



The ScottishPower  
Energy People Trust

Supporting Communities

## Annual Report 2009



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On the cover:  
Changeworks CEO Teresa Bray  
welcomes Ann Loughrey, The  
Trust's Company Secretary and  
ScottishPower CEO Nick Horler to  
the charity's HQ for a visit.  
**Full details on pages 8 and 9.**

# A million reasons why the Trust can be proud

The ScottishPower Energy People Trust continues to have a tremendous impact across Britain, working with charities to help vulnerable and fuel poor households.

Since the Trust's launch in 2005, almost one million vulnerable people suffering from fuel poverty have been supported through a range of measures offered by local charities and funded by the Trust.

By the end of 2009, a total of £6.5 million had been awarded to 134 projects across 606,280 households in Britain.

The Trust is administered by, but makes decisions independently of, ScottishPower and is part the ScottishPower Fuel Poverty Programme which also includes measures such as energy efficiency and a social tariff.

The Trust was established in November 2005 to provide much needed funding to not-for-profit organisations for projects which combat fuel poverty through investment in four categories – crisis funding, income maximisation, energy efficiency and research.

In many cases funding is awarded to projects spanning two or three of these categories.

Fuel poverty is when 10% or more of household income is spent on energy costs. The problem arises when people on low incomes live in poor housing, which is difficult to heat and keep warm. National Energy Action estimated that around five million households are fuel poor.

This report outlines a summary of the Trust's progress to 31st December 2009. For the latest information, visit: [www.energypeopletrust.com](http://www.energypeopletrust.com)

## The Trust's four categories of funding

- 1** **Crisis funding** – to meet the urgent essential needs of those in fuel poverty.
- 2** **Income maximisation** – funding projects to help those in fuel poverty maximise the income they are entitled to.
- 3** **Energy efficiency** – funding projects to make the homes of those in fuel poverty more efficient. To provide a sustainable solution to fuel poverty, crisis funding and income maximisation projects should now incorporate energy efficiency advice.
- 4** **Research** – the funding and encouragement of educational projects and research in relation to fuel poverty.

*(or a combination of the above.)*

*"We are very grateful to the ScottishPower Energy People Trust for its support for the Sustainable Heat at Realistic Prices (SHARP) project. Through this project we are able to help some of the most vulnerable members of our community insulate their homes adequately and replace old inefficient heating systems with new fuel efficient ones. This not only saves them money on fuel costs but improves the quality of their lives and contributes to global reduction in carbon emissions."*

**Liz Marquis, Director, The Energy Agency**

## Chairman's message



*"I have met some wonderful people during my time here and also seen at first hand just how much of an impact the Trust has at grass roots level."*

Hammy Smillie MBE, Chairman

## Looking back on another year of success

Over the past year I have had more reason than ever to reflect on the enormous success of the ScottishPower Energy People Trust.

I have been chairman since we launched in November 2005 and I am incredibly proud to have been part of something which has enriched the lives of so many vulnerable people.

This is my final year at the helm and I will be handing over the reins to incoming chairman Norman Kerr at the end of this year. I know he will continue to build on the success of the Trust in the future.

Over the years, the diversity of the projects that we have been able to fund has been one of the great pleasures of this job.

We have now helped over 600,000 households and have been able to make a significant difference to the lives of families

in these particularly challenging financial times.

I believe that with around five million households in the UK still affected by fuel poverty, the need for the Trust is even more relevant today than when we were established nearly five years ago.

I have met some wonderful people during my time here and also seen at first hand just how much of an impact the Trust has at grass roots level.

The breadth of support and the diversity of the organisations we work in partnership with enables the Trust to play a part in reaching those people out there who are still falling between the gaps.

As a stand-alone organisation the Trust would not have been able to reach even a fraction of the people we have.

However by working with these key frontline groups, the ScottishPower Energy People Trust continues to make an impact in ways that we had maybe not even considered back when we launched in 2005.

Over the next year the Trust will carry on in this crucial role working with not for profit organisations to ensure that together we continue the fight against fuel poverty with the long term shared goal of eradicating it altogether.

I wish my successor Norman all the very best in his new role and I am certain he will be a fantastic ambassador for The Trust.

*"The ScottishPower Energy People Trust funding has had a huge impact on the lives of the women and children whom Inverness Women's Aid support at a time when is really needed."*

Catherine Russell, Manager, Inverness Women's Aid

# Company Secretary's report



*"The Trust has been acknowledged by Ofgem as an exemplar in its field and I am delighted that we have received the recognition which the Trust so rightly deserves."*

Ann Loughrey, Company Secretary

## Trust recognised for exemplary work

Over half a million vulnerable households have been thrown a lifeline by the ScottishPower Energy People Trust since we launched in November 2005.

In that relatively short space of time we have been able to reach out to many, many people who may have otherwise slipped through the gaps in existing provision.

The funding which we have given to organisations working with those facing fuel poverty has had more of an impact than we could ever have imagined.

So many people are still unaware of the benefits they are entitled to and the available support out there. This is why the Trust will continue to fund groups which address this need.

It is also why we continue to raise awareness and encourage applications from organisations across the country.

