



The ScottishPower  
**Energy People Trust**

Supporting Communities Since 2005

# THE SCOTTISHPOWER ENERGY PEOPLE TRUST

ANNUAL REPORT 2014



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There are three different types of low energy bulbs that can save you money compared to traditional incandescent bulbs; CFLs (compact florescent lamps), halogens and LEDs (light emitting diodes).



CFLs use 60-80% less energy than incandescent bulbs.



Halogens use 20-30% less energy than incandescent bulbs (but you will often have more halogens in a fitting, using more energy).



LEDs use around 90% less energy than incandescent bulbs. Other benefits of LED bulbs include:

- LEDs are instantly bright when switched on (unlike CFL bulbs)
- Some LEDs can last around 25-30 years
- LEDs don't contain mercury (unlike CFL bulbs)

# 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 £15 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 the provision of energy efficiency advice.

# 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?

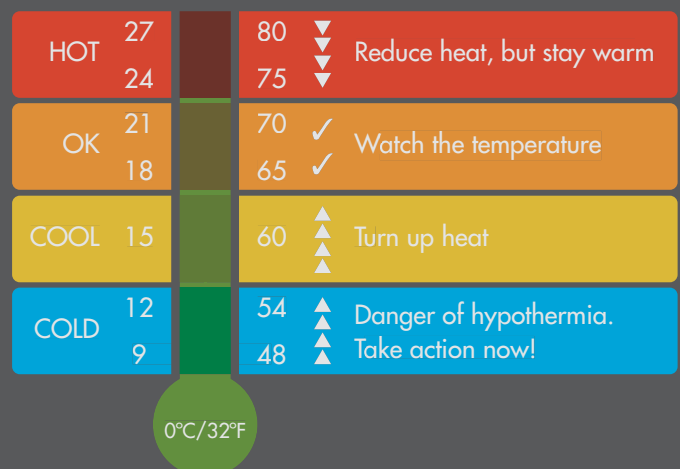
Apply online at:

[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.

## YOUR HANDY TEMPERATURE GUIDE



# CHAIRMAN'S MESSAGE BY NORMAN KERR

**2015 IS THE 10TH ANNIVERSARY OF THE SCOTTISHPOWER ENERGY PEOPLE TRUST. TO DATE THE TRUST HAS AWARDED ALMOST £13M TO 263 FRONT LINE POVERTY PROJECTS HELPING MORE THAN 1.6M PEOPLE THROUGHOUT BRITAIN.**

With over £702K given to 45 existing and 13 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 £59m 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 2014.



# COMPANY SECRETARY'S REPORT BY ANN LOUGHREY

## **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.**

ScottishPower is pleased to have donated in excess of £15 million to the charity to date and by funding organisations across Britain who work with people suffering from fuel poverty, we ensure that help is targeted to those who need it most.

In October 2014, Trustees visited National Energy Action, a leading fuel poverty charity based in Newcastle, to see first-hand how the project, which was awarded funding in 2013, was helping to educate families with young children on the solutions to fuel poverty and fuel debt.

Working in partnership with charities such as National Energy Action, has been the key to the Trust's success over the past nine years. The 263 projects supported by the Trust have themselves employed 142 full time employees, 233 part time employees who were supported by 285 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 2014 included Carers of East Lothian, Action for Children, Quarriers, DIAL Barnsley, Venus, Cheshire West Warm Zone and Coventry 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 2015 supporting more projects across Britain.



# PROJECTS FUNDED DURING 2014

**DURING 2014 THE SCOTTISHPOWER ENERGY PEOPLE TRUST AWARDED £414,683 TO 13 PROJECTS TO ASSIST 10,983 PEOPLE IN 4,634 HOUSEHOLDS THROUGH COMMUNITY PROJECTS DESIGNED TO REDUCE FUEL POVERTY.**

## **CHURCHES HOUSING ACTION TEAM (CHAT) – FLOATING TENANCY SUPPORT AND FUEL POVERTY SCHEME £10,504**

The Fuel Poverty Scheme will see clients on a referral basis where assessments will be carried out to see how much is needed to reduce their fuel debt and assist with fuel costs, while their benefits are being reviewed. Energy Efficiency advice will also be offered to clients as part of their tenancy support package.

