is made towards this objective the seven local authorities are working in partnership with the health sector and social services departments of Gloucestershire and South Gloucestershire, relevant services providers and the wider community.

Project Consortium

Gloucestershire Warm and Well is run by a consortium of seven local authorities. The consortium continues to be led by Cheltenham Borough Council. The other local authority members are Cotswold District Council, Forest of Dean District Council, Gloucester City Council, South Gloucestershire Council, Stroud District Council, and Tewkesbury Borough Council.

Funding Bodies

When the Warm and Well scheme began it received funds from the government sponsored HECAAction programme. This funding was used to instigate scheme management systems, promotion and awareness raising, advice to households, development of partnerships and referral mechanisms. These funds are no longer available but the scheme continues to benefit from the experience gained and materials developed during Phase I (October 2001 to March 2003).

Further funding for Warm and Well has come from:

- a) Each local authority for grants for energy efficiency measures. These funds are managed as a single grant scheme known as Gloucestershire Energy Efficiency Grants (GEEG).
- b) The health sector. The three Primary Care Trusts that cover Gloucestershire have supported the scheme from its inception. Some of that support has been in the form of funding for measures, promotion materials or encouraging involvement of staff and patients in the scheme.
- c) Scottish Power under their Energy Efficiency Commitment programme towards the cost of measures under GEEG and the bulk discount scheme.

Managing Agent

Warm and Well is managed on behalf of the consortium by the Severn Wye Energy Agency, a Gloucestershire based charity for the promotion of sustainable energy and affordable warmth.

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Duration

The pilot scheme ran from 2001-2003. Warm and Well has been extended through a continuation of the project partnership, but without further pump-priming funding from the Energy Saving Trust. The development of a sustainable approach is a prime objective of HECAAction funding, and this has been achieved through the payment of a referral fee for each major measure installed by the contractor to the managing agent. This enables the scheme to remain self-sustaining provided the level of installed measures can be maintained.

Technical Monitoring – Works installed during Phase I

Llewellyn Smith Ltd. were appointed as an independent third party with experience of this type of work to carry out technical monitoring of a random sample of 5% of all properties improved during the second year of the scheme (April 2002 to March 2003). Faults that were identified were rectified by the contractor. Many of these faults were of a minor nature. Discussions took place between the scheme managers, Scottish Power and the contractor as a result of these findings and the contractor has improved their own quality monitoring and installation procedures.

Works installed during Phase II of the scheme will be monitored during the summer of 2004. Once more, a 5% random sample of properties improved will be assessed.

2. Results – Phase II

Support from the Energy Saving Trust in the form of HECAction funding during Phase I financed the development of the scheme and provided an opportunity to work with health and social care professionals to build up the referral network and materials. The GEEG and bulk discount schemes were set up and working well by the beginning of Phase II. The efforts to build a referral network and good relationships with partner organisations contributed to the excellent results for the initial phase of the scheme.

Throughout Phase II the success of the joint local authority grant scheme (GEEG) continued. GEEG is a unique feature of Warm and Well, and is a positive step towards a coherent county wide approach. The common application procedure and criteria made it easier to promote the scheme across Gloucestershire. Within this we maintained flexibility to deal with various situations including:

- * amendments to the eligibility criteria, in line with the changes to benefits
- * amendments to the eligibility criteria to accommodate increases in the available budget part-way through the year
- * monitoring other similar schemes (such as Warm Front) as it had been found that it was not possible to succeed with parallel schemes that were too similar
- * consulting each local authority independently on special cases where the measures required were marginally outside of those offered (such as additional heating works)

Cotswold District Council, although continuing to support the Warm and Well Scheme, felt unable to join the other consortium members in funding GEEG. The authority continued to offer their own in-house improvement grants and to use their own surveying and application process. At the end of Phase I of the scheme the authority and the managing agent agreed that the levels of activity in the Cotswold District Council area had been disappointing and so a separate contractor was appointed for Phase II with the sole aims of increasing the measures installed in that area. Once again, results have been disappointing and it is hoped that Phase III will give Cotswold District Council an opportunity for greater involvement in the scheme and higher levels of properties improved.