Whether it is Citizens' Advice Bureaux, groups who work with carers or hard-to-reach members of society, the impact we can have is through partnership working.

Some of the projects we have helped in the last year are featured in this year's annual report. By bringing these stories to light we hope to encourage even further interest in the Trust.

There are some inspirational stories but it would be unfair to single out any one project. Each of them has their own unique set of customers and ways to help but the case studies we have included this year should give you a

flavour of the fantastic work which is going on.

The Trust has been acknowledged by Ofgem as an exemplar in its field and I am delighted that we have received the recognition which the Trust so rightly deserves.



*"We are delighted with this grant as it will help us tackle fuel poverty in a proactive manner in an area that has one of the highest rates of fuel poverty in the country. Already we have saved one elderly lady £600 a year. We are working with another client who can only afford to cook using a microwave and heat water once a week. We are also tackling her incorrect energy bill and organising the insulation of her home. This project will make a significant impact, in particular on the elderly, families with children, the disabled and those on low incomes who are most affected by fuel poverty."*

Roger Braybrook, Manager, West Northumberland Citizens Advice Bureau

# Fresh focus on fuel-poor households thanks to in-depth research project

Almost 350,000 households in Wales in fuel poverty will benefit from a research study undertaken by the Bevan Foundation and funded by the ScottishPower Energy People Trust.

The research project, entitled 'How fuel-poor households manage fuel use and bills', was made possible when the Trust donated almost £25,000 to conduct research.

Fuel poverty research by the Foundation specifically examines how people cope with fuel poverty, and attitudes to and awareness of energy efficiency. It will enable agencies to better understand and target the difficulties of those affected.

Research involves interviews with members of the public in South Wales, including follow-up telephone interviews with those identified as likely to be in fuel poverty, detailed qualitative interviews with key stakeholders in the public, private and voluntary sectors, and a round table discussion event with housing associations in Wales examining the role they play in tackling fuel poverty.

Victoria Winckler, Director of the Bevan Foundation, said: "We were delighted to receive funding from the ScottishPower Energy People Trust to support this project. We're amazed how little was known about how households on low income manage their fuel and hope our findings will help to target assistance more effectively."



Roy Jones, ScottishPower's Community Liaison Manager North West and North Wales, visits the Bevan Foundation to find out more about its work.



Complete findings will be published in late 2010. However, the main emerging trend from the research is that people in fuel poverty adopt a range of coping behaviours including staying warm but going into debt or not consuming other essentials in order to pay for staying warm. Many are self-disconnecting and staying cold in order to avoid having to pay for fuel.

Victoria added: "Both coping strategies carry with them serious and significant health risks and form part of the wider problems people in poverty face. This research shows that whilst debt is used as a coping strategy for people who view their situation as temporary (i.e. those in fuel poverty because they have lost a job and are confident of obtaining another), self-disconnection is a strategy used by people for whom fuel poverty is more severe and persistent."

The majority of the people interviewed by the Bevan foundation adopted strategies of staying cold and trying to avoid high bills as opposed to going into debt or arrears.

Ann Loughrey, ScottishPower's Head of Corporate Social Responsibility and The ScottishPower Energy People Trust's Company Secretary, said: "The work which has been carried out by the Bevan Foundation since it was launched in 2001 has had a significant impact on the lives of people in Wales and the issues they face.

"This is exactly the kind of project that the ScottishPower Energy People Trust looks for and we are delighted that we were able to help out.

Different types of support are provided to charities tackling fuel poverty, including crisis funding, benefits entitlement check, energy efficiency measures and research. The research carried out by the Bevan Foundation will help focus on the immediate and long-term needs of people affected by fuel poverty."

*"We're really pleased to have received the generous grant from the ScottishPower Energy People Trust. With lower than average incomes and higher than average expenditure, many families with disabled children are in debt, which makes them more susceptible to living in fuel poverty. Keeping Disabled Children Warm This Winter hopes to work with affected parents to let them know what help is out there, ensuring as many vulnerable households as possible avoid a life of fuel poverty."*

Simon Stagg, Head of Community Engagement, Contact a family

# Wise move for Trust and City Council as agencies join forces for new project

In 2009 the Trust worked in partnership with Glasgow City Council and the Wise Group embarking on a project in Glasgow that aims to help 27,000 of the city's households living in fuel poverty.

The project, which is part of the City's Fuel Poverty Partnership, was provided with £100,000 from the Trust to help establish a Home Energy Advice Team – G-HEAT.

The eight-strong team, initially funded for three years and managed and delivered by the Wise Group, has been established to give bespoke advice to Glasgow residents on a range of energy related issues. It is part of the council's wider strategy to alleviate fuel poverty in the City, currently estimated at 105,000 households.

The team helps householders with advice on all energy related matters and if necessary can refer residents on to partner agencies for specialist advice on a wide range of financial issues. Advice is given in a number of areas including the most cost effective use of heating and hot water systems, suggestions on energy saving measures for the home like insulation and energy saving white goods, understanding fuel bills and finding the best tariffs available to households, how to obtain emergency financial assistance and how to access grants or loans from a variety of sources for new or replacement heating systems.