## **ENERGY SOLUTIONS NW LONDON – BUDGETING 4 FAMILIES £48,000**

The funding will add a new strand called Fuel Poor Families, to Energy Solutions NW London Ltd core fuel poverty service. The element of the service will focus on proactively targeting and assisting vulnerable fuel poor families with children under 5 living in the most deprived areas of Brent. It will enable work with families, communities, schools, childrens' centres and faith groups to provide a more pro-active service to compliment the broader, reactive service that typifies the core caseload.

## **DIRECT HELP & ADVICE (DHA) – KEEPING EREWASH WARM £16,898**

The project aims to build on the highly successful previous programme "Warming Erewash" which impacted positively on health, economic and social wellbeing of the community. The current project will provide one to one support and advice locally to enable families to move out of fuel poverty and live in warmer homes.

## **COMMUNITY COUNCIL FOR SOMERSET – SOMERSET WARMER FAMILIES £19,637**

The Somerset Warmer Families project will tackle the fuel poverty experienced by a large number of families with young children in rural Somerset. The project will work with their own Village Agent, local authorities, NHS and voluntary sector partners to identify families with young children in these communities and provide those families with a comprehensive package of advice and support, which will allow them to improve the energy efficiency of their property and reduce energy costs.

## **CENTRE FOR SUSTAINABLE ENERGY – WARM & HEALTHY BRISTOL £48,000**

The CSE project will support households with children suffering from respiratory illness and/or living in deprivation, through referrals for energy efficiency measures, fuel debt assistance, income maximisation and energy awareness and to build on their existing health related work, utilising GP and health worker referrals and providing families with integrated support around all fuel poverty interventions.



### **South Seeds**

*L to R: Ruskin Gammon Energy Officer, Ann Loughrey ScottishPower Energy People Trust Company Secretary and Trustee, Lucy Gillie Project Manager, Lisa Pebbles Operations Officer, Carol Dunne Environmental & Social Policy Manager ScottishPower & Casey Dickson Energy Officer.*

## **SOUTH SEEDS – SOUTH SEEDS ENERGY CHAMPION £45,000**

The funding will support the continued work of delivering a programme of energy efficiency and fuel poverty advice within south Glasgow. The project will provide practical energy advice and help people reduce energy bills through a combination of measures and better control of energy use, make referrals to existing grant programmes, such as the Energy Assistance Scheme and Energy Companies Obligation, signposting and signing up eligible properties.



**Involve Northwest**

Jill Gethin (at the back) Energy Efficiency & Unemployment Advisor  
Rebecca Davies (at the front) Trainee Energy Efficiency & Unemployment Advisor.

**INVOLVE NORTHWEST – A WARMER DEAL FOR WIRRAL £31,227**

The project will employ an Energy Adviser to identify the potential to improve energy efficiency in a range of dwellings and to explain the Green Deal and the Energy Company Obligation to beneficiaries and refer to approved companies to undertake work where appropriate. They will be able to provide benefit health checks to households and to advise on working and claiming benefits and will refer beneficiaries to the in house Debt Adviser to negotiate debts and /or reduce /cancel debts for household electricity or gas supply by applying to individual Energy Trusts on behalf of beneficiaries.

**COVENTRY CITIZENS ADVICE BUREAU – HELPING FAMILIES AFFORD FUEL £40,000**

Coventry CAB currently works with 40 primary and secondary schools across Coventry to provide advice to parents on debt, benefit, housing and other matters such as welfare reform changes. The aim of the service is to create a more settled and stable home-life for children and assist families that are in fuel debt and fuel poverty through a range of interventions designed to provide relief from fuel poverty in the long term.

**CAMBRIDGE CITIZENS ADVICE BUREAU – MAKE IT COUNT £48,000**

Make It Count is a project aimed at helping vulnerable women to maximise their income with the aim of bringing a positive impact on their children and other family members. The service will aim to help the women and their families deal with fuel poverty and fuel debt, complex benefits changes, improve energy efficiency and maximise their income.

**CEREDIGION CITIZENS ADVICE BUREAU – BETTER FUEL DEALS – FITTER FINANCES £25,832**

Ceredigion CAB aims to deliver group sessions to consumers and frontline workers to inform them on energy efficiency around the home, local energy issues and local savings schemes. In addition they will cover general fuel efficiency measures, switching supplier, new changes to tariffs, fuel debts and grant schemes.

