

# THE SCOTTISHPOWER ENERGY PEOPLE TRUST

ANNUAL REPORT 2013



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The ScottishPower Energy People Trust has helped over **1.6 million people** in fuel poverty.

## WHAT THE TRUST DOES

The ScottishPower Energy People Trust is an independent charity that provides funding to front line charities that help vulnerable, disadvantaged people out of fuel poverty.

It was formed in November 2005 following research that asked stakeholders what they would want to see from a ScottishPower Trust. The study highlighted the need for the Trust to provide funding through existing agencies and charities and for a straightforward grant application process.

Since its formation the Trust has provided funding to organisations across Britain who work with people suffering from fuel poverty and are well-placed to identify those most in need.

The Trust currently receives funding from ScottishPower under the company's social programme, but makes decisions independently of the company through a Board of Trustees.

As part of its commitment to addressing fuel poverty, ScottishPower has provided over £11.7 million in funding to the Trust to date, including funds for distribution and administrative costs. The ScottishPower Energy People Trust has helped over 1.6 million people in fuel poverty.

## OUR MISSION

Our mission is to have a direct and lasting impact on fuel poverty by funding projects run by frontline charities that will help people in need to achieve affordable warmth.

Our clear focus is on awarding funding to projects that help families with young children and young people setting up home for the first time.

In order to have a sustainable impact on fuel poverty, all of the projects we fund must include energy efficiency advice, or the provision of measures that will improve home energy efficiency.

# HOW TO APPLY FOR FUNDS

## WHO CAN APPLY?

Funding is available to charities registered with the Charity Commission or Office of the Scottish Charity Regulator (OSCR).

## WHAT TYPES OF PROJECTS ARE ELIGIBLE?

Registered charities can apply for funding to support projects in some or all of the following categories:

- Energy Efficiency Advice - It is a condition of funding that all projects include the provision of energy efficiency advice. Energy advisors should be trained to City and Guilds standard or equivalent.
- Energy Efficiency Measures – improving home energy efficiency through draught proofing, insulating and/or other practical measures.
- Income Maximisation – providing funding to front line charities that carry out benefits advice to households missing out on financial help that they are entitled to through welfare benefits and tax credits.
- Fuel Debt Assistance - providing assistance, or funding the provision by other persons of assistance, to reduce or cancel debts for household electricity or gas supply, where such assistance is provided as part of a package of measures aimed at providing customers with long-term relief from fuel poverty.

Priority will be given to projects aimed at helping families with young children and young people setting up their home for the first time.

## WHAT IS THE MAXIMUM GRANT AVAILABLE?

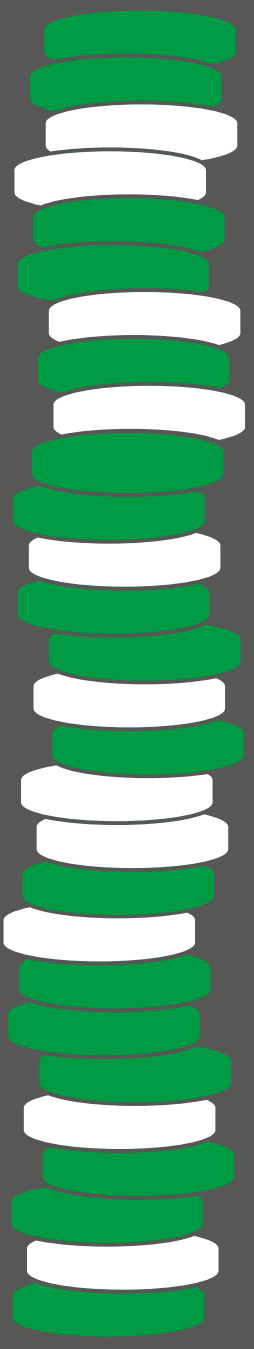
The ScottishPower Energy People Trust will award funding at levels appropriate to the type of project and the number of people to be helped, from small sums up to a maximum of £50,000, for a maximum of one year.

## HOW DO I APPLY?

Apply online at:  
[www.energypeopletrust.com](http://www.energypeopletrust.com)

## APPLICATION GUIDELINES

- All projects must address fuel poverty explicitly. Tackling fuel poverty must be the primary purpose of the project (not just as an add-on).
- Project applications must identify how the outcomes and outputs of a project will reduce fuel poverty and how a project will meet the ScottishPower Energy People Trust's objectives.
- Each application should demonstrate how many people will be helped as a direct result of the project.
- Please note that we will only accept one application per organisation at each Trustee's meeting.
- All applicants should create a link to their Organisation's latest annual audited accounts and confirm any previous applications to the Trust. This information should be updated in the Project Controls section of the application.
- The Charity registration number must be included in the application, if not it will be rejected.
- Priority will be given to those projects, which clearly demonstrate the greatest impact to reduce fuel poverty with the opportunity to sustain improvement on project completion.