Advice is offered to people on a face to face basis in their own homes, which can be



crucial when dealing with potentially complex problems associated with bills and energy use. Guidance and support is also provided through surgeries at various existing advice outlets such as the Glasgow Advice and Information Network (GAIN), credit unions and housing association offices. In addition, G-HEAT also takes referrals from social work services, community planning and social housing providers and acts as a resource for the co-ordination of information on energy issues for housing associations.

Bill Brown from Development and Regeneration Services is coordinating Glasgow City Council's involvement in the project. He said: "We're delighted that ScottishPower Energy People Trust is helping us to fund our project. G-HEAT is a major step to eradicating

fuel poverty in the City and the investment from the Trust is going a long way to helping with this.

"Our objectives are to help householders reduce their fuel bills and to enable them make more effective use of money they spend on fuel. We're already making a difference to the lives of people in Glasgow and aiming to help many others."

The project was officially launched by Alex Neil MSP, the Minister for Housing and Communities and Councillor George Ryan, Executive Member for Business and the Economy.

Key partners in the initiative include the Wise Group, the Scottish Federation of Housing Associations, the West of Scotland Forum of Housing Associations and GAIN. Funding is provided by Glasgow City Council, the Scottish Government and ScottishPower Energy People Trust.



Alex Neil, Cllr George Ryan, project manager Graeme Mullen and SPEPT Company Secretary Ann Loughrey are pictured.

*"We are delighted to receive this vital funding from the ScottishPower Energy People Trust. Helena Partnerships is committed to tackling the issue of fuel poverty within St Helens. Over 70% of our residents are on full or partial Housing Benefits so we are confident that the grant will help make a difference to the lives of over 4,000 of our tenants. We will also work with Social Services, who will refer those in desperate need of our assistance. Each case will be considered on merit and we will only assist those who face genuine hardship."*

Liz Howse, Affordable Warmth Project Officer, Helena Partnerships



£100,000 of funding for a fuel poverty worker in Toxteth, Liverpool.

## Initiative reaching out to Merseysiders

In Toxteth, Liverpool – one of the most socially deprived areas in Europe – a lifeline has been thrown to local residents thanks to the ScottishPower Energy People Trust.

A fuel poverty initiative which has been targeting hard to reach members of the community for the past 18 months has already helped change the lives over 500 people.

£100,000 of funding was given to the Toxteth Citizen's Advice Bureau (CAB) for a Fuel Poverty Outreach worker to provide specialist fuel advice and help clients maximise their income.

Multi-lingual Khaled Shalaby has been working in the heart of the local community to reach those people who may be at risk of slipping through the net.

Khaled said: "The people that we are able to help out in the community are not necessarily the people who would come through the doors of the CAB. Many do

*"It can be incredibly isolating to arrive in a foreign country, without knowing the local language or customs."*

not have English as a first language and there may also be cultural barriers in place. What we do is go out to them, via the local community centres, cultural centres, places of worship or wherever it is that the community gather together.

"We also see people from referrals and drop-ins but by and large the outreach work is the most successful. It can be a lifeline for people who are feeling alone and vulnerable."

"It can be incredibly isolating to arrive in a foreign country, without knowing the local language or customs, and then have to deal with all the necessary bureaucracy that comes with moving into a new home and managing your finances.

"We tend to find that when we go to speak to someone who is living in or facing fuel poverty, you see that the fuel problem is only one of many issues and that there is a deeper debt issue there."

For the duration of the project so far Khaled has already been able to help 507 people.

CAB Manager, John O'Meara, said: "Someone like Khaled is absolutely worth their weight in gold to us. He is able to reach out directly to those people in the community who we would probably not ever begin to engage with as they would not come to the CAB.

**Continued on page 8.**



*"We're delighted to receive funding from the ScottishPower Energy People Trust to support this project. We are amazed how little is known about how households on low income manage their fuel and we hope our findings will help to target help more effectively."*

**Victoria Winckler, Director, Bevan Foundation**



Toxteth CAB Fuel Poverty Outreach worker Khaled Shalaby.

## Project makes remarkable difference to people's lives

**Continued from page 7.**

"As he speaks so many languages and understands the issues faced by the communities he has been invaluable to us as a volunteer and now as a full time worker. Not only is Khaled helping people to manage their debt and their finances much better he has also managed to persuade people to give up some of their time and come and help out at the CAB which is really full circle."

John praised the support given to them by the Trust.

He said: "Year one of this initiative has been a huge success. The hard work and dedication of Khaled and the team at Toxteth CAB has achieved some great results. However, none of this would be possible without the excellent support from the ScottishPower Energy People Trust. So, on behalf of Toxteth CAB, I'd like to thank the Trust and look forward to the continued support to enable us to make a real difference to the lives of many more people in fuel poverty."

Ann Loughrey has been very impressed with the work which is being done in Toxteth and in particular with the contribution which Khaled himself has made.

She said: "Khaled truly is an inspiration and seeing the work he has done at the project first hand and the difference he – and the project – have made to the lives of people living in Toxteth is fantastic.

"Khaled is right when he says that the fuel poverty issue with clients will probably be only one part of a larger debt problem and that is where he helps people to maximise their income. There is still a huge amount of benefits in this country unclaimed each year and helping people to gain access to everything they are entitled to is a major aim of the ScottishPower Energy People Trust."

