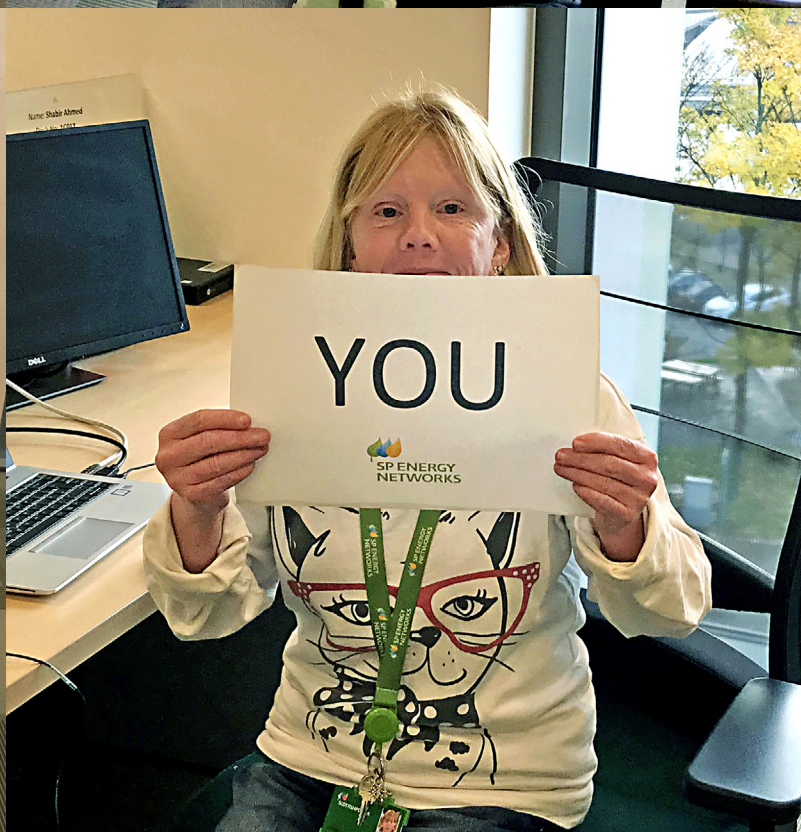
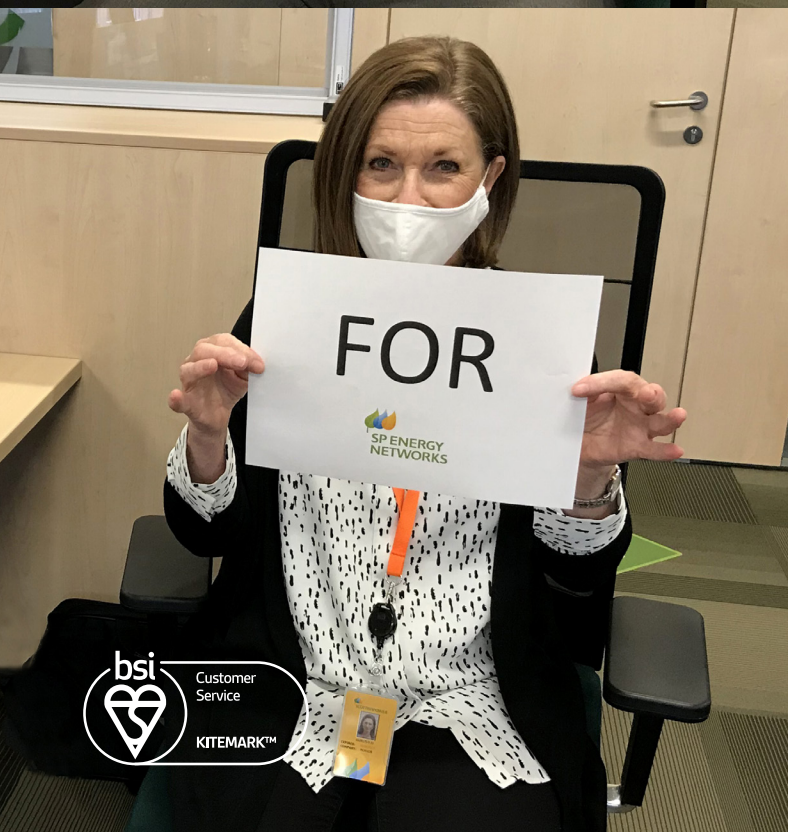
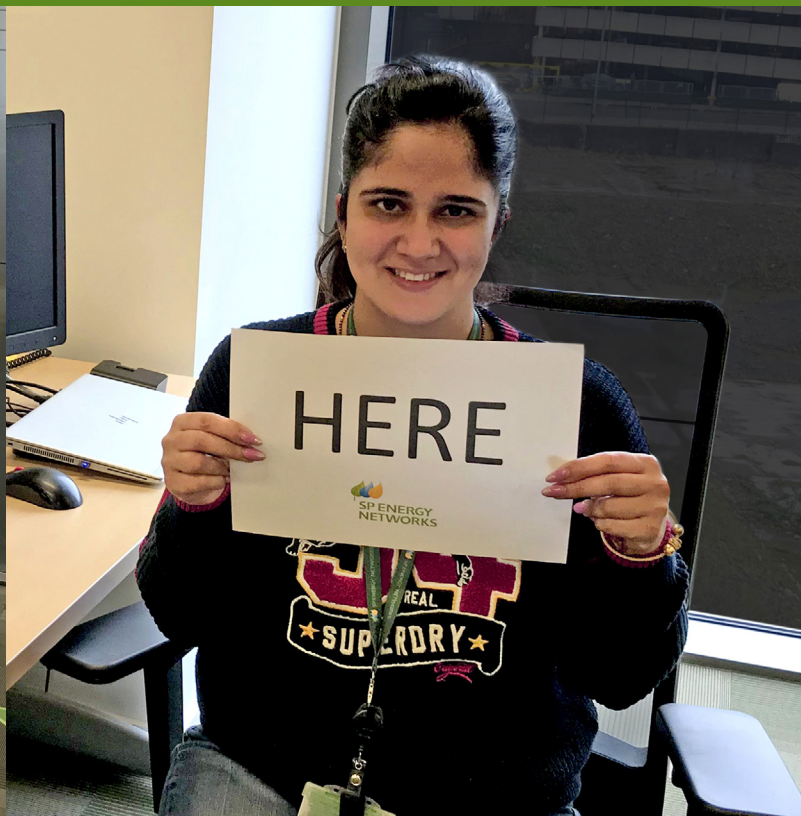


# Making a Difference

## Part Three: Our consumer vulnerability story



Ofgem Electricity Distribution Stakeholder Engagement  
and Consumer Vulnerability Incentive Scheme 2020/21





# This is Part Three of our submission to Ofgem's Stakeholder Engagement Incentive for regulatory year 2020/2021.

*Ofgem's annual Stakeholder and Consumer Vulnerability Incentive (SECV Incentive) encourages Distribution Network Operators (DNOs) to: 'engage proactively with stakeholders in order to anticipate their needs and deliver a consumer focused, socially responsible and sustainable energy service.'*

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## Our submission is in three parts:

### Part One

#### – Our strategy

Introduces our Stakeholder Engagement and Consumer Vulnerability Strategy, with evidence that we meet Ofgem's minimum requirements.

