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WESTERN POWER DISTRIBUTION

Fuel Poverty Best Practice Workshop:
Feedback Report

23 September 2021



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Introduction

On 23 September 2021, Western Power Distribution (WPD) hosted a Fuel -Poverty Best Practice stakeholder workshop to inform stakeholders about – and seek feedback on – the following topics: A Smart and Fair Future; Sharing Best Practice; and and Delivery and Effective Reporting.

Due to Covid-19 restrictions, the workshop was hosted online. It consisted of a series of presentations given by WPD representatives or stakeholders from key partners, followed by either round-table discussions or Q&A sessions. In addition, stakeholders were asked to vote in an online poll on a number of topics.

WPD instructed EQ Communications, a specialist stakeholder engagement consultancy, to independently facilitate the workshops and to take notes of the comments made by stakeholders. Every effort has been made to faithfully record the feedback given. In order to encourage candour and open debate, comments have not been ascribed to individuals.

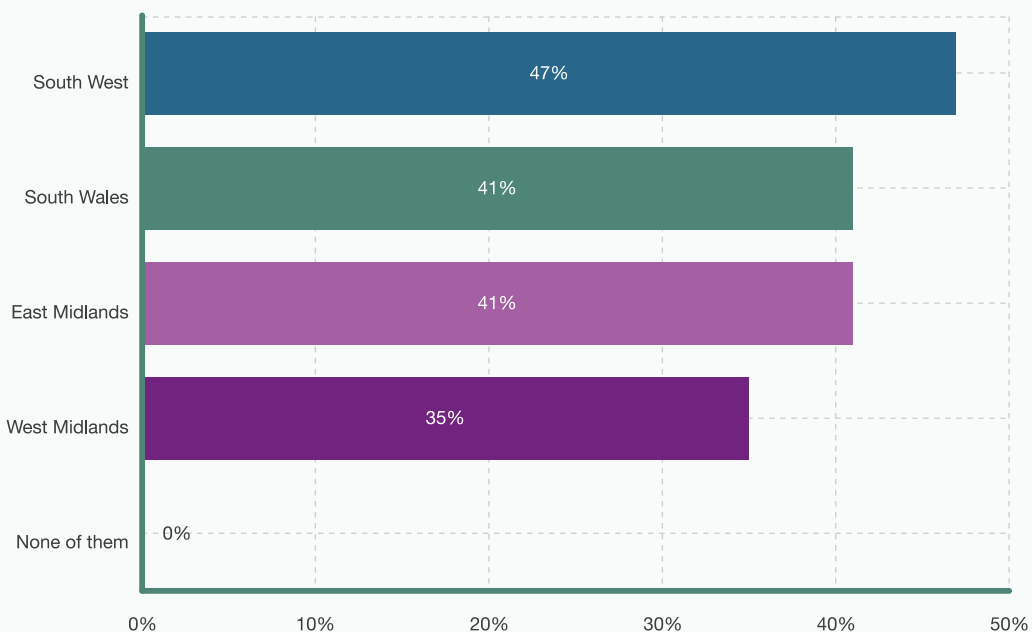


Executive summary

Participants

- 17 stakeholders participated in the workshop, representing 11 organisations. Each of these organisations was a charity.
- Just under half of attendees (47%) identified the South West as a region that was relevant to them, while South Wales, East Midlands and the West Midlands were relevant for 41%, 41% and 35% of delegates, respectively.
- 25% of attendees who filled out a feedback form told us that they found the workshop to be ‘very interesting’, with 63% opting for ‘interesting’.

Which WPD region is relevant to you?



Workshop One: Introduction and WPD’s new proposed vulnerability commitments

Richard Allcock, Stakeholder Engagement Manager, introduced the workshop, giving stakeholders some background and context about the draft Business Plan for RIIO-ED2. He then gave an overview of WPD’s core commitments under Customer Vulnerability asking for further feedback and guidance from delegates on two refined commitments: to increase registrations on the PSR to 75% of eligible customers, and to add tailored resilience plans to the Power Cut Reporter App. This was followed by a request for feedback and guidance on two new commitments: to appoint vulnerability champions at WPD depots, and to implement a criterion for vulnerability considerations when planning new schemes across the business.



- The highest-scoring commitment in the online poll was the additional commitment to implement a criterion for vulnerability considerations when planning new schemes across all areas of the business, scoring on average 4.44 / 5.
- Anything that could further embed the concept of vulnerability and that could provide further assistance for vulnerable customers across the business was widely supported, so it was felt that this proposal had strong potential. However, the point was made that WPD should also bear in mind different levels of neurodiversity when implementing this proposal.
- The second highest-scoring commitment was the additional commitment to appoint vulnerability champions at our depots to act as a point of contact for staff and to raise awareness of our vulnerability programme. This scored 3.93 / 5 on average. It was felt that this commitment could be really effective, thanks to the skills of WPD staff in spotting vulnerability. However, it was stressed that WPD should ensure that these vulnerability champions have the appropriate skills in order to really make a difference in their roles.
- The third highest-scoring commitment was the proposed refinement to the Priority Services Register commitment – to increase the number of customers registered on the Priority Services Register to 75% of total eligible customers, targeting 80% of customers with critical medical needs, including 50,000 hard-to-reach customers each year. This received an average score of 3.75 / 5. Stakeholders broadly praised the spirit and intent of the proposed refinement but were split about whether the stated level of ambition was too high. A number of individuals stated that greater engagement with local healthcare services and more community outreach work could make a real difference in this area.
- The lowest-scoring commitment was the proposed refinement to add a feature to the power cut app which enables customers to create their own, tailored personal resilience plans in the event of a power cut. This received an average score of 3.00 / 5. While stakeholders believed that it could be a worthwhile initiative if it proved to be effective, many were worried that vulnerable people by and large would not use it, due to their lack of technical skills or the fact that they do not own a smartphone. If WPD was to adopt this commitment, stakeholders stressed that the app must be simple to use.

Workshop Two: A smart and fair future

Toby Bridgeman from the Centre for Sustainable Energy (CSE) delivered a presentation about the charity's 'Smart and Fair?' research programme that explores critical issues arising from the decarbonisation of the UK's energy system and how this can be achieved equitably, with social justice at its heart.

- Following the presentation given by Toby Bridgeman (Centre for Sustainable Energy), stakeholders were given a chance to ask questions. Stakeholders did not raise any questions.

Workshop Three: Best practice

Representatives from three of WPD's Power Up! and Affordable Warmth partners gave presentations about how they deliver their services to vulnerable customers, with the aim of sharing best practices among WPD's network of partners. The first of these presentations was by Elly Pool from Auriga Services. The second presentation was delivered by Thomas Milne from the Energy Saving Trust. The final presentation was from Beatrice Roberts from Care and Repair (Cardiff & the Vale).



- Following the presentations, stakeholders were given the opportunity to ask questions. Questions were raised around how Auriga Services had managed to successfully increase its referral numbers with Severn Trent, and around whether Care and Repair was experiencing the deteriorating level of customer support from distribution network operators (DNOs) that many partners were facing.
- When discussing any best practice that could be taken away from these presentations, many stakeholders said that they had already adopted a great number of these measures. However, several stated that they would be looking to bring in daily referrals on Power Up! Applications, as opposed to the monthly referrals currently used. Easier referral methods, such as event work and the Energy Saving Trust's Google referral form, were also mentioned as good potential practices to adopt.
- In light of the presentations, there was a feeling among stakeholders that they could do more around community outreach in the delivery phase, with the hard winter ahead for many customers. In addition, a number of stakeholders said that the increasingly complex needs of vulnerable customers meant that they were spending far more time on giving advice than on helping them make savings.

