Start date: April 2026
PEA reference: FP-Collab-016a

Warm Homes Independent Advice Service

Vulnerability and Carbon Monoxide Allowance (VCMA)
Project Eligibility Assessment (PEA)







UK GAS DISTRIBUTION NETWORKS

Contents

Contents 2

Project registration table 3

Problem(s) 4

Scope and objectives 5

Project design engagement 5

Why the project is being funded through the VCMA 5

How VCMA funding complements or supplements BAU activities 7

Outcomes, associated actions and success criteria 8

Potential for new learning 9

Aligning with and supporting wider vulnerability approaches 9

Monitoring and evaluation 10

Scale of VCMA project and SROI calculations, including NPV 10

Internal governance and project management evidence 11

Eligibility Criteria 12

Security Classification: Public

Project registration table

Project summary	
Project title	Warm Homes Independent Advice Service
Strategic area	Fuel Poverty and Energy Affordability
Lead partner name	YES Energy Solutions
Lead GDN(s)	SGN
Funding GDN(s)	SGN and WWU
New/Updated	New
Collaborative VCMA Projects Specific role(s) of GDN(s) participating in a collaborative VCMA Project	SGN and WWU will work together with YES, SGN will lead on programme management
Date of PEA submission	May 2026
Project start and end date	April 2026 – March 2027
Project location	England, Scotland and Wales
Sectors involved	Gas Distribution Network Other – Community Interest Company
Name	Shelley Smith
Contact details	Positive.impact@sgn.co.uk
Project partners and third parties involved	
Organisation name	**Role**
YES Energy Solutions	Lead delivery partner
Costs and funding	
Total cost (£k)	£389,037.25
Total VCMA funding required (£k)	SGN = £194,197 WWU = £194,197 Total = £388,398
Total BAU vulnerability and CO safety activity baseline allowance funding by activity (£k)	SGN – CO alarms – £315 WWU – CO alarms- £328.25

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Problem(s)

This section needs to outline the problem(s) which is/are being addressed by the VCMA project.

Rising energy costs, fuel poverty and financial insecurity continue to place severe pressure on households across the UK. Since 2021, energy prices have almost doubled, and as of early 2026, it's estimated that around 6.7 million households across the UK are living in fuel poverty. Nearly half of low-income households remain in homes that are hard to heat, leaving millions exposed to cold, damp conditions that harm their physical and mental health.

Fuel poverty remains a significant and persistent challenge across England, Scotland and Wales, driven by a combination of low household incomes, rising energy costs, and the poor energy efficiency of homes across all nations. Many households spend a substantial share of their income on energy just to maintain safe and healthy living conditions with the most vulnerable households facing the greatest barriers to staying warm, well, and financially secure.

Across England, the latest official data shows that 11.0% of households, around 2.73 million were in fuel poverty in 2024, measured using the LILEE indicator. Scotland uses a different measurement framework, but national statistics consistently show a substantial proportion of households facing high energy costs relative to income. Statistics from Scottish House Condition Survey and Scottish Government indicate that one in every three households (34%) are currently in fuel poverty, and almost 20% are in extreme fuel poverty.

The latest Welsh Government modelled estimates show that around 25% of households (approximately 340,000) were living in fuel poverty in October 2024, with 5% experiencing severe fuel poverty, meaning they would need to spend more than 20% of their income to keep their home adequately heated, and a further 16% of households at risk of fuel poverty, spending between 8% and 10% of their income on energy costs. These figures highlight that a significant proportion of Welsh households continue to face unaffordable energy costs relative to income, particularly given Wales's older housing stock and lower average incomes.

There are many practical ways households can safely reduce their energy costs, whether it be such as simple measures including adjusting heating controls, improving draught proofing, or adopting more efficient appliances use can make a meaningful difference. However, for people living in harder to heat homes, the challenge is not only the cost of energy itself but also the difficulty of finding clear, tailored guidance. Accessing the right information or support can be confusing, especially when advice varies widely depending on the type of property, its age, household income and the specific barriers to improving its efficiency.

Data consistently shows that meaningful improvements beyond basic behavioural changes depend heavily on local conditions, housing tenure, the characteristics of the housing stock, and the availability of regional or national support schemes. These differences shape what upgrades are possible, what funding can be accessed, and how quickly improvements can be made. Without clear, place-based information, households can struggle to understand which options are realistic for them and which schemes they may be eligible for.