### Part Two

#### – Stakeholder engagement outcomes and impacts

Details the actions we have taken to meet the needs, preferences and priorities of customers and stakeholders identified through extensive engagement.

### Part Three

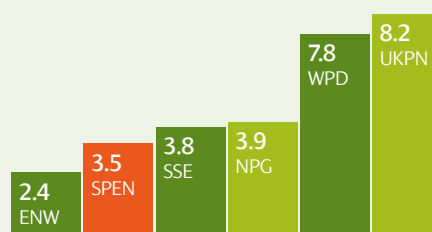
#### – Supporting vulnerable customers

Details key activities we delivered to address consumer vulnerability issues and the outcomes achieved during this regulatory year.

## About us

SP Energy Networks is the Distribution Network Operator that delivers electricity to homes and businesses in Central and Southern Scotland, Merseyside, Cheshire, North Wales and North Shropshire. We are the only network operator to work across three countries – Scotland, England, and Wales.

DNO Size by Household Numbers (Millions)



When comparing all six DNOs, SP Energy Networks has **3.5 million** customers, and is fifth in terms of our customer base, however this does not reflect the size of our ambition.



# Introduction from our CEO, Frank Mitchell

Caring for customers in vulnerable situations is at the heart of our business and embedded in everything we do. As a regional network, we are proud of the role we play in supporting and growing the communities we come from and live in. Understanding and responding to our vulnerable customers' needs is not only deep rooted in our culture, but is also essential to meeting the goals we have developed with stakeholders to guide our future plans.

These goals reflect our longstanding mission to first and foremost safeguard those in situations of vulnerability, to deliver industry-leading value by focusing on their core needs and ensuring no customer is left behind in the transition to Net Zero. Our meticulous focus on our customers' needs is more important than ever. While the transition to Net Zero increasingly presents new challenges for our vulnerable customers, broader socio-economic trends and, in particular, the COVID-19 pandemic, have impacted our customers profoundly over the past year.

## Our goals



*Deliver more value for our customers, communities and stakeholders*



*Develop a network that's ready for Net Zero*



*Ready our business for a digital and sustainable future*

Our vulnerability strategy, built around our customers and designed to be responsive to their feedback and that of our stakeholders and expert partners, was tested to the limit. To meet these challenges we leveraged our greatest strengths, from our people and processes, to our network of local partners and comprehensive data, to intensify our focus in meeting our customers' core needs:

- 1 Supporting them before and during a power cut.
- 2 Addressing fuel poverty and wider social issues.
- 3 Engaging with our customers to understand what role we should play to support them in the transition to Net Zero.

We believe that adding industry-leading value while meeting these core needs best reflects our role as a provider of a vital service to the safety and wellbeing of 3.5 million households, while balancing the impact we have on our customers finances, especially during these difficult times.



I believe that two milestones, in particular, demonstrate the success of our vulnerability strategy.

### Satisfaction

**96%**

In 2020/21 we achieved the highest ever customer satisfaction for vulnerable customers of 96%. This demonstrates the relentless focus of our people and partners in delivering prompt and meaningful responses to our customers' core needs while going above and beyond to cater to each customers' unique circumstances.

### Value

**£2.67 for every £1 spent**

The services and initiatives delivered over the past year to proactively address our customers' needs resulted in a benefit to society of £2.67 for every pound spent. Using the unified DNO SROI tool to calculate this value demonstrates our approach to vulnerability.

While I am proud of our achievements and our continued growth in this space, we must not be complacent.

The future transition and the lasting impact of the pandemic will continue to affect our customers, leading to potential new situations of vulnerability or exacerbating existing circumstances. I am confident that our mature strategy, the embedded capabilities that support it and, most importantly, the passion of our staff will continue to safeguard communities and deliver great value that meets their needs.



*Frank Mitchell*

**Frank Mitchell**  
Chief Executive Officer,  
SP Energy Networks

## Highlights of 2020/21

**96% customer satisfaction**, highest ever, from our vulnerable customers across all support services



**Benchmarked 1st** against all UK service sectors in the ICS UK Customer Service Index



**Delivered on average £2.67 value to customers for every £1 spent**



**Led the development of the all DNO SROI model along with WPD**



**Delivered advice and support services to over 2.3 million customers**



**293,293 vulnerabilities added to our register this year**



**Over 1.19m households now on the PSR (34% of customer base)**



**Through training, our staff knowledge in relation to detailed vulnerabilities has increased by 3.2 points this year**



**99.9% PSR customers experienced zero supply interruptions or were restored in 6 hours**



**Achieved 3 years running the BSI certification to both the Customer Service Kitemark and the Inclusive Service Verification scheme.**

*"SPEN's ongoing commitment to continual improvement is demonstrated by the organisation's certification to both the BSI Customer Service Kitemark™ and the Inclusive Service Verification scheme.*

*These achievements currently make SPEN the first and only utilities organisation globally to have achieved certification to both schemes, demonstrating that the organisation provides customers with a service experience that consistently meets their expectations, that is fair and flexible and can be used by all consumers equally, regardless of their health, age or personal circumstances."*

Natasha Bambridge  
Product Certification Programme  
Director at British Standards Institute



# Our consumer vulnerability strategy

Our ambition, as laid out in our mission statement, in addressing the situations of vulnerability that may affect any of our customers is to:

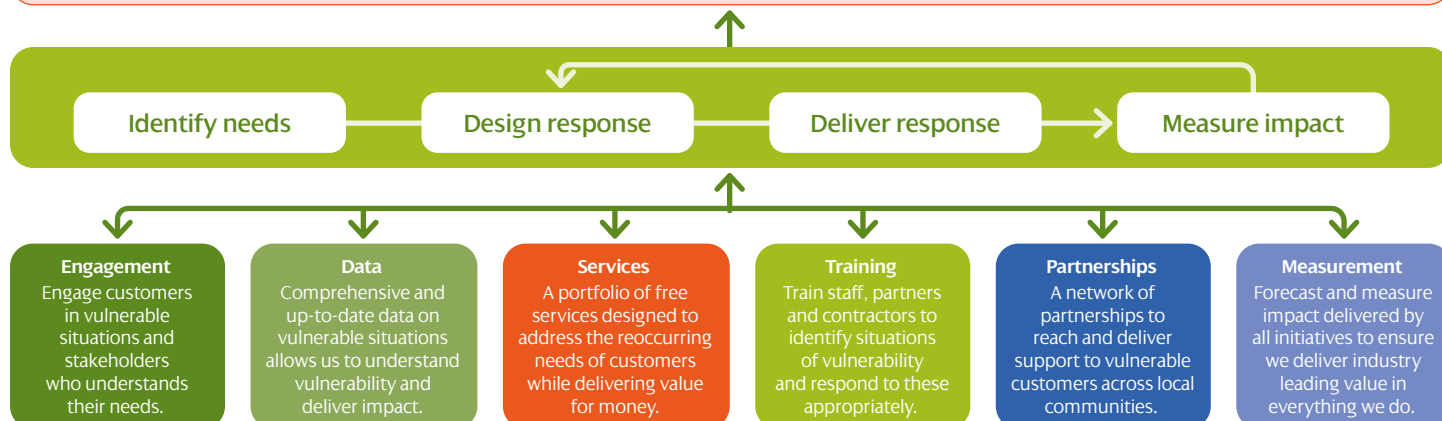
- Safeguard our communities.
- Deliver industry-leading value by addressing our customers' core needs.