Workshop Four: Delivery comparison and effective reporting

Tracy Cullen, Social Obligations Officer, gave a presentation on how WPD compares data on service delivery including comparisons of referrals and savings achieved by different partners. This included WPD's two projects: Power Up! And Affordable Warmth. Nicki Johnson, Stakeholder Engagement Officer, then discussed WPD's approach to data reporting. She listed the seven types of intervention currently reported against and then introduced WPD's new standardised-information form to make it easier to analysis and interpret information.

- Stakeholders were asked to vote on which challenges during the winter ahead would be the biggest obstacle to helping vulnerable customers. 'Increase in demand from clients' received the most votes by far (53%), followed by 'Resources (including colleague/volunteer retention)', with 33% of the votes. Many stakeholders expressed their concerns about the huge amounts of calls that are received on a daily basis and hoped that WPD could assist by helping them to achieve savings on these customers' bills.
- When asked how WPD could achieve or expand the outcomes for customers, it was felt that WPD could provide more funding for energy efficiency measures and could advise its partners about which information it really requires during a referral in order to streamline the process.
- Stakeholders were somewhat split about which interventions WPD could improve on this year to support customers when asked to vote. 'Income Maximisation' received the highest number of votes (38%), followed by 'Behavioural Change' (24%), 'Energy Efficiency Measures' (14%) and 'Health and Well-Being' (14%).
- It was felt that WPD's reporting proposals were interesting, but would require some time to be phased in, as they could be difficult for partners to adopt. When asked to suggest new areas that could fall under the 'Other' intervention category, a number of suggestions were given, including blankets and food vouchers.



Workshop One

Introduction and WPD's new proposed vulnerability commitments

Richard Allcock, Stakeholder Engagement Manager, introduced the workshop, giving stakeholders some background and context about the draft Business Plan for RIIO-ED2. He then gave an overview of WPD's core commitments under Customer Vulnerability, asking for further feedback and guidance from delegates on two refined commitments: to increase registrations on the PSR to 75% of eligible customers, and to add tailored resilience plans to the Power Cut Reporter App. This was followed by a request for feedback and guidance on two new commitments: to appoint vulnerability champions at WPD depots, and to implement a criterion for vulnerability considerations when planning new schemes across the business.

Summary

There was a fairly strong level of support for the proposed refinement to the commitment: **Increase the number of customers registered on the Priority Services Register to 75% of total eligible customers, targeting 80% of customers with critical medical needs, including 50,000 hard-to-reach customers each year.** When asked to vote on whether they agreed with the commitment, 697% of stakeholders either 'agreed' or 'strongly agreed', with 19% voting 'neutral' and just 12% 'disagreeing' or 'strongly disagreeing'. It was felt that the intention and spirit behind the commitment was broadly correct and that it would act as a good starting point for further interventions during RIIO-ED2. The wider 75% target was seen as broadly achievable, particularly in light of digital referrals and digital home visits becoming commonplace among stakeholders during the pandemic. However, concerns were expressed about the target of reaching 80% of customers with critical needs, as it was seen as potentially too ambitious, due to difficulties in engaging with local NHS services and GPs. In light of this challenge, WPD was urged to build further engagement and partnership work with adult social care services, occupational therapists, social prescribers, hospital staff and charities into this commitment. Furthermore, in addition to working towards these targets, it was stressed that WPD should never lose sight of the need to deliver tangible support to vulnerable customers in a way that really supports their needs.

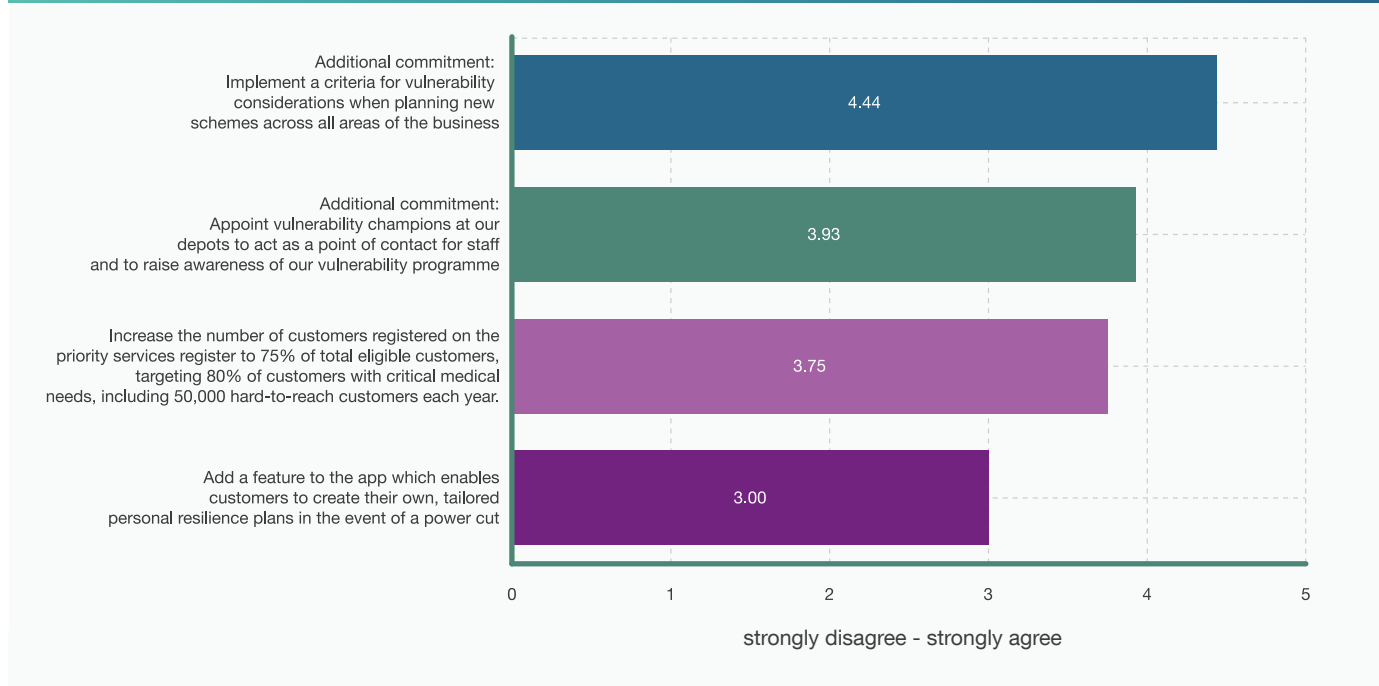
Many stakeholders felt largely uncertain about the proposed refinement to **add a feature to the app which enables customers to create their own, tailored personal resilience plans in the event of a power cut.** When asked to vote on whether they agreed with this new commitment, 63% of respondents voted 'neutral', with 19% voting 'disagree' and 19% voting 'agree'. Many stakeholders were worried that app-based support would not be useful for vulnerable customers, in light of their low levels of digital skills, which have become apparent during the past 18 months. In addition, it was stressed that many of these customers do not own smartphones and, therefore, would not be able to access the app in the first place. Questions were also raised about how creating personalised resilience plans would tangibly help vulnerable customers during a power cut. Stakeholders who were less sceptical stated that they would support the proposed commitment if it was able to deliver noticeable benefits to vulnerable customers. In addition, there was strong emphasis on the need for this app to be simple and straightforward in order to ensure high take-up and use.

