



National Consumer Roundtable on Energy Impact Assessment

**SACOSS Report
September 2019**

National Consumer Roundtable on Energy: Impact Assessment
SACOSS Report

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About SACOSS

The South Australian Council of Social Service is the peak non-government representative body for health and community services in South Australia, and has a vision of Justice, Opportunity and Shared Wealth for all South Australians.

SACOSS does not accept poverty, inequity or injustice. Our mission is to be a powerful and representative voice that leads and supports our community to take actions that achieve our vision, and to hold to account governments, business, and communities for actions that disadvantage vulnerable South Australians.

SACOSS' purpose is to influence public policy in a way that promotes fair and just access to the goods and services required to live a decent life. We undertake policy and advocacy work in areas that specifically affect disadvantaged and low income consumers in South Australia.

SACOSS has a long-standing interest in the delivery of essential services. Our research shows that the cost of basic necessities like electricity impacts greatly and disproportionately on vulnerable and disadvantaged people.

SACOSS has a strong membership base of around 300 people and organisations from a broad cross-section of the social services arena. Members of our organisation span both small and large agencies, peak bodies, service providers, individuals, and some government departments. SACOSS is part of a national network, consisting of ACOSS and other State and Territory Councils of Social Service.

The National Consumer Roundtable on Energy Project has been running for 14 years as a primary vehicle for energy consumer collaborative advocacy. SACOSS has been funded to be the convenor since 2013. The recently revised outcome of the National Consumer Roundtable on Energy is to better enable participant organisations to deliver outcomes at national and state levels that are in the long term interests of small energy consumers, with a focus on the consumption and production of electricity and gas.

Acknowledgements

SACOSS would like to thank all the Roundtable participants who shared their experiences and insights for this report.

We would also like to acknowledge the Australian Energy Regulator (AER), the Australian Energy Market Commission (AEMC) and the Australian Energy Market Operator (AEMO) for providing support and additional insights

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The views expressed in this document do not necessarily reflect the views of Energy Consumers Australia or any other stakeholder.

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Introduction

The National Consumer Roundtable on Energy (Roundtable) 2018 – 2021 is an informal coalition of national and jurisdictional energy consumer advocates primarily focussed on policy dialogue and strategic collaboration.

This Impact Assessment is intended to provide a preliminary evaluation of the Roundtable for the 10 month period November 2018 to September 2019 and contains the following:

- An outline of the evidence base built through the first 10 months of work.
- A preliminary evaluation of the Roundtable, including its benefits to consumers and its impact.
- A strategic assessment to review its direction and planned outcomes.
- A review of the budget to ensure that the resources committed are fit for purpose.

Background

The Roundtable origins date to 2004. An initial meeting was hosted by the Energy Action Group, in collaboration with the Consumer Utilities Advocacy Centre (CUAC)¹ and the Consumer Action Law Centre (CALC). This meeting provided a national forum for consumer advocates to discuss the implications of the Ministerial Council on Energy's (MCE)² proposal for a national retail and distribution regulatory regime. The following year saw the formal creation of the Roundtable, establishing a vehicle for consumer advocates with a 'collective and active interest in providing consumer advocacy in the National Energy Market (NEM) reform process' to meet.

From 2006 the Roundtable, as convened by CUAC and CALC, developed into a two day face-to-face meeting held three times per year. In 2007 Roundtable participants created a Charter of Principles for Energy Supply for the purpose of shaping joint advocacy in areas of common interest.

In its 15 years of operation the Roundtable has been convened by a number of consumer advocate organisations including:

- Consumer Utilities Advocacy Centre (CUAC) and the Consumer Action Law Centre (CALC) from 2006 - 2010
- The Australian Council of Social Service (ACOSS) in 2011
- The Queensland Council of Social Service (QCOSS) in 2012
- The South Australian Council of Social Service (SACOSS) from 2013 until the present day.

Current Roundtable

The current Roundtable builds on the previous ECA funded Roundtable project and has the following vision and mission:

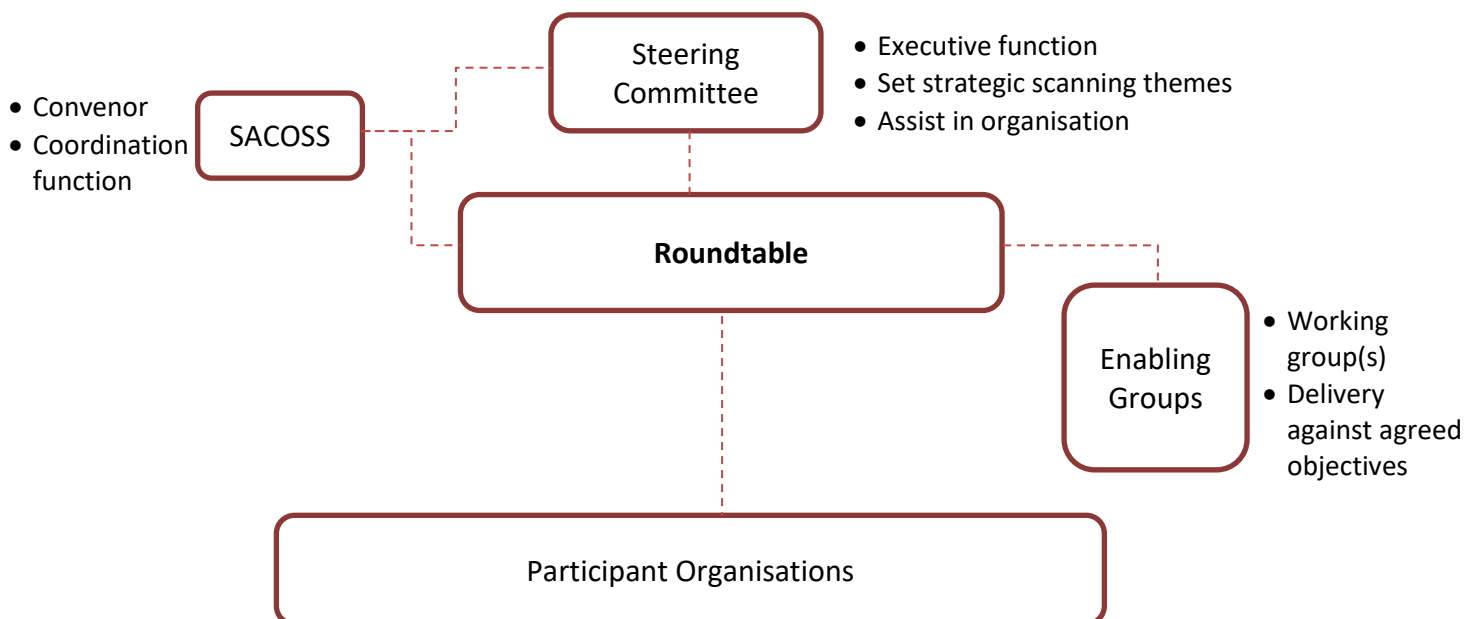
¹ Now the Consumer Policy Research Centre (CPRC)

² Now the Standing Council on Energy and Resources (SCER)

Vision: Small energy consumers in Australia are well served when decisions are made which take account of consumer interests.

Mission: To better enable participant organisations to deliver outcomes at national and state levels that are in the long term interests of small energy consumers, with a focus on the consumption and production of electricity and gas.

The Roundtable governance and operational structure is summarised in the following diagram:



The Roundtable is convened and co-ordinated by SACOSS and governed by a Steering Committee. It meets twice per year in various capital cities of the NEM. These meetings provide consumer advocates with the opportunity to consider, collaborate and strategise about contemporary energy policy.

The Roundtable also involves the establishment of up to 4 - 6 Enabling Groups each year which will operate to progress collective action on a set of agreed issues. Currently there are two Enabling Groups, Payment Difficulties and Distributed Energy Resources (DER). The Enabling Groups will promote collective action to be coordinated and monitored with a focus on influencing policy and practice. There is also increased transparency and co-ordination of reporting through this model.

The Roundtable will achieve its mission and vision by:

- Agreeing specific focus areas for the Roundtable via an internal prioritisation and governance process. This recognises that the Roundtable and participating organisations have limited resources and it is important to focus work effort on priority areas.
- Enabling collaboration, open dialogue, strategising and information sharing across participating organisations via means such as face to face meetings, online forums and teleconferences.
- Developing Enabling Groups to co-ordinate and share work effort on agreed priority areas to enable improved effectiveness and efficiency by leveraging access to the resources of participating organisations.
- Leveraging access to the communications channels and networks of participating organisations to better and more widely disseminate shared messaging of:
 - key outcomes and successes of the Roundtable and participating organisations
 - issues impacting consumers and desired changes to address these issues.

The Roundtable also aims to achieve the following key outcomes:

- Embed consumer perspectives
- Impact the regulatory framework
- Leverage influence through collaborative action
- Achieve policy change
- Develop integrated/holistic perspectives
- Enhance capacity of participants
- Support innovation and lateral thinking
- Ensure sustainable participation.

Roundtable participation

Appendix A to this Report contains the names of the 21 organisations currently participating in Roundtable, as well as the names of the Steering Committee and Enabling Group members.

Actions and Achievements to Date

This section briefly outlines the key actions and achievements to date of the Roundtable for the initial 10 month period, noting that given the relatively limited operation of the new Roundtable approach some of the achievements to date are a work in progress.