A core feature of Warm and Well has been the awareness-raising and development of a referral network with those who have direct contact with the target audience. In practice it is found that the latter delivers a slow trickle of the most vulnerable clients - while far greater numbers are achieved through the direct marketing both by the Warm and Well team and the contractor. Both are valuable, and will be continued into the next phase of the scheme. The approach is both planned and opportunistic, and includes briefing sessions with a wide range of health, social care and those from the voluntary sector, linking our message to that of the health promotion services, joint promotional

events with these partner organisations, more general public events, media articles and competitions, and air time on local radio.

The partnerships developed with Gloucestershire NHS Health Promotion, Care Direct, the Department of Works and Pensions, and BBC Radio Gloucestershire deserve a special mention. The continued support of the Primary Care Trusts during this phase has been invaluable and helps to provide an integrated approach to the problem of fuel poverty in the county.

Gloucestershire Warm and Well has been held up as an example of good practice by the "Fuel Poverty and Health Toolkit", published by the National Heart Forum, The Eaga Partnership Charitable Trust, the Faculty of Public Health Medicine, Help the Aged and the Met Office. It has also been selected as an example of good practice on the European ManagEnergy website and by National Energy Action (NEA) as an example of good practice for Scheme Integration (available on the Practical Help website). The SWEA have assisted Bristol and Somerset EEAC to set up a similar scheme.

Table 1a: Number of measures installed – GEEG Scheme – Phase II

Measure	CBC	CDC*	FOD	GCC	SGC	SDC	TBC	TOTAL
Cavity Wall Insulation	32	-	40	16	22	95	25	230
Loft Insulation	80	-	77	36	72	183	33	481
Draughtproofing	11	1	9	3	11	13	7	55
Hot Water Tank Jackets	15	-	8	2	5	15	5	50
Condensing Boiler	43	-	5	8	11	15	3	85
TRV (sets – up to 5)	38	-	56	16	51	108	16	285
CFLs (sets of 2)	132	-	108	47	100	267	45	699
TOTAL MEASURES	351	1	303	128	272	696	134	1885
TOTAL PROPERTIES	132	1	110	48	109	267	46	713

* Cotswold District Council in-house energy grants generated via the Warm and Well scheme

Table 1b: Number of measures installed – bulk discount scheme – Phase II

Measure	CBC	CDC	FOD	GCC	SGC	SDC	TBC	TOTAL
Cavity Wall Insulation	146	7	41	80	63	22	58	417
Loft Insulation	206	5	69	118	93	34	56	581
Condensing Boiler	9	-	3	4	3	4	5	28
TOTAL MEASURES	361	12	113	202	159	60	119	1026
TOTAL PROPERTIES	325	9	102	178	141	58	104	917

Table 1c: Number of measures installed – GEEG and bulk discount schemes – Phase II

Measure	CBC	CDC*	FOD	GCC	SGC	SDC	TBC	TOTAL
Cavity Wall Insulation	178	7	81	96	85	117	83	647
Loft Insulation	286	5	146	154	165	217	89	1062
Draughtproofing	11	1	9	3	11	13	7	55
Hot Water Tank Jackets	15	-	8	2	5	15	5	50
Condensing Boiler	53	-	8	12	14	19	8	113
TRV (sets – up to 5)	38	-	56	16	51	108	16	285
CFLs (sets of 2)	132	-	108	47	100	267	45	699
TOTAL MEASURES	712	13	416	330	431	756	253	2911
TOTAL PROPERTIES	457	10	212	226	209	325	150	1630