Stakeholders widely welcomed the proposed additional commitment to **appoint vulnerability champions at our depots to act as a point of contact for staff and to raise awareness of our vulnerability programme.** When asked to vote on whether they agreed with this new commitment, 86% of respondents either 'agreed' or 'strongly agreed', with the other 14% voting 'neutral'. One stakeholder abstained on this question. It was felt that this was a sound commitment and would make a great deal of difference, as it was noted that WPD's staff are highly skilled in recognising signs of vulnerability. However, in order to ensure that this commitment is effectively delivered, WPD was urged to ensure that these champions receive regular training in order to ensure that they can make a difference in their role. In addition, it was stressed that more work should be done to promote the PSR, which would ensure that the signposting aspect of the champions' role is more impactful.



The additional commitment to implement a criterion for vulnerability considerations when planning new schemes across all areas of the business ranked highest on average in the electronic voting. 56% of respondents 'agreed' and 44% 'strongly agreed'. Stakeholders felt that this was a very good commitment, as they believed that vulnerability considerations should lie at the heart of every measure within WPD's operations. There was not a substantial discussion on this additional comment, except for one stakeholder who added that WPD should consider different levels of neurodiversity when implementing this commitment.

Comparative graph with average scores for commitments: To what extent do you agree with the following statement: 'I agree with the proposed refinement to this commitment'





Verbatim comments and voting

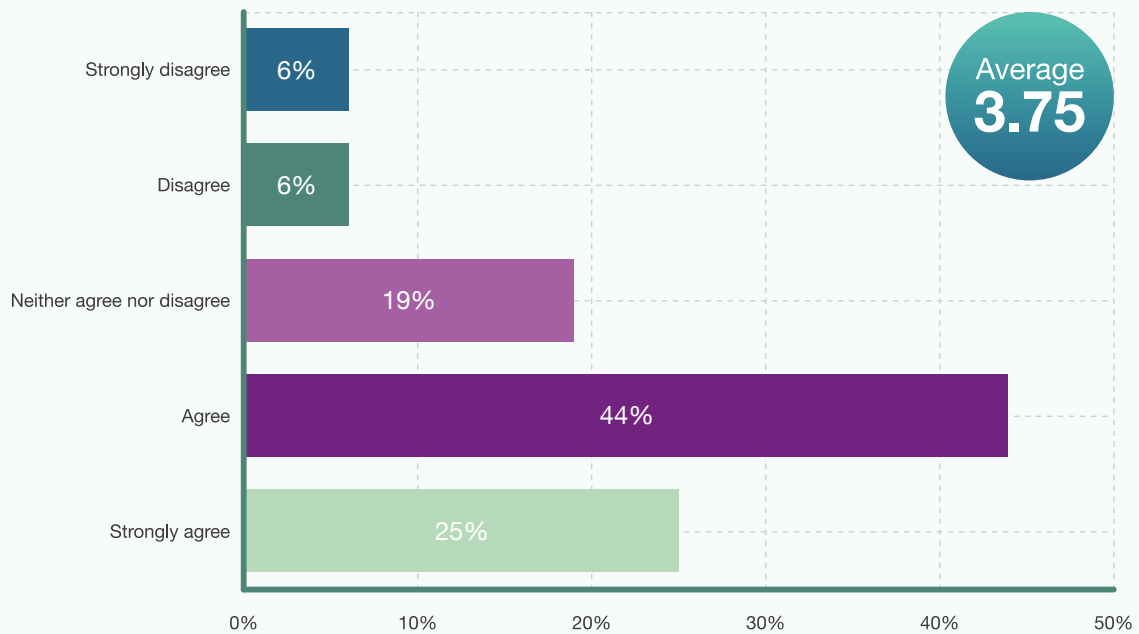
Increase the number of customers registered on the Priority Services Register to 75% of total eligible customers, targeting 80% of customers with critical medical needs, including 50,000 hard-to-reach customers each year

- “I think that the key thing here is finding a way through to the hard-to-reach people. This is a very ambitious strategy, particularly when you factor in the number of hard-to-reach numbers proposed. How are you going to get out to them?”
- “I think that this is a good starting point and is a feasible thing to achieve, in light of the move towards digital referrals brought about by COVID.”
- “I think that how you target the most vulnerable customers is the most important aspect here, as you will be dealing with lots of people with young children and elderly people. Many people won’t know who you are or what the PSR is, so you will get some pushback.”
- “I’m just thinking about the 80% of customers with critical medical needs. It’s a great target but it looks very high. A lot of those customers are hard to reach and are not always easy to find.”
- “The 80% of customers with medical needs seems very stretching. I’d hate to have my head on the block for that one.”
- “We find it very difficult to liaise with health services, so I don’t know whether it will be possible to hit the 80% of customers with medical needs target without better engagement with the health sector.”
- “I think that it’s worth having a target, but you really should not lose sight of what your customers need from you, particularly the ones that have acute needs. You must always ensure that something deeper is built around the target to ensure that they get the support that they need.”
- “WPD does a lot of mail-shotting about its PSR and I don’t know whether that actually works in terms of increasing sign-up numbers. I would look to work with Adult Social Care and embed an understanding around the importance of the PSR. This will require communication with local agencies. Is there a specialist body within WPD who can liaise with this group and improve communications in this area?”
- “We receive a lot of referrals from occupational therapists. They are a key partner for us.”
- “We work with social prescribers as we find this is the best way to reach people. Hospital staff are pressed and it’s often charities in the atrium that send the most referrals to us. We work a step back with social prescribers to reach us so it depends on how you’re defining critical medical needs as well. Although we support people having chemotherapy with their bills, it may not feel appropriate to support people initially as they can need time to adapt.”



To what extent do you agree with the following statement? “I agree with the proposed refinement to this commitment.”

Increase the number of customers registered on the priority services register to 75% of total eligible customers, targeting 80% of customers with critical medical needs, including 50,000 hard-to-reach customers each year.



Don't know / can't say: 0/16

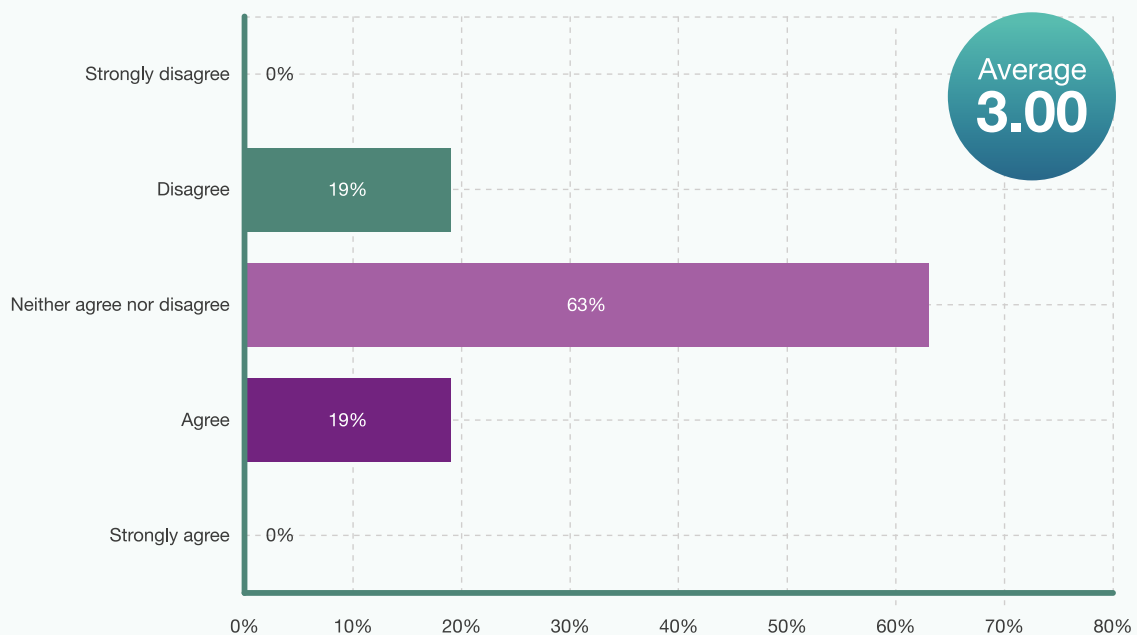


Add a feature to the app which enables customers to create their own, tailored personal resilience plans in the event of a power cut

