



# IMPACT REPORT 2019-2020



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# OUR IMPACT AT A GLANCE

In 2019-2020, AgilityEco's activities delivered a 489% social return on investment. We align our work to the UN Sustainable Development Goals (SDGs), incorporating them, where relevant, into our project plans. This enables us to measure the impact performance of all our projects against the wider goals of the UN's global challenges and ensures that we are doing all we can to address these challenges, including poverty and climate change.



**122,554** 

ENERGY EFFICIENCY MEASURES INSTALLED AND ACHIEVING **OVER £150 MILLION WORTH OF LIFETIME ENERGY BILL SAVINGS IN THE LAST YEAR (2019/20)**

**115,000** 

OUR ENERGY-EFFICIENCY MEASURES, ADVICE AND RELATED SERVICES REACHED APPROXIMATELY 115,000 **INDIVIDUALS.**

**690** 

690 **JOBS** HAVE BEEN SUPPORTED IN BOTH **LOCAL COMPANIES AND SOCIAL ENTERPRISES**

**£31M** 

WE HAVE HELPED TO UNLOCK OVER £31M OF **FUNDING FOR CLIENTS AND PARTNERS**

**47,926** 

OUR COMMUNITY PROGRAMMES AND INITIATIVES ARE SERVING 47,926 **HOUSEHOLDS IN NEED**

**425,431** 

TONNES OF LIFETIME CO<sub>2</sub> EMISSIONS HAVE **BEEN ABATED**

**£10.9M** 

THESE INTERVENTIONS HAVE LED TO A TOTAL OF £10.9M **ANNUAL SAVINGS FOR THE HOUSEHOLDS SERVED.**

**£425** 

AVERAGE PER HOUSEHOLD SAVED. **127% OF THE AVERAGE FUEL POVERTY GAP.**

# ABOUT US

AgilityEco is a leading provider of fuel poverty, energy-efficiency and low-carbon services across the UK, working in partnership with utility companies, local authorities, social housing providers, charities and social enterprises tackling the dual challenges of fuel poverty and vulnerability.

Utility companies rely on us to meet their social and environmental obligations by providing support for their vulnerable customers. We do this by creating and managing innovative projects that deliver holistic solutions for those most in need. Under the ECO scheme we arrange for the installation of energy efficiency measures such as better insulation and efficient boilers. We also work in close partnership with nearly 200 local authorities to identify households eligible for the Warm Home Discount, a separate Government scheme for those in particular need.

We design and operate a number of community-based programmes to provide fuel poverty and energy efficiency solutions to these specific households, one of which is our award-winning Local Energy Advice Partnership (LEAP). All of our fully funded community outreach programmes support the health, safety and wellbeing of the most vulnerable in our society.

**By providing fuel poverty, energy efficiency and low-carbon support to vulnerable people, we are helping the Government to meet its statutory targets of net zero emissions by 2050 and working towards a shared goal of no fuel-poor household living in an inefficient home by 2030.**

The delivery of these services helps address our urgent need to consume less energy and to reduce greenhouse gas emissions.

**We plan**, manage and deliver innovative services to give support to households that need a helping hand.

**We provide** practical help with energy efficiency, utility bills, households finances and vulnerability.

**We work** closely with local authorities, housing providers, charities and social enterprises to reach those most in need.

**We fulfil** social and environmental obligations for utility companies who fund our services.

**We deliver** these services through our carefully chosen national network of trusted and experienced energy efficiency partners.

# WELCOME

## GEARÓID LANE & JON KIMBER



If you know us already, you'll know that we are passionate about fighting fuel poverty and vulnerability. Our longstanding commitment to delivering better outcomes for fuel poor and vulnerable households has culminated in a unique approach, where we bring together high quality vulnerable customer support, delivered at scale; funding and delivery of energy efficiency measures; and local partnerships with local authorities, charities and social enterprises at the centre. This approach has evolved over a number of years and we're fortunate that our close working partnerships with government and our stakeholders mean we can continually broaden and deepen the level of support we can offer to the most vulnerable in society.

2019-2020 was a momentous year for AgilityEco, both in terms of delivering this support, but also for us as a company. We're delighted that we're able to report an enhanced level of social impact than in previous years and we're proud that due to swift action by our project teams, adapting our delivery models in light of the pandemic, our targets for next year will be largely unaffected by Covid-19. Indeed, the devastating toll of the pandemic on UK households, with hundreds of thousands predicted to experience difficulty in affording warmth this wintertime, has seen a marked increase in the need for our vulnerability services.

It was a truly exceptional year for AgilityEco and our sister company Bierce, which is responsible for much of our programme delivery. We broadened the support offered to fuel poor and vulnerable people, with our community programmes and initiatives serving 47,926 households in need, installing 122,554 energy efficiency measures and achieving over £150 million worth of lifetime energy bill savings in the last year (2019/20).

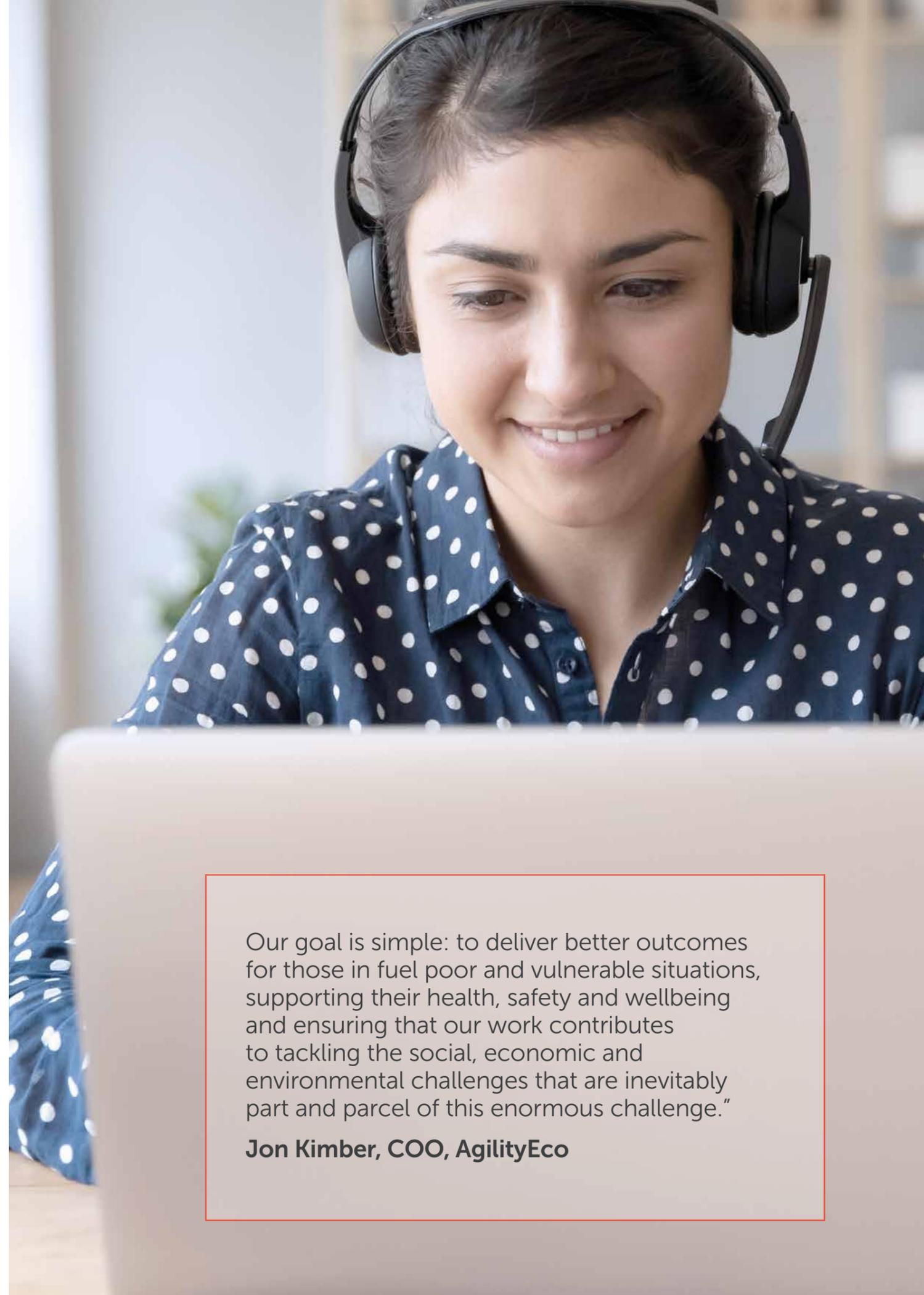
**These interventions have led to a total of £10.9m annual savings for the households served, an average of £425 per household, which is significantly higher than the average fuel poverty gap.**

Alongside our work on community programmes, this year we've played an increasing role in putting the case forward to Government and regulators for deeper support to be made available to the fuel poor and vulnerable. Our expert policy team responded to more Government and Ofgem consultations than ever before, seeking to influence key policies, and with encouraging signs of success.

