

LBN



Lancashire BME Network Evaluation Report

for the Energy Redress Scheme

Energy 360 Project, Aug 2020 – Feb 2022

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With funding from Lancashire BME Network



University of Central Lancashire
Global Race Centre for Equality




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This report was prepared by Paul Morris, onEvidence Ltd, who led the evaluation, managed by the Operations Manager of LBN. Mr Morris worked under the general guidance of Dr John Wainwright and Dr Roxanne Khan, both of Global Race Centre for Equality (GRACE) at University of Central Lancashire, who provided technical assistance, coordination, and logistical support.

The availability and valuable insights shared by the project partners, all of whom were involved in the implementation of this project, is gratefully acknowledged. Special thanks are due to the Chief Officer of BwD Healthy Living, and Operations Manager of Lancashire BME Network (LBN), for their cooperation throughout the evaluation process and assistance in the review of the report.

All the comments and suggestions offered by LBN and project partners are duly reflected in this report, as appropriate.

The views expressed in this report are those of the authors and do not necessarily reflect the views of the organisations.

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Summary

During the period February-March 2023, the Global Race Centre for Equality (GRACE), University of Central Lancashire and onEvidence Ltd, conducted an end-of-cycle evaluation of the Energy 360 Project.

This project was funded by the Energy Redress Scheme (Phase 1, Round 6), in the amount of £439,313.20, and was implemented by LBN from August 2020 to February 2022 in Pennine Lancashire.

The evaluation, commissioned and funded by LBN, reviewed the relevance, effectiveness, and efficiency of project implementation and, specifically, documents its outcomes in relation to its objectives. In addition, best practices and lessons learned from the implementation of the project were identified, which can be used when designing similar interventions in the future.

A mixed methodology was employed for this evaluation which covered the implementation of the project and comprised the following tools: (a) a desk study, (b) a stakeholder analysis, and (c) semi-structured interviews with programme managers and delivery partners.

Findings and conclusions

The main findings and conclusions presented in this report are divided into sections related to the evaluation criteria and key questions.

Relevance

Generally, the project was highly relevant to the target beneficiaries' needs throughout its implementation. Its alignment with the LBN programmes of work was high, as well as with the core priority of the Energy Redress Scheme with regard to "helping people who are most at risk from cold homes and high energy bills".

Effectiveness

Despite major adjustments to the implementation plan, the project was effective in the delivery of the main outputs and activities, while services were extended to more beneficiaries than originally planned.

Efficiency

Project implementation suffered delays due to external factors, which affected the technical and financial execution. However, resources were used in an efficient manner, with the delivery of services and activities being guided by LBN know-how and high standards of quality.

Best practices and lessons learned

The evaluation identified best practices that are linked to the adaptive approach taken by the project, the good use of the flexibility provided by the Energy Redress Scheme, and the ability of LBN to seize opportunities to add value.

The evaluation also revealed some lessons learned that could be useful for the following purposes: (a) more tactical and in-depth work with beneficiaries; and (b) the optimal utilisation of LBN senior staff.

Recommendations

There are 4 recommendations arising from this evaluation that respond to the main findings, conclusions and lessons learned, which are organised by evaluation criteria. These recommendations relate to: (1) the selection of beneficiaries; (2) monitoring and evaluation frameworks; and (3) project design and contract negotiation with partner organisations.

1. Introduction

This report presents an end-of-cycle evaluation of the Energy 360 Project (hereinafter mainly referred to as “the project”). The project was funded by Energy Saving Trust’s Phase 1, Round 6, Energy Redress Scheme grant and was implemented by LBN from August 2020 to February 2022.

The evaluation was conducted by external consultants, Mr Paul Morris, Dr John Wainwright, and Dr Roxanne Khan, between February and March 2023, commissioned by the operations Manager for LBN. The objectives were to review the relevance, effectiveness, and efficiency of the project implemented and, in particular, to document its results in relation to its objectives as defined in the project document. Emphasis has been placed on assessing the project’s capacity to adapt and respond to emerging issues, particularly the COVID-19 context, and on identifying best practices and lessons learned from implementing the project. The results of this evaluation are aimed at contributing to LBN accountability, its decision-making, and institutional learning to improve the quality of future interventions.

The evaluation process was carried out remotely and comprised analysis involving a desk review and delivery partner interviews. It was conducted in line with the norms, standards and ethical principles of LBN and the University of Central Lancashire.

2. Background

2.1 Project objectives and scope

The project's overarching objective was to tackle fuel poverty by helping vulnerable individuals and families to improve home energy efficiency while reducing their bills and carbon footprint.

In pursuit of this objective, the following activities were originally planned (prior to COVID-19):

- Train 10 project staff in Level 3 Energy Awareness 6281-01 by Aug 2020;
- Deliver 2700 home visits and 1-1 advice to 1350 households between Aug 2020 and Feb 2022;
- Deliver 14 events during the roadshow over the 2 years of the project, reaching 1000 households;
- Create a media campaign, including social media, to raise awareness of the service and energy saving measures throughout the lifetime of the project;
- Provide culturally sensitive energy advice in relevant languages through the duration of the project;
- Recruit and train 10 volunteers by December 2021 to be able to support paid staff in providing energy advice.

2.2 Stakeholder analysis

The management and executing entity of the Energy 360 Project was LBN, who provided contract management, accountability and reporting support. Also involved in its implementation were:

- Lancashire BME Network
- AAWAZ
- Bangladeshi Welfare Association (BWA)
- Peoples Enterprise & Empowerment Forum (PEEF)
- BWD Healthy Living
- ITHAAD
- Northern Community Network (NCN)

LBN recruited partners that were well placed and trusted within their communities. LBN worked with the partners to develop operation planning and mobilisation, including beneficiary recruitment strategy, and recording and monitoring systems.