- “During the last 18 months, we’ve realised that there is a huge level of data poverty and low technological skills within our client base. We’ve been really surprised at how low it is. While I really support the idea, you must not lose sight of the fact that face-to-face engagement is really needed for people who do not feel comfortable with newer technologies too.”
- “If it was something that was proven to help, some of our case workers would be interested in using it.”
- “I don’t think so. The majority of our clients do not use smartphones and they are not online.”
- “I’m not sure. What does this do to reduce someone’s vulnerability to a power cut?”
- “For some people there may be some ignorance of what this is. You need to make it simple to understand and provide IT support.”

To what extent do you agree with the following statement? “I agree with the proposed refinement to this commitment.”

Add a feature to the app which enables customers to create their own, tailored personal resilience plans in the event of a power cut



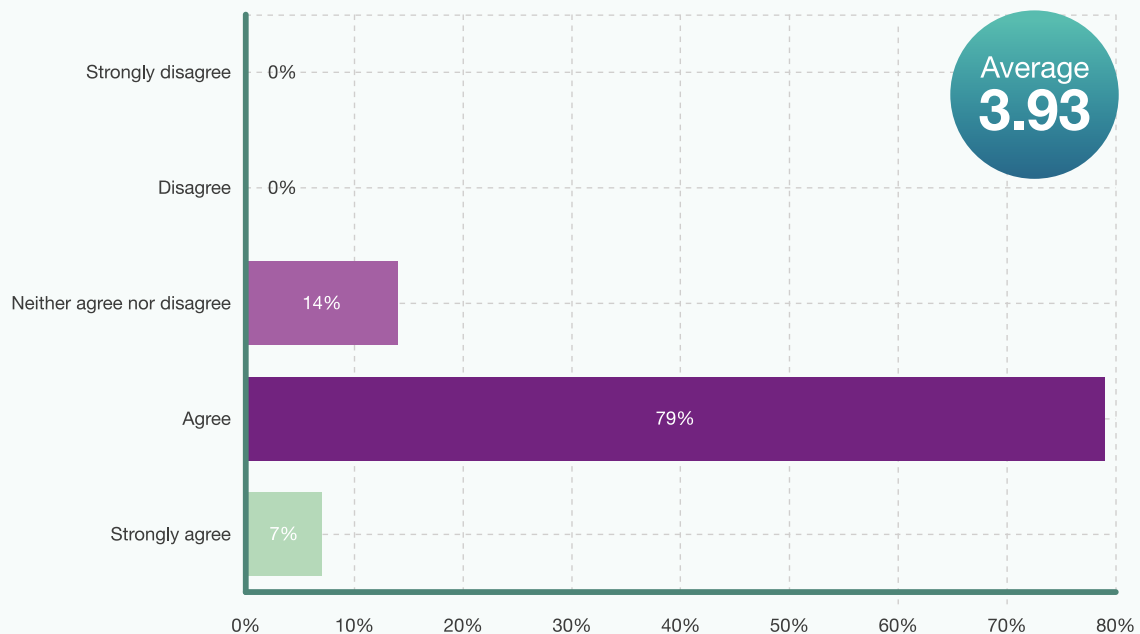
Don't know / can't say: 0/16



Appoint vulnerability champions at our depots to act as a point of contact for staff and to raise awareness of our vulnerability programme

- “This is a good idea, as our experience with WPD is that their staff are very good at identifying vulnerability. This would help us and give us greater confidence that we can all make a difference.”
- “I would just add that it’s important to ensure that your staff are constantly trained around the various needs of different vulnerable groups and around how to address such needs.”
- “I used to work as an occupational therapist and worked in vulnerable individuals’ homes, and many had never heard of the PSR or WPD itself. It only takes a minute, but you need to find a way to get word out about this more effectively.”

To what extent do you agree with the following statement? “I agree with the proposed refinement to this commitment.” Appoint vulnerability champions at our depots to act as a point of contact for staff and to raise awareness of our vulnerability programme



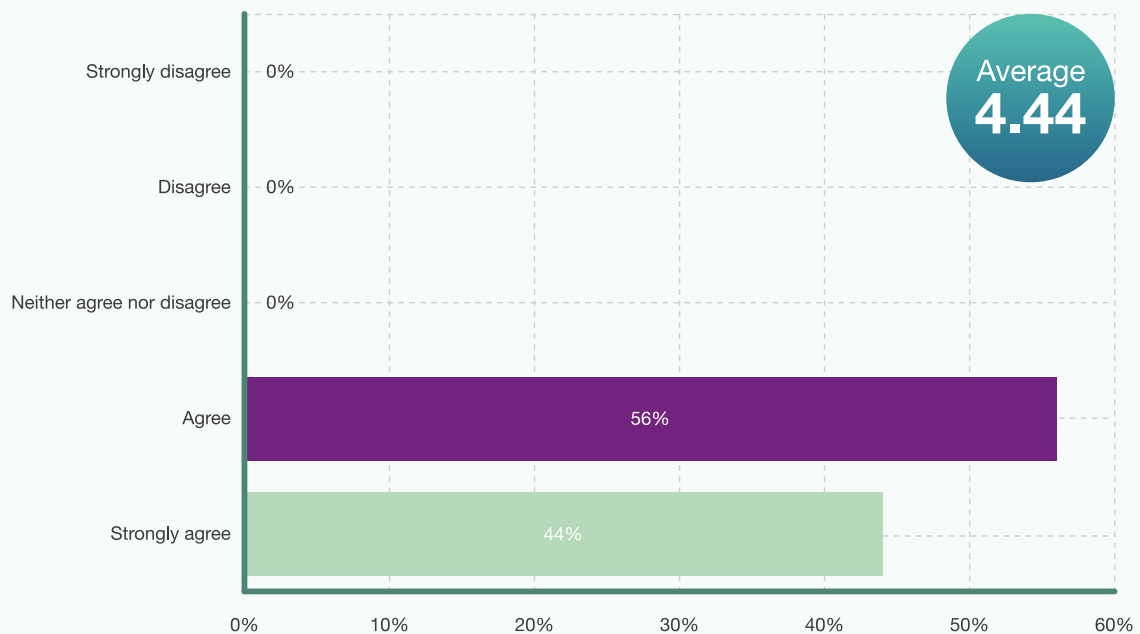
Don't know / can't say: 1/15



Implement a criterion for vulnerability considerations when planning new schemes

- “Vulnerable customers should be considered in everything we do. We should keep in mind people who are neurodiverse as well.”