## CHAIRMAN'S MESSAGE BY NORMAN KERR

**AS TRUSTEE THEN CHAIRMAN OF THE TRUST SINCE 2005, I'M DELIGHTED WITH WHAT HAS BEEN ACHIEVED, I AM ALSO VERY IMPRESSED WITH THE HARD WORK THAT HAS BEEN CARRIED OUT BY THE SCOTTISHPOWER ENERGY PEOPLE TRUST PROJECTS IN HELPING TO ALLEVIATE FUEL POVERTY AND RAISE AWARENESS AMONG THE GENERAL PUBLIC.**

The 250 projects funded by The ScottishPower Energy People Trust have helped over 1,600,000 households, making a significant difference to the lives of families in these challenging financial times and we will continue to strive to make a difference.

With over £1 million given to 71 existing and 14 new projects this year alone the ScottishPower Energy People Trust continues to work hard to help those in need and I am proud of this achievement – however there is a long way to go.

The objectives of the Trust are simple. We want to achieve the most effective use of funds in alleviating fuel poverty, help vulnerable groups within communities across Britain and raise awareness of the issue among the general public. Most importantly, we will continue to engage with grassroots organisations and other agencies so that Government, housing providers, the voluntary sector and the utility industry work together towards a common goal – consigning fuel poverty to the past.

Over the next 12 months we will continue to fund projects that address all aspects of fuel poverty, from providing long-term solutions such as energy efficiency advice and help with maximising incomes through claiming the right benefits, as well as vital immediate help with fuel debt assistance. Almost £50m in financial gains have been reported to date by projects offering Benefits Health Checks and Fuel Debt Assistance.

Decisions over which projects to fund are not taken lightly, but with such a strong commitment to values I have every confidence that the ScottishPower Energy People Trust will continue to make the right decisions and support projects that in many cases are life changing for the people they work with. I would like to thank the Trustees and the support team for their help throughout 2013.



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## COMPANY SECRETARY'S REPORT BY ANN LOUGHREY

**SINCE THE SCOTTISHPOWER ENERGY PEOPLE TRUST WAS SET UP IN 2005, ITS SOLE PURPOSE HAS BEEN TO HELP ORGANISATIONS IDENTIFY AND TARGET RESOURCES TO PEOPLE WHO DESPERATELY NEED ASSISTANCE TO STAY WARM AND BE COMFORTABLE IN THEIR OWN HOMES – SOMETHING THAT MANY OF US TAKE FOR GRANTED.**

Fuel poverty continues to be under the spotlight throughout the media and, while energy prices are a factor, we know that tackling fuel poverty requires an integrated approach – improving the fabric of housing, raising income levels and helping people to use energy more efficiently.

By funding organisations across Britain who work with people suffering from fuel poverty and are well-placed to identify those most in need, ScottishPower is pleased to have donated in excess of £11.7 million to the charity to date.

In October 2013, Trustees visited Claverhouse Training, a Dundee based organisation, to see first-hand how the project, which was awarded funding in 2006 and 2011, to allow them to assist large numbers of long term unemployed people in fuel poverty.

Claverhouse Training is a registered charity, whose objectives are to enhance the employability of long term unemployed people and disadvantaged people. They provide a discrete training area within their training centre giving practical energy efficiency advice to their clients most of whom fall into the definition of "fuel poor". The training centre is modelled on a typical domestic flat.

This recreates the physical environment for the applied elements of energy efficiency training. The project focused on energy efficiency advice with

team members trained to help clients learn how to set timers, read meters, understand utility bills and tariffs and see the practical benefits of low energy lighting, using low temperature washes and switching off items on standby.

The real benefits come from spreading the advice over a period of time, so that actions and behaviors can be reinforced and tasks like meter reading and timer setting can be repeated and checked

Working in partnership with charities and other not-for-profit organisations, such as Claverhouse, has been the key to the Trust's success over the past nine years. The 250 projects supported by the Trust have themselves employed 137 full time employees, 188 part time employees who were supported by 243 volunteers some of whom were supported in the past by the projects funded by The ScottishPower Energy People Trust and then went on to gain employment through the experience gained volunteering.

Thanks to the hard work of the charities which have benefited from funding, vulnerable homes across Britain are seeing a change for the better.

Other projects visited during 2013 included Thanet CAB, Energy Project Plus, Rooftop, Stirling CAB, Community First and Manchester CAB.

Our annual report highlights a few examples of successful projects that

are making a real difference to the lives of so many vulnerable, fuel poor, people.

I believe that the Trust will continue to make a positive impact across Britain working in conjunction with front line charities and we look forward to a successful year in 2014 supporting more projects across Britain.