The primary beneficiaries of the project were people of minoritised ethnic backgrounds living in Pennine Lancashire. Key demographic characteristics include:

- Majority South Asian ethnicity
- Living in terraced property (mixed rented/owned)

- 75% in receipt of benefits
- 21% in fuel debt
- 55% prepay for energy
- Average ratings of well-being more than 1 point below national average
- Average ratings of anxiety more than 1 point above national average

A detailed stakeholder map is included in appendices, section 8.

3. Evaluation objectives and methodology

3.1 Purpose and approach

The purpose of this evaluation was to provide an independent review that follows a participatory approach and responds to the accountability function within LBN. This evaluation is summative in nature and focuses on the measurement and analysis of the project's contributions to the results achieved in the Pennine Lancashire region.

The specific purposes of the evaluation, were to: (1) assess the project implementation, and more particularly, its results attained in relation to the overall objective; and (2) provide lessons learned, along with recommendations for the future planning and implementation of Energy Redress Scheme projects.

The evaluation used a framework with the criteria of relevance, effectiveness, and efficiency, applied to the three levels of analysis, namely design, implementation and outcomes.

3.2 Methodology

A mixed-method approach, combining quantitative and qualitative methods was used to obtain a detailed understanding of the project's accomplishments and the lessons learned. The following research tools were applied:

- a) A desk review and secondary data-collection analysis of a project documents, progress reports and LBN web pages. Additional relevant LBN resources and knowledge products and third-party reports were also reviewed.
- b) A stakeholder map was drawn up to identify the project's stakeholders (participants and beneficiaries), as well as LBN staff members involved in implementing the project. The mapping served the purpose of providing an overview of the range of stakeholders involved, and of selecting partners for interviews.
- c) Semi-structured individual interviews were conducted remotely with key project stakeholders from a random selection of partner organisations. One stakeholder shared information via email that was also taken into consideration.

The qualitative and quantitative data collected were compiled and analysed at different stages of the evaluation process, against specific evaluation questions, using the evaluation framework as the overarching guide to validate findings and formulate conclusions and recommendations.

3.3 Evaluation coordinators

- Mr Paul Morris

Mr Morris is Director of [onEvidence Ltd](#), an independent social research and training development agency specialising in crime and justice, ED&I, and education. He works with public, private and third sector organisations to provide research project management support, community-based participatory research (CBPR), and programme evaluation services.

- Dr John Wainwright

Dr Wainwright is the Director of the Global Race Centre for Equality (GRACE) at the University of Central Lancashire (UCLan). His research focuses on anti-racism, ethnicity, inclusion, social work and social policy. He is committed to working in partnership with Black, Asian and Minority Ethnic (BAME) organisations and communities to strive towards Race Equality. Dr Wainwright is also the Youth and Justice research strand Lead for the Centre for Criminal Justice Research & Partnerships, UCLan, and is involved in several co-participatory projects with children in the youth justice system.

- Dr Roxanne Khan

Dr Khan is a Chartered Psychologist and Research Scientist with 20 years' experience in the education and research sector. She authors books, journal articles, and conference presentations for international audiences. She is a Senior Lecturer and Course Leader for BSc Honours Forensic Psychology at the University of Central Lancashire.

3.4 Limitations

A number of limitations and constraints were identified during the evaluation inception stage, which included access to beneficiaries, as well as response rates to partner interview requests. In most cases, these were addressed or mitigated with the support of the Operations Manager of LBN.

Despite these limitations, the data collection instruments used allowed for sufficient information to be collected and triangulated to ensure that the findings, conclusions and recommendations are evidence-based and reliable.

4. Findings

4.1 Relevance

Key finding 1: The Energy 360 Project proved to be highly relevant in terms of beneficiaries' priorities and needs. However, early buy-in and engagement was a challenge for the project's roll-out strategy.

Stakeholder interviews confirmed that the project, in terms of design, objectives, and issues addressed, was highly relevant. Interviewees acknowledged that addressing the challenges and key gaps, in relation to sustainable provision of energy advice and support, represented a need for the beneficiaries involved and the Pennine Lancashire region as a whole. Therefore, financial assistance, guidance and support on this matter from national partners, such as Energy Saving Trust, is welcomed. Several interviewees confirmed that their organisations have specifically requested technical assistance and support from LBN, which stresses the relevance of the project's enabler function in terms of supporting partners to deliver the planned activities.

The interviewees confirmed that the project and LBN objectives aligned with the needs and priorities of their respective organisations. Regarding capacity development, interviewees highlighted its relevance in light of existing capacity and human resource constraints. Addressing these gaps is perceived as vital, and the project has been relevant in providing access to useful skills and knowledge adapted to the local context.

In practice, the overall design and scope was ambitious. The target 1350 beneficiary households unfurled a number of challenges with regard to early buy-in and engagement. However, the stakeholders interviewed agreed that the difficulties in engaging beneficiaries are not related to the relevance and appropriateness of the project design. Issues related to the operational dimension of the implementation strategy, will be assessed in more detail in the effectiveness and efficiency sections.

Key Finding 2: The alignment of the project with LBN's sub-programmes of work, as well as objectives and priorities of the Energy Saving Trust, were found to be high.

In line with its core aims and objectives, the project responded to the LBN commitment to “advance the education of the public, primarily but not exclusively minority ethnic and deprived communities in the county of Lancashire, by whatever charitable means the Board of Management think fit with the object of improving the conditions of life of the said beneficiaries”. It is specifically aligned with the objectives of the Energy Voucher Scheme (2022) and ongoing programme of Capacity Building.