Overview of actions

In the initial 10 months of operation the Roundtable has:

- Updated key operational and governance requirements consistent with the new structure including updating the terms of reference for its Steering Committee and Enabling Groups, identifying key success criteria to report to ECA and preparing a reporting template for the Enabling Groups.

- Held two meetings, the first in Hobart (28 Feb – 1 Mar 2019) and the second in Brisbane (27 – 28 June 2019).
- Held one masterclass (on Co-ordination of Generation and Transmission Investment; COGATI) to assist in building capacity and knowledge transfer amongst the participating organisations.
- Invited key external stakeholders to attend and present at the Roundtable meetings including the AEMC, AER, AEMO and the Energy Charter.
- Published and distributed key meeting information including post meeting Communique, jurisdictional updates and relevant presentations / papers.
 - All meeting papers and presentations are uploaded on the SACOSS website at - <https://www.sacoss.org.au/roundtable-meetings-and-outcomes>
- Established two Enabling Groups (DER and Payment Difficulties) which have:
 - Enabling Group leads to co-ordinate and manage the enabling group activities.
 - Active and engaged members: approximately 7 for DER and 9 for payment difficulties.
 - Clear goals and objectives for each Enabling Group, including:
 - DER
 - To develop principles on how the transition to a high penetration of DER should be paid for and the approach to treating split incentives.
 - Greater consumer input into the Open Energy Networks consultation.
 - Greater consumer engagement with other key DER related work in particular ARENA’s Distributed Energy Integration Program (DEIP).
 - Payment Difficulties
 - To develop a common, co-ordinated understanding on support and assistance for people experiencing payment difficulty.
 - Identifying the key issues surrounding payment difficulties, key problems to overcome, key barriers in accessing assistance.
 - Developing a common framework of language and terminology in expressing and responding to payment difficulty.
 - Developing a common understanding regarding how best to respond to payment difficulties and provide support more sustainably.
 - Providing a co-ordinated response to reform and policy processes which present an opportunity to implement agreed principles and recommendations for improved support for payment difficulty.
 - Held at least two meetings / teleconferences each to discuss and progress issues.
 - Worked outside of these meetings to progress the development of principles, submissions and other activities.
- Working towards developing one or two further Enabling Groups – possibly on the Energy Security Board’s Post 2025 review and AEMO’s Integrated System Plan / Coordinated Generation and Transmission Investment (COGATI).

Key achievements and benefits to date

As a result of the actions of the Roundtable, the following are examples of the key achievements to date against some of the success criteria:

Communique is circulated to 50% more senior stakeholders

Communique and presentations circulated to AEMO, AEMC, and AER.

Emailed by Roundtable members to over 100 energy market stakeholders and colleagues.

Shared on SACOSS and Roundtable Participants' social media.

The increased awareness of the Roundtable will only improve the ability to provide benefits to consumers and assist in the achievement of the mission and vision.

At least one recommendation from Roundtable is provided for in the regulatory framework

The payment difficulties Enabling Group developed coordinated submissions to the AER's Draft Hardship Guidelines. These submissions and other engagement by the Enabling Group members have resulted in some of the recommendations being explicitly referenced and either partially or fully adopted by the AER in their Notice of Final Instrument, with other recommendations to be reviewed in the near to medium term for consideration of inclusion.

The recognition and inclusion of the recommendations from the Enabling Group submission is direct evidence of the benefit of the Enabling Groups for participants, and ultimately for consumers.

The ability to work in the Enabling Group significantly improved the quality and 'weight' of the eventual PIAC response that served as a proxy for the agreed positions of the group.

At least 3 enabling groups are convened each year

This has been partially achieved.

Two Enabling Groups have been formally established with another two Enabling Groups identified and aiming to be established by the end of the year.

At least two recommendations from two Enabling Groups are referenced by a decision making body;

At least one recommendation from an enabling group is adopted by a decision making body.

Recommendations from the Payment Difficulties Enabling Group's coordinated submissions to the AER's Draft Hardship Guideline were considered in the AER's Notice of Final Instrument, with two recommendations included in the Final Guideline and three recommendations influencing the content of the Guideline. The AER has also committed to a review of the ESC Vic's Payment Difficultly Framework and possible future amendments to the Guideline.

The DER Enabling Group has recently been involved in the ARENA DEIP program and a workshop explicitly set up to enable ARENA to engage with consumers on their program. It is too early to understand if there are explicit recommendations from the Enabling Group that have been adopted by ARENA but the engagement and involvement is a significant achievement to ensure consumer perspectives are at least understood and included in the decision making process.