Our vulnerability strategy turns this ambition into reality. It does this by setting out a continuous process of refinement that starts from understanding the

needs of our customers and proceeds to deliver the best possible responses to these. This process was first introduced in 2015 and is now embedded across our company, translating our mission statement into everyday actions from the front-line to the boardroom. We are also engaging with stakeholders to understand how this mission statement should evolve to underpin our future strategy.

## Our mission statement

*"SP Energy Networks aims to be a service leader in the UK. We will strive to minimise the impact we have on our communities in relation to power interruptions and provide bespoke support to our customers in vulnerable situations. We will do so by offering the appropriate support to those who need it the most, while providing industry-leading value."*



Six 'action statements' provide solid foundations for our strategy. Each statement represents a key function without which our strategy would fail to deliver optimal outcomes for vulnerable customers.

### 1. Engagement

Ongoing engagement with customers and stakeholders plays a critical role in evolving our approach to vulnerability. The insight we gather on the situations of vulnerability that affect our customers and the underlying needs of those affected by specific situations lead us to new responses and delivery methods, ensuring we offer the right support to the right people.

*We reached **96,917** customers and stakeholders through our engagement.\**

### 2. Data

Comprehensive, up-to-date and granular data on the situations of vulnerability and the factors that drive these lead to insight that guides the evolution of our strategy. In practice, data plays a critical role in our day-to-day support, telling us who needs extra attention and bespoke support.

*We now have **1.86 million** vulnerabilities registered on our PSR.*

### 3. Services

While we strive to offer bespoke support that addresses the unique circumstances faced by customers, we have designed a wide portfolio of services that efficiently satisfies our customers' diverse needs.

*We delivered **2.3 million** advice and support services.*

### 4. Training

Addressing vulnerability is a company-wide effort. We provide extensive training, co-developed with our partners, to ensure that our staff, partners and contractors are well equipped to identify and respond to situations of vulnerability appropriately.

*We delivered over **2,666** hours of training in 2020/21.*

### 5. Partnerships

Our partnerships are vital to the success of our vulnerability strategy. From providing an expert view of our customers' needs to co-developing responses to these needs and gathering data on the impact of our actions, partners act as an extension of SPEN to deliver local impact across our diverse communities in England, Wales and Scotland.

*We have a network of **71** partners.*

### 6. Measurement

We employ the industry-wide Social Return on Investment (SROI) methodology across all vulnerability initiatives to ensure we are delivering value to our vulnerable customers and our wider customer base. This tool also informs our service design process, allowing us to target the most impactful responses to our customers' needs.

*We assessed all **38** initiatives aimed at supporting vulnerable customers.*

\*ED2 engagement excluded from these figures.

## How the strategy evolved this year

Our vulnerability strategy is designed to be flexible and is centred on the needs of our customers. The strategy lends itself to adopt different responses and ways of working in addressing the changing circumstances that impact our customers. Extensive engagement with our vulnerable customers, stakeholders, partners and our own staff as well as vulnerability data prompts us to continually challenge and update this strategy.

In 2020/21 we introduced a new Measurement Action to our strategy. This reflects our far reaching efforts to forecast and measure the impact of every action taken to support vulnerable customers to meet our ambition of delivering industry-leading value. Measurement is not new to our strategy, for the last three years we have consistently applied the Social Return on

Investment model and led the implementation of the ALL DNO SROI model along with WPD. The addition of this action statement reflects the critical role measurement plays in our strategy.

We have further engaged on our Nexus of Partnership coalition model this year, refining our thinking about how this should be structured, evolving this from not only a coalition of organisations delivering services but also sharing data and creating one vulnerability register. The Terms of reference is currently being developed, recruitment of the organisations will commence in 2021 and the TOR refined and governance in place with the recruited organisations in 2022 to ensure everything is in place ahead of ED2.

# 1. Understanding the situations of vulnerability that affect our customers and how best to support them

The needs of our customers in vulnerable situations lie at the core of our customer vulnerability strategy. Our experience tells us that vulnerability is complex, multi-dimensional and ever-evolving.

The transition to Net Zero means that the energy system is becoming more decentralised, decarbonised and digitalised, giving rise to new barriers between our vulnerable customers and the energy landscape. These new barriers trigger new customer needs.

At the same time, the COVID-19 pandemic has exacerbated our customers' existing needs and placed many more people in situations of vulnerability, ranging from health impacts to changing employment and living circumstances.

Now more than ever it's critical for us to better understand the situations of vulnerability that affect our customers and design tailored responses to new and changing needs. To do this, we rely on our data strategy and our ongoing engagement with customers, stakeholders and our vulnerability partners.

## Ensuring we have comprehensive and up-to-date vulnerability data

Vulnerability data is a key enabler of our vulnerability strategy, it informs everything from the design of services to our operational response to power cuts. We continually gather, maintain and use two types of vulnerability data:

- **PSR data** – as the cornerstone of our vulnerability strategy, the Priority Services Register holds up to date information on over 1.19 million households, 34% of our whole customer base. The PSR is our most accurate and up to date record of our customers' needs.
- **Vulnerability data** – We gather granular data on situations of vulnerability as well as data on factors associated with vulnerability from open government datasets as well as specialist providers. These additional datasets, displayed in our 'vulnerability mapping tool', are used to both strengthen our PSR and provide a richer picture of vulnerability to our teams and partners.

**Over 1.19m**  
number of households on PSR  
*11% increase since 2019-20*

**50%**  
of eligible PSR customers  
against National Statistics

**38,327**  
PSR Records shared  
*improving customer data across  
other organisations*

### Data sharing

Data sharing is an increasingly important channel for our data acquisition and maintenance efforts. We now have 13 data sharing partnerships, 4 of which are with other gas and water utilities. Beyond the immediate benefit our data quality, data sharing plays a critical role in the 'whole system' approach to vulnerability.

This recognises that to address the needs of our customers comprehensively we need to work with other organisations that play a complementary role to ours in supporting them. Our Coalition Partnership Strategy, once fully established, will allow us to work collaboratively so customers can receive tailored support cost effectively.

### Data Sharing Partners

British Red Cross	Carers Trust
Home Energy Scotland	Merseyside Fire & Rescue
Energy Projects Plus	Glasgow East End Community
Severn Trent Water	Carers
Hafren Dyfrdwy Water	SGN
NEST	Agility Eco
Wales & West Utilities	NHS
	All Suppliers

## Case Studies

### Heading towards a Single Vulnerability Register

#### Actions:

We have partnered with Scottish and Southern Electricity Networks (SSEN) and Scottish Water to launch the 'PSR Scotland' website, a resource that provides customers with insight into the free help and support they may be eligible for during an emergency and beyond.