- Provision of fuel vouchers to those who are living in fuel poverty/fuel debt
- Training opportunities, chances to work on partnership bids, and infrastructure support

In relation to partnerships, the project was closely linked to the objectives and priorities of the Energy Saving Trust’s Energy Redress Scheme, specifically to “help people who are most at risk from cold homes and high energy bills”.

Key Finding 3: Considering the impact of emerging issues, and particularly the global COVID-19 pandemic, the responsiveness of the project allowed it to grasp some opportunities and reassert its relevance.

The global COVID-19 pandemic created a number of significant and unprecedented challenges for the project. Stakeholders interviewed unanimously agreed that these challenges shifted the project’s initial priorities which required appreciable effort of adaptation.

Also significant were changes in the energy markets, particularly energy price caps and lack of switching options, which further affected project implementation.

Concerning adaptability, the evaluation confirmed that the project was amply responsive to funder-specific requirements and new opportunities. Interviewees highlighted the ability to adjust to beneficiary-specific constraints and needs, while taking advantage of emerging opportunities to expand the scope of the project, with increased emphasis on energy efficiency, including the integration of Energy Saving Packs and Winter Warmer Packs, as well as increased numbers of beneficiaries.

4.2 Effectiveness

Key finding 4: As a consequence of the adjustments in the implementation plan, the project met and even exceeded some of its output targets, while others were not fully accomplished.

In terms of the level of implementation of planned activities and outputs, the project’s performance was overall highly satisfactory. Although not all activities were implemented as expected, others were adjusted and increased in scope and the type of service delivery. In this respect, the initial project plan and the implementation strategy were to a large extent modified.

The output level, in terms of targets and scope, can be summarised as follows:

Project objectives	
Activities	Outputs
Train 10 project staff in Level 3 Energy Awareness 6281-01 by Aug 2020	15 project staff across all partners completed and passed the Energy Awareness Exam
Deliver 2700 home visits and 1-1 advice to 1350 households between Aug 2020 and Feb 2022	1509 households were given advice over the telephone or online
Deliver 14 events during the roadshow over the 2 years of the project reaching 1000 households	Events were cancelled due to COVID-19 pandemic and reprofiled

Create a media campaign including social media to raise awareness of the service and energy saving measures throughout the lifetime of the project	Promotion of project was completed via LBN & partner social media platforms. Posters were created which contained details of the project and these were shared across the partnership as well as external advisory services
Provide culturally sensitive energy advice in relevant languages through the duration of the project	All advice was provided in a culturally sensitive manner and in the relevant language
Recruit and train 10 volunteers by December 2021 to be able to support paid staff in providing energy advice	10 volunteers were recruited and trained by the partners

Other activities and services carried out that were not initially planned include, among others, the provision of 250 Winter Warmer Packs and 500 Energy Saving Packs.

- 250 Winter Warmer Packs: gloves, hat, blanket, hot water bottle, foil, temperature gauge, and bag.
- 500 Energy Saving Packs: mechanical timer, radiator foil, draught excluders, LED night sensor light, temperature gauge, X2 LED light bulbs, thermal flask, solar battery packs, and light key chains.

Based on the interviews held and desk review, the evaluation confirmed that the activities and outputs delivered served their immediate purposes. Interviewees acknowledged that the modalities of intervention had been appropriate and effective, and considered capacity-building activities to be useful for improving technical knowledge and skills at the individual level, as well as pertinent for improving performance at the organisational level.

Furthermore, interviewees generally acknowledged the effectiveness of the approach followed and implemented by LBN. They also highlighted as key features the aspect of skills transfer through the support provided, as well as the practical guidance received. Likewise, interviewees referred positively to the usefulness of knowledge sharing and peer learning fostered through meetings. That being said, interviewees indicated that more regular meetings would have been beneficial to the project.

4.3 Efficiency

Key finding 5: Despite the delays in project planning and implementation, these did not compromise the effectiveness and high satisfaction with the delivery of activities and services in relation to the needs and expectations of stakeholders.

As indicated in the progress reports and stakeholder interviews, the project faced challenges that led to delays and impacts on planning and implementation. The continuing challenges related to

COVID-19, changes in the energy market, and beneficiary engagement, as well as the shortened timeframe to implement the remaining activities and budget, added significant pressure on the LBN project team.

However, the evaluation confirmed that delivery delays did not ultimately compromise the overall effectiveness of the provision of services and support by LBN throughout the project. According to interviewees, the activities, products, and services delivered were of a high level of quality; a characteristic they consider representative of the work of LBN.

Key finding 6: LBN leveraged its expertise to address operational challenges and ensure value for money of the project.

Delivery partners pointed to high levels of commitment, dedication, and good internal coordination as strengths, although they acknowledged that human resource constraints were a challenge for implementation. For a project of this scope, the partner organisations internal resources for administration and monitoring appeared scant, and the management and administrative burden was found to be medium/high, which added to the workload of LBN as Project Manager.

Additionally, monitoring and evaluation tasks seemed to serve more for reporting purposes than for learning and informed project corrections. During interview, LBN's Operations Manager acknowledged that the project could have benefited from more spaces for exchange, including more regular meetings, to monitor progress and take advantage of opportunities for learning.

On another note, the support provided by LBN in relation to the development of the tasks and activities of partners was confirmed as sufficient. Interviewees identified expertise, knowledge of the context, and practical approaches, as positive features of the collaborations with LBN staff. In this regard, the evaluation confirmed that LBN oversight and guidance were pivotal to the high performance and quality of services and products delivered.