Stakeholder Perspectives

The success and impact of the Roundtable can also be gauged through the feedback and perspectives of stakeholders. This Section summarises perspectives from four areas:

- Feedback received post the two Roundtable meetings from attendees
- Comments and feedback from Roundtable members more generally
- Comments from Enabling Group leads, and
- Comments from informal and brief discussions with key external stakeholders in particular AER, AEMO, AEMC and the Energy Charter.

Post Roundtable Meeting Feedback

At the conclusion of each Roundtable attendees are asked to complete a simple survey to understand their views of the effectiveness of the Roundtable and any other comments. These survey responses are used to inform the planning for subsequent Roundtable meetings. Some key comments from the feedback forms are provided below:

- Good to have multiple jurisdictional presenters
- New Roundtable structure is beneficial
- Enabling Groups are good
- Plenty of time allowed for networking and informal discussions
- Catching up with everyone face to face
- Opportunity to discuss a broad range of issues and ask questions
- Exposure to topics otherwise not necessarily on my organisation's radar
- Listen to other perspectives
- Collaborative and friendly environment
- Helps capacity building and knowledge sharing
- The Roundtable has the potential to build coalitions and deliver better customer outcomes.

Roundtable Member Feedback

Roundtable members were asked to provide perspectives on how the Roundtable has benefited them and / or consumers. The following provides a perspective of five responses from members. It is evident from the responses that there is significant benefit from attendance at the Roundtable for members and customers more generally.

Rob Law, Victorian Greenhouse Alliances

'I have been involved with Roundtable for nearly 4 years now and it has been invaluable. Working for an organisation representing local governments on climate and energy advocacy, roundtable has enabled me to stay up to date and develop a much deeper understanding of the myriad of energy market reforms, processes and consultations. Being exposed to a range of different consumer advocate groups has been fantastic and often challenged me to look at issues from many different angles. I have often found after each roundtable that I have a much greater appreciation and awareness of different perspectives towards big energy and climate policy issues. The roundtable enables groups from all shades of consumer advocacy to come together, share views and find common ground. Long live roundtable!'

Miyuru Ediriweera, PIAC

'I found attending the Roundtable extremely useful and productive. Given the breadth of energy-related issues and the number of process ongoing, it's impossible for one person to be on top of everything. The Roundtable allows advocates to meet face to face and share experiences and knowledge. Further, meeting at the Roundtable provides much needed time to think, plan and collaborate more strategically that then translates into better advocacy throughout the year.'

Mark Byrne, Total Environment Centre

'Through the RT I am exposed to consumer perspectives that I might otherwise not be—and an arena to work through differences.'

Peter Appelman, Uniting Kildonan (Uniting Vic.Tas)

'Electricity and gas are simple products, but wrapped up in a complicated and fragmented system with multiple players and conflicting interests. As an advocate for consumers who works directly with industry participants, Energy Roundtables are essential to keeping across all that is happening (and on the way) right around the country in a sector that is rapidly changing (and needs to).'

Jake Lilley, Consumer Action Law Centre

'Roundtable has really helped by saving me hours of work getting up to speed on a new issue. It is great to have presentations from other advocates or decision makers and immediately hear the range of core concerns from the NEM's most experienced consumer advocates in the discussions that follow.'

Enabling Group Leader Feedback

The Enabling Group leaders were asked to provide feedback and perspectives on the effectiveness of the new structure and benefits to themselves, the Group and consumers. It is appreciated that there is some possible bias in their perspectives, however it is important nonetheless to understand perspectives directly from key Enabling Group members.

Feedback from Douglas McCloskey, Payment Difficulty Enabling Group

“My very blunt commentary on the impact of the RT enabling group structure (being in one and convening the other) is that it’s incredibly valuable in every sense, and it’s something the RT should have been doing from the start. If you want me to sell it to the ECA or anyone else, they can call me directly.”

- The payment difficulty enabling group was incredibly beneficial not only for the group members, but also for immediate and longer term impact (or increased likelihood thereof) upon consumers:
 - Enabled the initiation of a targeted discussion.
 - Provided a framework to direct the co-ordinated work of members.
 - Assisted to meet the very shortened timeframes of these processes.
 - Provided an opportunity to focus discussion, identification of issues, harmonisation of ideas and co-ordination of language and response.
 - Enabled direct participation in the AER workshop by all members of the group, something which would have been impossible without the Enabling Group and which would have left consumers largely unrepresented in this process.
 - Allowed continuity between the groups response to this short term process, and work to develop a longer term, co-ordinated understanding of payment difficulty.
- The benefit more directly has been in:
 - Providing a structure and a framework to access the experience and perspective of other advocates and service providers.
 - This has directly benefitted PIAC’s input to the AER process.
 - Enabled an ability to garner direct support for PIAC positions in a number of processes, bolstering the likelihood of positive response/impact on behalf of consumers.
 - Has provided the basis foundation for an ongoing workstream that, in the medium term, could develop a common understanding and language in relation to payment difficulty.