04

# PROJECTS FUNDED DURING 2013

**DURING 2013 THE SCOTTISHPOWER ENERGY PEOPLE TRUST AWARDED £446,957.58 TO 14 PROJECTS TO ASSIST 18,631 PEOPLE IN 10,816 HOUSEHOLDS THROUGH COMMUNITY PROJECTS DESIGNED TO REDUCE FUEL POVERTY.**

## **VENUS - FUEL AND FINANCE EFFICIENCY WORKER £49,476**

Venus was awarded funding to continue to employ a worker who will offer support and advice to women and families who are facing financial difficulties.

## **COMAS – CANNY LIVING PROJECT £13,522**

Supports people to reduce their debts and avoid utilities disconnections; maximise their income through welfare entitlement and become more money-canny by learning to budget, reduce fuel consumption with insulation and other measures, participate in community savings schemes and bulk buying groups. The project supports people recovering from addiction and reaches over 300 people throughout the City of Edinburgh.

## **THE ADVICEPOINT – CHIEF EXECUTIVE OFFICER £28,610**

The Advicepoint project will offer one off Fuel Poverty training sessions to community groups, mother and toddler meetings and the tenancy support group for single tenants incorporating a combination of income maximisation, advice on energy efficiency and educating clients how to manage household fuel usage.

## **NORTHERN OAK CREDIT UNION – THE MOBILE HOME HEAT HELPER £20,000**

Northern Oak Credit Union gained funding to provide a service, which will be delivered from a Mobile Service Point (a van) to support those struggling with fuel bills through a mix of one to one advice, referrals to other agencies for energy efficiency measures, energy rebates for vulnerable people and income maximisation services.

## **HUMBER & WOLDS RURAL COMMUNITY – RURAL ENERGY ADVICE PROJECT - £20,000**

The aim of this project is to work in specific rural communities situated in East Yorkshire that have no access to the mains gas grid and have a high level of Fuel Poor households providing them with energy efficiency advice and the steps that can be taken to alleviate the problem.

## **TEIGNBRIDGE CITIZENS ADVICE BUREAU – CAB/CHILDRENS CENTRE PARTNERSHIP £39,598**

The project worker and small team of volunteers will attend a range of existing support groups and seminars to discuss and promote energy efficiency, fuel poverty issues, help with maximising incomes through benefits checks and charity applications.

## **ACTION FOR CHILDREN – PERTSHIRE FAMILIES FUEL POVERTY £30,444**

The Action for Children project will employ a dedicated worker within the Perthshire Families Service who will take responsibility for leading on reducing the effects of fuel poverty on families referred to the service by assessing the impact poverty is having on the ability of the family to manage their resources and provide sufficient heating within the family home and will identify and introduce the family to methods or avenues of support that might help alleviate their situation and maximise their income.



*Ann Loughrey, ScottishPower Energy People Trust Company Secretary and Trustee meets with Claire Stewart, the Fuel Poverty Support Worker from Action for Children, Cath Gray, Service Co-Ordinator for Perthshire Families Service and Robin Gray, Grant Fundraiser during a project visit.*

*Project Manager Heather Weir from Quarriers and Kaz, a project recipient, along with Ann Loughrey, ScottishPower Energy People Trust Company Secretary and Trustee during a project visit.*



## **HEELEY CITY FARM – FAMILY FUEL BUSTERS 2 £40,000**

The Family Fuel Busters 2 project will engage and support families at risk of fuel poverty by enabling them to gain more control over heating their home through energy efficiency measures and specialist advice thereby reducing their costs.

## **DOORWAY – ENERGY WISE £38,461.90**

Doorway requested funding to enable them to provide a service that is specifically tailored to meet the needs of young people within Warwickshire. It is aimed at tackling fuel poverty at the source through educational workshops and 1:1 support with those identified as being vulnerable and at risk.

## **NEA – A SURE START TO A WARM HOME £32,219.88**

The aim of 'A Sure Start to a Warm Home' project is to educate families with younger children on the solutions to fuel poverty and fuel debt with the overall aim of removing them from fuel poverty and/or avoiding the future fuel poverty trap. In the short term, the project will equip families with the knowledge to be able to reduce their fuel bills and maximise their income. In the longer term, by training Sure Start Centre staff, the project will allow them to continually provide advice and support to their clients and future clients.

## **FAMILY LINK STOCKPORT – FAMILY ENERGY ADVICE LINK £22,000**

The project will provide one to one support for families who are energy vulnerable specifically in relation to fuel poverty and fuel debt and will provide a specialist service supporting families of young children in priority areas who may otherwise not seek support.

## **LESS – HOME ENERGY SERVICE £39,594**

The project aims to reduce fuel poverty by recruiting and training of volunteers to deliver the advice.