Despite implementation and budget reallocations due to COVID-19, the evaluation confirmed that resources were generally implemented efficiently and with optimisation in mind.

5. Best practices and lessons learned

5.1 Best practices

5.1.1 Strong oversight by LBN and effective use of partner organisations

The ability of LBN to capitalise on its added value and its close relationships with local partners has been a key factor in the achievement of project results. This includes the understanding of partner dynamics and the ways of working specific to the region. Therefore, the use of in-house expertise and LBN staff in the delivery of activities and services remains key for quality.

5.1.2 Adaptability and capacity to respond to emerging opportunities

Interviewees observed that the project managers needed to rethink the projects' implementation strategy. The adaptive approach adopted by the project to changing contexts and requests from partners was identified as a determining factor in keeping the project on course. It is key to grasp emerging opportunities rapidly and efficiently, given the flexibility offered by Energy Redress Scheme as a funding instrument and the responsiveness of LBN.

5.1.3 Value added products and services and importance of communication

While not being part of the initial implementation plan, Winter Warmer and Energy Saving Packs, as well as the LBN Community of Practice, were valuable in promoting the project, and fostering exchange of learning. These activities also provided opportunities for sharing information with a broader audience, with potential to create incentives for beneficiaries to take actions.

5.2 Lessons learned

5.2.1 Strategic investment of bounded resources when selecting beneficiaries

Regarding the urgent need to speed up the implementation of the activities and the existing constraints, the project opted to support more beneficiaries by expanding limited resources. The investment of time and labour to engage and work with each beneficiary, together with the management and administration burden, took resources away from the more tactical and in-depth work that could be achieved by working with fewer beneficiaries. In terms of strategic investment of resources, the approach to beneficiary selection requires more comprehensive assessment of opportunities and alternatives.

5.2.2 Maximum utilisation of limited human resources

Future projects managed and implemented by LBN need to take account of the management and administrative implications and the human resource constraints in the design and contract negotiation with partner organisations. Without partner staff dedicated to administrative and project management, the optimal utilisation of LBN senior staff for a project of this scope is not guaranteed.

6. Conclusions

RELEVANCE: To what extent were the objectives and targets of the project consistent with the priorities and needs set out by the targeted beneficiaries, and priorities of LBN?

The data collected confirmed that the project objectives and targets were and remain highly relevant to the target beneficiaries throughout its implementation. The appropriateness of the activities and services provided by the project to the needs and priorities of stakeholders and participants was assessed as high.

The project implementation adapted fluidly to emerging challenges related to COVID-19 and changes in the energy market and the negative impact of these on marginalised communities in the region. Addressing the challenges and key gaps, in relation to provision of energy advice and support, represented a pressing and ongoing need for the beneficiaries involved. Therefore, financial assistance, guidance and support on this matter from national partners, such as Energy Saving Trust, is welcomed.

The project's alignment and relevance are cemented in the mandates and mission of LBN and the project partners to support local marginalised communities. Strategic objectives and priorities of LBN programmes of work are pursued through the project, focusing on advancing the "education of the public, primarily but not exclusively minority ethnic and deprived communities in Lancashire in the interest of social welfare for those who have need by reason of their youth, age, disability, ethnicity, social or economic circumstances so as to improve their conditions of life".

EFFECTIVENESS: To what extent did the project achieve the objectives and targets outlined in the project document?

The performance of the project in terms of activities and outputs delivered has been strong, by ensuring usefulness, quality and applicability. Despite adjustments to the original implementation plan, the project was successful in meeting the targets specified in the project document, expanding services and activities to more beneficiaries.

The project's ability to adapt to partner-level interests and opportunities has significantly fostered the effectiveness of the outputs and services delivered.

Interviews confirmed that the capacity of selected partner organisations has improved in the area of bespoke service delivery and multi-stakeholder engagement. The fact that, with the support of the project, one partner organisation has developed a long-term energy advice strategy is a significant achievement.

Central to the success of the project have been committed partner organisations with decision-making power to move the agenda forward in their respective communities. The strong

relationships with these communities, LBN responsiveness, and the flexibility of the project, were crucial facilitating factors.

EFFICIENCY: To what extent were services and support provided in a timely and reliable manner, according to the priorities established by the project documents?

The implementation of the project suffered serious delays, caused by the COVID-19 pandemic. These translated into challenges in terms of planning, management and financial execution.

With regard to efficient and reliable use of resources, the project activities and outputs achieved very high ratings from partners for overall satisfaction with the implementation approach. Interviews confirmed that services and products delivered were of a high level of quality; a characteristic that partners considered representative of the work of LBN.

However, the scope of the project coupled with the limited human resources meant that some partner organisations involved found the recording and monitoring system and high demand for management to be a larger burden than they had anticipated. Despite this, the evaluation confirmed that, overall, resources were executed in an efficient manner.

7. Recommendations

The following recommendations are based on the findings and conclusions of the evaluation and take into consideration feedback from the stakeholders consulted.

Relevance

Recommendation 1. LBN should consider working more closely with fewer beneficiaries and pursue an approach that generates opportunities to offer more tactical and in-depth support.

Recommendation 2. The project implementation, in terms of its adaptability, should be used as a best practice for future projects that are relevant and conducive to that implementation approach.

Effectiveness

Recommendation 3. Ensure monitoring and evaluation frameworks that can better capture learning and inform strategic decision-making.

Efficiency

Recommendation 4. For the design of future projects, LBN should ensure that partner organisations clearly understand the roles and responsibilities of monitoring and reporting. Other necessary conditions include available human resources, skills and capacities (technical and administrative) to allow consistent monitoring of intermediate and final results throughout the project cycle.