*"We are delighted with the support provided by the ScottishPower Energy People Trust. Moving into your first home can be a very daunting experience, involving a great deal of financial pressure. For a young person affected by the devastating effects of homelessness, this can be even more overwhelming. The Trust's generosity will enable us to work intensively with around 100 young people, providing them with practical skills, help and a start-up pack to allow them to make the successful transition into their first home."*

**Heather Weir, Project Manager, Quarriers**

ScottishPower's Chief Executive Nick Horler believes that the Energy People Trust is one of the company's greatest assets.

This year Nick took time out to visit the Edinburgh-based charity Changeworks which had received two separate rounds of funding from the Trust totalling in excess of £200,000.

The Cosy Kids project works with the most vulnerable families with

## Chief hails

young children across East Lothian, Edinburgh and Midlothian. It aims to support families suffering from fuel poverty, to keep their homes warm at affordable cost and avoid fuel debt, providing their children with a better start in life.

Nick met with some of the team at the charity and also met with one of their clients, which brought to life



## Westminster event shows

The ScottishPower Energy People Trust was delighted to sponsor the National Energy Action (NEA) annual reception at the House of Lords in 2009.

The event was an opportunity to highlight the work of the NEA in relation to fuel poverty but also in delivering energy efficiency solutions and projects.

Ann Loughrey said: "The event at the House of Lords gave us a fantastic opportunity to showcase the work of the ScottishPower Energy People Trust at the highest level.

"We were delighted that we were able to be joined by representatives from the Toxteth CAB and from Independent Living Support from Dumfries, two groups which have made a fantastic impact on their local communities as a direct result of the funding given to them by the Trust.



# s efforts to cut fuel poverty

for him the reality of her situation when faced with fuel poverty.

Nick said: "One of the highlights of my visit was meeting a young mum, Clare, with a one-year-old daughter who had had a miserable winter. The heating had failed in her local authority home and the council installed blow heaters as a remedy.

"Having the blow heaters meant that she ran up an enormous debt, through no fault of her own. I heard from the charity how ScottishPower was helping her out and helping her manage this debt down.

Teresa Bray, CEO of Changeworks meets with Ann Loughrey and ScottishPower CEO Nick Horler.



"To see someone like Clare just motivates us to do more and enables me to actually illustrate the arguments that I am making with the policy makers and the regulators with real stories like this and how they need to be thinking about and understanding the practical consequences of policies in this area."

The funding from the ScottishPower Energy People Trust has gone specifically towards funding an Energy and Affordable Warmth Advisor – Sarah Aitken.

Nick added: "Sarah is a fantastic person who is part of the team at Cosy Kids and who is working to help support mums and families and making sure they get access

to all the benefits they are entitled to as well as giving fuel poverty advice. The complications that are associated with getting access to benefits and practical help are one of the real barriers standing in the way of helping us to alleviate fuel poverty."

Sarah said that her work can differ on a day-to-day basis depending on the needs of the families she is working with.

She said: "I work with very vulnerable families across Edinburgh, East Lothian and Midlothian, helping those at risk of fuel poverty and fuel debt. I mainly spend my time helping them with their billing advice, social tariff access, trust funds, helping them get new central heating installed through the energy assistance package - it really varies day to day.

"It can have a really profound effect on the clients as it can help them get out of fuel debt and fuel poverty and show them how to manage their heating effectively and manage their bills effectively. For many it often comes down to a choice between eating or keeping their house warm so we can have a huge impact on their lives – and especially on the lives of their children.

"It was lovely to meet Nick and for my client to meet him just to even be able to explain her situation and get information from the grass roots out there."

Company Secretary of the Trust, Ann Loughrey, said: "Nick is a great supporter of the ScottishPower Energy People Trust and it was great for him to take the time to come and visit one of our funded projects and see first hand the impact of the grant funding and how it can help transform the lives of vulnerable people."

## cases good work

"It was a great event to be involved in and representatives from both the charities spoke on the day which really brought to life not only the work they are doing, but also how the Trust enables them to carry out this work." The event also marked the launch of an NEA report called 'The Cost of Affordable Warmth' which was sponsored by ScottishPower.

Pictured at the reception are, from left: Willie MacDiarmid, who was Managing Director Energy Retail; Ed Milliband who was Secretary of State for DECC; Jenny Saunders, Chief Executive of NEA; Khaled Shalaby, Fuel Poverty Worker, Toxteth CAB; Jo Craig, Project Worker ILS, and Elaine Colquhoun, Financial Operations Manager, ILS.



*"It's heart-warming to know that there are organisations out there that provide help and assistance to charities and people who have been homeless. The Scottish Power Energy People Trust has been really helpful to our organisation and I would like to offer my thanks to everyone who has helped make this funding possible. Having this money has made such a difference to our project and to the lives of those we help."*

**June Glancy, Project Coordinator, Inverclyde Starter Packs**

# Meet the trustees



**Hammy Smillie,**  
MBE (Chair)

With nearly four decades of experience in the electricity supply sector, latterly as Business & Community Relations

Director with ScottishPower, and appointment to several charity sector positions, following retirement in 2004, Hammy is passionate about social justice and ending fuel poverty in particular.