The increased energy efficiency knowledge will have wider benefits for fuel poverty reduction in the community on a long term basis.

## **QUARRIERS – QUARRIERS HEAT PROJECT £23,682**

The ScottishPower Energy People Trust funded two previous HEAT (Homeless Energy Action Team) projects. Over the lifetime of these projects, over 200 young homeless people benefited from energy efficiency advice, benefit and budgeting support and improved practical skills and experience. The continuing economic difficulties combined with changes to welfare reform have further exacerbated the challenges faced by young people experiencing homelessness. As a result, to support a further 100 young homeless people, Quarriers HEAT project received funding to deliver much needed support.



# PROJECTS IN THE SPOTLIGHT

## CARERS OF EAST LoTHIAN UNLOCKS £743,933 OF VITAL BENEFITS FOR LOCAL CARERS

Today, Carers of East Lothian (CoEL) is celebrating helping local carers maximise their incomes by a staggering £743,933 in unclaimed benefits and charitable grants. To mark the occasion, they met with representatives from the ScottishPower Energy People Trust, the organisation who made this achievement possible.

In January 2011, CoEL was awarded £85,691 by the ScottishPower Energy People Trust to fund its energy project, 'Warmer and Better Off'. Now three years in, the project has helped over 751 local carers with advice and practical skills on energy efficiency and saving money on bills.

Carers in East Lothian often juggle paid work with their unpaid caring responsibilities at home for relatives suffering from Alzheimer's, Multiple Sclerosis or cerebral palsy. Managing bills can be stressful for those family members providing the care so the service is there to take the strain out of the process and act as a much needed lifeline.



Lisa McIlwraith, Project Co-ordinator from Carers of East Lothian and John Robertson, a project recipient, along with Carol Dunne, ScottishPower Environmental & Social Policy Manager during a project visit.



Cody Bill and Jesse-Leigh Street from West Midlands

## TURNING UP THE HEAT, WEST MIDLANDS CHARITY SECURES £38,000 TO HELP FAMILIES WITH DISABLED CHILDREN

Families with disabled children are being helped to make their homes more energy efficient as part of a ground-breaking new project. The 'Turning up the heat: Keeping down the costs' project secured funding of £38,000 from the ScottishPower Energy People Trust to help 1000 fuel poor families.

Contact A Family, the charity which runs the project, have found that one in five families with a disabled child go without heating and the project aims to address this.

Dedicated energy advisors will attend a series of planned events providing advice and support to families, helping them increase their household income by identifying ways of managing their finances and gain knowledge of the grants available to them.

Ann Loughrey, Company Secretary and Trustee of the ScottishPower Energy People Trust, said: "Simple tips on how to make a home more energy efficient can have a huge impact on heat levels in a home. The ScottishPower Energy People Trust recognises the invaluable work that projects like this provide. I know that the dedicated

project team will continue to make a huge difference to the families in the area."

Jan Eastwood, Contact a Family West Midlands Manager said: "Fuel poverty can be a particular issue for families with disabled children. They are more likely to be at home for longer periods of time and some disabilities and medical conditions worsen in the cold weather which means families must have the heating on for long periods to prevent their child becoming ill.

"However, thanks to the money provided by the ScottishPower Energy People Trust, we can give families in the West Midlands information to put practical solutions in place and make their homes more energy efficient."

## DARWEN CHARITY HELPS KEEP THE CHILL OFF VULNERABLE FAMILIES THIS WINTER

Blackburn & Darwen Healthy Living project announced that over 3,618 people in the local area are living in warmer homes this winter, thanks to their Bill Busters project and the support of the ScottishPower Energy People Trust.

Bill Busters was established in June 2012 with £46,835 of funding from the ScottishPower Energy People Trust. Since then it has helped thousands of families across Darwen, who may struggle to make ends meet such as those with young children, lone parents and social housing tenants. The project visits such families in their homes to share advice and practical knowledge on how to save energy and maximise their income. Bill Busters has also helped these people access a staggering £598,556 in unclaimed benefits.

Ann Loughrey, Company Secretary and Trustee of the ScottishPower Energy People Trust, said: "Blackburn and Darwen Healthy Living is already well established in the area offering local people a range of services. Thanks to funding from the ScottishPower Energy People Trust, they have been able to provide specialised energy advice to those who are particularly vulnerable in the community and we are delighted to have supported this valuable project."



Davinder Johal and Wendy Sherwood Fuel Debt and Energy Adviser from Coventry Law.



## COVENTRY LAW CENTRE'S FUNDING BOOST

Funding of £36,000 was secured for the Fuel Debt & Energy Advice Project, in Coventry, which went towards helping 300 fuel poor individuals and vulnerable people keep warm and debt free by offering free advice on energy efficiency.