#### Outcomes:

Customers across Scotland now benefit from a one-stop-shop where they can learn about the free help available by joining the PSRs in their area, with links straight to the specific sign-up pages on each company's website, making the registration process as simple as possible.

- Expanding our scope of support.
- Our aim is to test the success of this and take learnings into our future Nexus of Partners coalition model bringing multiple organisations together, working with one purpose, sharing data and delivering joined up tailored services in the most efficient way.

### Data Sharing Partners

Through our data sharing agreement with SGN, their Carline team sends PSR sign ups to us on a weekly basis and in turn we support SGN through our vulnerability mapping tool and by sharing our PSR data.

#### Actions:

Starting in February this year, our Social Obligations Team contact these new customers to inform them of the specific services we offer; confirm their PSR Category, check and ensure that their contact information is updated and take an alternative contact if needed.

#### Outcomes:

We take the opportunity to offer customers other free additional services that suit their needs and provide the maximum possible benefit. SGN use our vulnerability mapping tool to plan their customer engagement with planned projects and we share PSR records with SGN when they have larger scale gas outages.

*Since Feb-21 delivered 432 Additional Services with a value of £1,267 per customer.*

## How we acquire and maintain data

### Tools & Processes for gathering PSR Data

Industry Data Flows –  
95,322 added

Data Cleanse –  
467,721 checks

Data sharing with other  
organisations & Internal  
Acquisitions – 45,087

Customers calling to report  
a power cut – 18,903 added

As we strive towards our stakeholder-driven target to reach 80% of eligible customers on each needs code when compared with national available data, we continue to rely on a comprehensive approach to data acquisition. Over the years we have identified the best channels through which we gather new PSR signups. These channels, shown in the table, include targeted awareness campaigns, community events and our staff's efforts on the frontline.

Our primary focus on data acquisition is on closing large gaps in specific need codes. To understand and target these gaps, we have visualised them in the vulnerability mapping tool.

While having the right people on the PSR is critical to our ability to deliver the right support at the right time, the quality of this data is equally important. Because our PSR data informs many

of our operational efforts, especially during emergencies such as unplanned power cuts and storms, it is essential that we have up to date and accurate data on the particular needs of our customers.

While our policy is to verify every PSR record at least once every 2 years, our approach is flexible to accommodate the unique circumstances of our customers. Some customers may find themselves temporarily vulnerable due to a sudden change in life circumstances. Our systems allow for 'timed' PSR signups based on the expected duration of the customers' current circumstances. Once this period is up we contact the customer to inquire about an extension or permanent signup. We employ a wide and accessible range of channels including face-to-face and calls to update the records of our customers in a bid to ensure that our data is truly reflective of our customers' circumstances.

## Key PSR outputs in 2020/21

We have added  
**293,293**  
new vulnerabilities on  
our PSR, an increase of  
7% compared to last year

Increased the number  
of households on the PSR  
by 11%, having added  
**120,985** households

Total reach of  
**1,191,695**  
households on the PSR –  
34% of our customer base

This year we have reached a total of **83,919**  
customers with mental health issues, exceeding  
the reported National Statistics figure of 68,000  
eligible customers in this PSR category by 23%

As a result of our efforts to support customers during the pandemic,  
we have increased the number of PSR registrations in the temporary categories  
**'Life changes'** and **'Young adult householder (<18)'**  
by **44%** and **31%**, respectively, since last year

Shared  
**38,327**  
PSR records improving  
customer data across  
other organisations

**100%**  
of PSR portfolio  
has been checked  
in the past 2 years

## Engaging to understand and respond to vulnerability needs

We engage proactively with customers, expert stakeholders and our partners on an ongoing basis. This engagement gives us precious insight into the evolving needs of our customers and provides valuable challenge for our strategy and approach to consumer vulnerability. All engagement is consistent with the embedded stakeholder engagement strategy presented on page 3 of our Part One submission.

We haven't stalled when faced with the obstacles posed by the pandemic. Over the past year we have reached over 96,000 customers and stakeholders through methods such as bilaterals, workshops and online surveys. These figures exclude all ongoing ED2 engagement.

The table below presents examples of these engagements, together with some key examples of the outputs delivered.



## Examples of our Engagement

Engagement Method	Examples of Stakeholders Involved	Outputs	Reach
<b>Vulnerability Partner Engagement &amp; Joint Projects</b>	Merseyside Fire & Rescue, North Wales Fire & Rescue, Groundwork North Wales, Home Energy Scotland, Citrus Energy, Energy Project Plus, Maggie's Charity, Forth Valley Chamber of Commerce, Forth Valley Sensory Centre, Borders Carers, Innerleithan Community Council	<p>Held quarterly meetings with each Fire &amp; Rescue Services in addition to winter project meetings 'Wirral Winter Warmth Trial' to discuss their services during the pandemic.</p> <p>Monthly reviews with HES to discuss best value energy efficiency support.</p> <p>Monthly reviews with Citrus Energy to discuss how they will support fuel poverty/debt management referrals.</p> <p>Quarterly meetings with EPP to discuss our various projects and programmes.</p> <p>Engagement with the President of Forth Valley Chamber of Commerce to discuss engagement reach and opportunity for SPEN to join the Chamber, and engage with members in developing low carbon technology connections, future investment across Falkirk, Grangemouth &amp; Strirling and supporting rural communities.</p> <p>In all engagement we are promoting PSR and our additional services, developing further means of raising awareness, such as articles in partners newsletters, banners of partners websites and involvement in existing projects and exploring new initiatives.</p>	160
<b>Online survey</b>	British Red Cross, Glasgow's Golden Generation, Food Train, Centre for Sustainable Energy, Community Energy Scotland	<p>Obtain information on the barriers to low carbon technologies for vulnerable groups.</p> <p>Gain information about the social return on investment of our additional services for vulnerable groups.</p>	100
<b>Customer Engagement</b>	The Royal Cheshire Show, Anglesey Agricultural Show	<p>Digital Virtual Shows/Safety Messages/Powerwise/Power Cut 105/PSR.</p> <p>Discuss PSR and Network Natters with their service users and carers that they support.</p>	40,000
<b>Network Natter Customer Engagement</b>	*Housing 21, *Sefton Older Peoples Forum, Carers, Alzheimer Scotland, *Macular Society (Kelso), Carers Cafe, *Kirkcaldy Hard of Hearing Group, Carers Centre International Womens	<p>Made contact with area dementia advisors in SPD area and held meetings and talks.</p> <p>Review action plans to provide care for older people.</p> <p>Engagement to deliver support to local carers and their families.</p>	657



## 2. How we address the needs of vulnerable customers

Granular and up-to-date vulnerability data and the ongoing engagement we have with customers, stakeholders and partners have allowed us to build a rich picture of our vulnerable customers' needs and, most importantly, have led us to define the needs on which we should focus our efforts. We consider these to be the core needs of our customers in situations of vulnerability:

### Support before and during a Power Cut

While we always strive to deliver a tailored response to our customers' unique circumstances, we have developed a portfolio of services that we deliver free of charge to our customers to address typical situations of vulnerability in effective and efficient ways.