In addition to his role with the Trust, Hammy is a Director of Energy Action Scotland and a Trustee of Age Concern and Help the Aged in Scotland. He received the MBE in Her Majesty the Queen's New Year Honours 2001 for his service to ScottishPower and the community.



**Ann Loughrey**  
(Company Secretary)

Currently Head of Corporate Social Responsibility at ScottishPower, Ann has played a prominent

role in fuel poverty and energy efficiency campaigns for 23 years. She was Director of Energy Action Scotland for 12 years and previously Commercial Manager at Heatwise Dumbarton, before joining ScottishPower in 2005.

Ann was instrumental in establishing the ScottishPower Energy People Trust in her previous role as Head of External Business and Community Relations. She has served on the board of National Energy Action and the ScottishPower Green Energy Trust. Currently she sits on the Scottish

Government's Fuel Poverty Forum and Ofgem's Social Action Strategy Group.



**Douglas McLaren**  
(Treasurer)

Douglas is a member of the Institute of Chartered Accountants of Scotland (ICAS) and a key member of ScottishPower's

Control team. Douglas manages Business Performance for the Energy Retail division and reports to the Finance Director.

Douglas joined ScottishPower in 2004 after nine years with PricewaterhouseCoopers (PwC) where he primarily worked for their Business Assurance division across the UK.

Between 2001 and 2003 Douglas lived in Toronto, working for PwC Canada on acquisitions and disposals in North America.



**Joan Fraser**

A former Scottish Government official with a strong background in health, education and social policy, Joan has considerable experience

in the charity sector and a particular interest in support for disadvantaged young people. She served for two years as interim Chief Executive of YouthLink Scotland.

She is currently Chair of Scotland Yard Adventure Centre, which provides adventure play for children with additional support needs, a member of the Board of Edinburgh Voluntary Organisations Council, a non-executive board member of NHS Health Scotland and a member of the Visiting Committee for Polmont Young Offenders Institution.



The Trustees are pictured at a 2009 meeting.

*"We were thrilled the ScottishPower Energy People Trust donated such a substantial amount of money to our project. This funding helped us immensely and without the generosity of the Trust the project would not be started, let alone complete. Already we have seen a number of tenants achieving over 1000 kWh output from their solar panels. One tenant has been in to see us with a gas bill showing a reduction of 51% compared to the same period in the previous year. As she had not had her heating on much if at all in that period, she attributes the difference to the solar panels."*

**Alistair Cant, Director, Lister Housing Cooperative**



**Liz Futcher**

Liz has been Development Manager for Energy Action Scotland since 2005, delivering projects aimed at raising awareness of, and eliminating,

fuel poverty in Scotland. Previously she spent four years at Changeworks and was the Scottish Coordinator of the Energy Efficiency Advice Centre network. She also worked for British Gas for a number of years.

Before that Liz was Scottish Manager of the Gas Consumers Council. She has served on the South of Scotland Electricity Consumers Committee and was a member of the Scottish Committee of Postwatch.

Born and brought up on the Island of Lewis, Liz is a native Gaelic speaker.



**Neil Hartwell**

Neil has been a Trustee of the ScottishPower Energy People Trust since the charity was established in 2005.

He supported fuel poverty charity National Energy Action's 10 regional offices in England and Wales for seven years and was Finance Director of Warm Zones Ltd, a subsidiary of NEA that operates Warm Zones across Britain, bringing together local authority, energy sector and other partners to reduce fuel poverty.

A trained psychologist, researcher and designer, Neil has worked in the steel

and manufacturing industries in London and Northern England. He has worked at board level for several companies and in other roles encompassing Finance, IT and Human Resources.



**Norman Kerr**

Norman has been Director of the fuel poverty charity Energy Action Scotland since April 2005 and has been involved in fuel poverty and energy efficiency campaigns for 25 years.

He joined Energy Action Scotland as Deputy Director in 1996, following 12 years with Heatwise Glasgow, where he was responsible for delivering energy efficiency programmes.

Norman leads the Energy Action Scotland team that advises the Scottish Government and Communities Scotland on fuel poverty, local housing and home energy conservation strategies.

He sits on the Scottish Government's Fuel Poverty Forum and is a member of NEA's Executive Board



**Dr Bill Sheldrick**

Bill developed a strong interest in energy issues 30 years ago, through academic work, community initiatives and a local Right to Fuel

campaign group.

In 1987 he led Heatwise Glasgow's Jobs and Energy project, and subsequently became the organisation's Research and

Development Manager. In 1994, he established an independent consultancy, specialising in energy efficiency and fuel poverty issues.

He was a member of the Watt Committee's Domestic Energy and Fuel Poverty Working group and a member of the Building Research Establishment working group on fuel poverty methodology.

Bill is an assessor, trainer and examiner for the National Home Energy Rating scheme. He received a NHER lifetime achievement award in 2000.



**Helen Walker**

Helen is Fundraising and Sponsorship Manager for fuel poverty charity, National Energy Action, managing NEA's

Fundraising team and coordinating fundraising activities.

