



NINES – Northern Isles New Energy Solutions  
Customer Engagement Plan

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## **1 Introduction**

As part of our work to provide a reliable and sustainable energy supply for Shetland, Scottish Hydro Electric Power Distribution (SHEPD) is working with Hjatland Housing Association to install new 'smart' storage heating systems in approximately 250 homes. This document sets out how SHEPD will engage with customers in relation to this work.

The Northern Isles New Energy Solutions project aims to increase the contribution that local, smaller scale renewable generation makes to meeting Shetland's energy needs. This is part of a bigger plan, known as 'Shetland Repowering' which will ensure a reliable and sustainable supply of electricity for Shetland in the future.

An important part of NINES is the installation of 'smart' storage heaters and water heating in around 750 homes across Shetland. This will help us manage electricity demand on the energy network and allow us to connect more renewable energy to the Shetland network.

The first homes to receive the new heating system are owned by Hjalmland Housing Association. We have plans to make the heating system available to private homes in 2013; however this document relates only to the engagement we have with customers at this stage of the project, who we define as Hjatland Housing Association tenants who are to have the system installed in their home.

All information gathered in this trial is covered by our Privacy Policy, Data Protection Strategy, is subject to the Data Protection Act 1998 and all other relevant and applicable laws. This trial will begin in the first quarter of 2013 and end in December 2013.

## 2 Strategy and Scope

Customers are at the heart of the NINES project. Customers are critical to the success of the project and potentially to the future of renewable generation on Shetland. This is why customer engagement and management is imperative to the successful implementation of the project.

In order to gain a better understanding of the target audience for demand side management (DSM) capability, we have split potential customers of DSM into two distinct categories – Asset Owners and Customers, the definitions are as follows;

**Asset Owner** – A person or organisation who owns the home inclusive of the storage heating devices; for the purposes of this engagement plan the Asset Owner is Hjatland Housing Association.

**Customer** – A person(s) or organisation who is the energy user & electricity account holder of the home; for the purpose of this engagement plan the Customer is the tenant(s) occupying the selected home.

In this document, we explain:

- How we will engage with the customers who are receiving the new heating systems
- The arrangements we will have in place to undertake customer engagement
- How we will treat and protect personal data