The breadth of information available is also often technical, sometimes contradictory, and frequently scattered across multiple sources which can be overwhelming. For busy households, particularly those on low incomes or living with vulnerabilities, time, confidence, and capacity to navigate detailed application processes are limited, and the complexity of energy-efficiency guidance can become a barrier in itself. As a result, those who could benefit most from support often face the greatest difficulty accessing it.

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Scope and objectives

Outline the scope and objectives of the VCMA project linked to the problem statement above. This should be clearly defined including the benefits which would directly impact customers on the participating GDNs' network(s), and where the benefits of the VCMA Projects lie.

Together SGN and WWU are working in partnership with YES Energy Solutions to deliver a holistic telephone-based, independent energy advisory service for customers across the SGN and WWU regions. The service will bring together a personalised service, providing a comprehensive set of interventions tailored to each household's circumstances and energy needs. By consolidating regional support through one provider, this approach reduces the risk of multiple hand-offs and confusing signposting, which often require significant time and effort from customers who may already be under pressure.

Together, the YES Energy Solutions, SGN and WWU will:

- Provide a dedicated specialist Energy Advice team who can provide advice on energy safeguarding, ways in which you can increase energy efficiency, address the underlying causes of fuel poverty, promote safe heating, gas safety, and reduce carbon monoxide risks
- Deliver targeted customer engagement through tailored marketing and outreach using social data to ensure our support is offered to those most in need as defined by fuel poverty as well as income, benefit claimant numbers, age and ethnicity
- Identify opportunities for customers to improve the energy efficiency of their properties by a combination of both personal capacities to manage energy more efficiently in the home as well as via the access of schemes, grants and trusted installers where eligible for measures.

The objective of this initiative is to provide genuinely holistic support for households seeking effective ways to address the underlying causes of fuel poverty. Through a centralised and independent energy advisory service, customers will receive guidance that reflects their individual needs, property type, and financial situation.

This integrated model aims to ensure that people receive the right advice, at the right time, from a trusted and consistent source, helping them move beyond short-term fixes toward long-term improvements in energy affordability and home comfort.

Project design engagement

Targeting vulnerability support: This must describe how the GDN(s) identified the vulnerability need being addressed through the VCMA project, including the use of consumer research, stakeholder engagement, and data and technology.

Evidence of stakeholder and/or customer support: Information regarding all stakeholder and/or customer engagement which has contributed to the development of the VCMA Project.

Stakeholder project design input: How stakeholders were actively involved in the project design, and how their input and feedback were incorporated to shape the project design. Where stakeholders disagree about the project design, justification must be provided for why the current project design is deemed preferable.

The design of this project is rooted in extensive research, long-standing partnerships, and deep engagement with stakeholders who work directly with households in or at risk of fuel poverty.

Across GD1 and GD2, the GDNs have built a detailed understanding of the vulnerabilities faced by customers through a combination of data analysis, community insight, and collaborative delivery with trusted

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organisations. This evidence base has highlighted both the scale of need and the persistent barriers that prevent many households from accessing the support they are entitled to.

SGN's mature partnership with YES Energy Solutions was established back in 2012. As SGN's independent advisory partner, YES has played a critical role in assessing eligibility for energy schemes, including the Fuel Poor Network Extension Scheme, and in identifying households living in fuel poverty. Over time, this relationship has developed into a trusted, embedded model of community engagement. Together, SGN and YES have delivered hyper-local and regional marketing campaigns to raise awareness of available support, reaching households who may otherwise remain hidden from traditional referral routes. During the Covid-19 pandemic and the subsequent cost-of-living crisis, YES provided vital frontline capacity, helping SGN deliver urgent assistance to families in energy crisis and strengthening the pathways into communities most affected by rising energy costs. On our current GD2 project, we surpassed our target of 4,481 customers, delivering over 25,000 interventions, including identifying and supporting 1,536 eligible households' sign-ups to the Priority Services Register.

