28th August 2024

Citizens Advice Scotland Extra Help Unit & Citizens Advice Consumer Service

Domestic Supplier Liaison meeting



Housekeeping

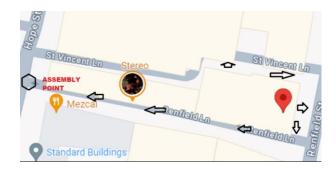
No scheduled fire alarm today, nearest exit/ assembly point



• Guest Wifi – CAS Guest, password – caswireless

• Break at 11:20

Toilets





Agenda

Time	Agenda item	Lead
10am - 10.10	IntroductionActions from last meeting	Leanne Dullard Citizens Advice
		Suzi Cassie, EHU Citizens Advice Scotland
10.10 - 10.30	Consumer Service Operations update	Leanne Dullard, Citizens Advice
10.30 – 10.45	• Operations update	Brian Stewart Hazel Knowles, Advice Direct Scotland
10.45 – 11.20	 Extra Help Unit Operations update Trends and concerns from Q1 	Natasha Gilmour Angus McMillan George Holmes, EHU Citizens Advice Scotland





Time	Agenda item	Lead
11.20 – 11.30	BREAK	
11.30 – 11.50	 Spotlight discussion Introduction to the ISO Inclusive Service Kitemark 	Julie Walker and Jo Howcroft, BSI Group
11.50 – 12.05	 Citizens Advice Energy Policy Team Energy policy update 	Will Johnstone, Citizens Advice
12.05 – 12.20	Citizens Advice ScotlandImpact Team update	Matthew Lee, Citizens Advice Scotland
12.20 – 12.30	• Next meeting dates Close	Leeanne Dullard, Citizens Advice Scotland





Domestic Supplier Liaison

August 2024





Citizens Advice

What we've been working on

- Code of the month focusing on BE20 Disputed bill, customer not responsible & BE29 Inaccurate bill or inaccurate estimated bill. Centres review the quality of the calls and that the correct codes have been used for cases
- Working with the EHU who provided training sessions for our advisers. Thank you to George & the EHU for their time on this!
- Looking to do Ombudsman training sessions for advisers in the near future
- Thanks to suppliers and partners for all your help on the systems protocol and referral research. It's been invaluable to get feedback from everyone involved.



Consumer service systems project

This project will deliver replacement systems for both our consumer service advisers and partners that access our data either through referrals or our reporting portal.

We anticipate the launch for the new systems will be in November 2024. The actual date will be confirmed soon

We will begin testing our referral functionality with partners in the coming weeks. There will be a requirement to log in to a new portal to retrieve referrals, guidance will be provided on how to do this but we do not envisage any disruption to referrals being received



Performance - Quarter 1



23%

Reduction in total demand when compared to Q1 23/24



44%

Reduction in demand for the priority line compared to Q1 23/24

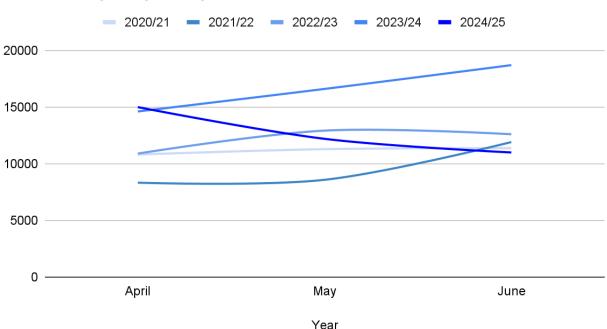


92%

Clients were satisfied or very satisfied with the consumer service

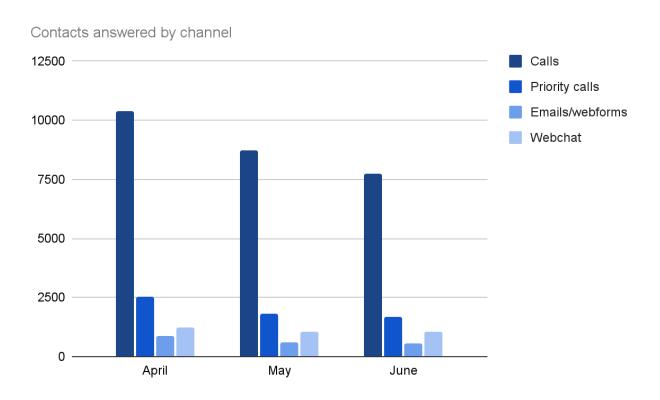
Contact volumes comparison Q1 2020/21 to 2024/25