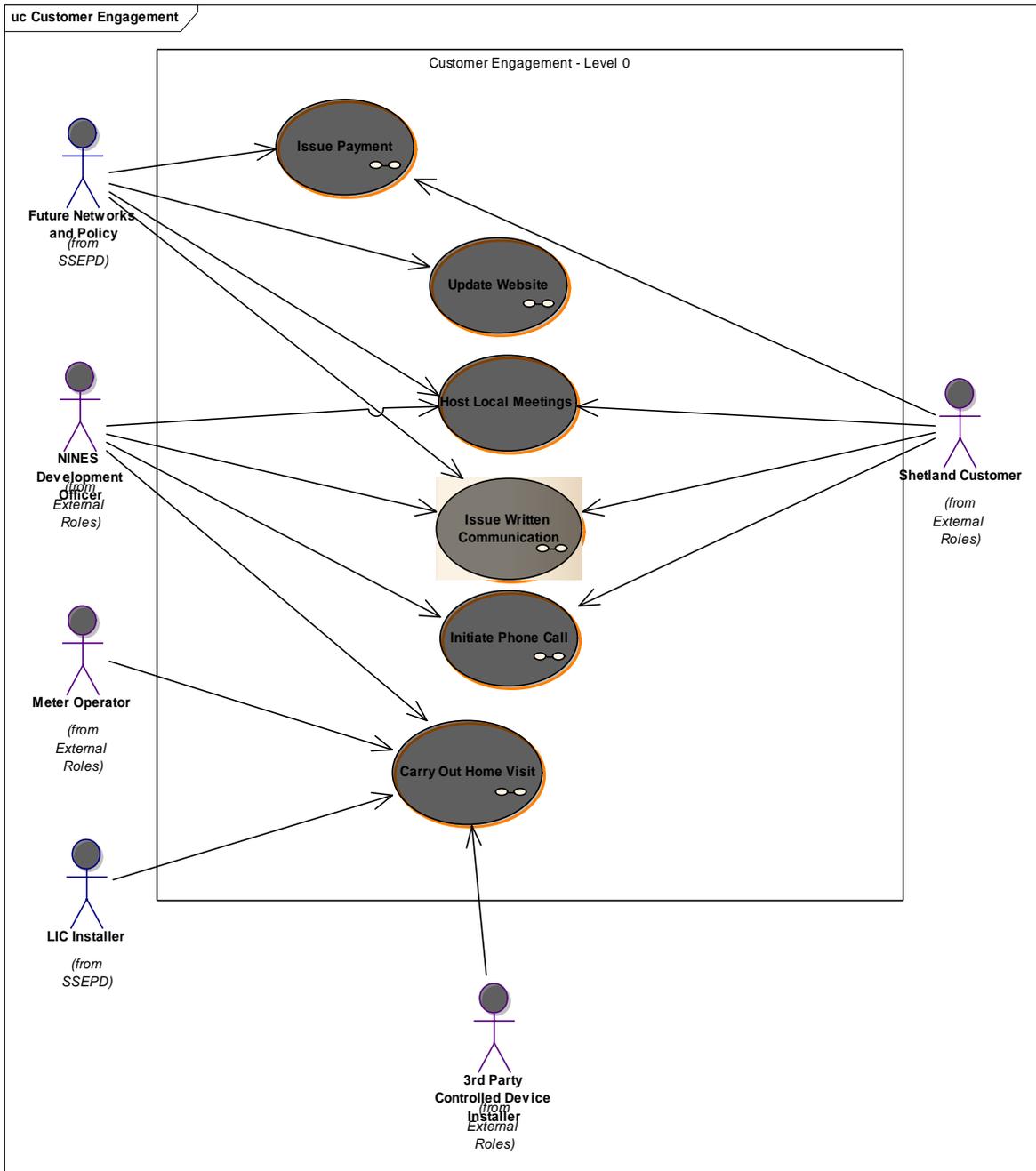
*Please note that the intention of this document is to advise how customer engagement will be managed in respect to the aspects of the project, either under the control of or influenced by SHEPD.*

## 3 Communication Channels

There are a variety of methods and mediums which can be used when engaging with domestic customers. However in relation to NINES, the project has adopted 6 core methods which we will use to engage directly with domestic customers.

The Use Case model below provides a pictorial representation of these methods. From the diagram it is clearly shown which parties will utilise the different methods to communicate with the customer. A full list of the planned communications can be seen in **Appendix A**.

### 3.1 Communication Channels



## 4 Participating Customers

The aim of the project is to provide DSM capability within the confines of the customers current supply agreement, including;

- Preferred Electricity Supply Company
- Tariff
- Preferred Payment Method

It is not the intention of the project to influence the customers existing supply agreement, nor to endorse any suppliers or tariffs. When a customer agrees to participate in the project the customers supply details will not be affected nor will the customer's right to change supplier be comprised.

Customers of the selected homes will be informed that with the installation of the new heating devices, SHEPD will make changes to their current flexible charging regime. SHEPD will ensure that the changes are understood and that the customer is given the opportunity to ask questions before we gain their consent to collect data pertaining to the usage of heating (inclusive of hot water) for research and development purposes. We will also notify the customer that we will contact their electricity supplier to inform them that the home has been selected to participate in the project.

In order to facilitate DSM within the existing confinements there is a possibility that metering changes may need to be undertaken. Any such changes will be done by the meter operator – in this case SSE Metering, using their existing processes and procedures.

### 4.1 Prepayment and Priority Service Registered (PSR) Customers

The NINES project has recognised that customer's circumstances differ and therefore we will ensure our approach to DSM for vulnerable and high risk customers will include a high level of duty of care.

The first step in the process is to identify the homes, including which homes are prepayment customers. This information will be provided by Hjatland housing association who will use their existing records. In addition all addresses provided by HHA will be cross checked against SHEPD's priority service register. We expect some inconsistencies between the two databases. Therefore when contact is made with customers SHEPD will verify, validate and proactively identify signs of vulnerability when making direct contact with the customer, either directly at public meetings or through visits to the customer's home ensuring any changes captured are reflected on the existing priority service register.