Stakeholders have consistently highlighted the value of having an independent, trusted energy advice service that the GDNs can confidently promote and refer customers into. This independence is seen as essential, it reassures households that the guidance they receive is impartial, tailored, and focused solely on their wellbeing rather than commercial interests. Stakeholders have also emphasised how important it is for customers to have a single, reliable source of advice that can address their immediate energy needs while also helping them navigate affordable, longer-term options to improve the efficiency and comfort of their homes. This dual focus being to support for today's challenges and clear pathways for future improvements has been repeatedly recognised as a strength of the model and a key reason why partners continue to advocate for its extension into GD3.

This initiative is also formally supported by the SGN Vulnerability Steering Group, whose oversight and strategic guidance ensure the service remains aligned with the needs of vulnerable customers and reflects best practice across the sector.

Wales & West Utilities' partnership with YES Energy Solutions was established during RIIO-GD2 and has since developed into a trusted model for delivering telephone-based, independent energy advice to vulnerable and fuel-poor households. Acting as an impartial advice provider, YES has supported the identification of households at risk of fuel poverty and delivered holistic, one-to-one support via a structured telephone advice service, covering energy efficiency, income maximisation, Priority Services Register registrations and carbon monoxide safety. Through the current GD2 project, YES has supported more than 2,600 householders, delivered over 6,700 tailored interventions and achieving average annual savings of £482 per customer. The telephone-based service model has enabled WWU to reach households who may not engage with face-to-face services or traditional referral routes, using targeted outreach, referral partnerships and data-led identification of vulnerability hotspots.

Learning from GD2 delivery has directly shaped the proposed GD3 service, resulting in a streamlined single-advisor call model, expanded referral pathways, enhanced reporting transparency and improved value for money. Stakeholders and customers consistently recognise the value of an independent, telephone-based advice service that WWU can confidently promote, providing immediate support to help households manage fuel poverty and unaffordable energy costs, while also offering clear, longer-term pathways to improve home

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energy efficiency and resilience. This proven partnership and refined delivery model provide a strong foundation for continued collaboration throughout RIIO-GD3.

Why the project is being funded through the VCMA

This should include an explanation of why the VCMA project meets the VCMA eligibility criteria, and how it aligns with the GDN's VCMA collaborative strategy.

This project meets this eligibility criteria, as the project aligns with the GDNs collaborative vulnerability strategy, in which we have a clear ambition to keep our communities safe and warm, and to support those most in need by helping vulnerable households not just today but as we invest in a green energy future.

This project aligns with the following shared objectives of our collaborative vulnerability strategy:

- Empower local communities to identify and support vulnerable households with their energy safeguarding needs
- Help more vulnerable households access energy safeguarding services
- Reach communities under-served and most in need of trusted intermediaries to take up support services
- Support our customers' move towards net zero, tailored according to their needs and circumstances

This initiative was co-designed with Yes Energy Solutions, SGN and WWU and has been developed in line with the updated VCMI governance framework, embedding robust oversight, transparency and continuous improvement from the outset. The VCMA eligibility criteria have been met and are detailed within the table at the end of the PEA.

The GDNs' vulnerability strategy under the pillar "fuel poverty and energy affordability" underpins this approach, using data and insights to identify those communities who are both most in need and least likely to access help without tailored provision.

By combining this evidence led targeting with trusted intermediaries and specialist, accessible services, the project is designed to reach people who would otherwise be excluded from essential services.

How VCMA funding complements or supplements BAU activities

Where the VCMA Project is being delivered alongside a BAU vulnerability and/or CO safety activity or activities funded through the GDN's baseline allowance, the GDN must provide sufficient evidence that the VCMA Project complements or supplements the BAU activity or activities to prevent the risk of double funding.

By working with YES Energy Solutions, we're working closely with an energy advice service that specialises in supporting households improve their energy efficiency and reduce their energy costs with the shared outcome of a safer, warmer and more efficient home.

The shared learning and insights gathered from all partners including the GDNs will improve the direct engagement into local services during gas emergencies, as well as a feedback loop for community groups when raising issues, they are having that are causing barriers to services provided by utilities.

As a trusted partner they can engage more effectively and refer eligible individuals for BAU-funded support, including carbon monoxide alarms, Locking Cooker Valves and where available Easy Assist fittings.

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Outcomes, associated actions and success criteria

Details of the VCMA Project outcomes and the associated actions to achieve these, interim milestones and how the Funding Licensee will evaluate whether the project has been successful. Each action should have a proportion of the funding allocated.