8. Appendices

Appendix 1	Terms of reference
Appendix 2	Evaluation framework
Appendix 3	List of documents and resources consulted
Appendix 4	Stakeholder map

Appendix 1

Terms of reference

TERMS OF REFERENCE

Evaluation of the Energy 360 Project

a. Introduction

This evaluation is being conducted in accordance with Energy Saving Trust guidelines, which endorsed the monitoring of implementation and the methods of evaluation. In this context, the Energy Saving Trust required that programmes be evaluated on an end-of-cycle basis, covering all areas of work under their responsibility. As part of the general strengthening of the evaluation function to support and inform decision-making in the Energy Saving Trust in general and LBN in particular, LBN's Operations Manager is implementing an evaluation strategy that includes end-of-cycle evaluation of this area of LBN's work. This is therefore a discretionary internal evaluation managed by the Operations Manager of LBN.

b. Evaluation topic

This evaluation is an end-of-cycle review of a project that aimed to offer a free confidential bilingual support service to help individuals and families in Lancashire to improve their home energy efficiency while reducing their bills and carbon footprint.

c. Objective of the evaluation

The objective of this evaluation is to review the relevance, effectiveness, and efficiency of the project implementation and more particularly to document the results the project attained in relation to its overall objectives as defined in the project document.

The evaluation will place emphasis in identifying best practices and lessons learned that derive from the implementation of the project. These will in turn be used as tools for the future planning and implementation of projects.

d. Background

The Energy Redress Scheme was established by the Energy Saving Trust in 2018, as a mechanism to distribute payments from companies who may have breached Ofgem rules to registered charities, community interest companies, co-operative societies and community benefit societies.

Projects financed from the Energy Redress Scheme aim to deliver energy related projects that support vulnerable energy customers and carbon emission reduction initiatives in England, Scotland and Wales.

LBN undertakes internal evaluations of each of its Energy Redress Scheme projects in accordance with Energy Redress Scheme requirements. Evaluations are defined by LBN as brief end-of-project evaluation exercises aimed at assessing the relevance, effectiveness and efficiency of project activities. They are undertaken as desk studies and consist of a document review and stakeholder interviews.

The project

The project under evaluation is part of the projects approved by the Energy Redress Scheme, Phase 1, Round 6, and was implemented by LBN from August 2020 to February 2022 in Pennine Lancashire.

The project's objective as stated above is to "offer a free confidential bilingual support service to help individuals and families in Lancashire to improve their home energy efficiency while reducing their bills and carbon footprint."

The expected accomplishments were defined as follows:

- A decrease in the amounts spent on energy (Gas, electric etc.) bills;
- Uptake of services such as loft insulations, boiler replacements, completion of an energy audit;
- Self-reported improvement in health and wellbeing;
- Improved occupier education about energy usage and agencies able to offer further support;
- More BME households being aware of how to reduce their fuel costs and maximise their family income;
- Increased awareness of how to source better-priced services and products independently;
- Fewer households will be living in fuel poverty;
- Improved partnership working to address fuel poverty;
- Development of an evidence base which can be anonymised and used for further engagements;
- Lasting a legacy of trained energy advisors and volunteer energy champions who will be able to continue offering specialist advice and support post project.

To achieve the expected accomplishments, the following activities were originally planned:

- Train 10 project staff in Level 3 Energy Awareness 6281-01 by Aug 2020;
- Deliver 2700 home visits and 1-1 advice to 1350 households between Aug 2020 and Feb 2022;

- Deliver 14 events during the roadshow over the 2 years of the project, reaching 1000 households;
- Create a media campaign, including social media, to raise awareness of the service and energy saving measures throughout the lifetime of the project;
- Provide culturally sensitive energy advice in relevant languages through the duration of the project;
- Recruit and train 10 volunteers by December 2021 to be able to support paid staff in providing energy advice.

The budget for the project was £439,313.20. Progress reports were prepared on a quarterly basis.

Stakeholder Analysis

As stated in the project document, the main project stakeholders were LBN, local partner organisations and people of BME heritage living in Pennine Lancashire

e. Scope of the evaluation

The scope of the evaluation will cover all the activities implemented by the project, including the following elements:

- Progress made towards project objectives;
- Efficiency with which outputs were delivered;
- Strengths and weaknesses of project implementation on the basis of the objectives and targets;
- Coordination within LBN and partner organisations;
- Relevance of the project's activities and outputs towards the needs of beneficiaries, and the mandates and programme of works of LBN.

f. Evaluation methodology

The evaluation will use the following data collection methods to assess the project:

- I. A desk review and secondary data-collection analysis of project criteria, the programme of work of LBN, project documents, progress reports, LBN web pages, etc.
- II. Semi-structured individual interviews to validate information and findings from the document reviews.

g. Evaluation questions

Questions will focus on relevance, efficiency, and effectiveness and will be applied to guide the analysis.

- Relevance: To what extent were the objectives and targets of the project consistent with the priorities and needs set out by the targeted beneficiaries, and priorities of LBN?

- Effectiveness: To what extent did the project achieve the objectives and targets outlined in the project document?
- Efficiency: To what extent were services and support provided in a timely and reliable manner, according to the priorities established by the project documents?

h. Deliverables

The evaluation will include the following outputs:

- Draft final evaluation Report. No later than 15 March 2023.
- Final Evaluation Report. No later than 24 March 2023. Before submitting the final report, the evaluation lead must have received the clearance on this final version from GRACE, UCLan, assuring the satisfaction of LBN with the final evaluation report.