Table 2: Expenditure on measures – £ - Phase II

Funding source	CBC	CDC	FOD	GCC	SGC	SDC	TBC	TOTAL
GEEG	181,911.59	91.55*	55,413.15	29,142.04	52,481.01	115,822.63	24,965.65	459,827.62
Householder	108,321.64	3,058.74	33,880.20	65,783.48	53,961.71	41,321.39	41,528.24	347,855.40
Scottish Power - EEC	54,031.00	1,657.43	27,304.00	28,869.00	25,070.50	36,074.00	19,134.00	192,139.93
TOTAL	344,264.23	4,807.72	116,597.35	123,794.52	131,513.22	193,218.02	85,627.89	999,822.95

* Cotswold District Council in-house energy grant generated via the Warm and Well scheme

Table 3: Total measures installed – Phase II

Measures	Phase II (Apr 03 - Mar 04)
Cavity Wall Insulation	647
Loft Insulation	1,062
Draughtproofing	55
Hot Water Tank Jackets	50
Condensing Boiler	113
TRVs (sets)	285
CFLs (set of 2)	699
Radiator Panels	-
Heat Recovery Fans	9
TOTAL	2,920

Table 4: Number of enquiries handled by the Warm and Well team – Phase II

	CBC	CDC	FOD	GCC	SGC	SDC	TBC	TOTAL
Enquiries/Advice given	863	97	450	618	558	434	224	3264
Referred to Warm Front	102	14	108	120	126	72	37	579
Referred to GEEG	127	24*	84	88	86	210	47	666
Referred to Bulk Discount	548	24	152	338	295	131	98	1586
Ineligible due to tenure /no referral made**	86	35	106	72	51	21	62	433

* Cotswold District Councils own in-house energy grants

** This includes clients that did not wish to proceed with a referral, those coming to the scheme after local authority budgets have been spent and where the measures offered by the scheme were not appropriate for the property.

Referrals to Warm Front

The tables below show the number of referrals made to Warm Front directly by the Warm and Well scheme. The Eaga Partnership has provided the following information:

Table 5: Warm Front Measures installed - Gloucestershire

Measure	2001-2002	2002-2003	2003-2004
Insulation works	600	1098	1777
Heating Works	122	445	502

It is clear that the number of installed measures under the Warm Front Scheme has increased greatly over the course of the scheme. We feel that the referrals directly from the Warm and Well scheme and those made by the contractor on behalf of the Warm and Well Scheme account for a large proportion of the increase in activity described. Also, as the figures from Eaga are for Gloucestershire, the South Gloucestershire referrals do not feature.

Energy Advice Home Visits – Phase II

These are carried out by trained Energy Advisers from the Severn Wye Energy Agency, in the following circumstances:

- a) if a client is to have a heat recovery extractor fan installed under the scheme
- b) if a client needs advice that is best delivered in the home, such as a condensation problem or help with the use of heating controls
- c) if a client particularly requests a visit
- d) if a health or social care professional indicates that the client is particularly vulnerable
- e) if a client seems to have particular difficulties with understanding over the telephone or in writing

Table 6: Home Visits – Phase II

No of visits	CBC	CDC	FOD	GCC	SDC	TBC	TOTAL
TOTAL	22	-	19	20	4*	2	67

* This total does not include home visits by SDC staff

South Gloucestershire Council carry out their own home visits.

Heat Recovery Extractor Fans

Thirty six heat recovery extractor fans were installed during Phase I of the scheme with a further nine being installed during Phase II. To qualify for a fan the client must be eligible for a GEEG or Warm Front grant and have someone suffering from asthma in the household. EEAC staff and contractor surveyors together with the health professionals/referrers help to identify potential recipients. A home visit by an energy adviser was carried out in every case.

The group agreed that home visits, advice and follow-up should be funded from the health funds and that heat recovery extractor fans should continue to be offered to clients in the appropriate areas where there are issues with asthma. Continued support from the Primary Care Trusts and Gloucestershire Health Promotion, including the development of promotional materials, has led to the development of a new training session and materials that can be used county-wide. “Active, Warm and Well” will be tackling the four main determinants of health for older people: physical activity, falls prevention, food and nutrition and cold damp homes.

