

Home Visits

Visiting people in their homes to better understand their circumstances and provide face-to-face advice

How it works

Home visits are an excellent way to provide people with personalised, face-to-face advice in their own home.

As home visits are resource-intensive and most valuable to vulnerable households, who may have difficulty accessing other forms of advice or need hands-on assistance (e.g. with heating controls), they are often booked through a referral from a partner organisation that is working with vulnerable people at home and has identified a need for support.

Home visits are made by trained and skilled advisors, who may be staff or volunteers. Typically, the advisor will look at the home to better understand the building fabric and any evidence of damp and mould. They will also look at heating systems, controls and energy bills, and ask questions about how the household uses energy, and any health conditions that may affect their energy use or need for warmth. They will then make personalised recommendations.

Sometimes advisors may help install low-cost energy saving measures, such as draughtproofing, during the visit. Advisors may also provide casework support post-visit, to help households access retrofit grants or benefits, or to resolve issues with landlords or energy suppliers.



Image © Plymouth Energy Community

What you'll need

- ⇒ A way to reach people and book them in for a visit – such as through community outreach, online self-referral, or referral through a partner such as a local authority or health and social care provider
- ⇒ Appropriately trained and skilled advisors
- ⇒ A clear understanding of the parameters of the support you are offering, that is understood by the advisor and communicated to the householder
- ⇒ DBS checks and insurance
- ⇒ Safety measures for home advisors, such as a buddy system
- ⇒ Printed advice materials to leave with the householder

Case study

Within **EnergyWise LEAD**, partner Green Isle of Wight CIC delivered home visits to anyone on the Isle of Wight, where many people are older, offline or living with low literacy levels. These free visits included boiler and loft insulation checks, with thermal imaging cameras used to spot issues with radiators. Advisors also provided guidance on grants to upgrade insulation and heating systems, and sometimes information on solar panels.

Why it works

Home visits allow advisors to gain a much better appreciation of both the physical condition of the homes and the householder's lifestyle and circumstances – helping to make advice more relevant and achievable. Unlike online advice, this approach doesn't rely on households already having some idea of what information they need. Visiting people at home to give face-to-face advice can build trust, and help overcome barriers including digital exclusion, low literacy, and mobility or travel issues. It can also reduce anxiety for people accessing support, as they are in a familiar setting and can explain any problems they are experiencing more easily ([Ambrose et al, 2019](#)).

Top tips

- ✓ Manage expectations and be clear on the service – a home visit is not a full retrofit assessment
- ✓ Give sufficient time for the visit, and be flexible about when these can be booked if you are targeting people who work ([Revell, 2014](#))
- ✓ Make sure advisors are sufficiently trained and skilled to do the work – home visits that focus on lifestyle and avoid technical jargon are useful, but it's also good for advisors to still have that technical knowledge when needed
- ✓ Home visits with easy wins – such as bleeding radiators – can help build trust to explore more advanced measures, such as insulation
- ✓ Thermal imaging can be a great engagement tool during visits – both to show heat loss and to identify radiators needing maintenance
- ✓ Draught testing can often highlight issues that would not otherwise be spotted
- ✓ Buddy systems can help keep advisors safe when going into homes, and are also a good way to train new advisors, or work with volunteers to reduce the cost of delivery
- ✓ More technical visits to homes can include full retrofit assessment (see [PAS 2035 - Retrofitting Dwellings for improved Energy Efficiency](#)) or Level 0 Planning Advice (see LEAD Toolkit) for advising on energy and conservation in tandem

Resources

[Fairer Warmth](#) is an online platform supporting CRM, data management and analysis on carbon and energy savings, and a client-facing app with further advice and grant information

- [ThermaFY](#) provides home surveys directly, but also provides a software platform that can be used by community groups carrying out their own home visits
- [Home energy advice leaflets](#) by the Centre for Sustainable Energy
- Other relevant LEAD Toolkit contents (see [South West Net Zero Hub](#)): **Visual and Data Tools** (method), **EnergyWise LEAD** (project summary), **Far South West Retrofit LEAD** (project summary)

About LEAD

LEAD is managed by South West Net Zero Hub and funded by the Department for Energy Security and Net Zero. The programme is trialling innovative approaches to retrofit advice for hard-to-reach groups and hard-to-treat homes. Find out more [here](#).

Publication date: March 2025