### Fuel Poverty & Wider Social Support

These services are delivered by our trained staff as well as our 71 expert vulnerability partners who play an essential role in delivering real and meaningful impact on our vulnerable customers – we present their role in more detail and our wider partnership strategy later in this chapter.

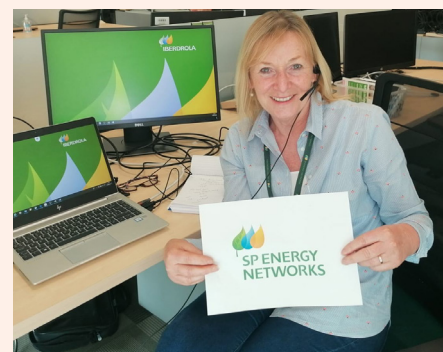
### Supporting Net Zero transition

### Support before and during a Power Cut

We take every step to safeguard our customers and communities during power cuts. Taking care to avoid causing any further detriment to customers as a result of power cuts is at the very core of our role in addressing consumer vulnerability.

While customers circumstances are unique, our engagement and experience tells us that our vulnerable customers need us to communicate clearly and to get them back on supply as soon as we can when a power cut occurs. Some customers, however, have more specific needs given the higher detriment they are exposed to when the power goes out.

All the services we offer to meet our customers' needs during power cuts aim to inform and support customers in tailored ways while preventing any detriment they may experience. Specifically, we offer two groups of services; Communication services and Power cut support services.



#### Communication services

These services are designed to ensure our vulnerable customers feel our presence and support before, during and after a power cut. From visits to a customers' premises before a power cut to providing accessible channels for communication during power cuts, we offer 12 responses to meet our customers' communication needs.

#### Power cut support services

Where possible, we take all steps necessary to prevent customer detriment tied to a power cut. When a power cut does occur, we work tirelessly to get our customers back on supply and, while we do this, we proactively offer a range of services designed to meet different types of customers needs. In 2020/21 we delivered 15,247 power cut support services, we present a breakdown in the diagram below.

IVR Messaging <b>91,337</b> Customers supported	Inbound fault enquiry <b>472,236</b> Customers supported	Text relay service <b>139</b> Customers supported
Restoration calls <b>218,704</b> Customers supported	SMS Updates <b>455,458</b> Customers supported	Dedicated PSR Helpline <b>7,798</b> Customers supported
Voice to landline updates <b>242,688</b> Customers supported	Website Accessibility <b>47,530</b> Customers supported	Transient vulnerability <b>9,713</b> Customers supported
Planned outage face-to-face visits <b>31,146</b> Customers supported	Added Security checks <b>2,021</b> Customers supported	Welcome and Welfare Calls <b>4,440</b> Customers supported

Generator Provision <b>6,042</b> Customers supported	Catering Vehicle On Site <b>4,475</b> Customers supported
Winter Welfare Packs <b>1,631</b> Customers supported	Hot Food Provision <b>988</b> Customers supported
Help in a Power Cut Support <b>2,111</b> Customers supported	



### Case Study

#### LEAP with Energy Project Plus

Energy Projects Plus delivers advice and support to residents across Merseyside and Cheshire to help them take action to reduce their energy bills and carbon footprint, with the ultimate aim of reducing fuel poverty and mitigating the impact of climate change.

During lockdown, EPP adapted their LEAP project delivery model from in house support to telephone based advice services.



#### Actions:

- In July 2020, we commenced online sessions, followed up with structured quarterly review meetings, with the LEAP Project team. We continue to have meetings enabling project updates and outputs as well as discussions about our projects and programmes.

#### Outcomes:

- Through the LEAP Project customers have had access to additional funding schemes such as ECHO (Emergency Central Heating Offer) for free gas boiler replacements, and HEART (Home Energy Appliance Replacement) for free white goods replacements. As a result we have supported 193 customers who received grants and services including Draught-proofing, White Goods, Warm Home Discounts and Energy Efficiency Advice.



## Fuel Poverty & Wider Social Support

Being a customer-facing organisations with a clear local footprint, we meet thousands of customers every day on the phone or on their doorstep. Across all of these touchpoints our trained staff often identify needs and situations of emergency that are not related to electricity. The situations range from health-related issues stemming from disabilities and mental health issues but also include wider complications of a social nature like poverty, unemployment and loneliness. Many of these are on the rise, due to socio-economic trends like an ageing population, smaller households and the impact of COVID-19 on the circumstances of many families across our communities.

### Fuel Poverty

A household is in fuel poverty if they are on a low income and face high costs of keeping adequately warm and other basic energy services. Customers in situations of fuel poverty can face 'heat or eat' choices and are more likely to be living in cold and damp homes, causing health conditions and impacting negatively on their wellbeing. As the provider of an essential service to the wellbeing of our customers we have a role to play, along our partners, other utilities and the government, to tackle the root causes of fuel poverty. Guided by customers and stakeholders we have developed a portfolio of services that aim to maximise our customers' incomes, lower their energy demand and improve the energy efficiency rating of their households.

Energy Advice & Efficiency Measures <b>30,326</b> Customers supported	Best Energy Tariff <b>316</b> Customers supported	Income Maximisation & Debt Advice <b>138</b> Customers supported
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Our customers and stakeholders believe we have a role to play in addressing these situations of vulnerability once we identify them and, where we are not best placed to act, refer these customers to specialised support. This is one of the main reasons why our partners are so critical to our vulnerability strategy. We offer two main types of responses to our customers' wider needs; Wider Social Support and Fuel Poverty.

### Wider Social Support

When we understand that the customer we are helping may need extra support to cope with an enduring issue or a temporary situation of distress, we work closely with our partners to offer the services which can best support our customers. Over 2020/21 we delivered wider support services to our vulnerable customers, below shows some of these.

RNIB Welfare Support Calls <b>2,769</b> Customers supported	Connections assistance <b>34</b> Households supported
Safeguarding through Fire Services – Safe and Well Programmes <b>437</b> Customers supported	Volunteering through the pandemic <b>826</b> Customers supported
Befriending, Carers Support, Dementia Support, Good Food & Friends <b>147</b> Customers supported	

## Case Studies

### Safe & Well

#### Actions:

Our Social Obligations team targeted areas with a high concentration of customers in vulnerable situations to offer a safety and advice visit. The team used the vulnerability mapping tool to identify the top ten LSOAs for PSR customers with the highest incidence of deprivation and affected by multiple vulnerabilities. Customers who accepted the offer were referred to Merseyside Fire & Rescue and an onsite visit was arranged. When onsite, our partners carried out a fire and safety check and shared advice with customers to minimise the risk of fires. As part of the conversation, they provided information about the PSR and the services we offer to customers on it. Customers who needed extra help were referred back to us and offered the full portfolio of services based on their unique circumstances.

#### Outcomes:

Following the success of this project, we are taking steps to replicate it to the other Fire Services, Health & Emergency Response, and Housing Associations for future initiatives. This tests the feasibility of secure data sharing and referrals, a key element of our Nexus of Partnership model. To date 437 vulnerable customers received a fire and safety support and additional advice. As a result of fire safety visits to 437 customers we were able to deliver additional support through services such as management of debt, befriending services and carers support to 373 of those customers.