Table 7: Referral Network – Oct 2001-March 2004

	Phase II
Number of Briefing Sessions Held	18
Numbers Attending Briefing Sessions	299

These numbers have not been divided into Local Authority areas as many Health and Social Care functions cover more than one area.

South Gloucestershire Council carry out their own briefing sessions.

Table 8: Number of enquiries: client entry to scheme – Phase II

Source	CBC	CDC	FOD	GCC	SGC	SDC	TBC	TOTAL
Local Authority	58	34	73	69	92	46	42	414
Health/social care prof*	18	1	9	27	35	19	10	119
EEAC referral	115	33	172	114	75	39	80	628
Contractor referral	579	-	103	271	222	227	70	1472
Self referral*	93	29	93	137	134	103	42	631
TOTAL	863	97	450	618	558	434	244	3264

* Health and social care professionals may be indirectly responsible for more referrals when they inform clients about the scheme but let the client make their own contact.

**Self referrals include householders responding to Warm and Well awareness-raising activity either in the media or in their communities and those using materials developed by the scheme i.e. Warm and Well Question and Answer leaflets and Warm and Well Home Energy Checks.

Table 9: Analysis of tenure – Phase II

Tenure	CBC	CDC	FOD	GCC	SGC	SDC	TBC	TOTAL
Owner Occupied	825	70	391	574	520	419	216	3015
Private Rented	22	6	40	29	10	11	6	124
Local Authority Tenant	8	4	11	9	21	2	3	58
Housing Association	3	15	6	6	3	-	14	47
Other/not known	5	2	2	-	4	2	5	20
TOTAL	863	97	450	618	558	434	244	3264

Customer Satisfaction Survey

A survey of Warm and Well clients was carried out in July 2003. 3159 clients contacted the scheme between April 2002 and March 2003 and were logged onto the scheme database. 1000 clients were randomly selected and sent a customer satisfaction survey form. 301 clients replied.

213 respondents described the service they received from Warm and Well as “Excellent” or “Good”. The energy efficiency advice provided by the scheme was described as “Excellent” or “Good” by 197 clients. Interestingly, 85 householders said that improving health was the reason that they followed the energy efficiency advice they had been given, and a further 154 said that increasing comfort was a motivation factor. Issues of health and comfort are very closely linked.

Table 10: Estimate of CO₂ saved resulting from measures – Phase II

	CBC	CDC	FOD	GCC	SGC	SDC	TBC
CO₂ (tonnes)	12,781.67	328.58	5580.53	6191.04	6125.36	8461.08	4578.95

TOTAL CO₂ SAVINGS FOR PHASE II OF SCHEME: 44,047.21 tonnes

NB: Figures are an estimate based upon the current fuel mix for the country. (Gas = 78%, Oil = 8.2%, Coal = 7%, Electricity = 5.9%)

These figures include only GEEG and bulk discount installations and are based on the lifetime energy saving potential of each measure.

3. Results – Scheme to date

Table 11a: Total measures installed – GEEG Scheme – Oct 2001-March 2004

Measure	CBC	CDC*	FOD	GCC	SGC	SDC	TBC	TOTAL
Cavity Wall Insulation	132	7	106	46	28	207	79	605
Loft Insulation	262	7	213	87	86	458	124	1,237
Draughtproofing	52	3	34	19	13	61	45	227
Hot Water Tank Jackets	70	-	37	16	6	41	23	193
Condensing Boiler	94	-	18	18	16	21	8	175
TRV (sets – up to 5)	188	1	158	62	67	265	56	797
CFLs (sets of 2)	356	8	288	167	128	653	206	1,806
TOTAL MEASURES	1,154	26	854	415	344	1,706	541	5,040
TOTAL PROPERTIES	408	10	310	138	138	697	135	1,877

* Cotswold District Council in-house energy grants generated via the Warm and Well scheme