Together Yes Energy Solutions, SGN and WWU have co-designed a programme that looks to provide support from crisis to energy confidence and resilience, this will be achieved by delivering the following.

Key outcomes expected from this project:

Outcome	Project Target	Target by network	
		SGN Target	WWU Target
Energy Triage	5,000	2,500	2,500
Energy Advice – Behavioural	5,000	2,500	2,500
Energy Advice - SM	3,500	1,750	1,750
PSR Conversations	5,000	2,500	2,500
PSR Registrations	2,500	1,250	1,250
CO Safety Advice	5,000	2,500	2,500
CO Alarm Provision	55	30	25
Benefits Checks	750	375	375
Billing / Meter Reading	5,000	2,500	2,500
Smart Meter advice	5,000	2,500	2,500
Access Energy Packs	5,000	2,500	2,500

Success Criteria

Over the 12-month project together we aim to support a minimum of 5,000 vulnerable households with their energy needs, from crisis to greater energy resilience and confidence, by supporting beneficiaries with outcomes such as;

- Fuel-poor households feel supported and empowered to manage their energy needs with confidence today, receiving clear, independent guidance that helps them stabilise their situation, reduce immediate pressures, and make informed decisions about their energy use.
- Fuel-poor households are supported to access energy-efficiency schemes designed to lift them out of fuel poverty, with practical barriers removed so they can successfully navigate eligibility, applications and installation processes that previously felt out of reach.
- Enabled vulnerable and fuel-poor households to participate in the green energy transition by providing independent, trusted advice that helps them understand low-carbon options, identify what is realistic for their home, and access the right support at the right time, ensuring the shift to a sustainable energy system is accessible to everyone, not just those with the financial means or confidence to navigate it.

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Potential for new learning

Provide details of what the GDN(s) expect(s) to learn and how the learning will be disseminated.

This project has been built on a strong foundation of data, insight and the experience of a long-standing energy advice programme that's been delivered by Yes Energy Solutions for over 25 years.

This project builds on this knowledge and the shared learning from SGNs and WWU's independent programmes delivered with Yes throughout GD2, the model reflects what local communities say they need from accessible, trusted energy advice and crisis support. It also draws on insights from local community engagement, the take up of energy efficiency schemes and customer feedback to ensure that we continue to co-develop a programme in our network areas that delivered the greatest impact to those most in need and based on personal circumstances.

Designed from the outset to be inclusive, the project has been intentionally structured to generate learning that will inform future VCMA activity and strengthen vulnerability strategies across the GDNs in the area of linking vulnerable households to energy efficiency advice and schemes that decrease household costs and increase health and comfort by living in a warmer home. Together with YES, we'll assess the impact of support on those beneficiaries who utilitise the service to measure the impact on their everyday lives in relation to their ability to maintain a safe and warm home and measure health and wellbeing outcomes.

The insight gathered will be shared across all GDNs and across the other utility networks.

Aligning with and supporting wider vulnerability approaches

Details of how the project supports or aligns with approaches to vulnerability taken by the wider energy industry, other utilities and/or consumer organisations; local, national or devolved governments; or evidence innovation or a gap in vulnerability support provision. For example, this could include evidence of collaboration beyond the VCMA, non-VCMA joint funding of the initiative, or identified gaps in the provision of vulnerability services which the project seeks to address. The GDN should show how the project fits within broader approaches to vulnerability.

The project is strongly aligned with Ofgem's Vulnerability Strategy, reflecting its core principles of ensuring that all consumers, particularly those in vulnerable circumstances, receive the support, protection and guidance they need in a rapidly changing energy system. By providing an independent, trusted energy advice service which supports vulnerable customers directly supports Ofgem's emphasis on improving access to impartial information, strengthening consumer confidence, and reducing barriers for those most at risk of fuel poverty.

Each nation's fuel poverty and vulnerability strategies highlight the importance of high-quality, impartial advice that helps households manage their energy needs today while planning for longer-term improvements in safety, affordability and efficiency. This service delivers exactly that: a consistent, cross-regional offer that complements local authority programmes, devolved administration schemes and utility-led initiatives. It supports national fuel poverty targets while integrating seamlessly with local referral pathways and area-based delivery models, mirroring Ofgem's call for better coordination across the sector.