**CASTLE VALE TENANTS RESIDENTS ALLIANCE – CASTLE VALE FUEL POVERTY PROGRAMME £28,880**

The Castle Vale project will employ a fuel poverty money adviser to provide one to one support to clients who are either at risk of fuel poverty or are suffering from fuel poverty. The grant will also be used to train volunteers to ensure there is a legacy after the funding has come to an end.

**SPEAKUP SELF ADVOCACY LTD – SAVE IT £20,783**

Save It is a vibrant interactive energy saving project, which will engage with hard to reach vulnerable groups, people with learning disabilities and their personal assistants/support workers, on how to access the correct most efficient tariff and to make sure that they know where to get help from, should they struggle.

**BRADFORD ENVIRONMENT ACTION TRUST – WARM HOMES HEALTHY CHILDREN £31,922**

The project will work through the network of Sure Start Childrens' Centres in Bradford to tackle fuel poverty in families that have one or more child under five years old. Families will be given advice and support in areas that can make a big impact on improving home energy efficiency and achieving affordable warmth. This includes accessing financial support towards energy bills, switching energy tariffs and reducing energy demand.



Kate Urwin, Energy Projects Manager, Bradford Environmental Action Trust.

# PROJECTS IN THE SPOTLIGHT

## NATIONAL ENERGY ACTION HELPS CITY HOUSEHOLDS THANKS TO £32,219 FUNDING FROM THE SCOTTISHPOWER ENERGY PEOPLE TRUST

Newcastle based charity, National Energy Action is celebrating helping Geordies become more energy efficient, by meeting with Trustees from the Energy People Trust, who invested significant funding into the innovative project.

In October 2013, thanks to £32,219 funding from the ScottishPower Energy People Trust, NEA was able to kick-start its 'Sure Start to a Warm Home' project. Over the past year NEA has worked in partnership with the North-East's Sure Start Centres, training their staff and sharing practical advice with service users, reaching over 9,000 local people.

The interactive project helps parents and children alike understand how to be energy efficient in the home and ultimately save money on bills. As well as being a fun activity for local parents and children the project is also a real lifeline for those who may be struggling to make ends meet.

## WARMTH 4 ALL HELPS MERSEYSIDE FAMILIES KEEP WARM THIS WINTER

Merseyside's Warmth 4 All project is helping local people live in warmer homes this winter thanks to over £49,000 funding from the ScottishPower Energy People Trust.

This innovative project operated by Energy Projects Plus, Warmth 4 All works with local partners to give vulnerable families practical, face-to-face advice on energy efficiency, income maximisation and access to benefits. The project has helped households to achieve £205,731 in additional income during its lifetime.

Energy Projects Plus with multi-faith based partner, Faiths4Change and Archdiocese partner, Parish Power, to identify and



Chris Ellis, NEA Training & Assessment Manager with Norman Kerr, ScottishPower Energy People Trust Chairman.

approach vulnerable individuals who may otherwise slip under the radar. The partnerships aim to give vulnerable households in Merseyside the knowledge and skills to achieve affordable warmth during the winter months.

Emma Ashcroft, Project Manager, said: "We are extremely proud of the success that we've achieved with Warmth 4 All. Working within the community enables us to help those who are most in need and it is incredibly rewarding to know that we are making a real difference to people's lives. We look forward to continued success with Warmth 4 All through the provision of a more sustainable solution to fuel poverty."

Ann Loughrey, Company Secretary and Trustee of the ScottishPower Energy People Trust, said: "Energy Projects Plus has done

a great job helping families in the local area achieve affordable warmth, something particularly important at this time of year. Thanks to funding from the ScottishPower Energy People Trust, they can now provide specialised energy efficiency advice to those who are vulnerable in the community and we are delighted to continue to support the Warmth 4 All project."



Dominic Griffiths, Warmth 4 All Project Officer with community event attendee.



## DIAL BARNSELY HELPS KEEP THE CHILL OFF VULNERABLE FAMILIES

DIAL Barnsley has supported 689 individuals in the local area to receive extra energy support throughout the winter, thanks to the an innovative advice project supported by £38,000 funding from the ScottishPower Energy People Trust. Upon completion, the project assisted 454 households and secured additional income of £463,426 in maximised income.

