

**Burnside Regeneration: Next Generation Fund**

**Burnside Community Energy**

**Customer Expectation Map**

draft 2

15 December 2020

**Expectations for different tenures:** Owner occupier. Private Renter. Social Renter. **Different personas:** Do we want to envisage different personas?

**Life changes that can occur over lifetime of the home/change of occupier:**

| Expectation  | Action for ESCO   |
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| <b>Information Supplied to Potential Purchaser/ Tenant</b>   | <b>Home Buyer/Renter Information Pack</b>   |
| I understand how my new home is heated and powered using low carbon/renewable energy rather than using gas and a mains electricity supply. | Provide a diagram/document explaining how it all works, e.g. "My new home is heated by a [low carbon/naturally occurring] heat source that is delivered by [hot water pipes] to my home. I have a [heat exchanger that heats up the water in my radiators/ tank/ underfloor heating]. The power/electricity supplied to my home is generated mainly on site using solar panels on [roofs/ground] and is topped up from the grid if needed. Batteries store the electricity to allow me to use renewable power when the sun isn't shining. I can charge my car using renewable electricity supplied by the PV panels." |
| I understand why my new home energy supply has been designed like this.  | Document explaining climate change and carbon-based energy issues, where UK energy comes from now, the energy transition plus the benefits of community-owned energy.   |
| I know that my home is very energy efficient so that it will not require a lot of heat to be warm and comfortable.                         | Information about the fabric first approach and energy performance of the homes, so that they are well insulated and well ventilated without losing a lot of heat. Estimated annual bills depending on size of home, number of occupants and lifestyle. Principles on pricing and fairness.   |
| I understand that my heat and power is supplied by [local ESCo] rather than market energy suppliers (like the big six)                     | Information about [local ESCo] – history, the community energy movement, community involvement and benefits, local economy. FAQs to address key concerns e.g. what happens if...  |

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| <p>I understand that my heat and power is supplied by [local ESCo] which owns and operates the heating and power supply to [all the homes / my home] as a local community energy system. This means that I [cannot change energy supplier / will be charged to use the system if I decide to change energy supplier]</p>                                       | <p>Information on energy supply regulation and standards e.g. Heat Trust, Code of Practice, rights to change energy supplier and how to find more information – see below.</p>   |
| <p>I get reliable heat and power</p>   | <p>[Local ESCo’s] performance guarantees and processes to deal with supply issues. <i>Behind the scenes: System designed for reliability, system monitoring in place, repair contracts in place with maximum call out times, 24/7 reporting system for any breakdowns, back-up system. System for advance notice of any planned interruptions for maintenance.</i></p>   |
| <p><b>Prior to Moving In</b></p>   | <p><b>Energy Supply Agreement</b></p>  |
| <p>I understand how I will be charged for heat and power and what I am likely to pay, but this will vary depending on how I use energy.</p>  | <p>Unit rates and standing charges set out. Example bills explained e.g. heat / hot water bill and power bill separated with fixed and variable charges. Explanation of billing standards [local ESCo] meets e.g. Heat Trust <i>Behind the scenes: Billing system defined. System to assess performance against standard set up.</i></p>   |
| <p>I will receive an annual account statement</p>  | <p>Example annual account statement with explanation. Typical comparison with previous year by month. <i>Behind the scenes: Metering, data collection and comparison system set up. Customer contact management system.</i></p>  |
| <p>I understand why my energy charges could change in the future, based on clear data with triggers by date or by changes to external costs (like fuel/components) because this is in my Energy Supply Agreement. I would be given a minimum of 31 days’ notice of heat charges changes; changes to my heat charges cannot be made more than twice a year.</p> | <p>Explanation of why prices may change, and examples of past changes in unit rates. Comparison of the average energy bill in these homes with average UK homes <i>Behind the scenes: develop principles/criteria around future energy prices and how these will be determined. Incorporate customer expectations around market prices. Principle of fairness: e.g. balancing needs of customers and investors, equivalence with other homes, not being able to raise charges by more than a certain amount at any time?</i></p> |
| <p>I know how to set up my account and payments and what payment options I have</p>  | <p>Options explained for direct debits or standing orders and pre-payment and how to decide which is best for you. <i>Behind the scenes: Account and data handling systems set up. Billing system set up. Mechanisms for debt handling. Assessment mechanism for pre-payment. Budget in</i></p>  |