We've made huge strides to improve and widen our network of energy company, local authority, social housing and charity partners and as a result we are, together, reaching those most in need of our services. This year, our Local Energy Advice Partnership (LEAP) programme is working with nearly 200 local authority and social housing partners, helping them to support their most vulnerable residents. LEAP is now available in local authority areas serving over 30.5 million people. That's almost half the current UK population.

Our goal is simple: to deliver better outcomes for those in fuel poor and vulnerable situations, supporting their health, safety and wellbeing and ensuring that our work contributes to tackling the social, economic and environmental challenges that are inevitably part and parcel of this enormous challenge."

**Jon Kimber, COO, AgilityEco**



Working in close partnership with energy companies and a network of local installation partners, our specialist ECO delivery team continued to provide compliant measures to go towards pressing energy company obligation targets.

**Our work meant we were able to unlock £34 million of funding for our clients, and we were delighted to receive the title "Funding Provider of the Year" at the 2019 National Energy Efficiency Awards.**

November 2019 marked an exciting milestone for AgilityEco, with Bridges Evergreen Holdings – a specialist long-term capital investment vehicle – acquiring a stake in our business. Managed by Bridges Fund Management, a specialist fund manager focused exclusively on sustainable and impact investment, this support will enable us to deliver more targeted and valuable social impact to fuel poor and vulnerable households across Britain.

## BRIDGES

Fund Management

Together, Bridges Evergreen and AgilityEco are working towards fulfilling our goal to help end fuel poverty by 2030, as outlined in our manifesto "From Obligation to Opportunity" published in summer 2019.

AgilityEco and Bierce have worked hard to develop and nurture relationships with a trusted network of supportive partners and teams across the country. This year, thanks to this collaborative network, we've managed to deliver numerous complex projects that have met the highest standards of compliance, professionalism and excellence.

This report highlights some of the key achievements from these projects. Thanks to your support, we've helped nearly 50,000 hard-pressed households in the UK. We're looking forward to working with all our existing partners, as well as welcoming new ones over the coming year, as we find new ways of helping people in need.

**GEARÓID LANE & JON KIMBER**

"AgilityEco's wealth of technical and commercial experience has assisted us greatly in securing funding for a wide range of projects. As well as funding ECO insulation and heating works, AgilityEco has raised the bar by being able to secure consistent funding for energy efficiency advice, income maximisation, emergency boiler repair and replacement, upgrading inefficient white goods, and anything else that can be done to help fuel poor households reduce their bills and stay warm and well. I couldn't think of a better recipient for this award."

**Jamie Robson, MD, JNR Contracting**



# ENSURING OUR VOICE IS HEARD

**Each year at AgilityEco we help tens of thousands of fuel poor and vulnerable households to reduce their energy bills and stay warm and well. We truly believe that being able to keep adequately, healthily warm in winter is a basic human right.**

Yet we believe much more must be done in public policy and in delivery if we are to meet the Government's statutory target to ensure no fuel poor household lives in an inefficient home by 2030. New policies and more funding are required, but also innovative approaches and improved efficiency. We see a great opportunity for all agencies to "work smarter" to maximise our strengths, reduce waste and overcome barriers.

**In September 2019, we presented our three proposals to help end fuel poverty by 2030 at the annual NEA Conference in Sheffield.**

In addition to delivering impactful responses to the many Department for Business, Energy & Industrial Strategy (BEIS) and Ofgem consultations throughout the year, our policy team urged our local

authority and supply chain partners to respond to key consultations, as well as providing regular policy briefings for them. In a year that saw many changes within the energy efficiency landscape, our partners relied on us to unpick the details and advise them accordingly. This additional layer of guidance has stood us in good stead for rallying industry support when needed.

Our team is increasingly seeing the fruits of its labour in positive policy outcomes, which are filtering through now.

Ofwat's decision on the £200m Innovation Challenge said: "We have amended ... to specifically reference those in vulnerable circumstances" and we campaigned for Ofwat to do this. The policy team petitioned strongly and successfully for consultation on a one-year interim extension to WHD, to "break the logjam" and the design of the recently announced Green Homes Grant has subsequently included a number of specific aspects which we suggested.

## AgilityEco's three proposals to help end fuel poverty by 2030:



### More Money, Better Spent

Recognise the need for more funding to deliver 2030 targets, and greater efficiency through data sharing



### Smarter Local Partnering

Leverage the unique strengths of local authorities by building long-term stable partnerships



### Help for All Vulnerable Customers

Provide help that customers need, including ECO measures and vulnerable customer support

"So much of the fuel poverty work we do at AgilityEco is achieved through partnerships, with strong local authority leadership at their heart. If we deal with energy efficiency and vulnerability together we achieve much better outcomes and if we work together to get the right infrastructure in place, we can support fuel poor households, in their own homes, recognising their particular issues and bringing all the relevant partners together."

**Gearóid Lane, CEO, AgilityEco**





# OUR SERVICES

## Improving lives for the fuel poor and supporting the vulnerable in our communities

AgilityEco's four unique, complementary services comprise managing obligations, community programmes and vulnerability support, project delivery, and property surveying. Our innovative care and support services help with energy efficiency, utility bills, household finances and vulnerability. They deliver great social and environmental impact and, in many cases, life changing outcomes.



### MANAGING OBLIGATIONS

Since our inception, we've been helping our energy supplier customers to meet their social and environmental obligations for hard-to-treat, low income and vulnerable homes. Utility companies rely on us to fulfil these obligations by funding our services, which are delivered through our carefully chosen national network of trusted and experienced energy efficiency partners. The outcome of these services combines practical help and support to hard-pressed households with an urgent contribution to sustainable energy consumption and reduction of greenhouse gas emissions. Our Energy Company Obligation activity resulted in an average lifetime saving of £14,706 per household from measures installed.



### COMMUNITY PROGRAMMES & VULNERABILITY SUPPORT

Our fully funded community outreach programmes help hard-pressed households to escape from fuel poverty. Working in partnership with close to two hundred local authority partners, we've given financial support through income, benefits and energy efficiency measures to almost 50,000 households in the past year. We've helped to reduce the fuel poverty gap for these households by 127% as well as achieving over £150m of lifetime energy bill savings in 2019/20. Our programmes support the health, safety and wellbeing of the most vulnerable in our society and their value to the national health and care services is worth over £6.5million. AgilityEco is proud to have supported 690 jobs within local companies and social enterprises through the rollout and delivery of our community programmes.



### PROJECT MANAGEMENT & DELIVERY

Working collaboratively with utility companies, we project manage the delivery of energy efficiency retrofit works in local communities. 2019-2020 has seen us significantly grow our activity in the area of First Time Central Heating (FTCH), where we have managed the replacement of old, inefficient electrical heating sources with new, modern and energy efficient central heating. This has typically halved heating bills for customers. In 2019, we helped utility companies achieve 1.94 million MWh of lifetime energy savings from insulation and heating improvements and abated 425,000 tonnes of lifetime CO<sub>2</sub> emissions. During 2019-20 we have managed three large Warm Homes Fund (WHF) programmes in partnership with local authorities and housing associations, generating an average annual saving of £560.67 for every customer.



### PROPERTY SURVEYING (BIERCE)

We've always offered a full range of solutions to manage the property surveying elements that are integral to the success of our fuel poverty services and energy efficiency programmes in both the domestic and commercial sectors. AgilityEco's sister company, Bierce Surveying, supports homes, businesses and public sector organisations to manage their energy efficiency initiatives by providing Energy Performance Certificates, stock assessments, Chartered Surveyor Reports and other technical surveys. In 2019/20, we delivered over 33,000 reports and surveys across a range of projects, supporting not only the ECO, technical monitoring and compliance aspects of our business, but also forming the backbone of our community programmes. Over 22,000 of these reports were for vulnerable households.

## MANAGING OBLIGATIONS

# ECO

**Over the past year we have successfully navigated several regulatory amendments to ECO3 which runs until March 2022. Over the last 12 months we have supported 11 obligated suppliers helping to fulfil their Energy Company Obligation (ECO) and Warm Home Discount (WHD) obligations. During this period, we have been involved with the installation/funding of an impressive 12,102 energy efficiency measures into 8,011 properties nationwide. This could not be achieved without the support of our highly skilled supply chain partners, who have grown in numbers.**

This expansion has only been possible due to our deep understanding of this sector. Our experience is unparalleled and recognised across the supply chain, obligated suppliers, government, regulators and the voluntary sector. We aim to be at the forefront of all ECO related policy development and continuously engage with BEIS, Ofgem, obligated suppliers and the supply chain at large. Over the last few years, our engagement with government on policy development and workshops to explain government policy and guidance have set the benchmark for the industry.