Since 1985, DIAL Barnsley's staff and volunteers have worked tirelessly to support clients and continually develop services in response to their needs. The organisation strives to help disabled people in Barnsley lead "a life without boundaries". Recognising that keeping on top of bills can be such a 'boundary' to disabled people and carers in particular, in November 2012 DIAL Barnsley created its energy advice project to help offer further support.

Since its establishment, the project has visited hundreds of vulnerable families in their homes, sharing advice and practical knowledge on how to save energy, helping hundreds of people become more energy efficient.

A beneficiary who has been helped by the project said: "The advisor at DIAL could really identify with what I was going through and offered me lots of valuable hints and tips on how to save money on my bills. As a result of her help and support I am now financially better off and my overall quality of life has improved."

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."

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



Molly Moxon, Fuel Poverty Advisor, DIAL Barnsley.



Yousef Behar, free@last Debt & Benefit Advisor with Dan.

## ADVICE PROJECT HELPS BIRMINGHAM'S POOREST FAMILIES

Birmingham based charity, free@last, is celebrating helping local people maximise their income by a staggering £1,862,809 in entitled benefits. The project has made a huge difference to the city's poorest families by helping them become financially savvy and through continuing their specialised debt and benefit advice service, they also reduced peoples' debts by £728,247.

Last year, free@last was awarded £30,000 by the ScottishPower Energy People Trust to fund its energy project, which was on the brink of closure. Thanks to this funding, over the course of a year the project was able to extend its services and help 433 people in the city with advice and practical skills on energy efficiency and saving money on bills.

The key focus of this project was helping local people who were experiencing money troubles to take control of their finances and enable them to develop strategies to manage their income and expenditure. As a result of these measures, the people targeted by the project have experienced an increased standard of living.

John Street, director of the charity, said: "Funding from the ScottishPower Energy People Trust has allowed us to provide a vital service in an area that has the highest child poverty in Birmingham and is classed as one of the most deprived wards in the country. Our intensive support to help local people with financial problems, has left hundreds of people to be better off. The ScottishPower Energy People Trust provided a critical lifeline for us at a time when our beneficiaries were most vulnerable and we are forever grateful."

Ann Loughrey said: "free@last is already well established in the area offering local people a range of support and 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."

# 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 Development Manager 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)**



After an initial career in photography and graphic design, then community business development, Ann developed a prominent role in the charity sector, leading fuel poverty and energy efficiency campaigns for more than 20 years.

Ann joined ScottishPower in January 2005 as Head of External Business and Community Relations and was instrumental in establishing the multi-million pound ScottishPower Energy People Trust, which is dedicated to helping end fuel poverty in Britain, where she currently holds the position of Trustee and Company Secretary.

She was appointed Head of Corporate Social Responsibility in October 2007 and has responsibility for CSR, sponsorships, community engagement and the ScottishPower foundation, which Ann helped establish two years ago and is a Trustee and Executive Officer.

**JOAN FRASER**



Joan has a background in health, education and social policy and considerable experience in the charity sector. She has a particular interest in support for disadvantaged young people.

She is currently Convenor of Edinburgh Voluntary Organisations Council, Chair of the Edinburgh and Lothians Trust Fund, a Board member of Scotland Yard Adventure Centre, a non-executive Board member of NHS Health Scotland and Vice Chair 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 ScottishPower Energy People Trust since this Scottish charity was established in 2005. A trained psychologist and designer, he worked in steel and manufacturing industries for many years across the UK, followed by a seven year spell with the English fuel poverty charity National Energy Action.

He is now based in Cornwall, heading up another Fuel Poverty and Environmental charity, (Community Energy Plus) as Chair of Trustees, together with other financial and operational roles in the voluntary sector.

**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 37 years dealing with vulnerable young people and families and is currently the Area Convenor for the Glasgow Panel. Until 2012 he was Chairman of one of Kibble Intensive Fostering Service, foster panels.

He was an appointed visitor for Barnardos Scotland until 2014, 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 2014

**During the financial period since inception ScottishPower has contributed in excess of £15.0 million to the Trust.**

Summary of our financial performance during 2014.

### FINANCIAL OUTTURN FOR THE YEAR

The charity was notified that ScottishPower had approved a donation of £2,399,998 to the Trust and this amount was subsequently accrued in the financial statements. The donation was transferred to the Trust's bank account on 6 March 2015. The charity's income for the period amounted to £3,301,180.