To what extent do you agree with the following statement? “I agree with the proposed refinement to this commitment.”
Implement a criterion for vulnerability considerations when planning new schemes



Don't know / can't say: 0/16



Workshop Two

A smart and fair future

Toby Bridgeman from the Centre for Sustainable Energy (CSE) delivered a presentation about the charity's 'Smart and Fair?' research programme that explores critical issues arising from the decarbonisation of the UK's energy system and how this can be achieved equitably, with social justice at its heart.

Toby provided an overview of the two phases of the programme, which run from 2019 to 2020, and from 2021 to 2023 respectively. He explained that phase one involved foundation work, including analysis around target groups and reviews of potential approaches to consumer investments, and development of a capability lens. This capability lens has built in a combination of personal characteristics and external factors that consumers would need to take up future smart energy offers to achieve benefits for themselves. He then set out the work involved in phase 2, which builds on the previous foundations, through measures such as marketing monitoring, development of the 'Smart and Fair Choices Tool' and policy engagement.

Toby then outlined a number of areas in phase 2 where the CSE was pushing the 'Smart and Fair?' programme forward. He first touched on how core funding from WPD was helping to significantly improve data modelling in order to better identify households, consumers and constraints in phase 2. He then introduced the 'Smart and Fair? Retail Market Monitoring Programme', which intends to create better transparency, help with providing advice and ensure that Ofgem can identify issues clearer and earlier. The final of these new initiatives presented was the Energy Choices tool, which has been designed for advisors to use with clients to help navigate the smart energy market. To finish, Toby provided a quick overview of the CSE's future work plans for phase 2.

Stakeholders were then given an opportunity to ask Toby any questions about his presentation, but none were raised.



Workshop Three

Best practice

Representatives from three of WPD's Power Up! and Affordable Warmth partners gave presentations about how they deliver their services to vulnerable customers, with the aim of sharing best practices among WPD's network of partners.

The first of these presentations was by Elly Pool from Auriga Services. She began by providing an overview of the scope of her organisation's partnership with WPD and their customer interventions, which include income maximisation, energy efficiency measures and behavioural changes. Elly then touched upon Auriga Services' engagement processes and noted that engagement has become more difficult over the past 18 months, with increasingly complex cases and the effects of COVID-19 posing huge challenges. At the same time, Elly identified a number of successes over this period too, which included moving over to daily referrals and a service level agreement of 2 working days for making initial contact with referred customers.

The second presentation was delivered by Thomas Milne from the Energy Saving Trust. He first listed his organisation's key partners for its referral initiatives, which include Welsh Water and housing associations, and then discussed its methods for finding new partners. Thomas then moved on to discuss the Energy Saving Trust's marketing strategy, which aims to promote support initiatives across a wide range of channels so that hard-to reach audiences gain an understanding of the help available. He explained that the organisation is planning to improve its strategy by using better social media target mapping and refreshing its online content. He finished by touching upon the charity's efforts to create new ways for partners to refer into the scheme and pointed to its Google online form as a simple avenue for doing this.

The final presentation was from Beatrice Roberts from Care and Repair (Cardiff & the Vale). To begin, she provided an overview of their service and their intended aim of collectively working to identify and support hard-to-reach customers, and sign them up to the appropriate support services. This support comes in the form of 7 interventions, including tariffs, boiler replacement health and wellbeing. To finish, she championed the work that Care and Repair has performed and the successes that it has achieved. This includes leveraging its links with local bodies to reach a wide range of people, using targeted outreach through social media and local groups, and delivering support through a series of interventions from well-trained staff.

After this series of presentations, stakeholders were given an opportunity to ask these three representatives any questions.

Summary

A couple of questions were raised by stakeholders following the presentations. The first of them was for Elly from Auriga Services, who was asked how her organisation had managed to increase the number of successful referrals with Severn Trent by such a large amount. The individual asking the question stated that their organisation had had huge problems recently and wondered whether Elly could point to a decisive factor in Auriga Services' success in this area. The second question was posed to Beatrice from Care and Repair and related to issues around customer service with DNOs. The person asking the question commented that customer service had noticeably worsened when contacting DNOs and, as a result, it has meant that they have had less time available to help vulnerable customers. Beatrice was asked whether she had encountered a similar situation.

During the discussion sessions, stakeholders were asked whether they had identified any best practices that they could take away to their organisation. Many stakeholders commented that they had already adopted similar practices to those set out in the presentations, but a number of important new best practices were also identified. The daily referrals mentioned in the Auriga Services presentation was a key example. A number of stakeholders felt that this would be far more effective than the monthly referrals used by many currently. It was felt that, by moving away from monthly referrals, it would reduce the rate of customer disengagement and would likely drive up the number of sign-ups to PSR services hugely. Others identified additional engagement and referral channels that they could use,



including newsletters for hard-to-reach customers, attending events and the Google referral form used by the Energy Saving Trust.

In addition, going beyond these best practices, in light of the difficult combination of Covid-related job losses, the sharp rises in the cost of living and the removal of the £20 Universal Credit uplift, there was a feeling among stakeholders that they needed to go further with community outreach when delivering their services. Stakeholders expressed concerns that the hard winter ahead would draw the ‘just about managing’ group into fuel poverty and this would exacerbate the difficulties that they have been facing in trying to support the fuel poor. It was commented that they were already incredibly stretched and were spending far more time on giving advice to customers rather than helping them making bill savings, meaning that they were helping fewer people than they would like due to time constraints. It was generally felt that the likely increase in demand on them this winter would make things even harder and that they should all be doing more to warn others more forcefully about this.

Verbatim comments and voting

1. Do you have any questions for the representatives from Auriga, the Energy Saving Trust or Care and Repair?

- **Auriga** “How did you foster the jump in Severn Trent Big Difference applications and make so much progress in your relationship with Severn Trent? Can you put your finger on what changed? We’ve had difficulties in moving things forward and have had challenges with the pre-screening process, with many failures at the final stage. I’m looking at ways to improve success rates for those applications and a streamlined process.”
- **Auriga** “As a side note, I found it very interesting to hear how much engagement improved when you shortened the referral time from WPD. I would be keen to aim towards daily referrals moving forwards, as monthly updates lead to many of the issues you alluded to, such as clients not remembering discussing extra support or even who WPD or NEP are!”
- **Care & Repair** “We run a scheme focussing on energy advocacy, working with distribution networks on behalf of customers. We’re finding in our interactions with energy suppliers that the quality of customer service is getting worse and that it has taken a lot longer to get a resolution. This is resulting in a worse service to our clients. How are you finding this in terms of time spent dealing with suppliers?”

2. From what you have heard, what best practice have you identified that you can take forward?

- “I felt that the Energy Saving Trust presentation featured a lot of useful best practices in particular, but all were valuable in their own way. It was great to hear how we could increase self-referrals through Power Up.”