Appendix 2

Evaluation framework

MANAGEMENT	
Evaluation coordinators	Dr John Wainwright (UCLan) Dr Roxanne Khan (UCLan) Mr Paul Morris (onEvidence Ltd)
Level of stakeholder engagement in the evaluation process	Limited: Interviews will offer partners the opportunity to make decisions and determinations of merit and worth of the programme and to formulate suggestions for future action.
Authority to make what type of decisions about the evaluation	The evaluation coordinators will have the authority to make decisions about all aspects of the evaluation.
Processes to be used for making decisions	Structure: <ul style="list-style-type: none"> ○ Evaluation coordinators Method/s: <ul style="list-style-type: none"> ○ Majority decision making Ways of exploring issues: <ul style="list-style-type: none"> ○ Informal online meeting processes ○ Email
Resources	LBN is funding the evaluation.
Ethical and quality evaluation standards	Cultural competency, instruction of Mr Prasad, UCLan, as ethics reviewer.
Document management processes and agreements	<ul style="list-style-type: none"> ○ Scope of Work (SoW) to be agreed between LBN, GRACE and onEvidence Ltd ○ Terms of Reference (ToR) to be drafted by GRACE and onEvidence Ltd ○ Informal agreement
Evaluation planning	<ul style="list-style-type: none"> ○ Evaluation framework ○ Gantt Chart
Meta evaluation (how the evaluation itself will be evaluated)	<ul style="list-style-type: none"> ○ Evaluation coordinator group critical reflection ○ Individual critical reflection
Evaluation capacity	The ability of the evaluation coordinators to conduct and use evaluations will be strengthened through reflective practice, coaching and supervision.

DETAILS ABOUT THE EVALUATION	
Initial description	This will be based on the existing project description.
Theory of Change (ToC)	LBN and onEvidence to develop retroactively.
Identification of potential unintended results	These will be identified through key informant interviews and unusual events reporting.
EVALUATION PARAMETERS	
Identification of primary intended users	LBN to provide details.
Primary purposes and intended uses of the evaluation	<p>Using findings:</p> <ul style="list-style-type: none"> ○ Contribute to broader evidence base ○ Inform decision making aimed at improvement (formative) ○ Lobby and advocate <p>Using process:</p> <ul style="list-style-type: none"> ○ Build trust and legitimacy across stakeholders ○ Ensure accountability ○ Ensure diverse perspectives are included, especially those with little voice
Key evaluation questions	Initial questions will focus on outputs. These will be developed based on evaluation coordinator group and LBN input into the evaluation planning process.
Criteria and standards for assessing performance	Stated aims and objectives will be central. Stories of change and values clarification interviews will also be used.
ACTIVITIES, OUTCOMES, IMPACTS AND CONTEXT	
Sampling strategy	<p>Convenience:</p> <ul style="list-style-type: none"> ○ Volunteer
Measures or indicators to be used	Process and outcome
Collection and/or retrieval of data about activities, results, context and other factors	<p>Information from individuals:</p> <ul style="list-style-type: none"> ○ Interviews with individuals <p>Information from groups:</p> <ul style="list-style-type: none"> ○ Group discussion ○ Brainstorming <p>Existing documents and data:</p> <ul style="list-style-type: none"> ○ Project records ○ Previous evaluations and research

Data management	<ul style="list-style-type: none"> ○ Consistent data collection and recording ○ Data backup ○ Data cleaning ○ Effective data transfer ○ Secure data storage
Qualitative and quantitative data combination	<p>When data are gathered:</p> <ul style="list-style-type: none"> ○ Sequential data gathering (first quantitative data collection, then qualitative analysis) <p>When data are combined:</p> <ul style="list-style-type: none"> ○ Integrated design <p>Purpose of combining data:</p> <ul style="list-style-type: none"> ○ Enriching ○ Examining ○ Explaining ○ Triangulation (confirming; rejecting)
Data analysis	<p>Numeric analysis:</p> <ul style="list-style-type: none"> ○ Exploratory techniques ○ Frequency tables ○ Summary statistics <p>Textual analysis:</p> <ul style="list-style-type: none"> ○ Content analysis ○ Thematic coding
Data visualisation	Tables, graphs, and infographics
Produced outcomes and impacts	<p>Gathering additional data:</p> <ul style="list-style-type: none"> ○ Key informants' attribution ○ Process tracing <p>Analysis:</p> <ul style="list-style-type: none"> ○ Check intermediate outcomes ○ Qualitative comparative analysis <p>Approaches:</p> <ul style="list-style-type: none"> ○ Mixed contribution analysis and collaborative outcomes reporting
Comparison of the factual with the counterfactual	<p>Non-experimental:</p> <ul style="list-style-type: none"> ○ Key informant
Investigation of alternative explanations	<p>Key informant and process tracing</p> <p>Approaches:</p> <ul style="list-style-type: none"> ○ Contribution analysis ○ Collaborative outcomes reporting
Data synthesis	<p>Processes:</p> <ul style="list-style-type: none"> ○ Consensus conference <p>Techniques:</p>

	<ul style="list-style-type: none"> ○ Lessons learned
REPORT AND SUPPORT	
Timeframe and format required for reporting	Communication plan will be developed by LBN, GRACE and onEvidence Ltd.
Reporting formats (suggested)	<p>Written:</p> <ul style="list-style-type: none"> ○ Interim report ○ Final report and summary ○ Newsletter (optional) ○ Website communications (optional) <p>Presentation events:</p> <p>Conference</p> <ul style="list-style-type: none"> ○ Feedback workshops (optional) ○ Verbal briefings <p>Presentation materials:</p> <ul style="list-style-type: none"> ○ PowerPoint (optional)
Accessibility	<p>General accessibility:</p> <ul style="list-style-type: none"> ○ Applied graphic design principles ○ Descriptive chart titles ○ Plain language <p>Specific accessibility barriers:</p> <ul style="list-style-type: none"> ○ Colour blind audience ○ Low vision and blind audience
Development of recommendations	Combined partner exchange, group critical reflection, and individual critical reflection.
Support use (suggested)	Recommendations tracking, conference presentations, and social learning.