The charity paid out £702,216 in grants and had a surplus of £2,575,355.

Unrestricted reserves at the period end were £3,149,626 of which £123,449 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 £15.0 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, if relevant.

### 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 2015.

The charity currently has a designated grants reserve of £123,449 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 £3,026,177. 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 2014 YEAR-END

### WHERE THE MONEY COMES FROM

Voluntary income	£3,300,000
Investment income	£1,180
<b>Total incoming resources</b>	<b>£3,301,180</b>

### WHERE THE MONEY GOES

Charitable activities	£702,216
Costs of generating voluntary income	£19,367
Governance costs	£4,242
<b>Total</b>	<b>£725,825</b>

## BALANCE SHEET AS AT 31 DECEMBER 2014

### CURRENT ASSETS

Debtors	£2,410,000
Cash at bank and in hand	£744,776

### CURRENT LIABILITIES

Creditors: amounts falling due within one year	(£5,150)
<b>New current assets</b>	<b>£3,149,626</b>

In the period to 31 December 2014 the Trust made 58 grants of between £500 and £43,200 to charitable organisations.

# PROJECTS FEEDBACK

**Lisa McIlwraith, Project Co-ordinator at CoEL, said:** "It is a huge achievement for an organisation to be given £85,691 over three years and turn that into so much extra generated income for Carers in East Lothian, £1,035,639.89 was gained through welfare benefits and energy savings. We are delighted we have been able to help so many carers on such a huge scale."

**Kester Dean, Manager of Rossendale CAB, said:** "The funding from the ScottishPower Energy People Trust has enabled us to provide specialist support to people with fuel issues. We have increased our specialist knowledge and skills throughout the Bureau and use these to support local people in a number of ways." Clients gained £1,062,730 through increased income and fuel debt relief.

**Jo Hughes, Money Management, who works for the Venus project said:** "Thanks to the ScottishPower Energy People Trust and this project, I have learnt so much about how effective small changes have huge impacts on saving energy. At Venus we work with local women to help them try to reduce energy consumption, which will in turn help them reduce energy bills."

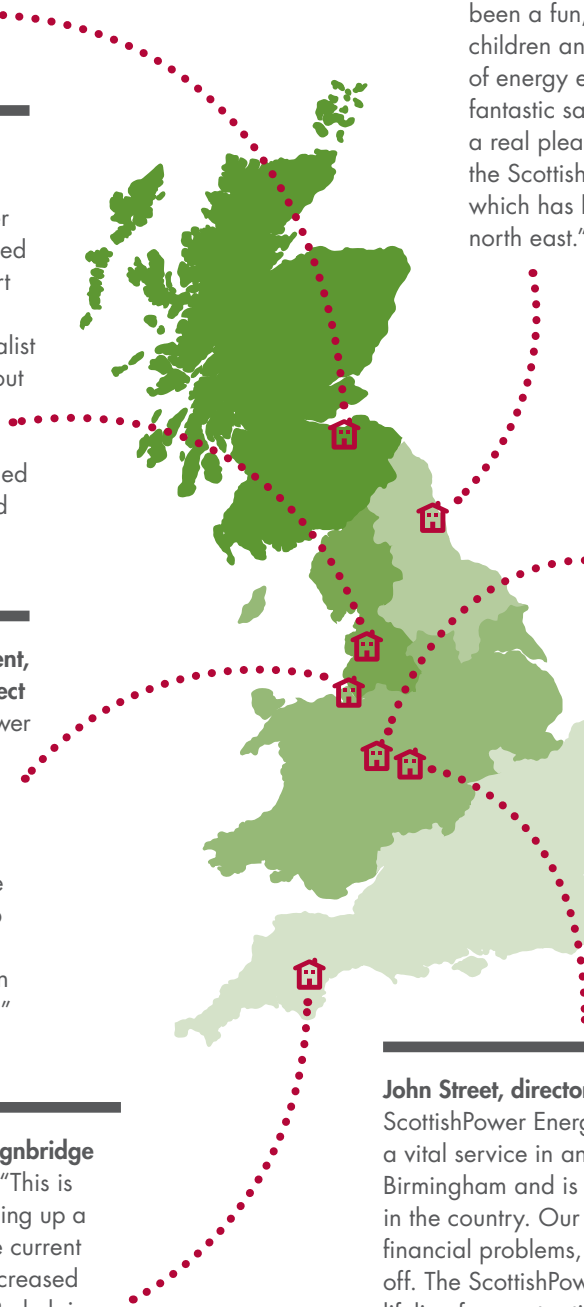
**Ken Pickering, Manager at Teignbridge Citizen's Advice Bureau, said:** "This is a very important project. Bringing up a family is never easy, but in the current economic climate there are increased pressures on young families. By helping them to develop financial skills, make key consumer choices and explore wider energy issues, we can reduce some of their financial worries."