The project based in the Coventry Law Centre, aims to offer a holistic service to those in need with energy advisors offering a full range of services including dealing with debt, setting up payment plans and providing advice on how to make homes more energy efficient. Families can also receive support on how to fill out applications for local grant and trust fund grants to help with accrued debt.

Ann Loughrey, Company Secretary and Trustee of the ScottishPower Energy People Trust, said: "Thanks to the money provided by the ScottishPower Energy People Trust and because of the hard work of the advisors at the Law Centre, people who are struggling with debt and energy efficiency can get the help and peace of mind they deserve.

"This project provides such wide ranging advice about what people can do to not only deal with debt issues but also how to make their homes more energy efficient, which can help people get right back on track. The hard work is paying off, I know the team will continue to help more families currently facing the same problems."

Wendy Sherwood, one of the advisors from the Law Centre said: "We are really pleased to be doing our bit and making a difference in these communities. Without projects like this, more people in the area might feel they had nowhere to turn. Thanks to the funding from the ScottishPower Energy People Trust, "I hope we will be able to reach out to many more families with simple but effective advice and tips on how to make their homes more energy efficient."

# MEET THE TRUSTEES

OUR BOARD OF TRUSTEES IS A GROUP OF EIGHT EXPERIENCED INDIVIDUALS WHO EACH HAVE A SPECIAL INTEREST IN REDUCING FUEL POVERTY.

**NORMAN KERR**  
**(CHAIRMAN)**



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 since 1984.

He joined Energy Action Scotland as Deputy Director in 1996, following 12 years with Heatwise Glasgow (now the Wise Group), where he was responsible for delivering the company's energy efficiency programmes.

Norman is the Vice Chair of Scottish Government's Fuel Poverty Forum, he is the Chairman of the ScottishPower Energy People Trust, a position he took over in 2011, a member of NEA's Executive Board and a Trustee of the Aberdeen Heat and Power Company.


**DOUGLAS MCLAREN**  
**(TREASURER)**



A law graduate and member of the Institute of Chartered Accountants of Scotland (ICAS), Douglas leads the Debt Business for residential customers across the UK.

Douglas joined ScottishPower in 2004 after 9 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.


**ANN LOUGHREY**  
**(COMPANY SECRETARY)**



Ann is Head of Corporate Social Responsibility at ScottishPower and has played a prominent role in fuel poverty and energy efficiency campaigns for 25 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, Scottish Government's Fuel Poverty Forum and the ScottishPower Green Energy Trust and is a current member of the Scottish Grant Making Trust. In May, 2013 Ann was appointed Trustee and Executive Officer of the newly established ScottishPower Foundation.

**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 2 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 INCLUDE REPRESENTATIVES FROM THE FUEL POVERTY CHARITIES, ENERGY ACTION SCOTLAND AND NATIONAL ENERGY ACTION. OTHERS OFFER EXPERTISE IN KEY AREAS OF FUEL POVERTY, HOUSING AND HEALTH.

The Board of Trustees meets twice a year to consider applications for funding from organisations throughout Britain.

**NEIL HARTWELL**



Neil Hartwell 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 CIC, a subsidiary of NEA that brings 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. He is based in Cornwall where he also sits as a Trustee of 2 other charities.

**ALAN HUGHES**



Alan has a career background in the financial services information technology sector.

He has been a member of Glasgow Children's Panel for 35 years dealing with vulnerable young people and families and for the past eight has been Deputy Chairman of the Glasgow Panel, recently taking up a new post as Learning and Development Coordinator for the Panel. Until 2012 he was Chairman of one of Kibble Education and Care Centre's foster panels.

He is an appointed visitor for Barnardos Scotland, operating as an independent assessor of Barnardos residential care services for young people in Scotland.

**DR BILL SHELDRIK**




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.

**PETER SUMBY**



Peter Sumby has worked at NEA, the national fuel poverty charity, since 1996 and has been Director of Development and Delivery since 2006.

Peter is a member of NEA's senior management team, responsible for the delivery of NEA's practical work programmes which, in partnership with local authorities, housing associations, the health sector, the community sector, energy company partners, seek to demonstrate innovative ways of bringing affordable warmth to low income and vulnerable households.

Peter leads a team of 24 staff and his role involves developing strategic partnerships to enable the delivery of NEA's programmes and to manage relationships with the national and local agencies with whom NEA needs to engage in order to deliver projects that tackle fuel poverty. Peter's role is also to ensure that lessons learned from project delivery are incorporated into NEA's policy development process in order to inform NEA's advisory role to government, local government and the wider energy sector.

# SUMMARY OF ACCOUNTS & FINANCIALS

## SUMMARY OF ACCOUNTS 2013

During the financial period since inception ScottishPower has contributed in excess of £11.7 million to the Trust.

Summary of our financial performance during 2013.