We pride ourselves on the quality and efficiency of our service, reflecting our professionalism and quality standards. Our key strength, differentiating us from others is the diversity of our supply chain and the level of in-house support we can offer, ensuring the services we provide to our clients is of the highest quality. Our support services are complemented by Bierce Surveying who assist us and our network with property surveys, PAS2030 surveys, training and quality assurance services.

ECO3 has seen the re-introduction of an innovation incentive, enabling new, smart innovative technologies to be delivered to households at enhanced ECO funding rates. We are recognised leaders in gaining regulatory approval for and the deployment of innovation products and schemes. We have recently launched a programme for an innovative Google smart thermostat which has had the highest uptake in comparison to other approved products through the ECO3 innovation measures route.

We passionately believe in optimising every interaction we have with a vulnerable household, ensuring they get all the help available to them. Through our community outreach programmes, we aim to ensure that householders benefit from the full range of services we offer, including ECO. We then link these households to our fully vetted supply chain partners, so they receive a first-class installation experience.

Building longstanding relationships is a key objective across our entire business. We have an extensive portfolio of supply chain partners (60+) and local authorities and housing associations (200+) clients across Great Britain, where we have excellent relationships through our work on ECO and community outreach and vulnerability programmes. We continue to assist them to identify and promote ECO funding opportunities where available. Much of our work on community outreach programmes involves charities and fuel poverty organisations who also identify ECO opportunities.

We continue to engage with BEIS on policy development for the proposed schemes that will eventually succeed ECO and to better position ourselves as a market leader within this sector.

All of the above provides great opportunities to further support our supply chain and provide greater confidence to our energy supplier partners. We look forward to meeting future challenges within this sector head on and remain confident in our model to assist suppliers with their obligations for the remainder of ECO3.



**Shueb Ali,**  
ECO Director

"E chose to partner with AgilityEco to assist in the delivery of both ECO and Warm Home Discount obligations following a comprehensive review of available options. AgilityEco are well established in both areas and it is evident that they are experts in their field. E are always keen to make the best use of obligation spend and by working with AgilityEco we can be certain that the funding is spent in a manner that benefits a great number of fuel poor and vulnerable consumers. Regular reporting and progress updates from AgilityEco ensure we always know where we are at with delivery. We hope to continue the partnership in future scheme years."

**James Thornicroft, Energy Services Manager, E**

"AgilityEco have been a trusted ECO delivery partner of ours for over half a decade. Their attention to detail and quality, combined with up to date knowledge of the evolving scheme landscape, ensures confidence in any element of the scheme we ask them to deliver. We look forward to continuing this relationship through ECO 3 and beyond."

**Jon Owens, Senior Environmental & Social Programmes Manager, Shell Energy Retail**

"I can't recommend AgilityEco enough. Working with AgilityEco has enhanced our confidence as an installer, knowing they value long term relationships, offer strong rates, and providing installers with a compliance and submissions support service which is second to none".

**Michael Griffiths, Compliance & HR Manager, C&T ECO Consultants**

## COMMUNITY PROGRAMMES & VULNERABILITY SUPPORT

# LEAP

Our Local Energy Advice Partnership (LEAP) had a phenomenal year, thanks in part to a large injection of extra funding in December. The majority of our funding came from six energy suppliers through their Warm Home Discount obligation – SSE, Scottish Power, British Gas, Shell Energy, Co-operative Energy and Avro Energy. We are extremely grateful to these energy companies for their continuing support.

LEAP seeks to address the three fuel poverty contributors of poor building fabric, high energy charges and low income. Overall, in the last scheme year, LEAP delivered £14m of value to the recipients of the service through tariff savings, energy reduction and additional income. With a fund value of £3.8m, this means LEAP delivered a benefit to cost ratio of 3.7:1 from its direct funding usage. What this means in reality is that it creates so much more value through onward referrals into other programmes, both in-house and through external partners.

LEAP now retains the services of over 80 trained home energy advisers, delivering energy efficiency and advice visits in the homes of fuel poor and vulnerable customers in 182 council areas across England and Wales. Around 30% of the people we visit in their homes are then referred on to our income maximisation partners, IncomeMax and Citizens Advice Manchester, who deliver the income and benefits assistance component of our service, with life changing results for many.

LEAP has established itself as a gateway to many other related services, principally the ones that we can deliver ourselves, such as ECHO, HEART, ECO and Warm Homes Fund. Crucially, LEAP can provide an onward link into other organisations that can deal with the broader health and wellbeing of these vulnerable people. For example, involving councils and other organisations that can address hazards and fire safety in the home, ensuring people are signed up to their Priority Services Registers with their utility providers, and even registering people for the social tariff at their local water company.

LEAP's success is dependent on the network of local partners that work closely with us in their area. We overlay a formality and consistency of delivery to the service wherever it is delivered in the country through our management team, marketing department, trainers, contact centre, service level agreements, code of conduct and ongoing monitoring. But it wouldn't be successful without all the councils, housing associations, local charities and our hard-working local delivery partners that create the "Local" in LEAP.

In 2020 we started to build a triage service for our energy funder companies – our "HelpHub". This provides a gateway into our services, primarily through LEAP as the starting point. We are excited about the added value this enables us to deliver to our committed funding partners and their customers and expect to see continued growth in this area.

Almost 20,000 people interacted with LEAP over the course of the year, resulting in over 12,364 home visits, even though we lost half a month due to the Covid-19 lockdown.

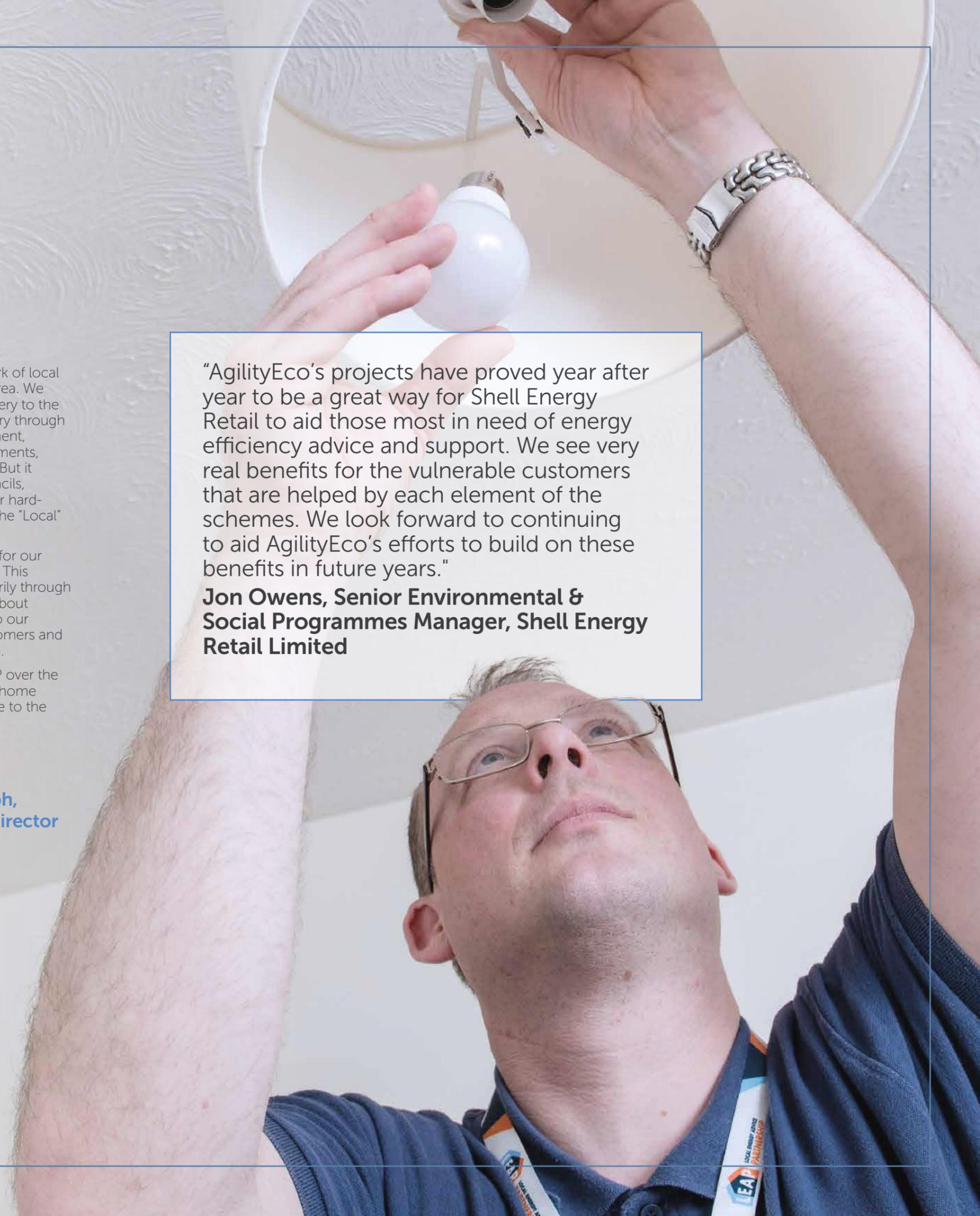


**Caroline Joseph,**  
LEAP Project Director



"AgilityEco's projects have proved year after year to be a great way for Shell Energy Retail to aid those most in need of energy efficiency advice and support. We see very real benefits for the vulnerable customers that are helped by each element of the schemes. We look forward to continuing to aid AgilityEco's efforts to build on these benefits in future years."