"The ScottishPower Energy People Trust provided a critical lifeline at a time when our beneficiaries were most vulnerable and we are forever grateful."

**Chris Ellis, Training and Assessment Manager at NEA, said:** "The Sure Start to a Warm Home project has been a fun, interactive and hands-on way of getting children and their parents engaged with the idea of energy efficiency in the home. It has led to some fantastic savings for families on their fuel bills. It was a real pleasure for NEA to be involved alongside the ScottishPower Energy People Trust in this initiative which has brought real benefits to families in the north east."

**Sue Howarth, Chief Executive, North Smethwick Development Trust, said:** "The project funded by the ScottishPower Energy People Trust has provided support to some of the most vulnerable households in the neighbourhood. We have worked with local agencies in North Smethwick to reach out to all members of the community to maximise low levels of household income by supporting people in reducing their energy costs, maximising benefit entitlements and helping them to identify where other household expenditure savings can be made. The project has secured £69,097 in additional benefits and enabled us to identify those most in need and we now run a debt advice clinic for local people."

**John Street, director of free@last, said:** "Funding from the ScottishPower Energy People Trust has allowed us to provide a vital service in an area that has the highest child poverty in Birmingham and is classed as one of the most deprived wards in the country. Our intensive support to help local people with financial problems, has left hundreds of people to be better off. The ScottishPower Energy People Trust provided a critical lifeline for us at a time when our beneficiaries were most vulnerable and we are forever grateful." The project gained £2,591,056 in benefits and debt relief for clients.



# PROJECT CASE STUDIES

## CASE STUDY 1

Robbie had approached our office for advice during a spell of very cold weather in January. He had been living without heating for several months and wanted to know how he could re-establish a gas connection.

For some time, he had been struggling to manage on disability and industrial injuries benefits and had fallen behind with payment of fuel bills. He had a long-standing debt problem and his gas supplier fitted a pre-payment meter to recover some arrears. Robbie found the recovery rate too expensive and simply stopped using gas altogether. As a safety precaution required by law, the Housing Association 'capped' the gas supply because it wasn't in use. However, standing charges continued to apply and Robbie's debt continued to grow, even though he was living in one room and using no gas at all. He described his flat as 'freezing' and 'miserable' and felt that his health was beginning to suffer as a result.

At Robbie's request and supported by his Energy Officer Ruskin, the Housing Association agreed to uncap the supply. Ruskin then negotiated with the energy supplier and they agreed to recover the debt on an affordable weekly basis rather than as a lump sum, which would normally have been the case. Ruskin also carried out an Energy Audit and identified a number of ways that Robbie could use energy more efficiently. South Seeds supported Robbie with these measures, which included draught proofing the front door, fitting a radiator reflective panel and LED light bulbs, learning how to use the boiler timer and room thermostat effectively and reporting a problem with one of the windows to the landlord.

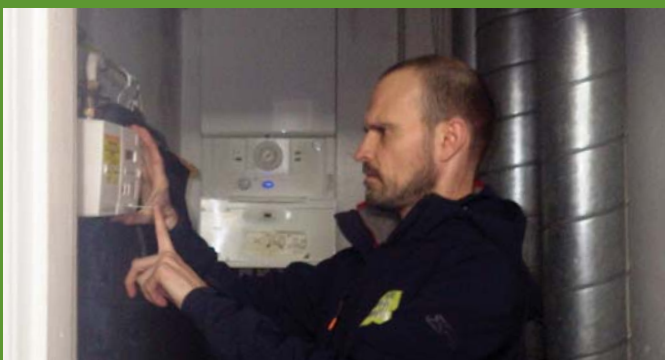
Ruskin also applied to a charitable trust run by one of the energy companies, requesting a grant to clear the remaining debt altogether, and to pay for a new energy-efficient cooker. Robbie was also encouraged to seek money advice from an appropriate organisation that could support him with general budgeting.