Feedback from Kellie Caught, Mark Byrne and others, DER Enabling Group

- All members of the DER enabling Group reported finding it beneficial. We have liked the ability to:
 - Have deep dives on issues.

- Share new and emerging information.
- Have frank discussions.
- Test ideas and positions against diverse perspectives.
- Receive presentations for external organisations working on DER issues and solutions.
- Develop joint principles and positions.
- The RT DER enabling group has been really helpful in guiding and adding value to the work of enabling group members:
 - DER is a rapidly changing space, the enabling group has helped keep individual members abreast of critical issues – risks and opportunities.
 - Provided a forum to explore the implications of different approaches for dealing with DER integration, enablement and equity.
 - Helped in the development of strategies and principles for contemporary consumer protections.
 - Helped members prioritise own work areas.
 - Helped connect members with processes being run by market and energy bodies.
 - Improved working relations between advocates.
- It's probably early days to see direct benefits to consumers, but it would be fair to say that:
 - The DER enabling group has strengthened and sharpened our respective advocacy work on DER. This has been evident in our engagement and advocacy with energy bodies such as AEMC, AEMO, ESB, energy companies, other advocates and policy makers, which is informing their positions and policies, which in turn should be beneficial to consumers.
 - Contributed to the development of a work program being led by two DER enabling group members (ACOSS and TEC) that that will bring together energy user groups, network operators, retailers, energy market bodies and other key stakeholders to develop a holistic suite of equitable and efficient network access and pricing solutions, underpinned by clearly defined end-user centric design principles, to inform policy, regulatory & rule changes.
- We think the enabling group structure is working well, because it enables a deeper dive into issues where there is limited capacity to explore fully in the broader roundtable, but still enable a strong connection to the roundtable as a whole.
- The funding for the enabling group can help improve the capacity of enabling group members to dedicate face to face time to working on the enabling group work plan and/or emerging critical issues.

External perspectives

Brief discussions were held with representatives from AER, AEMO, AEMC and the Energy Charter. These representatives and organisations were chosen as they have each attended one or more Roundtable in the new structure.

It is important to note that the views summarised below are anecdotal and paraphrased perspectives, they are not intended to represent specific views of any one or more of these organisations.

It is evident from the discussions that there are generally positive and consistent views of a strong benefit from the Roundtable. The discussions focussed on two key questions:

1. How has attending and / or engaging with RT benefited you or your organisation?

- There were very consistent themes indicating a strong benefit (both personal and organisational) from attending meeting(s).
- Examples of benefits include:
 - The Roundtable offers unique opportunities to share updates with and engage with multiple consumer advocates at the same time who have limited time and resourcing.
 - Enables a conversation and the ability to hear multiple points of view at one time, hearing points of difference can be very valuable.
 - Helps build trust and relationships - in particular the informal discussions.
 - Allows people to prioritise efforts with others in the room.
 - Allows reporting back within our organisation of consumer advocate perspectives.
 - Helps build bridges and linkages within and across industry.

2. How do you think has RT benefited consumers?

- Most acknowledged that it was 'Too early to tell' with the new approach and structure.
- It is however obvious that there is improved focus and direction amongst advocate which should have some benefit to consumers, albeit not something that is quantifiable at this stage.
- Jurisdictional mapping highlights common issues and impacts on consumers. This in the long run should benefit consumers.
- The attendance of the AEMC at the Roundtable helped with framing of AEMC consumer priorities to be in consumer language.
- The DER work and the input on consumer frameworks has influenced our thinking.
- If you can get efficiencies then there should be benefits to consumers. The Roundtable can assist with representing consumers as a group. That frees up time and money for some other issue to be addressed.

Forward Priorities

The work to date for the Roundtable has been beneficial, but recognises that it is still relatively early in the new structure to fully assess the benefits and effectiveness. However, it is evident from stakeholder perspectives and other information outlined earlier in this report that there is great support for the new focus and structure, in particular the Enabling Groups.

The broad strategic direction and forward work program for the Roundtable will evolve as the market and consumer priorities change, however it is most likely that in the nearer term the following Enabling Groups will likely drive much of the strategic output from the Roundtable:

- Distributed Energy Resources – it is likely that this Enabling Group will continue to work on their identified objectives.
- Payment Difficulties – this Enabling Group is also likely to continue to work on their identified priorities and objectives.
- Energy Security Board Post 2025 Review – it is likely that a new Enabling Group will be established to focus on this important reform program.
- AEMO's ISP and COGATI – it is likely that a new Enabling Group will be established to focus on this important work.