Adapted from Better Evaluation Rainbow Framework (August 2014)

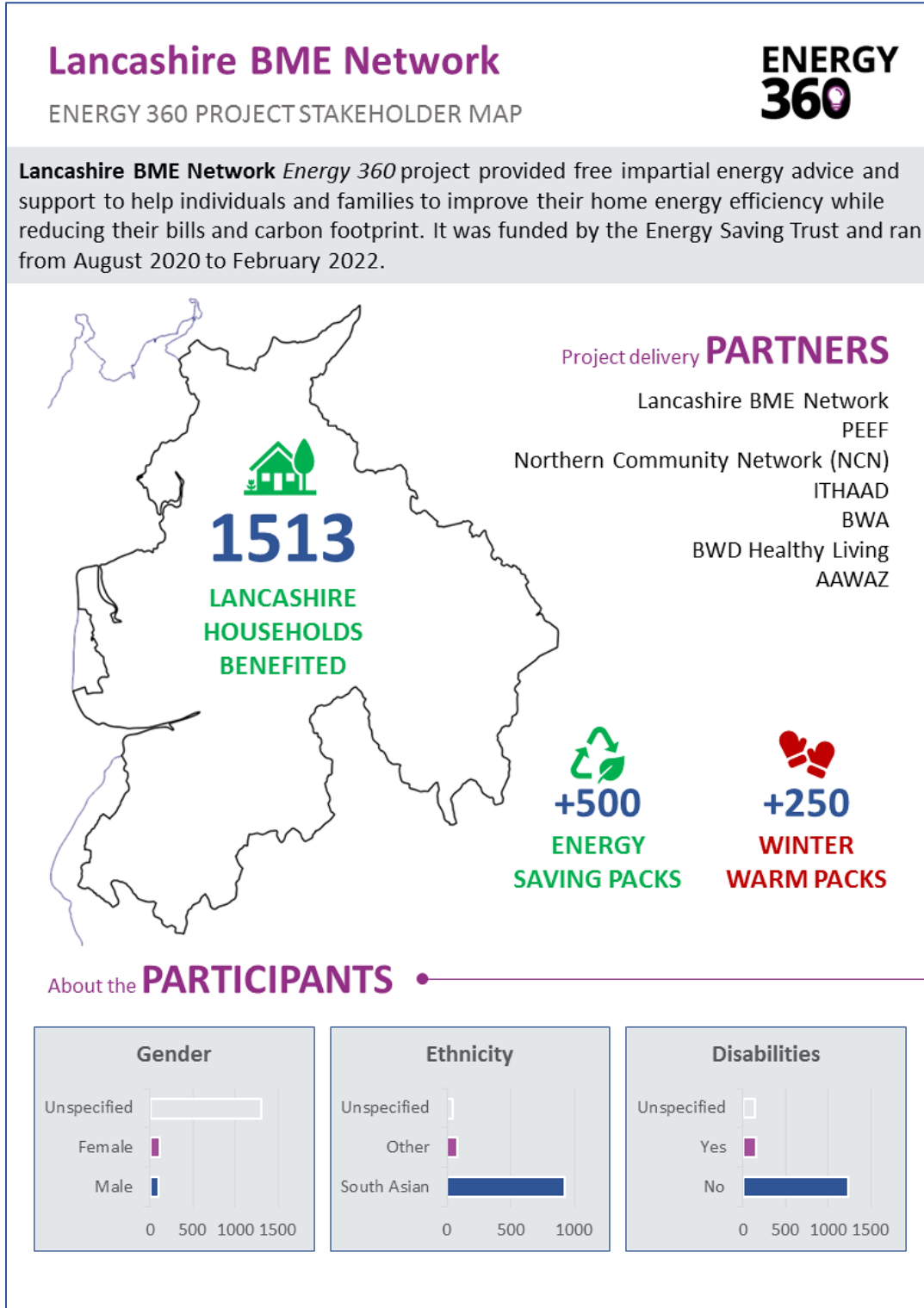
Appendix 3

List of documents and resources consulted

	Document title	Type
1	Energy 360 Evaluation (project document)	Design
2	Quarterly Grant Report Q1	Contractual/ Reporting
3	Quarterly Grant Report Q2	Contractual/ Reporting
4	Quarterly Grant Report Q3	Contractual/ Reporting
5	Quarterly Grant Report Q4	Contractual/ Reporting
6	Quarterly Grant Report Q5	Contractual/ Reporting
7	Quarterly Grant Report Q6	Contractual/ Reporting
8	Quarterly Grant Report Q7	Contractual/ Reporting
9	End of Project Report	Contractual/ Reporting
10	Energy 360 Views Report	Project output
11	Energy 360 Partner Bio	Project output
12	LBN Featured current works and projects https://lancashirebmenetwork.org.uk/our-work/current-work/	Online resources
13	Energy Saving Trust: Funded Energy Redress Projects https://energyredress.org.uk/projects	Online resources

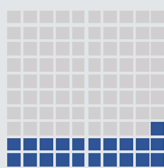
Appendix 4

Stakeholder map

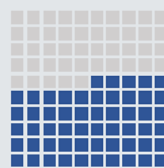




75%
IN RECEIPT
OF BENEFITS



21%
IN FUEL
DEBT



55%
PREPAY FOR
ENERGY

Participant **LIFE SATISFACTION**



Overall, how satisfied are you with your life nowadays?