**Jon Owens, Senior Environmental & Social Programmes Manager, Shell Energy Retail Limited**



**19,655** 

PROCESSED 19,655 REFERRALS FROM 33 SCHEME PARTNERS COVERING 165 COUNCIL AREAS

**1,467** 

REFERRED 1,467 PEOPLE TO THEIR LOCAL FIRE SERVICE FOR A SAFE & WELL HOME VISIT

**12,364** 

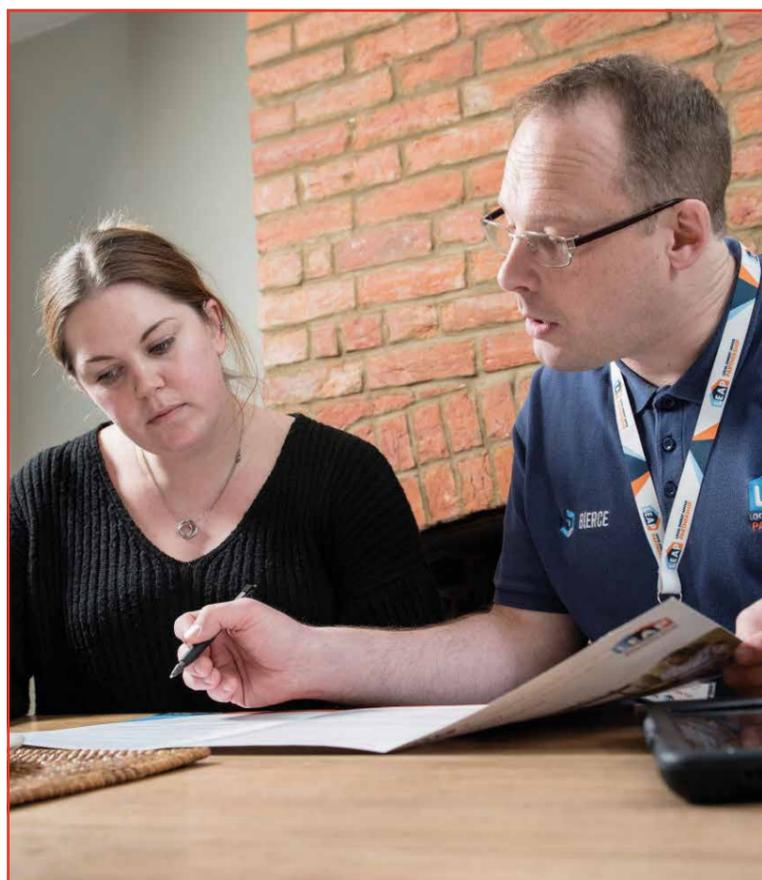
COMPLETED 12,364 HOME VISITS USING THE SERVICES OF 84 HOME ENERGY ADVISORS

**603** 

REFERRED 603 PEOPLE TO THEIR COUNCIL FOR HELP WITH HOME HAZARDS

**2,900** 

HELPED 2,900 PEOPLE WITH INCOME MAXIMISATION, IDENTIFYING OVER £6M OF NEW INCOME / COST SAVINGS



## HELPED

**559** 

PEOPLE TO GET REPLACEMENT BOILERS THROUGH ECHO

**290** 

PEOPLE TO GET FIRST TIME CENTRAL HEATING FROM THE WARM HOMES FUND

**1,238** 

PEOPLE TO GET NEW ENERGY EFFICIENT APPLIANCES FROM HEART

**1,425** 

HELPED 1,425 PEOPLE TO SWITCH TO A CHEAPER TARIFF DURING THE HOME VISIT

**2,182** 

HELPED 2,182 PEOPLE TO APPLY FOR WARM HOME DISCOUNT DURING THE VISIT

**£14MILLION** 

OVERALL DELIVERED £14M OF BILL/ENERGY SAVINGS AND ADDITIONAL INCOME, ACHIEVING A BENEFIT TO COST RATIO OR 3:7:1

# ECHO

The Emergency Central Heating Offer (ECHO) was developed as an emergency solution to help vulnerable households who found themselves without heat and hot water due to boiler breakdown. Generous funding - £3.9 million - from six energy suppliers meant that we were able to run the service again from August 2019 to the end of March 2020, and at a much larger scale to the previous year.

During the year, we were able to intervene in 1,558 emergency no-heat situations, repairing or replacing boilers and heating controls quickly and without cost to residents. Along with the immediate help provided, ECHO was able to save residents £19.5 million on their energy bills. Our ECHO team worked closely with 38 local authority and charity partners to identify households that needed emergency assistance.

At the end of the scheme year, we calculated that ECHO achieved a social return on investment of 502% which is outstanding value for money. Our funders have duly recognised this and have yet again demonstrated their commitment to ECHO by confirming their funds for a fourth round of the scheme. From the feedback we've received during our regular quality assurance checks, and an average customer satisfaction rating of 9.3 out of 10, we know that the exceptional support ECHO is able to provide to households has been truly life changing for some. With increased funding we hope to widen the availability of this support to help the most vulnerable households as soon as they need it.

## ECHO - working seamlessly alongside our other programmes

Miss L lives with her two adult sons in Runcorn. She was referred to ECHO via LEAP by our partner Energy Projects Plus as her boiler had broken. She is disabled and receives Personal Independence Payment and Employment and Support Allowance. ECHO replaced her boiler, whilst LEAP arranged for smaller energy efficiency measures to be fitted, including LED light bulbs and new radiator panels. An income maximisation assessment increased her income by £4919 and Miss L was signed up to the Priority Services Register.

Miss L said "I thought it was absolutely wonderful, very helpful. I'm suffering from a bad chest and it was great to have all the help. Thank you."



Joe McMullen,  
Project Director



"ScottishPower is delighted to have been involved with AgilityEco's vulnerable customer support programmes from the start and to confirm our commitment in future Warm Home Discount scheme years. It's encouraging to see these programmes expand so successfully across GB, meaning many more vulnerable customers will have access to the wide range of support available whether that be energy efficiency advice and measures or help in increasing household income through referrals to income maximisation services. It is clear from the growing network of referral and delivery partners and from the results achieved that LEAP, ECHO and HEART are proven as a trusted source of help to households living in fuel poverty. We wish AgilityEco and the partner network continued success in the future."

**Denis Heraghty, Warm Home Discount Manager, ScottishPower**

**2,137**

REFERRALS FROM 38 PARTNERS

**880**

REFERRALS FROM LEAP

**1,558**

HEATING RESTORED FOR 1,558 HOUSEHOLDS IN EMERGENCY "NO- HEAT SITUATIONS"

**1,184**

BOILERS REPAIRED AND REPLACED

**£19,511,959**

TOTAL BILL SAVINGS TO RESIDENTS OF £19,511,959

**24,648**

TONNES OF CARBON SAVINGS



# JULIE

Julie from Portsmouth applied to LEAP directly for help as she was struggling with her energy bills, a cold and damp home and a low income. Julie's open plan rented house was heated using a combination of oil radiators electric heaters and a portable Calor gas heater in the lounge. She is a single parent family with one child.



## LEAP HOME VISIT

LEAP arranged a home visit for Julie. The Home Energy Advisor immediately helped her with energy efficiency advice, installing low energy lighting which saves around £40/year on her energy bills, as well as a TV standby device.

## LEAP then referred Julie for further support:



Julie received much needed help with her water bill.

## IncomeMax

**IncomeMax**  
The LEAP Income Maximisation service found that Julie was entitled to additional income via the Discretionary Housing Payment. Julie received a total of £3,000 of extra annual income.

## Warmer Homes

**Warmer Homes**  
Warmer Homes replaced Julie's existing electric storage heaters with a brand new, energy efficient gas central heating system. The system cost a total of £3,873 and will save Julie up to £500/year as well as keeping her home warm and cosy.

