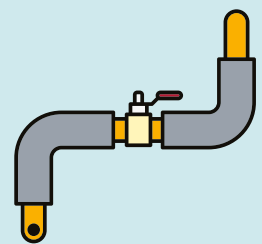
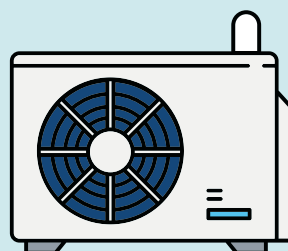
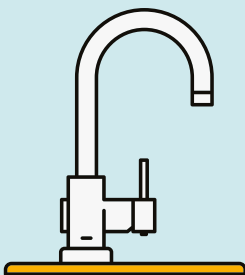
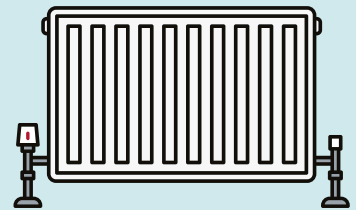
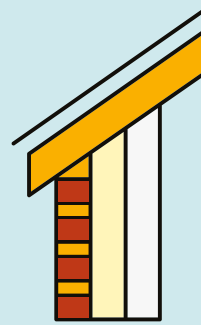
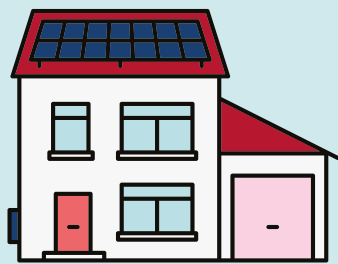


Home Energy Advice North East

LEAD Best Practice Guide

Overcoming barriers: vulnerable and rural residents



Introduction

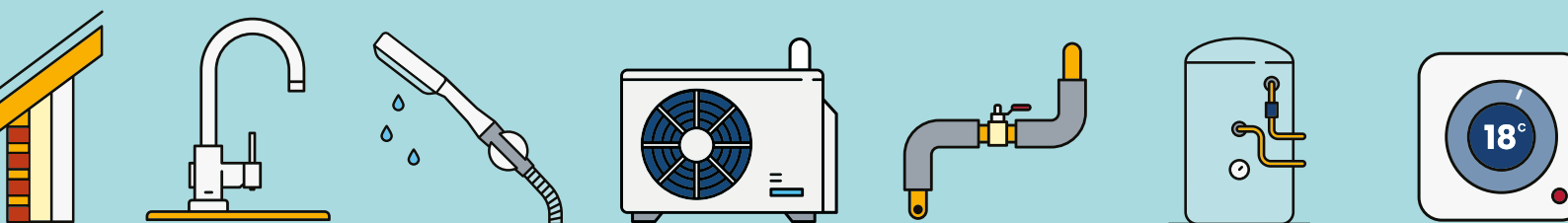
Domestic retrofit is a strategic priority for the North East region and the North East councils have a long history of delivering practical programmes to help people reduce heating and energy use in their homes. This includes supporting residents with energy efficiency and affordability through fuel debt advice, income maximisation of benefits and switching energy tariff.

Although the North East has been one of the most active regions in delivering home energy efficiency measures, it has some of the highest fuel poverty levels in the country due to income levels and remaining poor quality buildings. In the North East **as many as 220,000 households are estimated to be fuel poor** (Gov, 2023).

Scaling up domestic retrofit is a huge economic development opportunity for the North East but residents face multiple barriers including high upfront capital costs, slow return on investment, lack of knowledge, lack of trusted installers or advice and disruption to their homes.

Following a successful allocation of funding from the national Local Energy Advice Demonstrator (LEAD) programme run by the Department for Energy Security and Net Zero (DESNZ) in January 2024, the **North East Combined Authority (North East CA)** appointed Energy Saving Trust to deliver its LEAD project, with **Groundwork North East and Cumbria** and **Community Action Northumberland** as local delivery partners.

North East CA's LEAD project has been delivered alongside a One Stop Shop telephone and web advice service funded through the UK Shared Prosperity Fund; both projects are delivered under the overarching brand Home Energy Advice North East.



Objectives

The overarching objective of the LEAD programme is to trial different approaches to in-person energy advice, using learnings to inform the development of an approach to energy advice provision that could be replicated nationally.

The programme is focused specifically on targeting hard-to-treat properties and/or hard-to-reach residents.

North East CA's LEAD offer includes:

- Free and impartial advice on energy saving home improvements, delivered in the home
- A property report detailing energy saving recommendations, accessible through a QR code
- Face-to-face advice provided at community events

Implementation

Referrals into the service have been generated through a multi-channel marketing campaign, from partners and through advisors at community events.

Clients are offered a home visit in which they receive detailed personalised advice and a free property report with recommended actions. Energy advisors, trained to at least Level 2 in domestic retrofit, provide tailored advice based on home assessments and occupant needs. Ahead of the visit, they review EPC data (if available) and discuss client priorities.

During the visit, advisors inspect key areas such as heating, insulation, and windows, using a questionnaire to guide discussions. Clients receive information on energy use, available services, and potential retrofit options, including funding and grants.

Advisors may assist with grant applications on-site or provide cost estimates via Homewise – a digital advice tool that provides personalised energy efficiency recommendations for homeowners. After the visit, advisors follow up with resources and a check-in call to offer further support.