### Improving wellbeing through income maximisation

#### Actions:

Via a welfare call, we contacted Mrs K who has an illness and physical limitations that restrict her ability to properly care for herself – we discovered she would benefit from advice on income maximisation. We referred her into Glasgow's Golden Generation (GGG) who arranged a Welfare Officer visit, who identified her needs and applied for Attendance Allowance on Mrs K's behalf, that was an award of £89.15 per week. Once granted, it triggered other allowances and rebates for Mrs K: GGG carried out a financial assessment to access Pension Credit, identifying Mrs K was entitled to a guaranteed level of Pension credit she has now been awarded, further reducing her council tax. Moreover, she was entitled to further Disability Premium of £63.00 per week, and Carers Allowance.

#### Outcomes:

Mrs K has maximised her income from £152.15 to £325.15 per week, plus reduced expenditure within Council Tax. This allowed Mrs K to have a better quality of life and enable her to be more independent and socially active. For instance, she can take a taxi to an appointment and social meetings and afford to put on her heating without ongoing concern around costs.

### Energy Efficiency grants

#### Actions:

We referred Mr. G to Energy Projects Plus, who conducted a telephone-based 'Home Energy Check' of the property to provide bespoke energy efficiency advice. It was identified through the Local Energy Advice Project that Mr G was eligible for both a boiler replacement, free of charge, as well as free white goods replacement. Mr. G was also referred to the company Income Max, who delivers expert benefits advice and support for our clients.

#### Outcomes:

While Mr. G approached our service with an enquiry about energy efficiency, we continuously assess our clients against the broadest range of support available. Through this approach, his new boiler and white goods have been installed successfully, which will lead to a reduction in his energy bills.

Installation of new boiler	£2,000
Installation of White Goods	£500
Savings from Behaviour Change	£171
Benefits Maximisation	£1,400
<b>Total value of all savings</b>	<b>£4,071</b>

## Ensuring that our customers are aware of the support we offer

We know that some customers, even those on the PSR, may not be aware of all the support we offer. In addition to offering these services proactively, we rely on a vast range of promotional channels, our partners and community events. The diagram below presents some practical examples of the channels we use to promote these services.

#### Promotional Channels

High street posters & postcard hand-outs  
Social media advertising  
Rail & Bus Station route advertising  
Council website advertising

#### Community Initiatives

Network Natters  
Carers Associations  
Volunteer centres  
The Food Train Network

### 3. We deliver industry-leading value

Delivering industry-leading value continued to be a priority over the past year. As our ambition demonstrates, we see the value of our actions as central to our social role as a Distribution Network Operator. While on one hand we strive to identify vulnerability and design effective responses to our customers' needs, on the other, we have a duty to keep charges for our wider customer base of 3.5 million households as low as possible.

Our current approach to vulnerability is the result of a trade-off between the positive impact we can make on the wellbeing of our vulnerable customers and the costs of these initiatives to our wider customer base. In a bid to reconcile two opposing goals, we have been early adopters and champions of standardised and transparent value measurement approaches such as Social Return on Investment (SROI). For the past 3 years we have consistently valued our vulnerability initiatives with the SROI tool and we have led the industry this

year in developing the industrywide SROI approach in partnership with Western Power Distribution. This project delivered by Sia Partners included extensive stakeholder engagements to shape the model and ensure the values used were the most appropriate and conservative. Whilst this was developed for use in ED2 planning and beyond, we have used the tool as part of this years submission to ensure full transparency.

#### The value we delivered in 2020/21

The table below presents the value we delivered to our customers, communities and society at large as a result of addressing our customers core needs: support in a power cut, fuel poverty and wider social support.

The SROI figure, which presents a monetary value for the benefit delivered for every pound spent, highlights the cost effectiveness of the real and practical support we have delivered for over 2.3 million customers in vulnerable situations.

	Initiatives	Outcomes	Reach	Cost	SROI (per £1 spent)
<b>Support in a power cut</b> Provide support to vulnerable customers both before and during a power cut through site support, website accessibility, text updates, etc.	<b>22</b> initiatives	Customers gain access to information quickly and easily in a wide range of formats to suit their preferences (web, mobile, in-person assistance) and needs (translation services, braille), a reduction in anxiety during a power outage, food and accommodation if needed, contact with SPEN easily and effectively.	<b>2,347,553</b> customers supported (e.g. customer groups reaching Medically dependent on electricity, mental health, dementia, unable to communicate in english, etc)	£0.57 per customer	£2.20 per customer
<b>Fuel Poverty</b> Deliver a wide range of support services to fuel poor customers such as debt advice, energy efficiency advice, income maximization, best tariff.	<b>6</b> initiatives	Customers receive many benefits through SPEN's wide network of partners: warm home discounts, energy efficiencies solutions (boilers, insulation, radiators, white goods), improved health & wellbeing, reduction in fuel bills, increased benefits from low carbon technology.	<b>30,780</b> customers supported (e.g. customer groups reaching fuel poor, elderly, low income, etc)	£0.73 per customer	£22.37 per customer
<b>Wider Social Support</b> Deliver a wide range of support services to vulnerable customers to support wider social issues such as dementia, social isolation, etc.	<b>10</b> initiatives	Customers receive many benefits through SPEN's wide network of partners: reduced grocery costs, improved health & wellbeing, increased benefits (such as carers allowance), support.	<b>8,961</b> customers supported (e.g. customer groups reaching elderly, disabled, dementia, etc)	£3.43 per customer	£6.74 per customer

**We have delivered a Total Gross Present Value of £3,374,898 this year with a £2.67 SROI for every £1 spent. This value is based on the conservative values of the new ALL DNO SROI tool developed this year.**

#### Case Study

##### Provide information on key Low Carbon Technologies

###### Actions:

- We conducted research on future vulnerability trends and the impact of the DSO transition on situations of vulnerability. The research, and the engagement with customers and stakeholders that followed it, found five barriers faced by customers in the transition to Net Zero:

1 Knowledge

2 Financial

3 Technical Capability

4 Opportunity

5 Willingness to Take Risks

- Based on this research we made a commitment to inform our customers of the benefit of Low Carbon Technologies, addressing several of these blockers.
- We delivered information on green energy technologies and identified grants and loans for our vulnerable customers to facilitate the uptake of low carbon technologies appropriate to the customers' unique circumstances.

- We also increased our support to vulnerable customers by delivering energy advice services through our partners Home Energy Scotland, Energy Projects Plus and NEST. As part of these services, we offer customers support and grants with technologies such as smart meters, heat pumps and solar panels.
- We updated our website page with advice on Low Carbon Technologies, particularly heat pumps and electric vehicles, outlining the details of connecting EV chargers to the grid, types of chargers available, and steps to follow to install an EV charging point and heat pump.