The identified customers will still be asked to opt into the project, and will be given the same terms and conditions as all other participating customers; however implementation of DSM capability will differ

slightly. The decision has been taken not to modify their existing charging regime until we have gained a greater understanding of how the proposed changes may affect the customers and their personal circumstances, particularly their energy usage.

It will only be when the partners involved in the project feel confident that enough data and learning has been obtained that we will begin to make changes to these customers' current flexible charging regime. This will ensure that we do not expose the customer to any risks or adversely affect them in any way. Customers will be fully informed of this change prior to the implementation, with SHEPD ensuring that the customer fully understands the impact of the change. Post implementation SHEPD will introduce a procedure to check that these customers are not being adversely affected by the trial.

In addition to the duty of care with postponing full flexible charging for PSR customer, we will also endeavour to facilitate all direct customer contact through a home visit; in the case that we receive no response to the visits we will revert to issuing a letter to the customer. Extra time will be allocated for dealing with these customers to ensure that the customer has a full understanding of the project, what they are consenting to and how they will be affected.

#### **4.2 Joining SHEPD's Priority Service Register**

Customers will be informed in communications that we can offer extra help to eligible customers who register for priority services and how they can register. Where SHEPD have recognised vulnerability in our interactions with the customers we ourselves will seek customers consent to register them on the priority services register.

### **5 Reasons for Engagement**

The introduction of DSM will see Distribution Network Operator's having more customer contact and thereby becoming more customer focused.

It was with this in mind that the NINES project has tried to take a pragmatic approach to customer engagement and management. The aim is to be open and honest at all times, keep communications clear, concise and informative, minimising disruption and inconvenience to the customer whilst providing the correct support network needed for customer contact.

These very reasons are why in a close knit community like Shetland, it is important for customers to have a local representative who knows what is happening and can answer queries/concerns they may have. HHA and SHEPD have entered into a joint agreement to recruit a NINES Development officer, employed by HHA, funded by SHEPD.

Primarily, direct contact will be made by the NINES Development Officer with support and guidance from SHEPD. The aim is to build a trusted relationship with the customers, making sure the customer experience is as effective and efficient as possible, whilst ensuring customer's expectations are met.

Full roles and responsibilities are described in the customer engagement business process model.

## **5.1 Informing Customers of the Project**

Initial contact with customers will be to provide the background to the project, what it means to the local community, what it would mean to them personally and to describe the installation work which will be needed to facilitate DSM. By being open and honest we hope that customers will not only agree to be involved, but that they will become a supporter and champion of the project.

Important contact details will be provided to customers who wish to contact the project with any queries or concerns they may have. We have attempted to mitigate any concerns from customers by arranging to have a demonstration storage heater in place in the HHA offices which the customers can drop by and visit. The NINES Development officer will be equipped to explain how the devices work.

## **5.2 Gaining a Customers Consent**

Obtaining a customers consent to collect the data in relation to their heating usage, is critical to the success of the project, without it we are unable to collect the valuable data which allows a number of models to be built on our behalf by the University of Strathclyde. These models will provide the project and industry with knowledge and learning.

In exchange for the customer agreeing to SHEPD collecting the data pertaining to their heating energy use and allowing energy to be stored we will be offering customers an ex-gratia payment. The payment will be made direct from SHEPD to the customer, using the current business processes for issuing payments to customer.

## **5.3 Ongoing Communication**

To maintain the trusted relationship with the customer and to maintain the customer's interest it is imperative that customers are provided with or given access to regular news updates.

By keeping customers informed and their levels of interest high, we hope this will encourage customers to participate in the project.

Alongside informing customers of updates we will actively encourage customers to keep the project team up to date, with both changes in their circumstances and with their invaluable feedback throughout the lifecycle of the project from start up communications through to final delivery and implementation.

The Nines Development Officer will collate and analyse this data to help the project understand areas of improvement, allow us to tailor communications to ensure maximum effectiveness and provide learning for future projects.

#### **5.4 Customer Contact**

With any customer facing project it is important that customers have a mechanism to make enquires, raise concerns, provide feedback or raise complaints. Without this type of customer support network being in place, we would struggle to measure the success of the project and understand the affects it has on domestic customers.

Customer Contact will be handled in accordance with our current customer service processes. Details of who to contact, how to contact SHEPD & HHA, and what the customer can expect in response will be provided when initial contact is made to inform customers of the project, and then as part of the welcome pack.