Given the large volume of activity in the sector, there are clearly other areas the Roundtable will be involved in, however these areas are more likely to be through a more reactive process and via the twice yearly Roundtable meetings as opposed to a formal Enabling Group.

A role of the Steering Committee is to assist the Roundtable in identifying priority areas and set the strategic direction. This will continue to be the case going forward through the Steering Committee's regular meetings.

Budget and Resourcing Review

A review of the budget and resourcing was undertaken for the first 10 months of the Roundtable to understand if the budget is appropriate and the resourcing is fit for purpose. The details are included in two Appendices:

- Appendix B: A review of the budget in relation to the Roundtable meetings, Enabling Groups, Steering Committee, Management and SACOSS In-Kind.
- Appendix C: Further detail on the SACOSS in-kind budget in relation to the Event Management, Roundtable continuity and support officer.

The key findings from this review include:

- Roundtable meetings: At a sub-line item there were discrepancies between budget and actual but overall, the cost of the two Roundtable meetings was within budget. **No change required.**
- Enabling Groups: Noting that only two enabling groups have been established the costs of the Enabling Groups were within budget. **No change required.**
- Steering Committee meetings: Slightly over budget, and would have been more so if more teleconferences were held / allocated in the 10 months. Travel for the face to face meeting cost more than anticipated. This was balanced by fewer teleconferences. **There may need to be a review of this component in the forward budget.**
- In-kind (Steering Committee and SACOSS senior policy officer / management): A detailed analysis has not been undertaken however it is believed this budget is appropriate. **No change required**
- Event Management: Costs were within budget. **No change required.**
- Other SACOSS In-Kind (project officer): Actual costs did not include additional estimated staffing costs incurred by SACOSS. It is estimated SACOSS spent 10 more Project Officer days (25% more time) managing the grant than the 40 days allocated (incurring \$2,930 of unbudgeted staff expenses). **There may need to be a review of this component in the forward budget.**
 - This component of the budget is important to enable the effective and efficient operations of the Roundtable.
 - The review of this component of the budget should also consider the analysis and recommendations from the recent Uniting Communities report on Resourcing Consumer Engagement (July 2019) which recommended the potential expansion of the Roundtable budget to enable improved prioritisation and coordination.

Appendix A

Roundtable Participation

Roundtable Steering Committee

- Craig Memery, Public Interest Advocacy Centre (PIAC)
- Dean Lombard, Renew (Alternative Technology Association)
- Gavin Dufty, St Vincent de Paul, Victoria
- Iain Maitland, Ethnic Communities Council of NSW
- Mark Henley, Uniting Communities
- Robyn Robinson, COTA QLD

Roundtable Participant Organisations

- ACT Council of Social Service (ACTCOSS)
- Anglicare Tasmania
- Australian Council of Social Service (ACOSS)
- Brotherhood of St Laurence
- Consumer Action Law Centre
- Consumer Policy Research Centre
- Council on the Ageing (COTA)
- Council on the Ageing (COTA) Queensland
- Energy Consumers Australia
- Ethnic Communities Council
- Kildonan UnitingCare
- Public Interest Advocacy Centre Ltd
- Queensland Council of Social Service (QCOSS)
- Renew (Alternative Technology Association)
- South Australian Council of Social Service (SACOSS)
- St Vincent de Paul Society Victoria
- Tasmanian Council of Social Service (TasCOSS)
- Total Environment Centre
- Uniting Communities
- Victorian Greenhouse Alliances
- Western Australian Council of Social Service (WACOSS)

Roundtable Enabling Groups

Payment difficulty / hardship enabling group

- Douglas McCloskey (PIAC, lead)
- Robyn Robinson (COTA)
- Mark Henley (Uniting Communities)
- Fiona Hawthorne / Rose McGrath (QCOSS)
- Georgie Morris (SACOSS)
- Iain Maitland (ECC)
- Jake Lilley (CALC)
- Bernadette Jago (TasCOSS)
- Kellie Caught (ACOSS)

The Distributed Energy Resources (DER) Enabling Group

- Mark Byrne (TEC, Lead)
- Luke Reade (QCOSS)
- Kellie Caught (ACOSS)
- Craig Memery (PIAC)
- Douglas McCloskey (PIAC)
- Dean Lombard (ATA)
- Rob Law (CVGA)
- Gavin Dufty (SvDP)
- Mark Henley (Uniting Communities)

Appendix B

Budget Review – Roundtable, Enabling Groups, Steering Committee, Management and In Kind