## Improvements



Low Energy Lighting & energy saving devices



Energy efficiency advice and help with water bill



Additional income & benefits

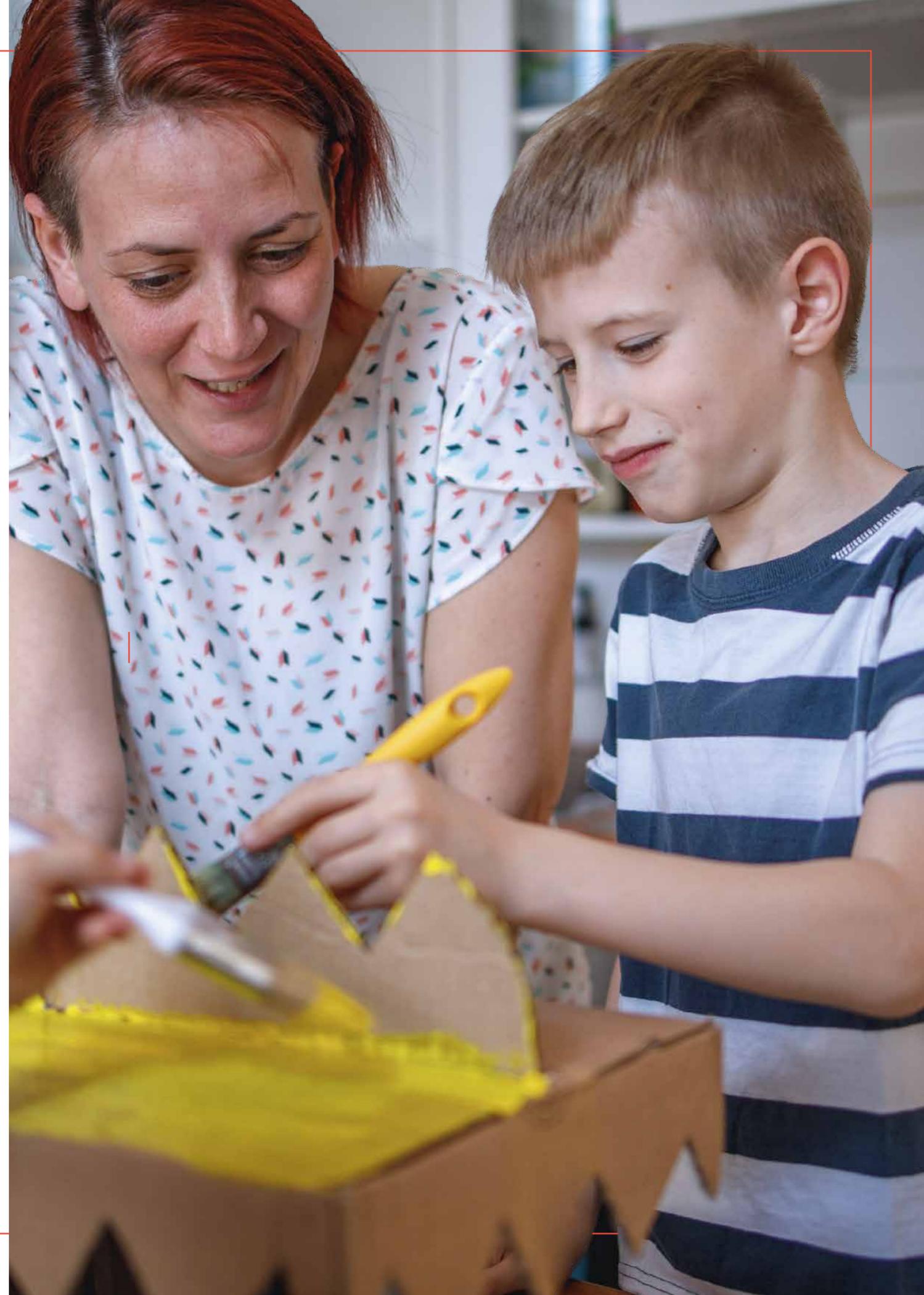


New gas central heating system



New gas connection via SGN arranged as well as a new gas meter. AgilityEco accessed funding through SGN's Central Heating Grant Scheme to enable the central heating installation.

**approx. £3,540 per year in annual savings and increased income**



# HEART

The Home Energy Appliance Replacement service (HEART) supports fuel poor and vulnerable households through the replacement of old, inefficient fridges, fridge/freezers, washing machines and cookers with modern, efficient alternatives.

The programme is run in partnership with CSupplies Ltd, one of the UK's largest suppliers to the charity sector – supplying over 70 charitable organisations with white goods, furniture and supermarket vouchers. With years of experience in sourcing products and importing directly from the manufacturer, CSL can negotiate the best possible price for white goods.

HEART is delivered in partnership with a range of trusted referral partners such as charities, local authorities and energy company funders. Our LEAP service is also a key route for vulnerable people to apply for a new appliance. These partners have been specifically targeting households that are either in fuel poverty, in danger of falling into fuel poverty, or otherwise vulnerable. Applicants to HEART must be owner occupiers, private renters or tenants in social housing who are responsible for their energy bills.

**HEART received 2,069 applications – of which we were able to help 1,665 eligible customers. A total of 2,446 appliances were delivered and installed. Our HEART customers saved a total of £1,022,452 in lifetime energy bill savings.**

HEART has now received generous funding from three utility companies enabling the service to run throughout the year.



“Thanks HEART Team for my washing machine and fridge freezer. My mental health is not great but on days like this there is some sunshine. A very grateful and lucky person I am to have you guys help me.”

**Miss J, Darlington**

“I want to say a big thank you to the whole team for my new washing machine and fridge, they have made a difference to me. The HEART delivery team and communication with the office was great. I was fretting as I did not disconnect the washing machine, the crew said not to worry, they disconnected the old one and fitted the new one in a matter of minutes. I was really impressed with the service and thought you deserved the praise.”

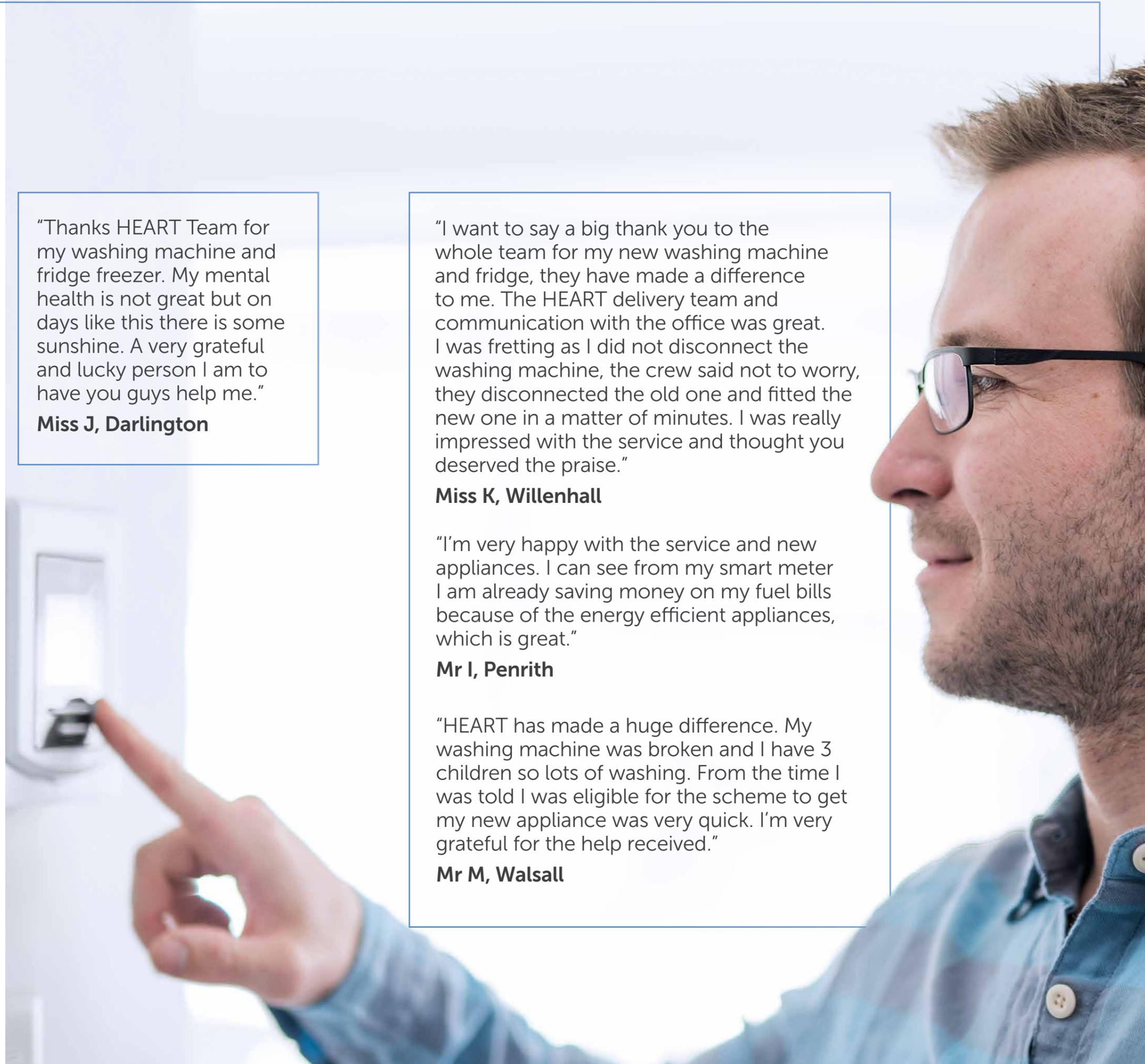
**Miss K, Willenhall**

“I’m very happy with the service and new appliances. I can see from my smart meter I am already saving money on my fuel bills because of the energy efficient appliances, which is great.”