###### Outcomes:

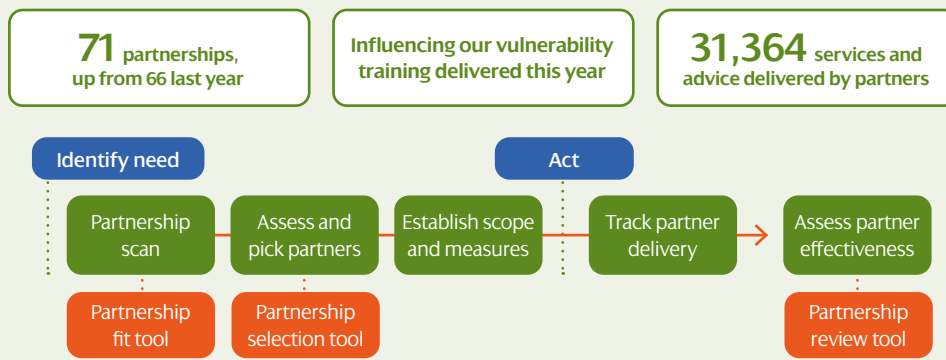
- Through the initiatives delivered with our partners, £136,132 worth of benefits were delivered to our vulnerable customers.
- 326 customers benefited from information and advice on reducing energy bills, improving energy efficiencies and low carbon technologies advice.

## 4. The key role of our partners

Partners are much more than third parties who deliver support to our customers on our behalf. The close relationships we have developed with our network of 71 partners across England, Scotland and Wales today play a key role in shaping our strategy and day-to-day efforts in addressing consumer vulnerability.

Our partners have a great deal of expertise we can learn from. As (mostly) local organisations, regularly in contact with customers in situations of vulnerability, they complement our staff by acting as our eyes and ears across the communities we serve. Today, partners influence our end-to-end approach to vulnerability, providing rich insight that informs our understanding of vulnerability and the design of services, promoting the PSR and the services we offer, gathering PSR signups and tracking the impact we have delivered.

Recognising the vital role of partners, we have established a clear partnership strategy, shown in the diagram below, that guides our efforts in growing our network of partners to deliver more comprehensive support and, in turn, industry-leading value to our vulnerable customers. The strategy is embedded by structured tools and processes that guide our staff in finding the right partners for each customer need.



### Reacting to the COVID-19 pandemic with our partners

The COVID-19 pandemic continues to have a dramatic impact on the lives of millions in the UK, and across our communities. Our ways of working, especially our approach to vulnerability, were redrawn by the obstacles and limitations posed by the pandemic over the past year. Social distancing and workplace safety rules mean we cannot meet customers at community events as we used to, this is especially true when it comes to reaching elderly customers who may be shielding at the moment.

To overcome this obstacle, we relied on our network of partners to promote awareness of our PSR and additional support services through their new ways of engaging with customers, from delivering food shopping and essential supplies to taking part in their Zoom meetings and supporting with volunteering.

We recognise that partnership are a two-way street and always seek to add value to our partners so they can provide better, more comprehensive support, to the customers we all serve. Over 2020/21 we leveraged our granular vulnerability data and resources to support our partners.

### Nexus of Partnerships – the future of partnerships

The Nexus of Partnership is the evolution of our partnership strategy. Introduced last year by SPEN, this model acknowledges that the efforts made by many organisations to address the needs of the same vulnerable customers are not as effective when delivered in silos.

#### This innovative model breaks down organisational silos to:

- Identify all of those who require extra help by casting a wide net across thousands of touchpoints daily – this will greatly improve the identification of vulnerable customers
- Cross-refer customers in situations of vulnerability, pool resources and capabilities across partners to deliver a full suite of support that will comprehensively address and alleviate the root-causes of vulnerability.

By establishing a tightly knit group of organisations that will share resources, data and capabilities to identify and address the same customers' needs at 360 degrees, the model promises to deliver unprecedented impact on vulnerable customers. Data sharing, and binding terms of reference will underpin the success of this partnership.

#### We have taken the first steps towards the realisation of this model over 2020/21:

- We are developing a structured terms of reference covering key functions like data sharing, governance, coordination and referrals to services with key partners. The terms of reference will form the backbone of the model that will be trialled and refined within 2021/22.
- We trialled secure data sharing methods, such as the successful implementation of Resilience Direct with Merseyside Fire and Rescue to test one of the key enablers of the Nexus of Partnership model.

## Case Studies

### Supporting RNIB in engaging those they support

At the beginning of the Covid-19 pandemic we were contacted by one of our partners, The Royal National Institute for the Blind (RNIB), whom we had worked with prior to assist with training materials and expert advice. The RNIB asked us for support during the pandemic, they were aware we held a PSR register and asked us to contact our Blind/partially sighted customers to provide them with the helpline number and further support that the RNIB could offer them. RNIB do not hold customer/client records, nor did they have the resource to contact them. We were happy to support our partner to reach out to 2,769 customers. We carried out welfare calls to ensure these customers felt supported, providing advice from RNIB and offering them additional support and services from the additional services we offer from our wider partner network.

#### Actions:

- We supported RNIB by carrying out welfare calls to our PSR vulnerable customers, providing them with advice and assistance from RNIB.

#### Outcomes:

- 2,769 blind customers or customers with restricted vision benefitted from tailored advice to their situations designed by specialist RNIB.
- 2,769 customers were also offered the full suite of services based on their unique circumstances.
- Our work with RNIB has resulted in 1,075 PSR records removed through data cleansing, and 1,329 new added.

### Producing COVID-Friendly material for our partner

#### Actions:

In 2020, we collaborated with Energy Action Scotland (EAS) to produce "Keep Warm and Well in Winter" advice material. We included information on how to join the PSR, how to lower bills without depriving yourself of comfort, and information on the additional services we offer.

#### Outcomes:

Energy Action Scotland delivered this advice to their network of members and support organisations, most of whom are frontline workers supporting fuel poor and vulnerable people. The frontline workers then reached their networks of elderly and vulnerable customers throughout Scotland, and health and social care organisations, local projects and Community Groups, charities, and support organisations. They provided energy efficiency advice that aims to lower customers' bills and increase their mental wellbeing while addressing their physical health. In addition to this, Ofgem's communication team has shared the leaflet with all the community groups they work with and has asked if they can share it via their Social Media Channels.



**30,000** reached



## 5. Addressing vulnerability is a company-wide effort

### Key achievements of our Vulnerability Training Programme 2020/21

**2,666**  
hours of training delivered

**92%**  
Employee Satisfaction

**7**  
Different types of training

From our Board to our frontline staff and contractors, everyone at SPEN has a role to play in supporting customers who are in situations of vulnerability. To ensure that all colleagues have the tools, resources and understanding needed to identify and respond to our customers' needs, we offer a comprehensive vulnerability training programme to all staff.

#### Our training empowers our whole workforce to make a difference by:

- Learning how best to approach a discussion with a customer on sensitive topics;
- Allowing them to identify signs that may indicate situations of vulnerability;
- Picking the right action that will meaningfully help a customer in need;
- Understanding the range of services that we or our partners can deliver to address the unique circumstances of our customers.

Our Vulnerability Training Programme has resulted in 2,666 hours of training delivered to our staff over 2020/21.

#### Partners involved in our Vulnerability Training Programme

MIND  
Alzheimer Scotland  
Fife Council's Dementia Friendly Initiative  
Local Authority Social Services  
SAMH  
Dementia UK  
UK DEEP Network  
Alzheimer Society  
Time to Change  
British Lung Foundation  
STAND Group  
RNIB

### 'Making a Difference' Training

Last year we introduced an overhauled training programme called 'Making a Difference'. This programme was based on research and developed by a vulnerability training professional who joined our team full time to further embed vulnerability knowledge across SPEN.