This approach also reflects the direction set out in the UK Government's recent Warm Homes Plan, which places strong emphasis on improving access to independent advice, simplifying customer journeys, and ensuring that households—particularly those in vulnerable circumstances—receive tailored guidance on reducing bills and improving home energy efficiency. The Warm Homes Plan highlights the need for coordinated, trusted support that helps people understand their options, access funding, and make informed

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decisions about upgrades. The independent advisory service directly supports these aims by providing a single, reliable route for households to receive personalised, future-focused energy advice.

As the UK transitions to a smarter, low-carbon energy system, Ofgem has been clear that no vulnerable household should be left behind. Many customers need support to understand smart meters, time-of-use tariffs and emerging low-carbon technologies. By offering clear, impartial guidance, the service helps build confidence and ensures that all households, not only those with financial means or digital skills can participate in and benefit from the transition.

Working with YES Energy Solutions further strengthens alignment with Ofgem's priorities around safeguarding and the Priority Services Register. YES's expertise in identifying vulnerability, assessing eligibility and engaging hard-to-reach households enhances the accuracy of PSR referrals, improves frontline understanding of risk factors, and ensures earlier, more effective support.

As we all work towards a greener, more sustainable energy system, it is essential that this shift is accessible to everyone, not only those with the financial means, confidence or capacity to navigate new technologies and schemes. Ensuring that vulnerable and fuel poor households can participate in and benefit from the green energy transition is a core part of this initiative. An independent advisory service provides the trusted guidance people need to understand emerging low-carbon options, identify what is realistic for their home, and access the right support at the right time.

By working closely with YES Energy Solutions, the GDNs can help ensure that no community is left behind as the energy system evolves, strengthening safeguarding pathways, and supporting a fair, inclusive transition that delivers cleaner, safer and more affordable energy for all.

Monitoring and evaluation

Details of how the GDNs will work with their project partners to monitor the impact of the VCMA project and evaluate its effectiveness and success.

This project features co-designed success criteria underpinning its Social Return on Investment (SROI) framework, with clear reporting and insight requirements from mobilisation through to delivery.

YES, Energy Solutions, SGN and WWU will review monthly reports on measurable outcomes, collaborating to ensure successful delivery, while each quarter the core project team will come together to share performance insights, highlights mitigations for any underperformance, and drive opportunities for continuous improvement.

We will report annually on partnership impact, sharing broadly via collaborative and company-specific reports to showcase outcomes and key learnings. Additionally, the CO and Vulnerability Working Groups provide performance updates to the National Delivery Group and National Steering Panel, with all GDNs disseminating results through their business governance processes, including Independent Steering Groups.

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Scale of VCMA project and SROI calculations, including NPV

Justify the scale of the VCMA project – including the scale of the investment relative to its potential benefits. As part of this, the Funding Licensee(s) should provide the SROI calculation, including NPV. Note: The value in numbers of the SROI and NPV must be provided, rather than confirmation of positive impact.

Together with the other Gas Distribution Networks we worked with leading social impact research consultancy SIRIO Strategies on the development of the Industry Standard Social Value Framework and supporting GDN Rulebook. We have used that GDN Rulebook to carry out an assessment of financial and wellbeing outcomes applicable to our services for vulnerable households included in this partnership.

We've incorporated social value based on the deliverables and associated targets detailed above. Carrying out an assessment of these predicted outcomes we forecast a positive net Social Return on Investment of £28.60 for every £1 spent.

Social value measurement

Total cost*	£388,393.30
Total gross present value	£11,497,175.57
Net Present Value (NPV)	£11,108,782.27
SROI	£28.60

*Accounting for inflationary factors over the term of the project.

Internal governance and project management evidence

Provide a description of GDN(s) review of proposal and project sign off, with details on how the project will be managed.

Project oversight for this partnership will be led by SGN on behalf of WWU, with clear governance arrangements in place to monitor delivery, performance and risk throughout the duration of the project.

A structured contract framework will ensure that any material changes remain aligned with customer need and stakeholder expectations, safeguarding the effective and responsible use of VCMA funds.

SGN has worked closely with YES Energy Solutions and WWU to co-design this partnership so that its ambition directly contributes to the GDN's Collaborative Vulnerability Strategy, developed through the Vulnerability Working Group and overseen by the GDN VCMA Steering Group.

The PEA has been reviewed and approved through each network's internal governance processes and formally signed off by the relevant senior leaders.