- “I noticed that there was a consistently reasonable high number of self-referrals for Power Up, so it would be good to go back and unpick that all.”
- “We’re engaging in a lot of similar practices to those set out, but the challenges ahead with the effects of Covid on employment and pay, as well as the removal of the Universal Credit uplift, has made us think about our own role in reaching people in our own communities, as the impact of these things has been awful. We need to create a community outreach role within our charity and feed back any successes that we are able to achieve. We also need to reach out more widely and look beyond focussing mostly on old people.”
- “The previous ‘just about managing’ are facing tough times ahead and things will only get tougher.”
- “There was a lot of best practice mentioned that’s good to reflect on, but we do lots of this stuff already.”
- “These presentations have made me think about our operating structure. We could do more to create stronger relationships within the delivery phase and try to communicate more. This could help us increase the referrals. The situation is already chaotic as it is, but with so many energy suppliers going bust, I am worried that things will get even worse, with people onboarding to new suppliers and system clashes. I worry that all of our energy will be eaten up by this coming crisis and, as a result, we will be able help fewer customers. We should be doing more to sound the alarm bells around this.”
- “It’s good to see what others are doing through these presentations. I would like to see daily referrals for our Power Up updates, as the process currently takes a very long time and we sometimes have to deal with back-to-back calls for people who are recently deceased, which is very stressful. I would make sure that people are trained to be as sensitive as they can be with these sorts of situations.”
- “These presentations have made me think about the importance of revisiting your connections with job centres and hospitals due to how things have changed in the last 18 months. The advice side of our work has become so much more complex and it is taking so much time working out how complex a case is. As a result, we have less time to focus on making savings for clients, which is our main aim.”
- “I was quite encouraged by Elly’s comments about having a daily referral system. We receive referrals in monthly instalments and the problem can be that clients become disengaged with the process. Having referrals coming in every day or two would improve our chances of maintaining that engagement.”
 - “Previously we got weekly referrals from WWU. Now we get them within a day and try to reach people within 24 hours which is helpful. When we mention the name of the WWU rep the customer spoke to that also helps.”
- “Tom mentioned something about energy bills and not having a clue. All of our team have done a full city and guild NEA. Free courses and refreshers are available which are great for keeping on top of things.”
- “Our local age connect has a regular drop-in with a solicitor in attendance. It works really well.”
- “I found what Elly said about the health and wellbeing quite interesting in terms of OT referrals and blue badges. Is this quite time-consuming for you?”



- “Sending out newsletters to hard-to-reach vulnerable people who are not online is something that we can take forward.”
- “We’ve proactively got in touch with clients about the Warm Home Discount. Knowing which supplier people are on is key. We are looking at a lot of coffee mornings that church groups and other charities often run. Thanks for sharing all the ideas, it’s really great to see.”
- “The Google Forms for referrals was a big takeaway for me. It sounds like a really good way of maintaining that.”
- “Any suggestions for recruitment would be appreciated. The word ‘energy advisor’ puts people off.”



Workshop Four

Delivery comparison and effective reporting

Tracy Cullen, Social Obligations Officer, gave a presentation on how WPD compares data on service delivery, including comparisons of referrals and savings achieved by different partners. This included Power Up! delivery comparisons, which use average savings to highlight opportunities and reflect savings through Income Maximisation and Behavioural Change interventions. Tracy then moved on to Affordable Warmth delivery comparison, which covers savings in four types of interventions: Income Maximisation, Heating Solutions, Health & Wellbeing, and Other. Tracy stated that she was interested in hearing about potential support that could fall under 'other' in order to gain a greater perspective of how to assist delivery in this area across all partners.

Nicki Johnson, Stakeholder Engagement Officer, then moved on to discussing WPD's approach to data reporting. She acknowledged the huge amount of data involved in this process and reiterated WPD's desire to make reporting as quick and easy as possible for partners. She listed the seven types of intervention currently reported against and then introduced WPD's new standardised-information form to make it easier to analyse and interpret information.

Summary

Stakeholders strongly emphasised that a large increase in client demand this winter would be the biggest obstacle to delivering support to customers. When asked to vote about which potential obstacle would impede them the most in assisting customers, 53% of respondents voted for 'increase in demand from clients' followed by 'resources, including colleague and volunteer retention', which received 33% of respondents' votes. Stakeholders identified a number of new opportunities for WPD to support partners and customers this winter which could provide solutions to these obstacles. Stakeholders wanted WPD to provide them with more support in achieving savings on customer bills, in light of the large current demand, and with more support to alleviate the large number of calls expected. WPD was also urged to use its influence to lobby Ofgem about streamlining the customer service/data provision processes when dealing with energy suppliers. Stakeholders complained that it currently took a lot of time and effort to get any sort of resolution with energy suppliers and felt that, by overcoming this issue, they would have more time to focus on assisting vulnerable customers.

Stakeholders thought that WPD could do a number of simple things to achieve or expand outcomes for customers. WPD was urged to communicate the benefits of the PSR more dynamically to target groups, as this would increase wider awareness of the support available and would help to increase sign-up numbers and improve delivery of support to customers. There were also calls for WPD to provide more funding for supporting energy-efficiency measures, such as loft hatches and pipe connections. Finally, WPD was asked to provide partners with more specific guidance about which information was strictly required and which was nice to have in its referral form. It was noted that some information for the form takes a long time to obtain, so if it was not strictly needed, partners would be able to devote more time to helping vulnerable customers directly.

There was somewhat of a split among stakeholders about which top two interventions they could improve on this year in order to support customers. When asked to vote on their top two interventions, 'Income Maximisation' was clearly the most popular, gaining 38% of respondents' votes, followed by 'Behavioural Change', with 24% of respondents' votes. However, there was no clear preference on the next three, with 'Energy and Efficiency Measures' and 'Health and Well-Being' receiving 14% of votes, and 10% of votes for 'Heating - Boiler Replacement'.

Due to time, there was less discussion on the topic of effective reporting. Stakeholders found the data reporting principles interesting, but thought that they should be phased into WPD's data reporting approach slowly, as some people could find them tricky. When asked about which opportunities partners are reporting via the 'Other' reporting category, stakeholders listed blankets for power-cuts, hardship funding for replacement boilers, gas connections and food vouchers.



Verbatim comments and voting

Delivery

1. How do we expand or develop new opportunities to support customers this winter?

- “As a group of advice agencies, we have struggled and completely failed in persuading Ofgem to change how it views suppliers giving information to advice services on a customer’s behalf. I would urge WPD to get Ofgem’s ear on this. We spend so long trying to deal with suppliers, as the process is different each time. It would be great to be in a situation where we can talk to someone in 20 minutes and get a quick solution. We feel like we’re constantly going around the houses.”
- “We’re in a similar situation and we’re feeling that things will get worse rather than better. The complexity of the cases is increasing ten-fold and the difficulty in dealing with them has been exacerbated by difficulties in getting through to energy suppliers. This is awful, as we can’t help our vulnerable customers make the savings that they need and cannot escape from this cycle of fuel poverty, which will have dreadful effects on their health. They shouldn’t have to choose between heating and eating. Fuel poverty doesn’t exist in a vacuum; it’s a type of poverty, so they need all of the support that they can get.”
- “A lot of our referrals come through as wanting an energy comparison. Unfortunately, we cannot offer any savings at the moment. We will offer grants for clearing arrears and support customers on prepayment meters.”
- “We’re expecting a lot of demand. It might seem like obvious advice to us, but a lot of customers will need reassurance. We are expecting a lot of callers. It’s more difficult to achieve financial savings. We were on local news with a courageous client this week. Calls haven’t quietened down over the summer with advice lines. There are a lot of billing queries. One adviser saved a customer £10,000!”
- “Supplier issues will only increase the number of calls we receive. Waiting times with suppliers will also increase and processes will become more complicated. Everything just feels like it’s getting very stretched. Savings from tariff switches won’t be there as much at the moment.”
- “We are looking to recruit ahead of the winter. It’s a constant balancing act in terms of resources and providing the best service.”