**Mr I, Penrith**

“HEART has made a huge difference. My washing machine was broken and I have 3 children so lots of washing. From the time I was told I was eligible for the scheme to get my new appliance was very quick. I’m very grateful for the help received.”

**Mr M, Walsall**



# WARM HOMES FUND

The Warm Homes Fund (WHF) is a £150 million national scheme to help people with high heating costs. It has been provided by the National Grid and administered by its not-for-profit partner, Affordable Warmth Solutions. The aims of the WHF are to reduce bills, increase comfort in non-gas households, and improve health outcomes for residents.

**During 2019-20 we have managed three large WHF programmes in partnership with local authorities and housing associations.**

These programmes install fully-funded, first-time central heating into fuel poor households that were previously using costly and inefficient room heaters, storage heaters and open fires to heat their home. We provide a complete end-to-end management of the customer journey, from identification, checking eligibility and vulnerabilities, surveying properties, securing funding from multiple sources, coordination of the installation and follow-up care.



**James Sommerville,**  
Head of Business Development & GMWHF Project Director



**Joe McMullen,**  
Project Director: ECHO, Warmer Homes, Help to Heat and SGN Voucher Scheme



## The programmes:

- **Warmer Homes** is a consortium of English councils across the South and East of England, led by Portsmouth City Council, which, with our support, secured £4.85 million from the WHF back in April 2018 to install heating in around 1,500 homes.



- **Connected for Warmth** is a new partnership with whg housing association and Cadent that covers the whole of the Cadent Area – the North West, West Midlands, East of England and North of London. This project launched in November 2019 and has £2.88 million budget to install heating into 1,000 homes.



- **The Greater Manchester Warm Homes Fund** completed its final installations during October 2019. In total, since 2018, we worked in partnership with the Greater Manchester Combined Authority and Manchester councils to secure £1.86 million in WHF to help 500 properties benefit from both gas and low carbon central heating.



Our WHF projects are also working in partnership with LEAP to provide further support with energy efficiency, income maximisation advice and safety and hazard checks in the home. Both Warmer Homes and Connected for Warmth are due to continue installing heating systems until late in 2021.



“The National Grid Warm Homes Fund, established by Affordable Warmth Solutions, offers life-changing opportunities for low income households living in energy inefficient homes to get modern heating at no cost to themselves. Ensuring that these households have a successful installation and a positive customer experience requires close working between the local authorities and housing associations that we have funded and their operational partners. AgilityEco has shown its ability to innovate, drive performance and achieve a positive customer experience in its role of managing the delivery of large-scale Warm Homes Fund projects.”

**Jeremy Nesbitt – Managing Director, Affordable Warmth Solutions**



## PROJECT DELIVERY

## SGN VOUCHER SCHEME

This service provides support to fuel poor and vulnerable customers following a gas escape. For customers in vulnerable circumstances this can cause a huge problem. Many subsequently struggle to pay for the necessary repairs to their heating or cooking appliances, leaving them vulnerable to the cold and without appliances to heat food. Where a vulnerable household is identified they can be referred into the service for support, either via direct referral or by leaving the customer with details to contact our team on a unique freephone number. We then organise for a qualified gas engineer to attend the property, diagnose the issue, repair if possible or schedule a further appointment to fix the problem. Customers are also offered a broader range of services including energy efficiency, income maximisation and health and wellbeing support via a LEAP visit.

Funding is provided by the gas distribution network for the initial repair, up to a pre-determined amount, whilst also providing a contribution towards more expensive repairs/replacements, again at an agreed rate. Where a gas boiler is required to be replaced funding is also sought from a range of sources including our own ECHO programme as well as the Energy Company Obligation (ECO), to ensure there is no contribution required from the householder.

**Client feedback has been extremely positive. Clients gave the service an average score of 8.8/10.**

Feedback from customers reinforces our strong belief that this service provides essential and compassionate support to those households most at risk from disconnection. This service provides a benchmark that we hope other GDNs meet over the coming years.



Yvonne from Worthing is 82 years old, recently bereaved and receives pension credit. SGN were called out as her boiler had a gas leak. The First Call Operative (FCO) isolated her supply for safety reasons. She was referred to the SGN Voucher Scheme as she had no other way to heat her home and was suffering during an especially cold December.

AgilityEco received this referral on the 10th December. The survey was carried out within 48 hours of receiving her details. A brand new, energy efficient boiler was ordered for Yvonne and installation was carried out on the 18th December (at Yvonne's request).

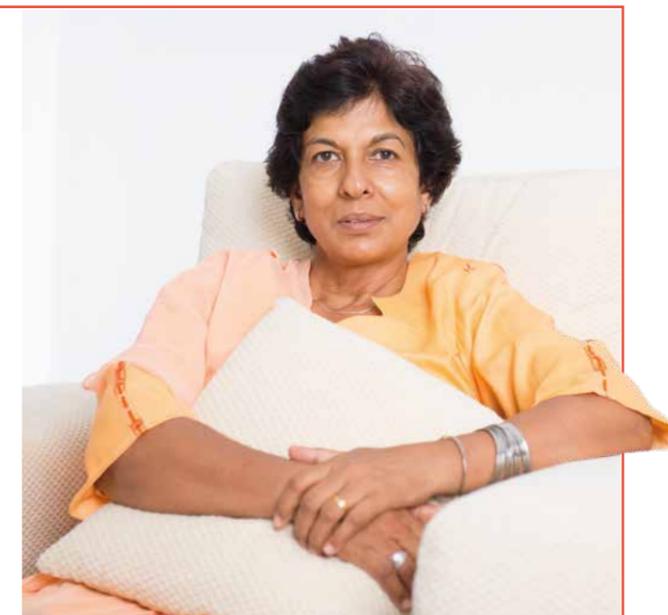
Yvonne was delighted to have the heating and hot water fully restored to her home telling us "I'm so grateful for this service, and that my heating is working in time for Christmas". She is now enjoying an estimated £1,600 annual saving from the new energy efficient boiler.



Mrs C was referred to the SGN Voucher Scheme after an SGN engineer condemned her boiler. Mrs C is terminally ill and relies on bottled oxygen. With her boiler condemned, she was reliant on a portable electric heater for warmth. The team arranged for an engineer to attend and survey the work required at which time a boiler replacement was identified as the only route to restore heating to the home.

It was recognised that the client qualified for funding through the Emergency Central Heating Offer (ECHO) to cover the cost of the boiler replacement. In order to access this, a local environmental charity, The Environment Centre, were contacted to assist with obtaining a Local Authority Flexible Eligibility Declaration which enables ECHO funding to be accessed. This was obtained quickly and a replacement boiler was installed 5 working days following the first visit, fully funded by the ECHO programme. Mrs G rated the service as 9 out of 10 and told us she loves the new boiler.

Mrs J, a full-time carer for her disabled son, was left without the ability to heat her home or cook following a gas leak. The SGN Voucher Scheme team arranged for a gas safe registered engineer to attend the property to investigate how the issue could be resolved. During this visit, it was quickly determined that the leak was emanating from pipework which was hard to access under the floorboards. Following the approval of the works required, the engineers came back three days later and restored Mrs J's gas connection to all her appliances.



# PROPERTY SURVEYING

# BIERCE

Our sister company Bierce Surveying Ltd is an established firm of Chartered Surveyors that supports businesses and public sector organisations to manage their quality assurance, technical, and property surveying needs alongside their energy efficiency initiatives and statutory marketing requirements.

Bierce's expertise is recognised throughout the industry, where it successfully blends compliance and quality with consumer delivery and protection.

In September 2019, Bierce was one of the first to deliver an in-depth look at the new PAS 2035:2019 & PAS 2030:2019 specifications, impacting the retrofit industry. A market-leading launch taking place in the form of a well attended workshop and presentation in central London, the event featured presentations from BEIS, Ofgem, TrustMark, The Retrofit Academy, Elmhurst Energy Solutions and AgilityEco.

Bierce continued to lead the industry in 2020. In January Bierce was contracted as the technical advisor to support the Government Endorsed Quality Scheme through ECO technical monitoring. In addition, it was selected to be the key delivery partner to a global strategic and environmental consultancy for a Government compliance and auditing regime for renewable energy.