### FINANCIAL OUTTURN FOR THE YEAR

The charity's income for the period amounted to £452,943.

The charity paid out £1,132,302 in grants and had a deficit of £719,340.

Unrestricted reserves at the period end were £574,271 of which £462,336 was held in a designated fund for future grants that have been approved.

### PRINCIPAL FUNDING SOURCES

During the financial period since inception, ScottishPower has contributed in excess of £11.7 million to the Trust. The Trust is committed to exploring additional funding routes as outlined in more detail below.

### INVESTMENT POLICY

Aside from retaining a prudent amount in reserves each period, most of the charity's funds are to be spent in the short term so there are few funds for long term investment.

The Trustees have noted their intention to review the banking arrangements on an on-going basis, thereby ensuring maximum returns for the Trust as far as possible.

Trustees ask the Treasurer to consider the best banking option for trust funds in the current economic climate and this is kept under review and discussed at Trustee meetings.

### RESERVES POLICY

The reserves are needed to meet the working capital requirements of the Trust and the Trustees remain confident that the current level of reserves is sufficient to allow the continued activity of the Trust through 2014.

The charity currently has a designated grants reserve of £462,336 to pay grants that have been approved and are to be paid in future years subject to conditions being met.

The charity currently has a general reserve of £111,935. The current surplus held by the Trust will continue to be awarded to worthwhile projects consistent with the Trust strategy. Similarly, discussions will continue with all parties in an effort to secure additional funding as the period develops.

### THE SCOTTISHPOWER ENERGY PEOPLE TRUST FUND FINANCIALS 2013 YEAR-END

#### WHERE THE MONEY COMES FROM

|                                 |                 |
|---------------------------------|-----------------|
| Voluntary income                | £450,200        |
| Investment income               | £2,743          |
| <b>Total incoming resources</b> | <b>£452,943</b> |

#### WHERE THE MONEY GOES

|                                      |                   |
|--------------------------------------|-------------------|
| Charitable activities                | £1,132,302        |
| Costs of generating voluntary income | £36,113           |
| Governance costs                     | £3,868            |
| <b>Total</b>                         | <b>£1,172,283</b> |

#### BALANCE SHEET AS AT 31 DECEMBER 2013

|                                   |                 |
|-----------------------------------|-----------------|
| <b>Current assets</b>             |                 |
| <b>Cash at bank and in hand</b>   | <b>£582,871</b> |
| <b>CURRENT LIABILITIES</b>        |                 |
| <b>Creditors: amounts falling</b> |                 |
| <b>Due within one year</b>        | <b>(£8,600)</b> |
| <b>New current assets</b>         | <b>£574,271</b> |

In the period to 31 December 2013 the Trust made 85 grants of between £500 and £46,300 to charitable organisations.

# PROJECTS FEEDBACK

**Glasgow MSP Bob Doris said:** 'It is crucial that lone parents get as much advice and support as possible to assist them and their children. I have witnessed first-hand how One Parent Families Scotland offer that support, having spoken to a number of parents in the Maryhill area who value greatly the assistance on offer. I pay tribute to funders such as the ScottishPower Energy People Trust who seek to support such a vitally important local service.'

**Dr Mandie Currie of Allenergy, advised** "Our Affordable Warmth Argyll project funded by the ScottishPower Energy People Trust raised awareness and understanding of fuel poverty issues to more than 1400 people, we provided advice and assistance to more than 900 people and in depth advice, support, mentoring and benefits checks to 341 people, resulting in an increase of more than £400K in benefits, more than £480K was spent on energy efficiency improvements resulting in about £2.2M lifetime savings on fuel bills.