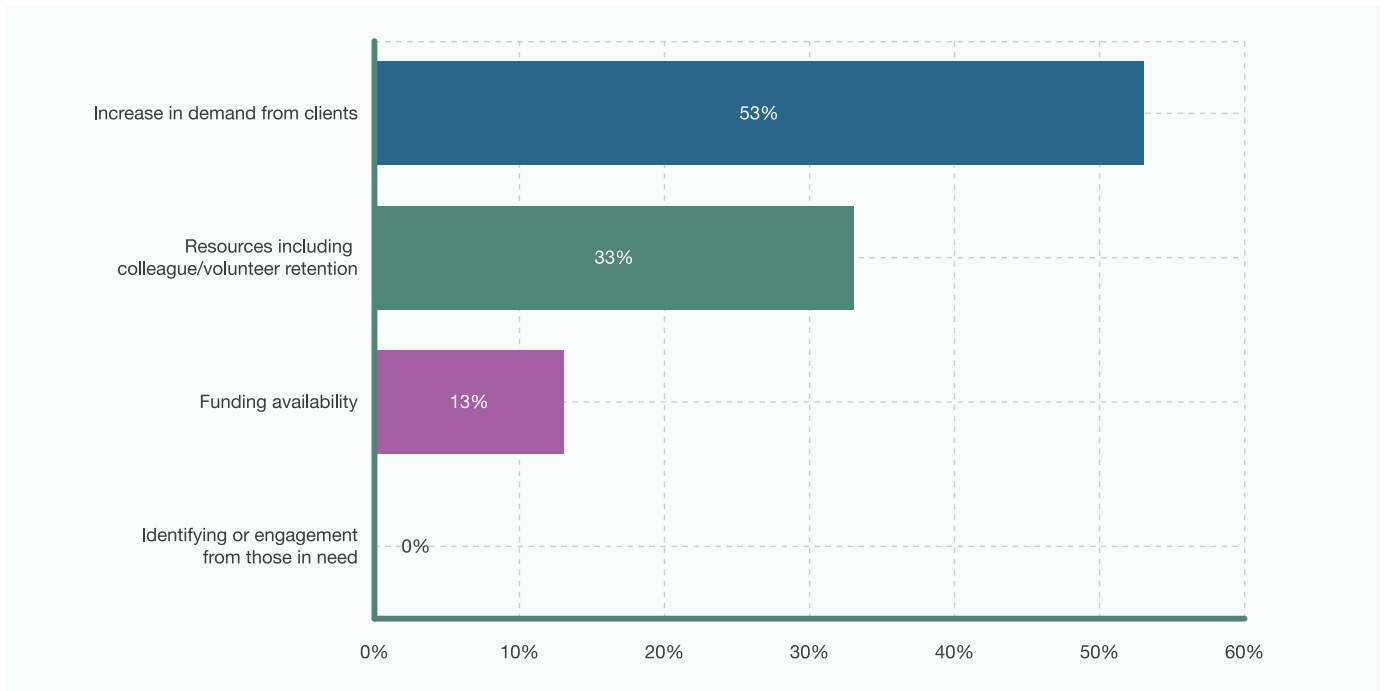


2. What can WPD do to help you achieve or expand the outcomes for customers?

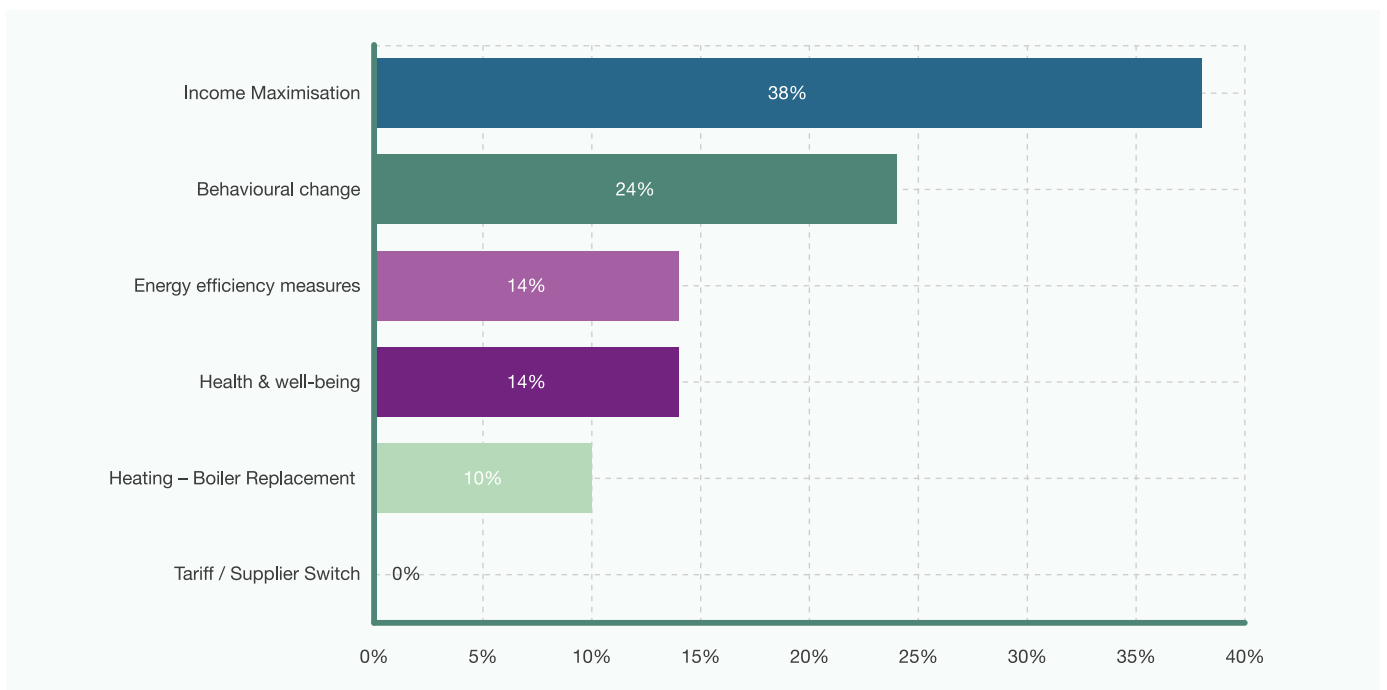
- “I feel like a lot of the people that we contact are uninterested in receiving help and that has affected our outcomes and results. It does help that we receive the daily referrals. But maybe WPD could help further here in communicating the PSR benefits more strongly and in more targeted ways in order to drive up sign-ups.”
- “I think that it would help if WPD gave us more clarity about the Word form that it uses. Some of the information can take a while for us to compile and that makes the PSR sign-up process less efficient than we would like. It would be good to know which information in the form is essential and which is nice to have, meaning that we can allocate our efforts appropriately. A more streamlined approach here would be really great.”
- “Sometimes acknowledging that one intervention will not resolve someone’s vulnerability. More funding is always a brilliant thing in casework. Funders always want higher savings for less time and less money. Offering users a bit of rapport and a chat is an essential part of our service.”
- “Some funding for enabling works can unlock energy efficiency measures installation. We make referrals but they fall through as the funding does not cover all costs. £500-£1000 per customer for loft hatches, pipe connections can be the difference between an installation going ahead or not.”
- “Would WPD consider redress funding with a crisis pot? In Shropshire there is a charity that will regularly give out £250 per customer.”
- “Just to build on what I heard from Davina, in terms of what might be helpful in resolving complex cases - if WPD have any sway with energy companies supporting their customers who are on the PSR - we don’t notice a quicker or more efficient process for those on the PSR at the moment and we quote it on the phone but it means very little to those on the other end (it seems). The service needs to be improved to aid delivery on such projects, meaning it doesn’t take so long.”
- “Having an extra bridge in terms of funding would be great.”