In 2020, Bierce became a founder member of the Retrofit Academy Centre of Excellence and, maintaining its close working relationship with Trustmark, it became a fully registered TrustMark business in early 2020.

Bierce provides contact centre and customer management resource to support AgilityEco's community programmes helping vulnerable and fuel poor households.

Beginning with LEAP in 2016, Bierce has been the backbone of AgilityEco's fuel poverty outreach services – providing a fully trained contact centre, fulfilling eligibility assessments, undertaking home visits where possible and in-depth telephone advice calls.



**Nicholas Ainger, MD,  
Bierce Surveying**



**33,317**

SURVEYS COMPLETED

**22,128**

SURVEYS TO VULNERABLE CUSTOMERS

**18,193**

QUALITY ASSURANCE SURVEYS COMPLETED



# FUNDING PARTNERS

None of these programmes would be possible without our huge network of partners, comprising the major utility companies, local authorities, charities, referral partners, energy agencies and our nationwide supply chain. Many of our energy company funders have committed to some of our programmes such as LEAP for several years (subject to business / regulatory change) and with this renewed injection of confidence in our programme management and delivery, other smaller energy company funders have followed suit.

**We are grateful to the following funders for their continued support:**



“AgilityEco’s LEAP programme provides vital energy advice and support to thousands of vulnerable customers each year in an effort to address fuel poverty. Avro were delighted to be able to partner with AgilityEco and provide funding to support the delivery of this programme. The opportunity to refer Avro customers into AgilityEco’s support network also provides us with a really important additional avenue through which we can assist our own vulnerable customers who are in or at risk of fuel poverty. We look forward to continuing our partnership this coming winter.”

**James Thornicroft, Head of Environmental and Social Schemes, Avro Energy**



# THE FUTURE

Despite the challenges we faced after March 2020 and at the start of the Covid-19 lockdown, we began 2020-21 in a strong position. In early April 2020 AgilityEco moved its entire operation to home-based working, in order to comply with Government's Covid-19 health and safety guidance. Our teams have no doubt had to adapt quickly and at the beginning, there was some consternation over how we could continue to deliver our vital programmes in the midst of the Covid pandemic.

What we discovered was that developing an agile, flexible and productive workforce was the key to ensuring the continued success of our programmes. We invested in our people at a time of great uncertainty, ensuring the team had everything they needed to work from home comfortably and productively. Even our call centre temporarily shifted location to living rooms across Aylesbury and as a result, we have sustained delivery of all of our projects, whilst keeping a keen eye on the morale and mental wellbeing of our valued team.

We're in a fantastic position to start 2020-2021. Work has been ongoing during lockdown to secure new funding contracts with energy suppliers, strengthen existing partnerships and to forge new relationships with the potential for funding our work.

**Citizens Advice has highlighted in a recent report that many more households will fall into fuel poverty due to increased unemployment with 12%, the equivalent of 6 million people, already behind on household bills and a further 13% (7 million more) expected to fall behind. Indeed, the impacts of coronavirus will be deep and long lasting, and AgilityEco is committed to working alongside Government, and with all utility companies providing essential services to support these households.**

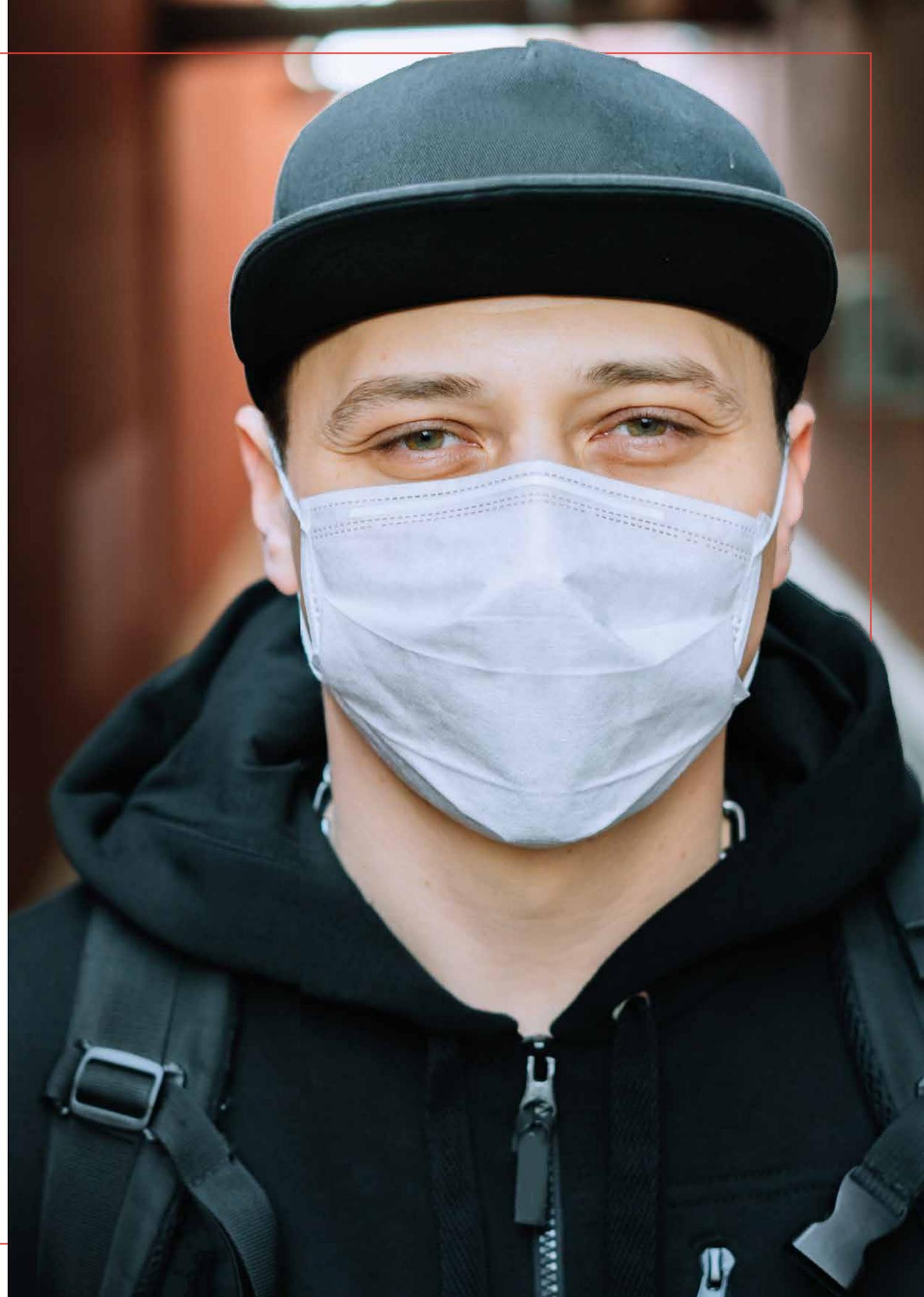
## HelpHub

HelpHub is our new IT and people-powered platform that enables us to quickly and effectively provide tailored support to low income and vulnerable households based on their postcode and circumstances. Where needed, our expert team can give lots of in-depth advice and support by telephone. We can then refer households into all of the AgilityEco services that they are eligible for – whether energy advice, home visits, heating and insulation measures – or to other services provided locally by council, housing associations and charities. With the help of our local partners, we have assembled a database of hundreds of local and national services that our staff can signpost households to, depending on their needs. We will continue to grow this into a comprehensive digital information resource that will ensure that vulnerable and fuel poor households referred into our HelpHub are given the very best advice based on their needs and what's available locally.



## Connect for Help

In the coming year, our flagship HelpHub service will be Connect for Help, which is funded by National Grid's £150 million Warm Homes Fund and delivered in partnership with Income Max CIC. We are already providing HelpHub services for some of our energy company funding partners. This enables them to refer vulnerable, fuel poor and indebted customers to us, so we can triage their needs, provide advice and support, and then refer them on to our services and those of our partners. Connect for Help will run until at least 2022.



We are working closely with our local authority partners to make the most of new energy efficiency funding from government. At the time of writing, we've heard that our team has been successful in securing £3.1 million for Portsmouth City Council through the Green Homes Grant Local Authority (LAD) Delivery scheme. This will be used to support significant retrofit works in over 300 low income homes by March 2021.