Table 11b: Total measures installed – bulk discount scheme – Oct 2001-March 2004

Measure	CBC	CDC	FOD	GCC	SGC	SDC	TBC	TOTAL
Cavity Wall Insulation	314	84	125	170	90	238	391	1,412
Loft Insulation	431	67	213	230	120	395	443	1,899
Draught Proofing	16	1	15	12	-	24	16	84
Hot Water Tank Jackets	2	-	-	-	-	-	9	11
Condensing Boiler	64	4	18	22	7	17	14	146
TRV (sets)	129	6	99	47	3	171	78	533
CFLs (Set of 2)	12	8	8	8	-	4	12	52
TOTAL MEASURES	968	170	478	489	220	849	963	4,137
TOTAL PROPERTIES	713	148	345	377	195	604	800	3,182

Table 11c: Total measures installed – GEEG and bulk discount schemes – Oct2001-March2004

Measure	CBC	CDC*	FOD	GCC	SGC	SDC	TBC	TOTAL
Cavity Wall Insulation	446	91	231	216	118	445	470	2,017
Loft Insulation	693	74	426	37	206	853	567	3,136
Draughtproofing	68	4	49	31	13	85	61	311
Hot Water Tank Jackets	72	-	37	16	6	41	32	204
Condensing Boiler	158	4	36	40	23	38	22	321
TRV (sets – up to 5)	317	7	257	109	70	436	134	1,330
CFLs (sets of 2)	368	16	296	175	128	657	218	1,858
TOTAL MEASURES	2,122	196	1,332	904	564	2,555	1,504	9,177
TOTAL PROPERTIES	1,121	158	655	515	333	1,301	935	5,059

Table 12: Total expenditure on measures – £ - Oct 2001-March 2004

Funding source	CBC	CDC	FOD	GCC	SGC	SDC	TBC	TOTAL
GEEG	465,517.24	91.55	165,714.19	87,955.91	69,024.18	319,972.95	84,965.65	1,193,241.67
Householder	148,844.38	43,137.70	52,764.20	86,462.83	68,009.95	88,001.52	112,905.59	600,126.17
Scottish Power - EEC	83,749.40	15,862.43	35,809.00	47,482.00	40,493.50	88,153.97	70,594.20	382,144.50
TOTAL	698,111.02	59,091.68	254,287.39	221,900.74	177,527.63	496,128.44	268,465.44	2,175,512.3

Table 13: Total measures installed – Oct 2001-March 2004

Measures	Total To Date
Cavity Wall Insulation	2,017
Loft Insulation	3,136
Draughtproofing	305
Hot Water Tank Jackets	204
Condensing Boiler	321
TRVs (sets)	1,320
CFLs (set of 2)	1,858
Radiator Panels	36
Heat Recovery Fans	54
TOTAL	9,251

Table 14: Total enquiries handled by the Warm and Well team – Oct 2001-March 2004

	CBC	CDC	FOD	GCC	SGC	SDC	TBC	TOTAL
Enquiries/Advice given	1,891	272	1,357	1,571	797	1,557	1,138	8,603
Referred to Warm Front	283	51	299	408	169	275	113	1,598
Referred to GEEG	498	57	526	267	94	564	158	2,302
Referred to Bulk Discount	866	105	339	641	462	315	524	3,252
Ineligible due to tenure /no referral made**	244	59	193	255	72	265	363	1,451

* Cotswold District Councils own in-house energy grants

** This includes clients that did not wish to proceed with a referral, those coming to the scheme after local authority budgets have been spent and where the measures offered by the scheme were not appropriate for the property.

Table 15: Referral Network – Oct 2001-March 2004

	Scheme to Date
Number of Briefing Sessions Held	65
Numbers Attending Briefing Sessions	671

These numbers have not been divided into local authority areas as many health and social care functions cover more than one area.

South Gloucestershire Council carry out their own briefing sessions.

TOTAL CO₂ SAVINGS FOR SCHEME TO DATE: 137,294.94 tonnes

NB: Figures are an estimate based upon the current fuel mix for the country. (Gas = 78%, Oil = 8.2%, Coal = 7%, Electricity = 5.9%)

These figures include only GEEG and bulk discount installations and are based on the lifetime energy saving potential of each measure.