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|   | <i>ESCo to install pre-payment meters or assist with payment scheme support if required.</i>   |
| I understand that the heat network is registered with Heat Trust and what this means. I have a <u>Customer Charter</u> that sets out the terms of service from [local ESCo].  | Customer Charter: Explanation of the standards [local ESCo] will meet, and how these are determined – Heat Trust and Code of Practice. Provide Terms and Conditions<br><i>Behind the scenes: Define T&amp;Cs and check against other suppliers. Ensure the system meets the standards and set up system for continuous monitoring against this.</i>  |
| I have a separate <u>Heat Supply Agreement</u> that sets out the service contract between me and [local ESCo] which covers my heating and hot water supply and I have an Electricity Supply Agreement OR I have a combined Energy Supply Agreement which will show my use of heat and electricity separately OR I pay for heat and hot water and electricity through my leasehold or tenancy agreement. | Provide copy of the Energy Supply Agreements prior to customer moving in. Provide easy to understand explanation of the small print.<br><i>Behind the scenes: Determine whether to offer single or combined supply agreements. Agree with landlords whether/how to manage payments through tenancy agreements.</i>   |
| I understand that I will receive a Customer Information Pack when I move in (I can see this before I move in)   | Customer Information Pack to be provided<br><i>Behind the scenes: Customer Information Pack developed and tested with Phase 1 homes to check it makes sense and is useful, improvements made to it. Having a person on the phone or ESCo representative to visit and explain. Estate agents have this explained to them so they can market this clearly. Make a vimeo video/cartoon of how the system works and how it works for the customer?</i> |
| <b>After Moving In</b>  | <b>Customer Information Pack – containing...</b>   |
| My energy system is easy and intuitive to operate. I don't notice it.   | Simple explanation of basic controls and how to get the best out of the energy system.   |
| I know how to operate my heating and hot water system and that it differs to using a gas boiler based central heating system  | Simple explanation of the heating system and controls. How to get heat when needed, how the storage system works.  |
| I know how to keep my bills down through effective use of my heating, hot water and electricity system  | Energy saving advice: complement with customer stories.<br><i>Behind the scenes: work with early customers to gather feedback and stories. Including vox pops. Recruit 'expert customer' or 'customer champion' who can be a community peer supporter/explainer.</i>   |

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| <p>I have learnt how to make the best use of my energy system so that I can help [local ESCo] to provide me with renewable energy. I know how to use power at times of day when it is cheaper/more efficient through price signals on my [Energy App]</p> | <p>Information to help customers load shift to use best value energy. More detailed information on how the system works for those that are interested: time of day controls, best times to use heat/hot water, understanding the storage system, understanding when it's best to charge EVs etc. Include updates based on customer feedback. Ask customers to provide their stories for Customer Information Pack.<br/><i>Behind the scenes: determine whether to use time of use tariffs, set up management system and customer information system (app?).</i></p> |
| <p>I understand which [components] I own and need to repair or maintain myself [and what standards/type of installer to use?]</p>   | <p>Explanation of the boundary between the ESCo system and the customer's home system. Explanation of what will need servicing when, and what might go wrong. Advice on arranging service contracts.<br/><i>Behind the scenes: list of local contractors who are trained to maintain/repair customer equipment. Reminder or checklist provided on annual statement.</i></p>   |
| <p>I understand which [components] are the property and responsibility of the ESCo and that they may need access to my property for maintenance and repair.</p>   | <p>Explanation of the ESCo's maintenance plans and how that is managed. How to get in touch if you spot a problem.<br/><i>Behind the scenes: maintenance contracts and warranties in place. Ensure local contractors are skilled up to look after the system.</i></p>   |
| <p>I know who to contact/call if there is a problem e.g. supply interruption or other technical problem.</p>  | <p>Contact routes: phone, email, text, app, website<br/>Explanation of minimum standards for response times for different situations.<br/><i>Behind the scenes: set up customer service operation including contact mechanisms, emergency response system, compensation system, means for vulnerable customers to make contact. This can be on a sticker by the meter/on key appliances.</i></p>  |
| <p>I understand the safety aspects of my heating and hot water system, and what I should/should not touch</p>   | <p>Safety information provided in the Customer Information Pack; maybe also in a sticker on key appliances or by the meter.<br/><i>Behind the scenes: develop and test safety information with early customers.</i></p>   |
| <p>I can register on the Priority Services Register with my ESCo if I have additional communications needs (eg need large print etc)</p>  | <p>Large print billing. (Braille or other languages?)<br/><i>Behind the scenes: set up Priority Services Register system and system to assess need for other communication methods.</i></p>   |
| <p>I can register as a Vulnerable Customer and the ESCo will hold my details on the Vulnerable Customer Register.</p>   | <p>Information for customers who are significantly less able to protect themselves or their interests in the energy market and/or significantly more likely to suffer detriment than a typical heat customer (Ofgem definition)</p>   |