Robbie is delighted with the changes to his flat. He says the results have been 'fantastic'. The South Seeds team will be here to support Robbie with any issues that come up as things move forward.



*Casey Dickson, Energy Officer, South Seeds carrying out a home energy audit.*

"Ruskin negotiated with the energy supplier, and they agreed to recover the debt on an affordable weekly basis, rather than as a lump sum, which would normally have been the case."



*Ruskin Gammon, Energy Officer, South Seeds.*



South Seeds handyman Uillie McKinnon

## CASE STUDY 2

Mr Alexander originally contacted Energy Projects Plus advice line because of an advertisement for the Halton Healthy Homes grant that we administered. He unfortunately missed out on this grant by the time he got in touch with us, but we subsequently made contact with him to explain what Warmth4All can offer people in his area. At the time he was unemployed and in receipt of Income Support and Child Tax Credits, he was about to go into part-time employment and wanted to be referred for a benefits health check to assess his entitlement. Halton Council assisted with a new application for Working Tax Credits and his overall increase in income was £6,000, including £1,970 of Working Tax Credits. He was also referred to Local Solutions for assistance with switching to a cheaper tariff and received tailored energy efficiency from our advisors to help lower his usage.

## CASE STUDY 3

An elderly gentleman was referred to West Midlands Warm Zone for a full benefits check. He had extreme mobility problems and was struggling to cope physically and financially on a daily basis. He lived in an upstairs flat with no way of being

able to get out as he couldn't walk to the bus stop or afford to pay for taxis. His son had to move in to help care for him therefore he too was unable to look for work. He was advised by the jobcentre that he could no longer claim jobseekers allowance as he was not able to actively seek work. So effectively, he had no income of his own. This left both father and son with very little resources and had to choose between putting on the heating or buying food as they couldn't afford to do both. The customer suffers from a cold related illness and this resulted in his overall condition worsening.

A full holistic assessment of the circumstances was completed and the client was advised which benefit he would be better claiming. We visited him, helped him to achieve this and he was successfully awarded income related ESA.

We then looked further into any other benefits he may have been entitled to, highlighting that he may have an entitlement to PIP. We advised the customer to apply and supported him to complete the application forms. He was awarded the enhanced rates of PIP of both components of mobility and personal care. This resulted in a claim by his son for a Carers Allowance for looking after him so he

would now have an income of his own. As he was receiving an income based benefit he was entitled to claim the Warm Home Discount rebate, which we also highlighted and advised him how to sign up for the scheme.

In addition, he was eligible to receive a blue parking badge and a vehicle on the Motability scheme to enable him to get out of the house occasionally. This award improved the customer's wellbeing greatly as he now had full housing benefit and council tax reduction, he could afford to put his heating on and buy nutritious food.

## CASE STUDY 4

One of our beneficiaries came to Venus from out of the area, as she was afraid that if she went to any local organisations someone might recognise her. She had several payday loans and had exhausted all avenues of acquiring further credit to pay towards them. She worked full-time in a hospital kitchen and had resorted to stealing food to feed her son as her monthly wage had been taken by the payday loans. Altogether she had eight loans and was unable to pay any household bills. Venus contacted each loan company individually to explain her hardship circumstances and the difficulty she was experiencing trying to meet payments. Almost all of them reduced her payments and froze the interest. The bank was also informed and supported the client to open a new account with no overdraft facility and reimbursed most of the bank charges incurred due to the payday loans accessing her account without any funds available. Therefore she was able to set up affordable payment plans with all her utility providers.

The client's two grown up daughters also attended Venus for money management support as they too followed the same route as their mother and had several payday loans. All three women received one-to-one budgeting advice and credit union savings accounts. One daughter is expecting her first child and wanted to purchase baby items without falling into debt. All report that the support received at Venus was a real 'life saver' for them, as they could see no way out of their spiralling debt. They now feel more positive with the support and skills gained and their mental health has greatly improved.

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# CONTACT US

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Carol Dunne, Environment & Social Policy Manger



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