

EnergyWise LEAD

Providing advice to older people and families living with disadvantage and low incomes, and helping them access grants and retrofit services, across Southampton and the Isle of Wight

Activities

This project ran over two separate locations, both reaching different vulnerable or fuel poor audiences through **community outreach**, especially those eligible for grants.

In Southampton, Testlands runs a [Wellbeing Hub](#) running holiday, youth and after school clubs, with a focus on physical activity, mental wellbeing and reaching **families** living with socioeconomic deprivation. Despite an existing client base and school relationships, this proved challenging: schools lacked capacity to engage, large events were well-attended but advice uptake was low, and clients were sceptical about 'catches' in free advice. By shifting focus to a **community champion-based model**, and allowing people to self-refer (supported by effective marketing), Testlands was able to significantly improve engagement.

On the Isle of Wight, the population is much older than average, with some of the lowest literacy levels in England and a relatively high proportion of people offline. Green Isle of Wight, under the 'Energy Wise' project banner, ran face-to-face **drop-in advice sessions**, in places where groups meet, with Veterans Outreach Support, Sight for Wight, Alzheimer's Cafe and 'Our Place' groups to reach **older people**, build trust, and help those who are **offline** with accessing grants. A mix of marketing channels was also used. [NOSY](#) marketing agency was employed to help, with great success, and eventually extended their support to the Southampton element.

Once households were engaged, they were offered a **home visit** for a ThermaFY home survey. The project also referred people into grant schemes such as the Home Upgrade Grant (HUG 2), working with [Agility Eco](#) to support installation. The project team provided Retrofit Assessments (including EPCs where needed) and follow-up visits to help people understand and get the best from their new technology.



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Key project information

Awarded: £489,212

Duration: Jan 2024 to Mar 2025

Reach: Bespoke advice to 1,480 people, 5,800 engaged overall

Lead partner: Testlands

Supporting partner: Green Isle of Wight CIC (under the EnergyWise project banner)



Replication

- Trust is crucial to reaching older people and families experiencing socioeconomic disadvantage. Making use of personal networks (through community champions) is very effective, and repeat face-to-face outreach through existing community groups helped build familiarity and trust in individual advisors
- Despite being trusted to work with existing clients on wellbeing, this did not translate into being trusted to give energy advice. Testlands overcame this by starting small, such as using thermal imaging cameras to show where radiators needed bleeding or unblocking. This helped with credibility and encouraged interest
- In Southampton, Testlands learned a great deal from what didn't work: schools lacked capacity to engage; texting clients and area-based leafleting did not get a response; renters paying a flat rate for their energy bills were entirely uninterested; competitions did not interest families; and families were not interested in engaging with energy advice at family events
- Using an external marketing agency was very effective, and can be a good use of budget if in-house skills are insufficient; approaches included real case studies and short audio clips as part of press releases, which proved popular with news outlets and improved coverage
- Staff were initially trained in Level 2 Retrofit Advice, but found this didn't prepare them for working with people in fuel poverty. The NEA Energy Awareness Level 3 course was then found to be a much better fit for the project, mixing technical and customer awareness. The project also employed qualified Retrofit Assessors to support the installation process
- The project used the Fairer Warmth app as a CRM because it helps ensure that retrofit advice given to people conforms to PAS2035
- Working with commercial installers generated extra project income through referral fees and services under the grant funding process (see [webinar](#) 52:15 to 53:20 for details of fees)

Resources

- [Project case study](#) hosted on Green Isle of Wight CIC's website
- [Level 3 Award in Energy Awareness](#) is delivered by National Energy Action (NEA)
- [Fairer Warmth](#) is an online platform supporting CRM, data management and analysis on carbon and energy savings, and a client-facing app with further advice and grant information
- [ThermaFY](#) provides home surveys directly, but also provides a software platform that can be used by community groups carrying out their own home visits
- Other relevant LEAD Toolkit contents (see [South West Net Zero Hub website](#)): [Community Outreach \(method\)](#), [Home Visits \(method\)](#), [Community Champions \(method\)](#).
- EnergyWise LEAD contributed to the SWNZH LEAD Webinar Series: [Innovations in domestic retrofit advice - Retrofit](#) as a service 22 Jan 2025 (35:15 to 56:30) (see also [full slides](#)).

About LEAD

LEAD is managed by South West Net Zero Hub and funded by the Department for Energy Security and Net Zero. The programme is trialling innovative approaches to retrofit advice for hard-to-reach groups and hard-to-treat homes. Find out more [here](#).

Contact this project

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