Category	Budget	Actual	Comment
Roundtable (travel, accommodation, catering, facilitation)	Travel and accommodation 2 Roundtable meetings - \$45,000 Venue and Catering 2 Roundtable meetings - \$12,000 Total budget for travel, accommodation, venue, catering: \$57,000 Facilitator (consultant 4 days @ \$2,500 per day) - \$10,000 Total: \$67,000	Travel and accommodation - \$23,186 Venue and catering - \$25,763 Total actual for travel, accommodation, venue, catering: \$48,949 Facilitator - \$12,244 (\$3,000 per day for 4 days) Total: \$61,193	Overall, the cost of the two RT's was within budget. Accommodation costs for the Hobart RT were assigned to the venue and catering code (as received in one invoice). Therefore, it is necessary to add both venue and travel and accommodation to get the total actual cost of RT (travel, accommodation, venue, catering). Flexibility in the budget needs to be retained for varied travel expenses (depending on the location / timing of the travel). The facilitator charges \$3,000 per day as opposed to \$2,500.
Roundtable Enabling Groups (travel)	Enabling Group face to face meeting x 4 - \$24,000 Total: \$24,000	Enabling Group face to face meetings x 2 - \$11,135 Total: \$11,135	Overall, the costs of the Enabling Groups were within budget. Two Roundtable Enabling Groups were established, as opposed to

Category	Budget	Actual	Comment
			four.
Steering committee (travel and teleconferences)	Steering Committee face to face - \$7,000 Teleconferences - \$1,000 Total: \$8,000	Steering Committee face to face - \$8,118 Teleconferences - \$72.00 Total: \$8,190	Slightly over budget , and would have been more so if more teleconferences were held / allocated in the 10 months. Travel for the face to face RTSC meeting cost more than anticipated. This was balanced by fewer teleconferences.
Management	Event management (venue, delegate, accommodation and speaker management) - \$4,700 Roundtable continuity and support project officer (40 days @ 293 per day) - \$11,720 Impact analysis and report (4 days @ \$2,500 per day) - \$10,000	Event management - \$4,700 Roundtable project officer - \$11,720 Impact analysis and report (3 days @ \$3,000 per day) - \$9,000	Actual costs were on budget, but did not include additional estimated staffing costs incurred by SACOSS. Event management was within budget (see attached estimate of project officer time). Roundtable project officer time exceeded budget. It is estimated SACOSS spent 10 more Project Officer days (25% more time) managing the RT

Category	Budget	Actual	Comment
	<p>Project management: IT, phones, financial management, rent, electricity - \$14,318</p> <p>Total: \$40,738</p>	<p>Project Management - \$14,318</p> <p>Total: \$39,738</p>	<p>grant than the 40 days allocated (incurring \$2,930 of unbudgeted staff expenses).</p> <p>Impact assessment report preparation: Consultant's fees were less given fewer days allocated (3 days at \$3,000 per day).</p> <p>Project Management costs are assumed to be based on 10% of the total grant from year 1 of \$139,738.</p>
<p>In kind contributions (Steering Committee and SACOSS)</p>	<p>Steering Committee Group costs (2 hours per month x 6 @ \$200 per hour) - \$28,800</p> <p>SACOSS -Senior Policy Officer (30 days @ \$376 per day) - \$11,280</p> <p>SACOSS - Management Supervision - \$5,000</p> <p>Total In kind: \$45,080</p>	<p>Steering Committee Group costs (2 hours per month x 6 @ \$200 per hour) - \$28,800</p> <p>SACOSS -Senior Policy Officer (30 days @ \$376 per day) - \$11,280</p> <p>SACOSS - Management Supervision - \$5,000</p> <p>Total In kind: \$45,080</p>	<p>On budget.</p> <p>We have not done a detailed assessment of the in kind contributions, but are confident these contributions are within the estimates.</p>

Appendix C

Budget Review: Further detail on SACOSS In-Kind - Event Management, Roundtable continuity and support officer

Category	Tasks	Budget	Estimated (Actual)	Comments
Roundtable and Masterclass event management	<p>Event management (7.5 Days per Roundtable plus 1 day for masterclass)</p> <ul style="list-style-type: none"> • Set travel and accommodation budget • Manage over-budget flight approval process and booking variations • Source venue and accommodation quotes • Booking management - payment schedules, draft & final group rooming list • Venue liaison - event schedule, final numbers, panel table numbers, room set-up, AV and catering arrangements • Speaker liaison - source speaker presentations and send venue & time details 	Budget = \$4,700 (allocated to external consultants in Personnel costs in budget).	16 days SACOSS (@\$293 per day = \$4,688)	On budget
Total time and costs incurred by SACOSS on Project Officer budget item	Tasks are outlined and itemised, below.	Budget allows for 40 days of project officer time @ \$293 per day = \$11,720.	It is estimated a total of 50 days of Project Officer time was required @ \$293 per day = \$14,650	It is estimated SACOSS incurred \$2,930 of unbudgeted staff expenses. It is estimated SACOSS spent 10 more days (25% more time) managing the