An Honours Graduate in Sociology and Social Policy from the University of Newcastle, Helen joined NEA in 2004, as a research assistant, supporting the charity's Policy and Research team before her appointment as Fundraising and Business Liaison Officer in 2005.

Prior to joining NEA, she worked as a Policy Officer at the North East Assembly, evaluating the effectiveness of the Regional Development Agency in delivering economic strategy. Helen's knowledge combines fuel poverty and energy policy with health, housing and wider social issues.

*"We are extremely grateful to The ScottishPower Energy People Trust for its support, which has enabled us to help so many single parents. This year has seen a high level of calls to the helpline with thousands of single parents contacting Gingerbread to discuss fuel poverty and debt related issues. The support of The ScottishPower Energy People Trust allows us to improve this essential advice line and service."*

**Paul Treloar, Head of Helpline, Gingerbread**

# Projects funded during 2009

## **Southwark Carers**

£85,870

Southwark Carers received funding for its Carers Energy & Poverty Project. The Project will employ a part-time worker to develop and distribute an energy savings information pack, income maximisation advice and crisis payments to carers in the area. In addition the project will develop a referral network with other organisations in the area to increase the reach.

## **Dial Great Yarmouth**

£56,919

Dial Great Yarmouth received funding for its Money and Debt Caseworker project. This project seeks to minimise the impact of fuel poverty on this client group by providing a comprehensive income maximisation service for their clients, i.e. claiming benefits etc. The project will employ a part-time worker for three years.

## **Dumfries Welfare Rights**

£99,888

The Dumfries Welfare Rights Organisation received funding to employ two full-time workers to deliver an innovative income maximisation project for families within the Dumfries and Galloway area. The project will deliver benefit health checks and energy efficiency advice and measures to their target group by leafleting all of the primary schools in the area, making contact and running monthly benefit surgeries with mother toddler groups and by making more of the contacts with existing organisations that they are currently are working with. The project will run for two years.

## **Castle Advice Service**

£65,537

The Castle Advice Service received funding to employ a worker for two years to develop a service to families in Sheffield. The worker will provide comprehensive advice to help families maximise their income; this will include benefit health checks and energy efficiency advice. The project already provides this service in

the area but requires additional resource to meet the increasing demand on the service.

## **RSABI**

£34,500

RSABI received funds to continue the Crisis Fund established two years ago through funds awarded by The Trust in 2006 and 2007. The funding will be used to provide crisis funding for the payment of fuel bills for people experiencing severe hardship and in fuel poverty. Payments will be made directly to fuel providers. In addition individuals in receipt of the crisis funding will be provided with a benefits check and helped to make sure that they apply for energy grants to which they are eligible.

## **Peterborough Environment City Trust**

£84,117

Peterborough Environment City Trust received funding to run the Warm Homes Peterborough Project for two years. The project will aim to alleviate fuel poverty amongst social tenants in the area by providing a comprehensive income maximisation service that will provide access to energy efficiency advice and measures through the provision of 'Energy Packs', and signposting to relevant benefits.

## **Bolton Primary Care Trust**

£89,638

Bolton Primary Health Care Trust received funding for its fuel poverty project, Working in the Health Sector. The project is aimed at the long-term sick who are more likely to experience the effects of fuel poverty. The worker will develop links with all of the 53 local GP surgeries to deliver advice and information sessions to raise awareness/offer solutions to the issues of fuel poverty. The project will develop links with a range of key stakeholders to provide a full range of services to alleviate fuel poverty, including income maximisation. A full-time energy efficiency officer will be employed for two years.

## **One Parent Families Gingerbread**

£100,000

One Parent Families – Gingerbread, received funding to part-fund two full-time posts and one part-time post to maintain an advice helpline and develop online resources to help single-parent families who are facing financial difficulties. The type of advice provided through the help line will include income maximisation, benefit information, and ways to overcome fuel poverty. The helpline will run for two years and be available in England and Wales.

## **Family Action Bradford**

£99,900

Family Action in Bradford received funding to enable them to deliver energy efficiency advice to reduce fuel poverty through face-to-face home visits and in groups. The funding also allows sourcing and provision of energy-efficient tools (e.g. light bulbs), ensuring full awareness of grants available, maximisation of income, stabilisation of debt, money management and budgeting. The project works in partnership with other services to promote develop and deliver the service.

## **NEA Joint Application with EAS**

£59,235

A new project, 'Warmer, Healthier Children', in partnership with EAS in Scotland, will deliver training sessions to a wide range of agencies working with children between the ages of 0-16 and from different family groups. Previously this training has catered predominantly for professionals working with families with children under the age of five, however fuel poverty affects children of all ages. The aim of the project is to ensure professionals working with vulnerable families, are able to communicate energy efficiency issues effectively, and to raise awareness and understanding of the impact of poor housing conditions on the health of children and young people.

### **The Environment Centre (tEC)**

£96,000

The Centre will provide a comprehensive programme of energy efficiency and fuel poverty advice, specifically targeting at-risk groups including young families and the elderly. It will deliver a series of presentations, roadshows and street events providing information primarily on energy efficiency and fuel poverty, making use of our interactive Energy Explorer bus. It will also deliver a series of primary and secondary school educational activities on energy efficiency, provide a freephone helpline to give advice (all staff possess the nationally recognised National Energy Action qualification) and run a referral scheme to local insulation companies with access to CERT (Carbon Emissions Reduction Target) and other national funding streams.