#### **5.5 Concluding Customer Participation**

We understand that customers who are engaged with the project may leave the project for a number of reasons – moving home (to a home which does not have DSM capability), a change in circumstances or they just no longer wish to participate in the project. The 'Leaving Process' will be similar for all scenarios, and once notified we will stop collecting data through our monitoring devices. A letter will be issued to the customer informing them the date we have stopped collecting data.

SHEPD believe that the DSM delivered as part of NINES is an enduring process which will continue to operate after the project has completed. However we are aware circumstances may change, if this is the case then SHEPD will arrange to have the monitoring equipment removed and the customers service will be restored to normal i.e. pre NINES implementation.

### **6 Safety**

Safety is one of SHEPD's core values and fundamental to all the activities and work which we or anyone employed by SHEPD undertake.

We will ensure that any installations of equipment will be carried out in a safe and secure manner, wearing the appropriate personal protective equipment, complying with regulations, codes of practice and relevant legislation.

All staff making direct customer contact will show appropriate identification complete with a photograph, the employees name and the company name. Where a customer has a password, the employee carrying out the home visit will expect to verify the password before being granted access to the home.

Duty of care will be undertaken when working in a customer's home minimising disruption and inconvenience to the customer, ensuring the property is left in a similar state 'as found' as far as is reasonably possible.

Full health and safety checks and risk assessments will be undertaken prior to any installation work. Safety checks will be carried out pre and post implementation. A handover pack will be left with the customer, including user manuals, emergency contact numbers, test certificates and warranties.

## **7 Treatment of Customer Data**

NINES project will see customer data being collected in one of two ways; Customer survey or automated data collection via monitoring equipment installed in the customer's home.

### **7.1 Home Survey Data**

Home surveys will be carried out by HHA, using their own process and procedures. It will be SHEPD's responsibility to request the data which we require in order to engage with and contact the customer for the reasons stated in section 5 of this document.

Data expected to be required but is not limited to as follows;

- Property Address
- Tenant Name
- Contact Phone Number/Email

### **7.2 Automated Data Collection**

Data collection will only be turned on providing that a signed consent letter has been received and processed. The data which will be collected via the communication equipment installed within the home will be anonymised during the NINES data management process. All data collected will be in relation to the heating energy used by that home, including values such as remaining storage capacity.

Consequently, data within the NINES project cannot and will not be used to tailor marketing strategies or used to analyse an individual customer's behaviour.

Access to customer data will be limited to SHEPD staff and partners working on the project. Customer usage data will not be shared with HHA, nor will it be shared with any electricity supplier including the customer's chosen supplier.

For more information in relation to the treatment of data, please refer to the Northern Isles New Energy Solutions Data Protection Strategy.

Data presented for the purposes of learning dissemination will be anonymised.

## Appendix I – Planned Communications for NINES

Communication Method	Communication	Information that will be provided	Customers Affected	Responsible Party	Project Phase
Local Meetings	Local community meetings	Background to project Opportunity for customers to raise concerns Consent Letter	All	SHEPD HHA	Initiation
Payment	Ex-Gratia Payment	Customer Cheque Compliments slip	All	SHEPD	Development
Written	NINES awareness	Background to NINES Benefits to the community Benefits to the customers Expected Timelines	All	SHEPD/HHA	Initiation
Written	Press Releases	Project Status Updates Contact Information Advertisement of website	All	SHEPD HHA	Throughout Lifecycle
Written	Consent Letter	Overview of project Clearly defined asking for consent Term & Conditions	Non PSR customers	SHEPD	Initiation
Written	Welcome Pack	Product Information Contact Details Copy of signed consent letter	All	SHEPD HHA	Development

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		Feedback from 6 homes customers			
Written	Response to Complaint	A written response to a customers complaint	All	SHEPD	Throughout Lifecycle
Written	Confirmation of Opt Out	Confirmation of the date they ceased to be involved Confirmation that data collection has been stopped Flexible charging has ceased	All	SHEPD	Post Implementation
Written	Handover Pack	User manual for new devices Test Certificates Contact Details	All	SHEPD HHA	Implementation
Written	Surveys	Reason for survey How the data will be used Who will access the data	All	SHEPD HHA	Throughout Lifecycle
Phone Call	Respond to customer contact	Answer to the customers contact	All	SHEPD HHA	Throughout Lifecycle
Phone Call	Confirmation of Visit	A phone call will be made in advance of a scheduled visit to ensure the visit is still suitable	All	HHA	Development
Phone Call	Reschedule Visit	Where a customer has requested a reschedule a phone call will be made to confirm new appointment	All	HHA	Development Implementation