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				RT grant than the 40 days allocated. The main driver was the 29 days in preparing for, attending and following up on the Roundtable, as well as organising the Masterclass and the work involved in meeting the multiple reporting requirements (Roundtable and Enabling Group). See below.
Roundtable meetings preparation, delivery and follow-up	<p>Developing the agenda (5 days per Roundtable)</p> <ul style="list-style-type: none"> • Liaison with steering committee • Review feedback form from previous RT • Research speakers • Speaker invitations and liaison • Confirm speakers & finalise the agenda • Develop structure, objectives and agenda for Masterclass • Issue and manage Masterclass invitations <p>Pre-Meeting (4 days per Roundtable)</p> <ul style="list-style-type: none"> • Send invitations / flight procedure email 	<p>Budget not itemised – Roundtable continuity and support project officer – allocated a total of 40 days under Personnel costs in the budget.</p> <p>See total.</p>	<p>29 days @ \$293 per day = \$8,497</p> <p>Itemised by SACOSS:</p> <p>Developing Agenda – 5 days per Roundtable</p> <p>Pre-meeting – 4 days per Roundtable</p> <p>Attending / supporting</p>	<p>This estimate includes work undertaken in preparing for the Roundtable as well as 4 days attending Roundtable in a supporting capacity and work undertaken in Roundtable follow-up. The tasks were more time intensive than originally estimated, due to unforeseen demands arising from liaising with</p>

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	<p>to delegates</p> <ul style="list-style-type: none"> • Process registrations; follow up non-responders • Confirm delegate attendance and manage RSVPs • Order and send out cab charges to delegates • Source and collate papers (incl. jurisdictional update) • Meet with facilitator to plan and brief on structure with consultation from RTSC • Distribute agenda with papers to delegates (accommodation and venue information, jurisdictional reports, ask delegates to prepare some questions for external presenters) <p>During Roundtable (2 days per Roundtable):</p> <ul style="list-style-type: none"> • Note taking • Venue, speaker, delegate liaison <p>Post conference (4 days per Roundtable):</p> <ul style="list-style-type: none"> • Record action items from the 2 days • Prepare and distribute communique • Collate cab charge stubs from delegates • Collation and distribution of meeting outcomes, presentations and documents 		<p>Roundtable – 2 days per Roundtable</p> <p>Post conference – 4 days per Roundtable</p>	<p>delegates and developing the Masterclass. There were additional demands on the Project Officer due to the departure of the lead SACOSS Roundtable convenor.</p>

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	<ul style="list-style-type: none"> Collate survey results Meet with Facilitator to plan next RT structure with consultation from RTSC			
Establishing and Supporting Roundtable Enabling Groups	Draft RT Enabling Group Terms of Reference Draft RT Enabling Group Reporting Template Liaise with RT Enabling Group leaders re: <ul style="list-style-type: none"> Budget management (flight + accommodation booking) Meeting objectives and outcomes Reporting requirements 	Budget not itemised – see total	5 days @ \$293 per day = \$1,465	
Progress Report 1	Draft Progress Report Draft and collate attachments: <ol style="list-style-type: none"> Enabling Group Report Templates Roundtable Governance Documents Roundtable Agenda Roundtable Communique and Jurisdictional Updates	Budget not itemised – see total	3 days @ \$293 per day = \$879	
Progress Report 2	Draft Progress Report Draft and collate attachments: <ol style="list-style-type: none"> Roundtable Communique and Jurisdictional Updates Enabling Group Reports Roundtable Agendas Masterclass Agenda Updated Priority Issues for Roundtable Consumer Advocates 	Budget not itemised – see total	4 days @ \$293 per day = \$1,465	Preparing Progress Report No. 2 was more time consuming than originally estimate due to the tasks associated with collating information on the Enabling Groups and reporting on the impact of the Enabling Groups.

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	I. Roundtable Governance Documents			
Progress Report 3	Draft Progress Report Input into Annual Report on RT advocacy activity	Budget not itemised – see total	1 day @ \$293 per day = \$293	
Impact Assessment Report	Seeking and collating feedback from: <ul style="list-style-type: none"> • RT participants • RT Enabling Group Leaders Liaising with consultant Providing information to consultant Creating template report Liaising with SACOSS Communications Coordinator Liaising with ECA Reviewing budget Reviewing Report	Budget not itemised – see total	5 days @ \$293 per day = \$1,465	
Roundtable Steering Committee meetings	4 meetings in total, including: <ul style="list-style-type: none"> • 3 teleconference meetings (February, April, August) • One face-to-face meeting. Liaising to arrange a time for the meeting Agenda Attending meeting Minutes Emerging Issues Governance	Budget not itemised – see total	2 days @ \$293 per day = \$586	