### **Sydenham Community Insulation project**

£12,420

This is a Community Insulation project in an area which is ethnically multicultural and has multiple deprivation. Housing stock built in the 1960s and '70s has low levels of insulation and uneconomic heating systems. The project plans to promote the importance of insulation and energy efficiency in the residential estate and to encourage householder take-up. The project aims to secure efficient and cost-effective insulation options for the residents (e.g. loft insulation, cavity wall insulation etc) by putting installers in touch with residents, and to reach those residents who may not have considered or been discouraged from installing insulation due to cost, lack of awareness, language barriers, technical difficulties, practical issues, old age, gender or ethnic background.

### **REAP**

£6,620

The grant will pay for training for REAP staff and volunteers (10 people) to go through City & Guilds training on energy

efficiency to enable delivery of energy efficiency advice and to assist people to get access to government funds for insulation and improvements. It will also pay for training on how to operate a thermal camera (recently gained through a grant from the Scottish government's CCF fund). The thermal camera will be free to those in receipt of benefits to alleviate fuel poverty.

### **Link Group Housing Association**

£14,671

The initial phase is the training and certification of 15 people within Link Group as key Domestic Energy Advisors to City & Guild level through an organisation such as Energy Action Scotland. These 15 people will provide the framework of support, advice and expertise on domestic energy issues to many thousands of households. The second phase is to create contact with all households, partly to explain fuel poverty so that they may place themselves within the issue, but primarily to offer a referral service to request contact and a visit by one of 15 key Energy Advisors. The objective is to analyse the energy usage at their home, discuss potential improvements and offer specific advice on reducing energy consumption and, importantly, reducing their financial burden.

### **Telford & Wrekin Council**

£100,000

This project is aimed at helping those most vulnerable (elderly, financially poor, health poor) who are living in mobile park homes. Park homes sites were marketed as being affordable housing and mainly house those over the age of 55. In realistic terms, park homes are wooden or sometimes metal boxes, which are expensive to heat and do not keep the heat in due to lack of insulation. The make-up of the park homes means that they can usually have expensive forms of heating or electric heaters and have no insulation to keep them warm, which also causes condensation. All of this aggravates

or causes cold and damp-related illnesses such as respiratory, cardiovascular, muscular diseases.

### **Argyll, Lomond and the Islands Energy (Allenergy)**

£99,996

This project is to improve knowledge and understanding of energy efficiency, encouraging people to take action in relation to fuel poverty, providing energy efficiency advice and assistance to vulnerable fuel-poor households in Argyll on income maximisation, grants, utility tariffs and debt. It will also negotiate with utility suppliers via a benefits and energy officer, link to CAB, NHS, social work and education, working with families with young children, disabled and elderly.

### **Contact a Family**

£38,773

Contact a Family will provide support to families with a disabled child living in the Northwest, to make sure they can keep warm this winter. The project will hold workshops and events targeting families at greatest risk. They will be informed of sources of financial and practical help regarding fuel poverty and benefits health checks.

### **Quarriers**

£24,615

The project will provide a structured work programme giving one-to-one support, knowledge and advice on implementing energy saving strategies to help with budgeting. It will offer advice on tariffs, income maximisation, home insulation, grants access, start-up packs.

# Projects funded during 2009

## **Meadows Partnership**

£85,000

The Green Community Advisor will review utility bills ensuring residents are on the lowest tariff, provide loans for energy-saving adoptions or appliances, advise on energy efficiency conducting audits in the home and advise on ways to be environmentally friendly in their daily lifestyle. The work is supported by a financial review working with other partners ensuring local community facilities promote reducing environmental impacts.

## **Helena Partnerships**

£99,630

The aim is to establish a fuel debt relief scheme to provide assistance to tenants who are struggling to pay their fuel bills, to recruit volunteers to work with the Affordable Warmth Project Manager, having been trained in energy efficiency, benefit entitlement and general debt. Support towards employment will also be given.

## **Poole Housing Partnership (PHP)**

£91,741

This partnership aims to actively engage vulnerable residents to reduce their fuel poverty by getting the best energy deal for their circumstances and to increase their disposable income through Welfare Benefits health checks. It will employ a full-time Fuel and Benefits Health Check Officer to help the most vulnerable and difficult to reach people in the community to tackle fuel poverty, enjoy increased social inclusion and improve the quality of their lives.

## **South Yorkshire Energy Centre**

£83,180

The Centre aims to promote behavioural change and increase the number of families accessing support and help to reduce their energy usage and manage fuel bills, avoiding debt and disconnection. This will be achieved through family activities and work with schools across

Sheffield by developing established links with community organisations and NHS – reaching and supporting fuel-poor, low-income parents. It will increase energy awareness through one-to-one meetings, information packs, referral to grants and financial support.