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Website	Project Updates	Project Progress Latest News	All	SHEPD	Throughout Lifecycle
Website	Publish Knowledge & Learning	Reports Copies of presentations Business Analysis Models	All	SHEPD	Throughout Lifecycle
Website	Provide 'Contact Us' facility	Details of who to contact Direct request for contact to be made	All	SHEPD	Throughout Lifecycle
Home Visit	Demonstration of Storage Devices	Advice on how to use storage devices User guide	All	HHA	Implementation
Home Visit	Consent from Priority Services Customer	Walk through of project Advice on how it will affect the customer Consent Letter	PSR	HHA SHEPD	Initiation

## Appendix II – Customer Consent Letter

Inveralmond House  
200 Dunkeld Road  
PERTH  
PH1 3AQ

Telephone: XXXX  
Email: XXXX  
Website:

Name  
XX XXXX ADDRESS

Date: XXXX

**Our Reference:**

**Your Reference:**

Dear XXXX

### **Northern Isles New Energy Solutions (NINES)**

We are constantly looking at ways in which we can improve how our networks operate. As part of that continual improvement, the NINES project aims to solve a number of the challenges the islands' networks are currently facing.

To alleviate these challenges SHEPD are working in partnership with Hjatland Housing Association, to upgrade your existing electricity heating system. This means you will be provided with a more efficient, controllable heating system enhancing the level of comfort in your home.

To ensure you are receiving the best service possible, SHEPD will make changes to your current flexible charging regime, allowing new renewable generation to connect to the electricity network in Shetland whilst ensuring that you have heat and hot water available when you need it. These changes will not affect your current agreement with your chosen electricity supplier; however we will notify them that your home has been selected to participate in the project.

To establish the effect the new heating system has on your levels of energy consumption, SHEPD will arrange to install a monitor in your home, which will help us gather energy usage information on your heating and hot water use. The information we gather will form part of the data we will analyse for research and development purposes. All data collected will be used to demonstrate the effectiveness of the systems we are evaluating. All data will remain confidential and no personal data will be disclosed. As a token of our appreciation for allowing us to store energy, alongside collecting and analysing the data a payment of £100 will be made payable to you.

Hjatland Housing Association will be in touch to arrange access to your home to install the heating system and monitor. Once you have read, understood and agree to the terms and conditions, please complete the attached form below, and send it back to ourselves in the prepaid envelope.

If you have any questions please do not hesitate to contact us on the above contact details.

Yours faithfully

Colin Mathieson

**Terms and Conditions**

1. The customer shall retain the ability to boost comfort levels which override any signal from the network operator.
2. Whilst the new heating system offers an increase in energy efficiency, if you choose to increase the level of heat in your home we cannot guarantee these efficiency savings will be reflected in your energy bill.
3. The equipment that SHEPD install shall at all times remain the property of SHEPD. The customer shall take reasonable care of SHEPD's equipment.
4. Data shall be collected from the homes to manage the NINES project and to establish the performance of the new heating system. SHEPD may share this data with its partners for any purpose related to the NINES project, including for research purposes.
5. A customer shall be entitled to receive the £100 participation payment 6 months after installation in the event that: consent is provided for the collection and analysis of data and the customer continues to participate in the trial for a minimum of 6 months.
6. Customers are free to opt out of the NINES project at any time; details of how to opt out will be included in your welcome pack.
7. SHEPD retains the right to remove and/or upgrade the equipment. All works will be carried out at no cost to the tenant and arranged at a mutually agreed time. SHEPD must notify your energy supplier of your participation in the NINES project. This does not affect your right to change electricity supplier.

**Declaration**

I am the customer and hereby agree to participate in the NINES project and the terms and conditions detailed above.

Address

.....  
.....  
.....  
.....  
.....  
.....

Sign: .....

Print name: .....

Date: .....