Overall, to what extent do you feel that the things you do in your life are worthwhile?



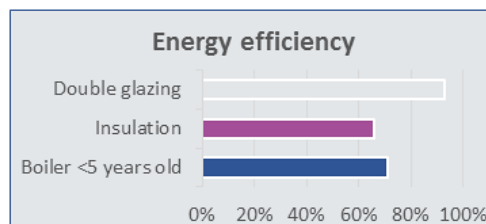
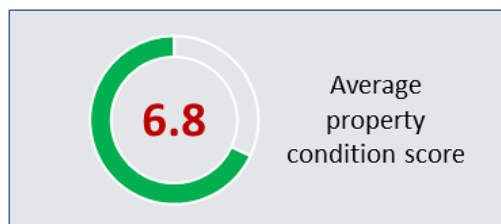
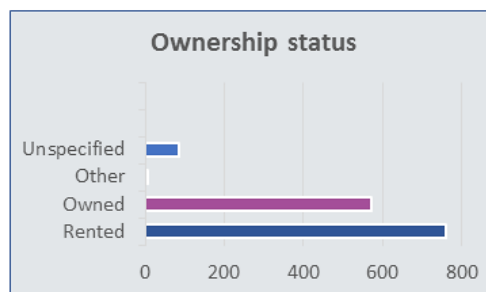
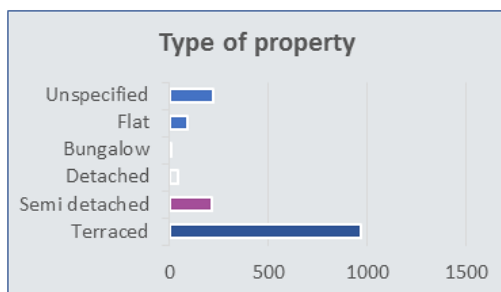
Overall, how happy did you feel yesterday?



Overall, how anxious did you feel yesterday?

Overall wellbeing scores were consistently **>1 point below** national averages.

About the **PROPERTIES**



PARTNER FREQUENCY DATA	
Partner organisation	Total (participants)
Aawaz	185
Bangladeshi Welfare Association	151
BwD Health Living	416
Ithaad Community Development Trust	211
Lancashire BME Network	217
NCN (Jinnah Development Trust)	117
Peoples Enterprise & Empowerment Forum (PEEF)	210
BENEFICIARY FREQUENCY DATA	
Gender	Total
Female	109
Male	91
Not specified	1311
Ethnicity	Total
Afghani	1
African	5
Bangladeshi	139
Caribbean	1
Chinese	1
Indian	31
Lithuanian	1
Moroccan	2
Pakistani	755
Romanian	1
Syrian	8
White British	12
White Irish	8
Dual Heritage: White & Black African	1
Dual Heritage: White & Black Caribbean	1
Any Other Asian Background	8
Any Other Black Background	5
Any Other Ethnic Group	13
Any Other White Background	17
Not specified	49

Disability	Total
No	1237
Yes	159
Not specified	141
Pre-existing conditions/mental health	Total
Yes	360
Not specified	1068
Number of children	Total
0	497
1	205
2	304
3	222
4+	183
PROPERTY INFORMATION	
Property type	Total
Terrace	964
Bungalow	12
Semi-detached	215
Detached	44
Flat	90
Not specified	221
Ownership status	Total
Rented	758
Owned/mortgaged	573
Lives with family	5
Other	1
Not specified	85
Loft and/or under floor insulation status	Total
Without	276
With	531
Not specified	702
Age of boiler	Total
0-5 years	208
5+ years	84
Not specified	1216
Boiler type	Total
Combination Boiler	1265
Conventional	86
Other	91
Not specified	67

Double glazing status	Total
Yes	1283
No	101
Not specified	125
Energy meter type	Total
Credit	473
Payment	721
Smart meter	239
Not specified	77
Energy payment method	Total
Direct Debit	372
On receipt of bill	273
Prepayment card	796
Not specified	69
Financial/fuel debt status	Total
In debt	293
Not in debt	1132
Not specified	95
Benefits status	Total
In receipt of benefits	1077
Not in receipt of benefits	364
Not specified	72
Overall condition of property (self-reported, very poor - perfect)	Total
0	5
1 = 9	4
2 = 50	25
3 = 69	23
4 = 204	51
5 = 745	149
6 = 1470	245
7 = 2786	398
8 = 2768	346
9 = 1260	140
10 = 290	29
Average score	6.8

LIFE SATISFACTION SURVEY*	
Q. Overall, how satisfied are you with your life nowadays?	Total
0	3
1	7
2	37
3	54
4	111
5	221
6	282
7	356
8	210
9	92
10	44
Average score	6.3
Q. Overall, to what extent do you feel that the things you do in your life are worthwhile?	Total
0	2
1	3
2	35
3	53
4	103
5	190
6	296
7	347
8	244
9	96
10	45
Average score	6.4
Q. Overall, how happy did you feel yesterday?	Total
0	3
1	9
2	42
3	58
4	103
5	211
6	231
7	382
8	238
9	100
10	41
Average score	6.3

On a scale where 0 is "not at all anxious" and 10 is "completely anxious", overall, how anxious did you feel yesterday?	Total
0	99
1	72
2	236
3	162
4	111
5	190
6	169
7	164
8	153
9	51
10	20
Average score	4.6

*ONS4 was used to allow LBN to benchmark responses against national datasets.