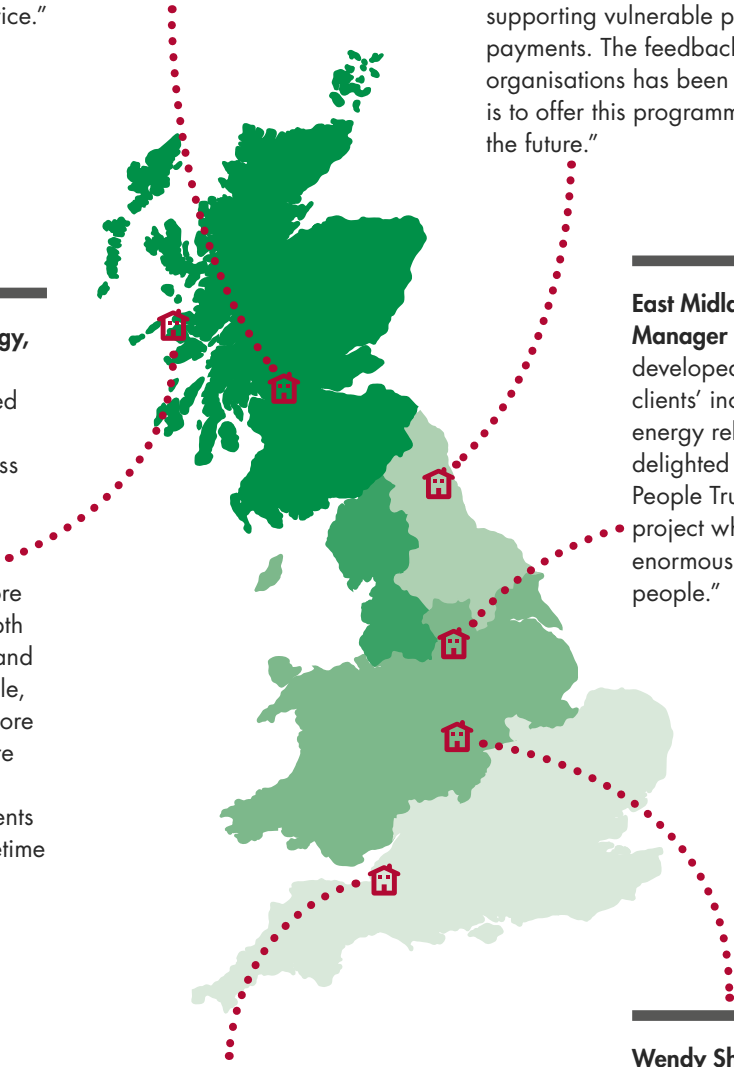
**Rhianne Cotterill, Energy Advice Project Manager at Bristol Debt Advice Centre, said:** "We'd like to thank the ScottishPower Energy People Trust for its funding award to our Energy Advice project. The money has made a real difference to our clients and enabled us to help hundreds of people in Bristol to lift themselves out of fuel poverty. We have a solid foundation from our first year of funding which we can now build on in year two to develop this project into an even bigger success."

"I hope we will be able to reach out to many more families with simple but effective advice and tips."

**Lyn Boyd, CEO of Mental Health North East, said:** "This project has been a huge success, we have successfully managed to train 197 individuals who are now supporting vulnerable people to better manage fuel payments. The feedback MHNE has received from organisations has been extremely positive and our aim is to offer this programme to many more communities in the future."

**East Midlands – Jill Morton, Development Manager at DIAL Barnsley, said:** "We developed this project in response to our clients' increasing need for advice on energy related matters. We are obviously delighted that the ScottishPower Energy People Trust continues to support this project which has proved to be of enormous benefit to local disabled people."

**Wendy Sherwood, one of the advisors from the Law Centre in West Midlands said:** "We are really pleased to be doing our bit and making a difference in local communities. Thanks to the funding from the ScottishPower Energy People Trust, more people in the area might feel they have some where to turn. I hope we will be able to reach out to many families with simple but effective advice and tips on how to make their homes more energy efficient."





# A CLOSER LOOK AT SOME PROJECTS FUNDED BY THE TRUST

## CASE STUDY 1

Marjory called Greener Kirkcaldy to ask for a home energy advice visit, after a friend recommended the service to her. Advisor Fraser Nicol carried out a visit, at which he completed an energy survey of the building and discussed Marjory's concerns. The 1930s house is exposed on two sides to the Firth of Forth and Marjory found it hard to heat. She is working, but on a low income and was spending a high proportion of her income on gas and electricity.

"I was always spending loads of money on heating with little success; it seemed to take forever heating my house and very expensive too."

Fraser identified that the house had no cavity wall insulation and only a minimal amount of loft insulation; he was able to arrange free cavity wall insulation and a loft insulation top-up to the recommended 270mm, via an Energy Company Obligation scheme.

The other main source of heat loss in the property was the windows – sash-and-case windows which were in poor repair and very draughty. Marjory did not qualify for the Scottish Government's Energy Assistance Scheme, which can fund draught-proofing for people on qualifying benefits, so Fraser referred her to our handy service. A sash-and-case window specialist we work with, Craig Begg, surveyed the house and identified the priority windows – a large bay window in the living room and two smaller windows in Marjory's bedroom, which were the main sources of heat loss and discomfort. Craig then fully refurbished those windows and added draught-proofing.

The windows now open and close easily, keep the heat in and the sea wind out. Marjory is delighted with them. She feels confident that her energy consumption will dramatically reduce and is very grateful.

"I can really feel the warmth now, particularly upstairs. The house heats up more quickly and seems to keep its heat for much longer so I don't need to have my heating on quite as much."