GDN	Approver (Name and Role)	Date
SGN	Maureen McIntosh, Director of Customer Services	03/06/26
WWU	Gwyn Thomas – Communications & Customer Senior Manager	15/10/26

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Eligibility Criteria

Eligibility Criteria	Description	Project qualifies Yes / No
Positive SROI	Have a positive, or a forecasted positive, Social Return on Investment (SROI) calculated in accordance with a model which the GDNs have developed and submitted to Ofgem including for the gas consumers funding the VCMA Project	Yes
Positive NPV	Have a positive, or a forecasted positive Net Present Value (NPV)	Yes
Support Criteria	Either: i. provide support to consumers in Vulnerable Situations and relate to Energy Safeguarding, or ii. provide support for those most at risk of being left behind in the transition to net zero, or iii. provide awareness of, and education on, the dangers of CO beyond the activities funded as business as usual (BAU) through baseline allowances, or iv. reduce the risk of harm caused by CO	Yes
Defined Outcomes	Have specific, measurable, and time-bound outcomes which align with relevant Consumer Vulnerability Strategy objectives to achieve the requirements set out in 'Success Criteria' above;	Yes
Beyond Other Funding	Go beyond activities that are funded through other price control mechanism(s), including baseline allowance funding, or required through licence obligations	Yes
Support or Align	Support or align with approaches to vulnerability taken by the wider energy industry, other utilities and/or consumer organisations, and local, national and devolved government, or evidence innovation or a gap in vulnerability support provision;	Yes
No Other External Funding	Not be delivered through other external funding sources directly accessed by a GDN, including through other government (national, devolved or local) funding	Yes
BAU vulnerability and CO safety activities	Where a GDN's BAU vulnerability and CO safety activities are funded through baseline allowances, these are not suitable for funding through the VCMA. The GDN is permitted to use VCMA funds to supplement or complement its BAU activities, however, it must ensure that its reporting provides sufficient evidence to prevent double funding.	Yes

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Eligibility criteria for company specific essential gas appliance servicing

Eligibility Criteria	**Description**	**Project qualifies Yes / No or N/A**
Servicing must meet the following criteria:	Either: i. A GDN has had to isolate and condemn an essential gas appliance following a supply interruption or as part of its emergency service role; or ii. A GDN or its Project Partner has identified an essential gas appliance which has not been serviced in the last 12 months in the owner-occupied home of a customer in a Vulnerable Situation where an occupier of the property suffers from a permanent or temporary health condition12 that makes them more vulnerable to health risks associated with cold homes; or iii. A GDN or its Project Partner has identified an essential gas appliance which has not been serviced in the last 12 months in a tenant-occupied home of a customer in a Vulnerable Situation where it is the tenant's responsibility to maintain the essential gas appliance, where an occupier of the property suffers from a permanent or temporary health condition that makes them more vulnerable to health risks associated with cold homes	N/A
Affordability	The household cannot afford to service the essential gas appliance, as assessed against the affordability criteria set out in the VCMA governance document	N/A
Funding	Sufficient funding is not available from other sources (including a social or private landlord and national, devolved, or local government funding) to fund the essential gas appliance servicing	N/A

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Eligibility criteria for company specific essential gas appliance repair and replacement

Eligibility Criteria	**Description**	**Project qualifies Yes / No or N/A**
Unsafe pipework and essential gas appliance repair or replacement must meet the following criteria:	Either: i. GDN has had to isolate and condemn unsafe pipework or an essential gas appliance following a supply interruption or as part of its emergency service role; or ii. A GDN or its Project Partner has had to condemn unsafe pipework, or an essential gas appliance, following an essential gas appliance service (as described in 3.19 of the VCMA governance document)	N/A
Health condition	Either: i. The occupier of the property suffers from a permanent or temporary health condition that makes them more vulnerable to health risks associated with cold homes and has a household income of £31,000 or below in 2025/26 prices, adjusted for inflation using Consumer Price Index with Housing costs (CPIH) 13, or ii. the household cannot afford to service the essential gas appliance, as assessed against the affordability criteria set out in Appendix 1 of the VCMA governance document	N/A
Funding	Sufficient funding is not available from other sources (including national, devolved, or local government funding) to fund the unsafe pipework or the essential gas appliance repair or replacement.	N/A

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