The programme is structured in Foundation Days and online training modules which are based on the situations of vulnerability most prevalent within our districts and communities (informed by our Vulnerability Mapping Tool).

The Foundation Day session equipped our staff with the knowledge, tools, and support to confidently help customers in vulnerable situations, empowering them to do what is needed to fulfill their needs correctly and effectively.

Our online training modules are targeted at specific customer-facing/customer-supporting roles in our operational districts and customer service functions. These are deployed at key intervals throughout the year and complemented by awareness messages and PSR and Additional

Services' promotion to enhance customer touchpoints. We have delivered three in-depth modules this year; Medically Dependent on Electrical Equipment Customers; Mental Health and Our Customers; and Our Customers living with Dementia. These modules build on our core vulnerability training provided to all staff, with further modules programmed throughout 2021/22.

In general, the training first focuses on vulnerability and the challenges these customers face day-to-day. It then explores how an outage, fault or work delivered by SPEN could impact customers and demonstrates how SPEN processes, conversations, and support options help our customers and communities when needed. An online assessment then supports this learning with set criteria and robust reporting to allow us to focus on knowledge gaps, results, and further support/training needs in a targeted fashion. All staff training systems are subsequently updated to record completed training.



#### Key Outcomes

41 sessions delivered

Overall score of 9.2/10 from employees who attended.

Increase of 3.2 points in overall knowledge and confidence to support vulnerability, following the training, giving an average knowledge score of 8.9/10.

91.5% pass rate.

### 'Customer Needs Tracker' Tool

Last year we introduced this tool which tracks our vulnerable customers' personal and diverse needs, allowing us to understand them and ensure that our support services and processes satisfy them. We have delivered bespoke individual training sessions to those who will be using the Tracker and created a set of multi-media training materials to support ongoing development.

This year, we have delivered a total of 41 individual sessions with access to the tool to ensure practical application within the session.

### Partner Awareness training

We created a bespoke video for use in sessions with our partners to improve their current and potential knowledge about SPEN and the support we can provide to their users. It covers who we are, what we do, how we support our customers, our vulnerability focus and the mutual benefits of partnership.

### Apprentice training

Our apprentices, like the rest of the workforce, have a role to play in supporting vulnerable customers, today but most importantly, in the future. It is vital they start to understand the importance of this support and the ways they can participate at the beginning of their time with us. We designed and implemented new training modules throughout the Apprentice journey that focus on Customer Vulnerability, our internal processes and support tools, as well as customer experience and support. These messages are aligned with the current Vulnerability training across SPEN and will continue to be reviewed and updated based on trends and our evolving strategy every year.

### Case Study

#### Supporting customers is part of our culture

##### Actions:

- In Spring/Summer 2020, 10 SPEN Trainees volunteered with Glasgow's Golden Generation. Among their duties, they called customers for a friendly chat, packaged and delivered groceries, essentials and puzzles to the elderly in Glasgow.
- Our staff volunteered at Christmas to deliver hot meals and packs (gloves, hat, blanket) around Wirral with fellow Age UK and Merseyside Fire & Rescue volunteers.

##### Outcomes:

- Our 10 trainees volunteered for a total of 819 hours across GGG three centres.
- SPEN provided a total of 200 hot meals and packs around Wirral.

## 6. Ambitious targets for the coming year

### Last years' targets: achieved

While we recognise our achievements we know that more needs to be done to support our vulnerable customers throughout the COVID-19 pandemic and the transition to Net Zero. Recognising the scale of this challenge, we set challenging targets for 2020/21 that touched upon all aspects of our approach to consumer vulnerability. Notwithstanding the profound impact of the pandemic on our ways of working we have achieved all targets.



The table below provides an overview of last years' targets and what we have done to achieve them:

Last years' targets	How we achieved these
Developing the Nexus of Partnerships approach	We are developing the terms of reference that will underpin the live trial of this model in '21/'22. The agreement will set out the key responsibilities of all parties involved and describes the processes (e.g. secure data sharing, processes for referring customers for partner support) that the parties will follow.  We successfully trialed secure data sharing via GCHQ-backed 'Resilience Direct' with Merseyside Fire & Rescue. This tool enables data sharing, a vital process at the core of the Nexus of Partnership model.
Continue to close PSR gaps (achieve our ultimate goal of 80%)	Reached 50% of eligible PSR customers, up 11% from last year. Added over 293k records focusing on the situations of vulnerability least represented in our PSR (3 least represented need codes account for 36% of all new signups).
Lead development of industry-wide social valuation measurement tool	Successfully set up the working group, in collaboration with WPD, that delivered the industry-wide Social Return on Investment (SROI) method is based on stakeholder engagement using conservative values. Whilst this was development for use by DNO's in their ED2 plans, SPEN has used this tool for this years submission to ensure total transparency as the tool is fully developed.
Deliver our plan to address the low carbon blockers we identified as a result of our research and engagement	In partnership with Home Energy Scotland, Energy Project Plus and NEST, we provided information and energy advice to over 326 vulnerable customers focused on Low Carbon Technologies. As part of the tailored advice and information provided to customers we offered support in accessing grants for new heating, self-generation and storage options, helping us shape our new services in this area for ED2.  We continued to improve our advice and information on Low Carbon Technologies by updating our literature and website pages ensuring our guidance was easy to understand.
Perform social value measurement of all initiatives aimed at consumer vulnerability	Measured every service and initiative offered. The diagram on page 7 provides an overview of all services and initiatives measured through the industry-wide SROI method.
Address the outputs of the work undertaken on understanding household income and impacts on the definition of fuel poverty	Fuel poverty decreases for all GB nations including customers in SPD & SPM by 2035 relative to the 2017 position given factors which reduce Fuel Poverty such as improving the Energy Efficiency Rating of Housing Stock and increases in efficient appliances. Energy Efficiency can outweigh the impact of decarbonising domestic heat however this does not take into account the additional costs of installing new low carbon technology. This year we have delivered £503,693 gross present value to support Fuel Poor customers whilst engaging customers to develop our long term role and targets to help all fuel poor customers in our areas.

### Targets for the coming year: continuing to grow

For the coming year we have set ourselves ambitious targets. Building on last year's, these new targets will allow us to better safeguard the communities we serve and continue to meet our customers' core needs at a challenging time.

1

Further develop our nexus of partnerships model by recruiting key partners, finalising the terms of reference and shaping data sharing arrangements.



2

Improve the transparency and accuracy of our value measurement by gathering detailed data on the impact delivered by our services and initiatives.



3

Develop a comprehensive customer-facing, accessible resource to inform, educate and link to expert advice and funding for our vulnerable customers. This initiative aims to address the five barriers faced by our customers in taking part to the Net Zero transition, empowering our customers to access information tailored to their specific circumstances.



4

Continue to close PSR gaps to reach 80% of all eligible PSR customers, focusing efforts on situations of vulnerability least represented on the PSR. We will also conduct research and analysis on the broader vulnerabilities outside the common needs codes which we will consider as part of our future strategy.











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