## **Glasgow City Council in partnership with the Wise group**

£100,000

The Council wishes to establish a Fuel Poverty Advice Team, which will be closely aligned to the Financial Inclusion Strategy but also capable of close linkage with the Energy Assistance Package announced by the Scottish Government on 18th November 2008 and scheduled for implementation in April 2009. The Team will provide face-to-face advice to vulnerable residents in fuel poverty in terms of energy billing, including obtaining the best tariffs, benefits health check, which will include taking the householder through the application process, including making online applications, and providing advice on the best use of energy in the home.

## **Inverness Women's Aid**

£16,974

Families who go into refuge are on very low incomes and Inverness Women's Aid anticipates that 30 families will be re-housed over the next three years. This project aims to provide energy-efficient cookers, washing machines and fridge-freezers to families who have been allocated their own tenancies after leaving their homes due to domestic abuse and to alleviate hardship and educate on energy efficiency to low-income families.

## **West Northumberland Citizens Advice Bureau**

£19,209

West Northumberland Citizens Advice Bureau aims to employ a part-time worker who will deal exclusively with fuel poverty and will have cases referred from the debt workers. They will also take on clients

from drop-in sessions. By building up this expertise the Bureau can be much more proactive in tackling fuel poverty in an area where it is great cause for concern.

## **Hyde Charitable Trust**

£95,000

The Trust will support young families and residents who are fuel-poor through money management, benefit maximisations, efficient fuel management and grant take-up via a dedicated benefits and fuel advisor.

## **Energy Agency**

£99,000

The Agency will provide a small grant fund scheme which will allow those fuel-poor who do not qualify by small margins for mainstream support initiatives, to replace non-operational or inefficient domestic heating system. Taking a whole house approach, the project will tackle fuel poverty by offering energy efficiency advice, and make appropriate referrals to insulation schemes and income maximisations services.

## **Solas Scotland**

£75,402

Solas aims to build on the foundation it has in place by extending and enhancing the energy efficiency advice, advocacy and support services it offers. Two new Energy Advocates will work alongside and be mentored by its community officer. Outcomes will be increased take-up of welfare benefit, reduced fuel poverty by improved energy efficiency, resolution of fuel bill issues and increased take-up of energy efficiency measures through CERT & EAP, with opportunities to learn and replicate across Scotland.

# Summary of Accounts 2009

The Trust's income for the period to 31st December 2009 was £3,252,165. The charity paid out £1,449,201 in grants and had a surplus of £1,741,382.

## Summary of our financial performance during 2009

Restricted income of £64,238 was received in the form of a donation from ScottishPower to cover running costs, and these funds were fully expended.

ScottishPower supplies employees to administer the Trust at no cost to the charity. Running costs include the website and publicity, while governance costs include legal fees, audit fees and costs linked to the strategic management of the charity.

Unrestricted reserves carried forward were £3,953,005, of which £1,726,790 was held in a designated fund for future grants that have been approved. ScottishPower has contributed in excess of £6.9 million to the Trust in the period since inception to December 2009.

Over the past year, £1,898,152 was given to 29 projects, helping over 556,761 individuals and 512,697 households throughout Britain.

Since 2005 the Trust has awarded over £6.5 million to 134 projects, helping over 772,403 people in 606,280 households throughout Britain.

The Trust continues to be funded by ScottishPower and an online donation facility exists on the Trust's website – [www.energypeopletrust.com](http://www.energypeopletrust.com) – to enable individuals to make donations. The Trustees are very grateful to all those people who have assisted.

The Trustees remain confident the current level of reserves is sufficient to allow continued activity of the Trust through 2010. Discussions to secure future funding will continue.

## The ScottishPower Energy People Trust Fund Financials

### 2009 YEAR-END

#### WHERE THE MONEY COMES FROM

Voluntary income from SP	£3,177,153
Investment income	£10,774
SP donations to cover running costs	£64,238

**Total** £3,252,165

#### WHERE THE MONEY GOES

Charitable activities	£1,465,323
Cost of generating funds	£42,066
Governance costs	£3,394

**Total** £1,510,783

#### BALANCE SHEET AT 31 DEC 2009

##### Current Assets

Cash at bank and in hand	£4,146,334
Debtors	£3,450

##### Current Liabilities

Creditors: amounts falling due within one year	£194,123
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**Net Current Assets** £3,955,661



The ScottishPower Energy People Trust team are here to help: Pictured are Kirsteen Lappin, Angela Martin, Irene Murdoch and Carol Dunne.

## Contact us

Our contact details are:

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Tel: 0141 568 3492

For more information on the Trust and/or to apply online, visit: [www.energypeopletrust.com](http://www.energypeopletrust.com)

For any application enquiries, please email:  
[SPEnergyPeopleTrust@ScottishPower.com](mailto:SPEnergyPeopleTrust@ScottishPower.com)

**ScottishPower Energy Retail Ltd**  
Registered Office  
1 Atlantic Quay  
Glasgow, G2 8SP



**The ScottishPower  
Energy People Trust**

*Supporting Communities*

[www.energypeopletrust.com](http://www.energypeopletrust.com)

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The ScottishPower Energy People Trust is a Scottish Charity (SC0036980) registered in the books of Council and Session in November 2005.

Produced by The BIG Partnership