3. Of the following obstacles you or your organisation may face this winter, which most impedes your ability to help clients?



4. Which top two interventions do you think you can improve on this year to support customers?





Reporting

1. What are your views on the reporting proposals and quantifying customer 'behaviour savings'?

- "I'd like to see the template as I'm curious about the PSR column."
- "We may need to phase this in as it can be difficult with clients."

2. Can you expand on what opportunities partners are reporting via the 'other' category?

- "We quite often give customers blankets to keep warm and we have pots of money for this. These cost us £50 and save them a number of pence per hour. This could be good for this other category."
- "When you help someone to get a grant under hardship funding for boiler replacements, does it go in 'other' rather than income maximisation?"
- "We include gas connections, hardship funding and food vouchers in this category."



Appendix 1

Participants

A total of 17 stakeholders attended the workshop, representing 11 organisations. The organisations represented on the day are shown below:

Auriga Services
Care and Repair - Cardiff and the Vale
Centre for Sustainable Energy
Citizens' Advice Bureau - Coventry
Citizens' Advice Bureau - Derbyshire Districts
Community Energy Plus
Energy Saving Trust
Marches Energy Agency
Nottingham Energy Partnership
Plymouth Energy Community
Severn Wye

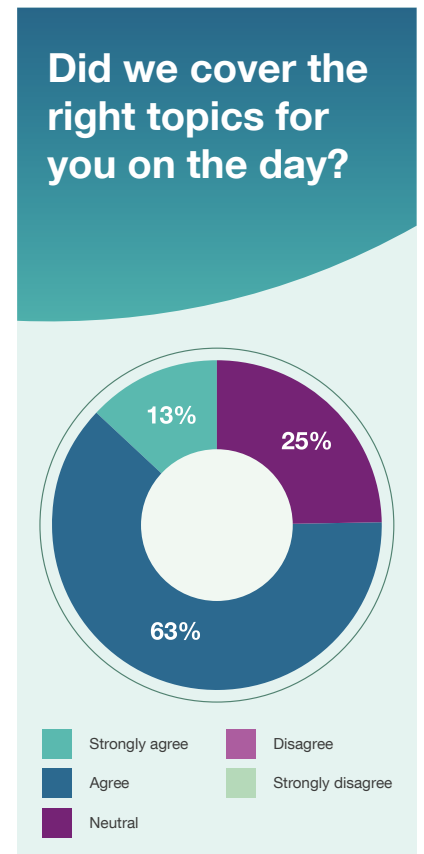
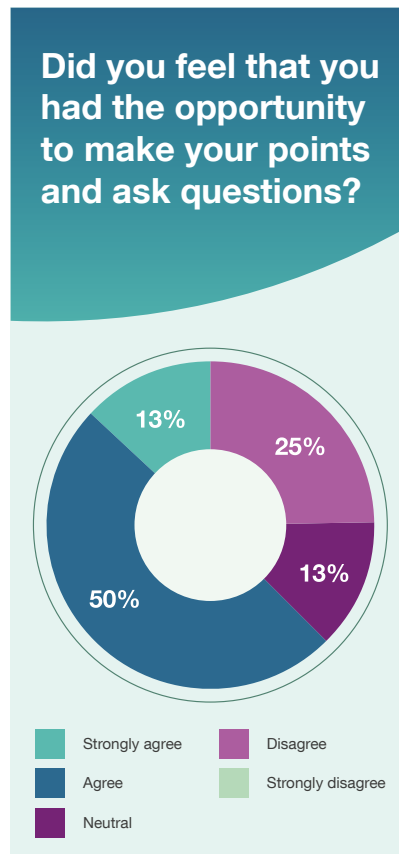
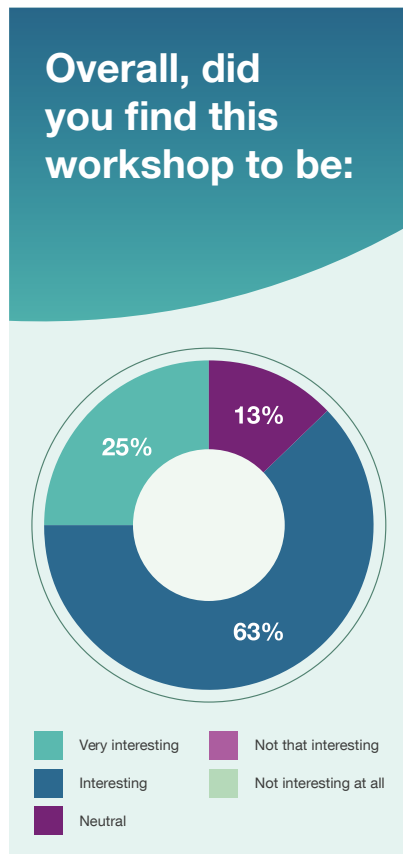


Appendix 2 Workshop feedback

After the workshop, stakeholders were asked to complete a short feedback form. The feedback was as follows:

Overall, how satisfied were you with today's workshop?

Average - 7.87 / 10



“I felt that the breakout rooms were too short to either cover the helpful topics or have in depth discussion.”

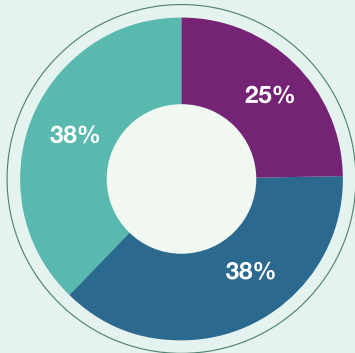
“It would have been great to have more discussion time to share ideas, best practice, etc”

“I think the topics were relevant, but there wasn't as much detail as I hoped. The disparity between the different behaviour change claims was mentioned, but it would have been really useful to discuss how different organisations are making these decisions and come to some sort of agreement.”

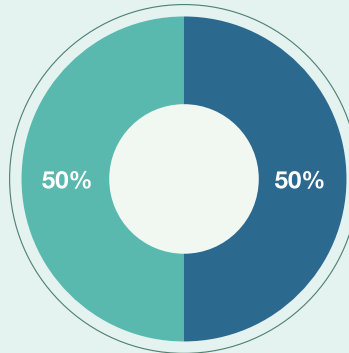
“It would have been better to have focused the session on the topics covered in the 2nd half.”



What did you think of the way the workshop was chaired by your facilitator?



How well do you think the online format worked?



“I think that the 2nd half would have been much better in person. It’s always easier to share ideas, best practice and tips with a range of different organisations in person.”

Any other comments?

- “I would have liked more time for discussion in the breakout groups.”
- “I enjoyed the workshop and appreciated the opportunity to hear about other organisations’ challenges. There could have been a bit more time to discuss some of the issues in the breakout rooms.”



Western Power Distribution (East Midlands) plc, No2366923
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Registered in England and Wales
Registered Office: Avonbank, Feeder Road, Bristol BS2 0TB

www.westernpower.co.uk