Common challenges and solutions

Challenge 1: Vulnerable clients experiencing fuel poverty

Many households in the North East are struggling to afford adequate heating due to low incomes and rising energy costs, leaving them in fuel poverty. Between 13–16% of residents in each North East local authority area is in fuel poverty based on the low income, low energy efficiency (LILEE) definition.

These clients are often eligible for grant funding but can struggle with complicated application processes and eligibility criteria. Cases are sometimes further complicated by the client's circumstances, complex needs or chaotic lifestyles. They may not have the resources to follow up on their application and need additional support to navigate the journey from concept to install.

Case study

A vulnerable client in Northumberland

Background

Community Action Northumberland were contacted by a vulnerable, disabled client's parent. The client was noted to have high energy usage due to around-the-clock care and their disability. Several rooms within the client's home were cold, as they had three external walls. The client also had issues with draughts from a kitchen/garage extension that was rushed to completion to meet the client's needs.

The property is owned by a trust which was set up by the client's parents to support them. For highly vulnerable disabled adults requiring 24/7 care, in-home support is essential. It enables access to advisory services and facilitates direct communication with family members or trustees, ensuring advisors fully understand the client's needs.

Action taken

The energy advisor assessed the client's circumstances and identified that they were potentially eligible for the Home Upgrade Grant (HUG). This would support them with funding towards insulation, making the client's home warmer and more comfortable, as well as reducing their energy bills. The advisor supported the client in making an application to Northumberland County Council for HUG funding.

The advisor also installed small energy saving measures in the home including 10 LED bulbs and radiator reflector panels, funded by the Redress scheme.



Outcome

The advisor was able to follow up this case with the local authority so the nature of the home ownership could be explained and considered fairly.

The offer of in-home support allowed the advisor to communicate with the vulnerable client's carers and assess the issues that were being faced. Following a discussion with Northumberland County Council, this case was successfully approved for HUG funding for solar PV and insulation. Once installed, these will help save a combined £530 a year. In addition, the LED bulbs will help save £70 a year and the radiator reflector panels will reduce heating bills by around 8%.

The client is also looking to install a domestic battery storage system so that when power is down, the client and carer will still have some power, due to their home being in a very rural location. This will be paid for by their trust.

Without the support of the LEAD energy advisor, the client would not have been able to identify which measures would be most appropriate for their home, or to navigate the complexities of the grant funding system. By maintaining a client-centred, collaborative approach, professionals can ensure that vulnerable individuals receive the support they need while alleviating the burden on their caregivers.

Challenge 2: Clients living in rural areas

Durham and Northumberland have high proportions of rural properties (48% and 46% respectively).

There is a proportion of these clients that would be deemed able to pay, however the vast majority fall under the low-income bracket.



Case study

A traditional home in a rural Northumberland

Background

The client had purchased a substantial, traditionally built home in a very rural area that needed complete renovation and refurbishment. The client wished to consider energy efficiency while undertaking work but struggled to get impartial advice as previous advice had been a hard sell. The EPC of the property was G. The clients were advised to deal with their damp issues caused by poorly maintained gutters and flashing.

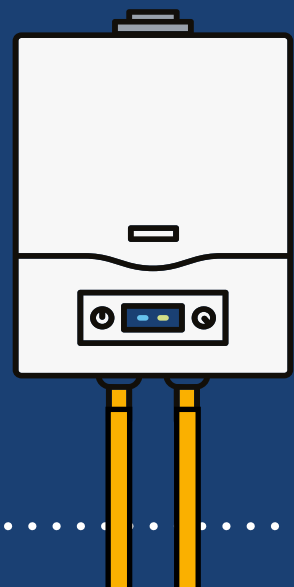
Action taken

Community Action Northumberland's energy advisor suggested a range of options that could be suitable for this home. They suggested a heat loss survey would ascertain whether a heat pump might be appropriate for the property, due to the build type and as most rooms were unheated. They flagged that this case would need to refer to the Historic England guidance on installing heat pumps in traditional buildings.

The advisor also suggested that if the client preferred a wet central heating system, biomass might be suitable at this location and advised the client about Boiler Upgrade Scheme (BUS) grants. Internal wall insulation was recommended because a limited number of 'features' would be affected. The suspended flooring could also be insulated depending on adequate ventilation. Particularly as the property is off mains gas, solar PV was recommended as a good option.

Outcome

The advisor recommended that loft insulation was required within the property, as a first step. The client was referred to Home Energy Advice North East's end to end installation scheme, delivered by Warmworks, as the client was not eligible for grant funding. They have now had 5 new high-capacity storage heaters, double glazing and loft insulation installed. They have plans to fit solid floor insulation, solar PV and a domestic battery in the next phase of work.



Conclusion

Energy advisors conducting in-home visits play a vital role in empowering households to improve their energy efficiency and alleviate fuel poverty. By providing tailored advice and resources directly to clients, advisors can identify specific challenges, such as inadequate insulation or inefficient heating systems, and recommend practical solutions.

These personalised interactions help to build trust, address barriers like digital exclusion, and connect clients with relevant funding opportunities and tools. Through consistent, ongoing engagement and support, energy advisors not only improve the comfort and affordability of homes but also contribute to broader environmental goals by reducing energy consumption.

Implementing these best practices ensures a sustainable and impactful approach to energy efficiency, benefiting individuals, communities, and the environment alike.



HM Government



north east & yorkshire
NET ZERO HUB