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|   | <p><i>Behind the scenes: System to hold information in CRM system and update/add to. Training for staff in how to manage vulnerable customers. Special provision of temporary heat and power or emergency power supply eg for medical equipment reliant on electricity. This may mean being able to set another person up to manage the billing.</i></p>   |
| <p>I know how to contact the ESCo if I am having difficulty paying my bill.</p>   | <p>ESCo will set up a payment plan. Information on how is this handled/assumption of a certain level of debt in the system/cost of managing support eg via CAB, cost of payment plan or debt collection etc</p> <p><i>Behind the scenes: the metering/billing system does not allow a customer to build up a large level of debt; contact is made rapidly if there is non-payment. Training for staff in handling customers with financial difficulties. Friendly, approachable staff.</i></p> |
| <p>I can request a pre-payment meter if I am having difficulty managing my bills and this will be installed at [ESCo or Housing Association?] expense.</p>                    | <p>Information provided on options and costs of pre-payment meters, and how to contact ESCo.</p> <p><i>Behind the scenes: Budget for cost of pre-payment meter installation</i></p>  |
| <p>If I refuse to pay my bills I know what process the ESCo will follow: namely access to install a pre-payment meter</p>   | <p>Set out process in simple language.</p> <p><i>Behind the scenes: Ensure process complies with Ofgem regulations and takes account of vulnerable customers.</i></p>  |
| <p>I know how to provide feedback to the ESCo if I want to</p>  | <p>Information in the Customer Information Pack and easily available on website and all communications.</p> <p><i>Behind the scenes: A system for taking customer satisfaction and feedback and acting on it. An ESCo director responsible for managing customer satisfaction and Heat Trust compliance.</i></p>   |
| <p>I understand how to complain a) to the ESCo which will respond within 8 weeks if I am still not happy I know how to complain b) to the Heat Trust or Energy Ombudsman.</p> | <p>Complaints procedure clearly set out in Customer Information Pack, and easily accessible on website.</p> <p><i>Behind the scenes: Complaints procedure in place and staff trained in handling complaints. ESCo director responsible for monitoring and keeping up to date with changes in legislation.</i></p>  |
| <p>My personal, bank and energy use data is secure</p>  | <p>Explain the Data protection systems in place</p> <p><i>Behind the scenes: An ESCo director responsible for GDPR and data protection; system designed and monitored for data security/data breaches; procedures in place to act [fast] should a breach occur. Staff trained on data security.</i></p>  |

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| <p>The internet connection to my meters and controls are secure</p>  | <p>Explain the need for an internet connection, what it does and how security is maintained<br/> <i>Behind the scenes: specified in the system design - a separate line to the property that cannot be disconnected? System in place to ensure it is working or deal with it if not.</i></p> |
| <p>The ESCo can take remote control of my heat and hot water demand to reduce my costs, make the system more efficient and maximise use of the zero carbon energy generation. I can over-ride this if I want to. I understand the process.</p> | <p><i>This might be too complicated or something for the future. Needs to consider benefit sharing between ESCo and customer and be transparent in billing.</i></p>  |
| <p>I know the ESCo will give me X days/weeks notice of disconnection for planned repairs and maintenance.</p>  | <p>Clear information provided and a mechanism to get information to customers via different media.<br/> <i>Behind the scenes: the ESCo has the necessary contact details for each customer.</i></p>  |
| <p><b>Joining the Community Energy Company</b></p>   |  |
| <p>I am happy that my heating and power comes from a not-for-profit ESCo that puts its profits back into making the energy system better, and benefits Burnside residents.</p>   | <p>This information is shared in the annual statement and in local publicity.<br/> <i>Behind the scenes: ESCo monitors system performance but also wider benefits such as CO2 reductions, community benefit and so on</i></p>  |
| <p>I can join the ESCo as a member, invest in the ESCo through purchasing community shares, this means I can vote at the AGM and become a director or customer representative on the board.</p>  | <p>Explained in Home Buyer/Renter and Customer Information Packs, BCE/ESCo website and publicity; 'Energy Walks' around the development and an open means to join the ESCo.</p>  |