## CASE STUDY 2

The Festival Housing Energy Enabler from Worcestershire visited a young family on benefits with a toddler and a baby who were in fuel poverty. They were paying £8.00 per week on their prepayment meter towards their gas debt of £435.00 so could not afford to heat their home adequately. At the time of the visit, the thermo card was registering at 15°C which increased the risk of dampness and respiratory illness. The project were able to arrange to get the debt cleared through a Trust Fund and the Warm Home Discount was applied for. The family gained £130 electricity rebate so they could afford to heat their home. They were using the electric immersion to heat their water instead of the gas boiler as they didn't know how to use the controls and timers, as a result they were paying high charges on their electricity bills. The family were given energy saving tips e.g. turning off appliances rather than leaving them on standby to save money and shown how to use the gas boiler controls.



Craig Begg fixing Marjorie's windows.

## CASE STUDY 3

A 76 year old home owner living in the Springburn area of Glasgow was alerted to the "Parliament Talks" forum, hosted by Anniesland College in February, by her daughter, who had spotted a promotional poster and decided to attend the event. At the end of the event she approached an advisor from the Glasgow Home Energy Advice Team and explained she lived with her mum and they had problems with their gas central heating. A G.HEAT home visit was then arranged. At the home visit, the advisor was told of the pensioners frustration with her radiators. She always felt cold as insufficient heat came from the radiators, while she had a service contract for her heating system the engineer said that her radiators had deposits of sludge inside them. Flushing them out could be done but it would cost around £900. After fully assessing her circumstances, it became clear to that the pensioner might qualify for a free scheme offered by the Scottish Government's Energy Assistance Package.

The G.HEAT advisor then phoned the Energy Saving Scotland Advice Centre (ESSac). The contact centre advisor walked through an assessment and confirmed that she would be put forward for Stage 4 of the Energy Assistance Package and that a survey would be arranged to see if she would qualify for a new system. The surveyor called to complete the survey within two weeks and confirmed eligibility for a new central heating system, free of charge under the scheme. Engineers and installers were then booked and the installation took place exactly one-month after the Select Committee event.

The pensioner commented: "I never could get a heat with my old radiators. What a difference with this new system, I can't believe my house is so cosy. It was amazing that this came out of the blue and it all happened so quickly. I went out for the day and came back to a wonderful new heating system and my flat was left absolutely spotless. Thank you to everyone who helped with this."



David Kennedy from G-HEAT reviews the new system with Lorraine who spotted the promotional poster for the Parliament Talks event

"I can really feel the warmth now, particularly upstairs. The house heats up more quickly and seems to keep its heat for much longer so I don't need to have my heating on quite as much."

## CASE STUDY 4

A Single Parent family with 5 children and grandmother currently live in a static home on a travellers site but have access to mains utilities.

The Family were referred into the Ormiston Children & Families Trust, Keeping families Warm Project in Norfolk by the child's school due to children reporting they were feeling cold at home and not having a hot meal in the evenings. The youngest child had just been diagnosed with ADHD.

At the time of the referral, the mum was struggling to heat her caravan, there had been a pre-payment meter fitted by the electricity company for some time. She had not put on the heater during the winter months, apart from the very coldest days, in order to try and save money. She was in receipt of income support and child benefit. She reported they were not a family to ask for help and furthermore she found it difficult to speak to people from companies such as benefits agencies and heating companies.

It was clear that she was caring for her elderly mother and had been for many years, so with this in mind – the relevant benefits agency were contacted on her behalf and supported her to apply for DLA (carers). Initially she was reluctant to apply for this benefit, reporting that it was just what travellers did, they look after their own. Eventually she agreed that if she wasn't caring for her Mother she could have gone out to work and therefore she would apply for the benefit.

In terms of her electric supply, she reported she has had a meter fitted for many years, originally when she went behind in her payments. She agreed that the company in question could be contacted. When this was done, the company informed us that the original debt had been paid off some time ago and in fact she was in credit with her electricity by nearly £200. This came as a surprise to her – who further revealed that she didn't open letters and in fact showed a pile of unopened letters dating back several months. She was unable to read or write.

It took many phone calls and letters before the DLA was awarded. She was finally assessed as being entitled to the highest level of DLA and this was backdated for 1mth prior to claim. She now receives an extra £79.00 per week on top of her other existing benefits – she received £316 back pay. In addition, she was supported (through a different worker and funding stream) to claim for the relevant benefits in terms of her sons ADHD diagnosis.



# CONTACT US

## OUR CONTACT DETAILS ARE:

The ScottishPower Energy People Trust  
Cathcart Business Park  
Spean Street  
Glasgow, G44 4BE

Tel: 0141 614 4480 / 0141 614 8199

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

For any application enquiries please email:  
[spenergypeopletrust@scottishpower.com](mailto:spenergypeopletrust@scottishpower.com)

## REGISTERED OFFICE:

1 Atlantic Quay  
Glasgow, G2 8SP

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Carol Dunne, Environment & Social  
Policy Manager



*Irene Murdoch, Clare Allan, Angela Martin and Joanna Doherty.*