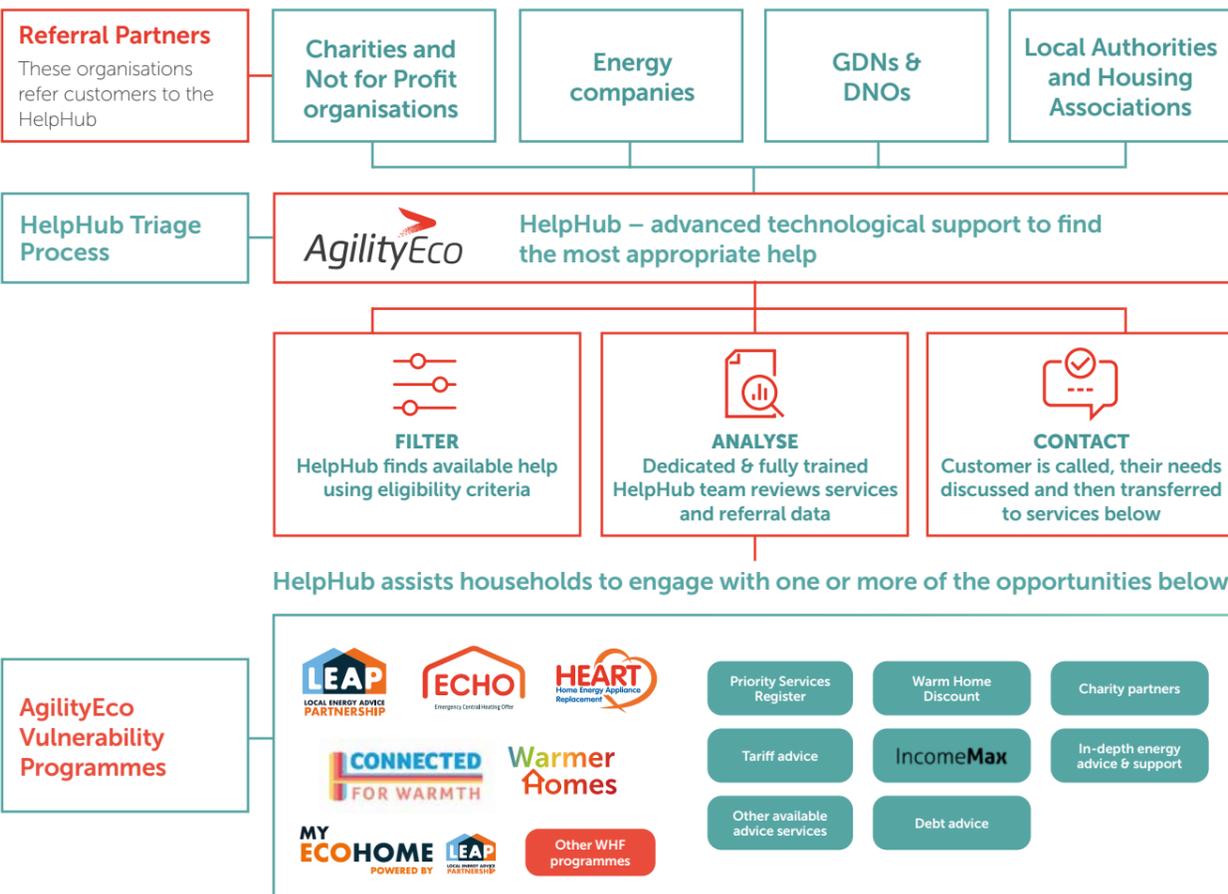
AgilityEco is also supporting registered social landlords to engage with the Social Housing Decarbonisation Fund. The government has promised £3.8 billion over 10 years to ensure the most energy inefficient social homes achieve low carbon retrofits that benefit both residents and the environment.

During 2021 we are forming a new partnership with Smart Energy GB to support digitally disengaged households in understanding the opportunities that

smart meters can offer. Working with our community sector partners across the South West of England we will engage over 1000 households, many of them elderly and without access to the internet. We will engage these households in conversations about the benefits of smart, such as accurate billing, no meter reading and more immediate support from energy suppliers if a supply is disconnected.

We will also be working even more closely with the utility companies that run the gas, electricity and water networks to help them prepare to deliver on their new obligations to support vulnerable customers. Opportunities such as the Gas Network Vulnerability and Carbon Monoxide Allowance (VCMA) and Water Innovation Competitions will enable us to work with these companies to help even more of their vulnerable customers to reduce their bills and receive extra support as necessary.

### AgilityEco HelpHub: The most comprehensive package of help and support to low income and vulnerable households across Britain



IncomeMax

nationalgrid



### Connect for Help has achieved the following since July 2020:

**850+**

CLIENTS PROVIDED WITH FREE ENERGY AND MONEY ADVICE, PLUS REFERRALS TO OTHER SERVICES

**£300,000+**

ULTIMATE LIFETIME FINANCIAL BENEFIT FOR THESE LOW INCOME AND VULNERABLE HOUSEHOLDS

**100+**

TELEPHONE ADVICE CALLS OFFERING "DEEP ENERGY ADVICE"

**114**

PEOPLE REFERRED TO INCOMEMAX FOR MONEY AND DEBT ADVICE AND SUPPORT

**57**

HOUSEHOLDS REFERRED TO ECHO FOR EMERGENCY HEATING SUPPORT

**50+**

HOUSEHOLDS REGISTERED FOR WARM HOME DISCOUNT

**49**

PEOPLE REGISTERED WITH THE PRIORITY SERVICES REGISTER

**86**

PEOPLE GIVEN TARIFF ADVICE



# A NOTE FROM OUR BOARD

AgilityEco co-founders Gearóid and Jon continue to lead our business day-to-day, but we are now fortunate to have three new board members, all with in-depth experience of guiding growth businesses like ours, whilst also ensuring strong governance.

Scott Greenhalgh and Luke Edwards from Bridges Evergreen now join the board, along with Ian Peters, who is our Chair.

“Bridges Evergreen is a long-term investment capital vehicle backing mission driven businesses that tackle major issues of social need. We’re approaching the first anniversary of our investment in AgilityEco. The team, and the business, have performed fantastically well, despite the Covid-related challenges of the past six months, demonstrating the huge positive impact that their community programmes bring to so many households in vulnerable situations. It’s a pleasure to work with such a committed team and they have proven that we can look forward to the next phase of growth with real optimism.”

**Scott Greenhalgh, Executive Chairman of Bridges Evergreen Holdings**

**BRIDGES**  
Fund Management



AgilityEco



“I’ve had a long association with Jon and Gearóid, so I was delighted to join the business as Chair. It’s a really exciting time for AgilityEco as Government formulates a new wave of environmental and social policies. With a plethora of new programmes in the offing including the ECO successor programme, the Social Housing Decarbonisation Fund, Home Upgrade Grants and the Warm Home Discount successor, we want to use our expertise to widen and deepen our positive impact on those most in need, and to make a valuable contribution to delivering the nation’s fuel poverty and net zero commitments. Equally important will be the increased emphasis on utilities and indeed businesses across all sectors to do more to help their vulnerable customers, particularly in this new post-Covid economy. I know the team at AgilityEco will relish every opportunity to deliver bigger and better contributions going forward.”

**Ian Peters, Chair, AgilityEco**

# MEET AGILITYECO

**GEARÓID LANE**  
CEO



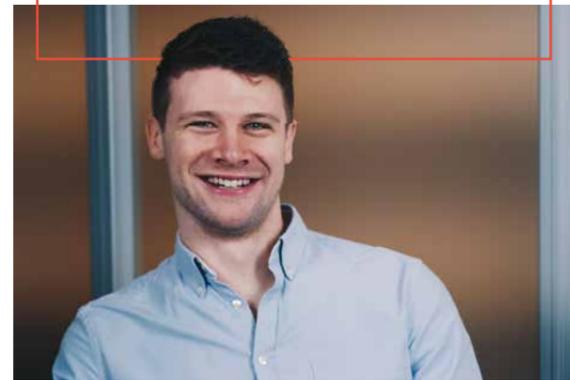
**JON KIMBER**  
COO



**CAROLINE JOSEPH**  
Community Programmes Director



**JOE MCMULLEN**  
Project Director



**JAMES SOMMERVILLE**  
Head of Business Development



**SHUEB ALI**  
ECO Director



**NICHOLAS AINGER**  
MD, Bierce Surveying



- [www.applyforheart.org.uk](http://www.applyforheart.org.uk)
- [www.applyforleap.org.uk](http://www.applyforleap.org.uk)
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- [www.lowincomeprogramme.co.uk](http://www.lowincomeprogramme.co.uk)
- [www.myeohome.org](http://www.myeohome.org)
- [www.warmerhomes.org.uk](http://www.warmerhomes.org.uk)



"AgilityEco's LEAP and ECHO programmes have been successful at providing much needed support to thousands of vulnerable customers up and down the country. It's a pleasure for us to be involved in such important schemes, which focus on helping households in fuel poverty by improving the energy efficiency of their homes and providing assistance when they are in emergency heat situations. We look forward to continuing to work alongside AgilityEco to help even more vulnerable customers get the access to the support they need."

**Tanya Robertson, Warm Home Discount Customer Service Manager, SSE Energy Services**



## **AGILITYECO**

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