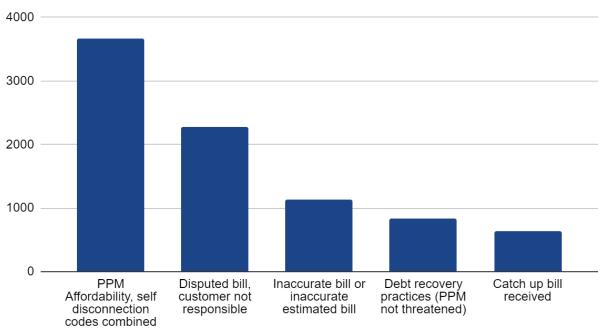
Quarter 1 contacts answered by channel





Trends quarter 1 2024/25







Quarter 1 Trends split by nation

England	
PPM self disconnection (Affordability)	2912
Disputed bill, customer not responsible	2150
Inaccurate bill or inaccurate estimated bill	1078
Debt recovery practices (PPM not threatened)	779
Catch up bill received	601
Direct debit issues	518
Meter accuracy	463
Final account reconciliation	459
Unsuitable payment scheme/payment method	440
PPM affordability self disconnection unable to credit meter	418

PPM self disconnection (Affordability)	180
Disputed bill, customer not responsible	91
Inaccurate bill or inaccurate estimated bill	42
Debt recovery practices (PPM not threatened)	33
Unable to Credit Meter (Technical Issue)	29
Direct debit issues	28
Meter accuracy	27
Catch up bill received	23
PPM affordability self disconnection unable to credit meter	22
Price/tariff information	21

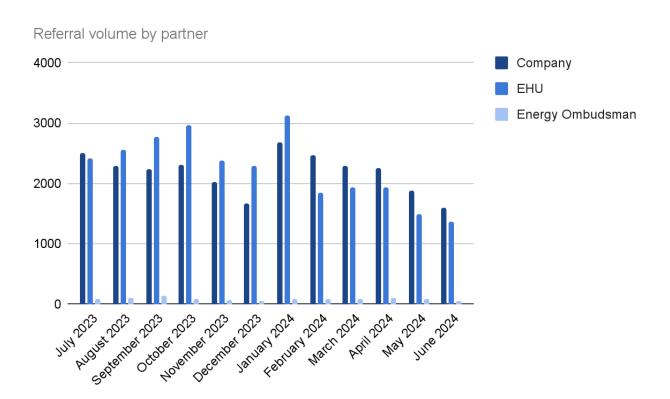


Signposted cases

Signposted to	Total signposts		
Citizens Advice local office	8,493		
Energy Ombudsman	1,028		
National Debtline	883		
Ofgem	431		
Shelter	226		
Fuel Voucher Signpost	150		



Referral proportions July 2023 - June 2024





Presented by: Leanne Dullard

Date: 28 August 2024





ADVICE DIRECT SCOTLAND DOMESTIC SUPPLIER LIAISON QUARTER 1 2024/25

Brian Stewart Operations Manager

Hazel Knowles Senior Project Lead



Key Points from Q1

Self-Disconnection

Substantial 202% decrease in self-disconnection cases since the previous quarter.

Use of New Codes

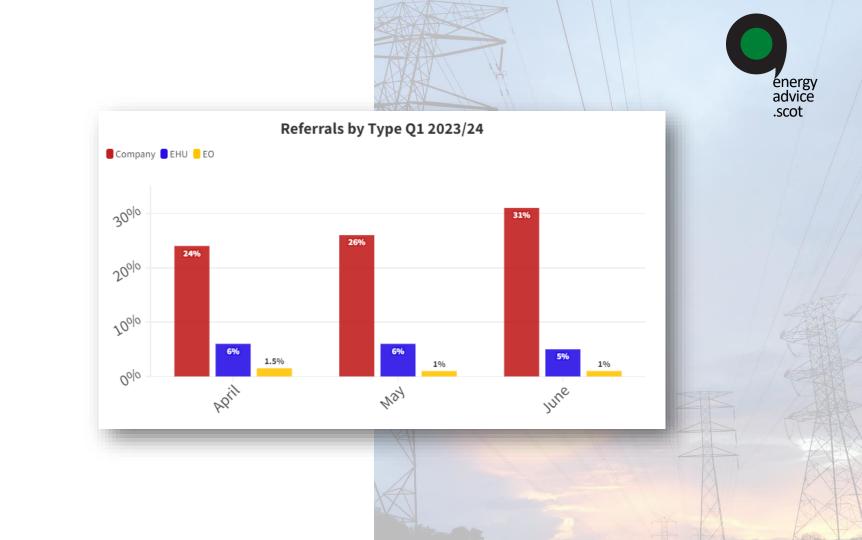
The introduction of new codes, particularly those relating to complex meters have given us more insight into the specific issues customers are facing.

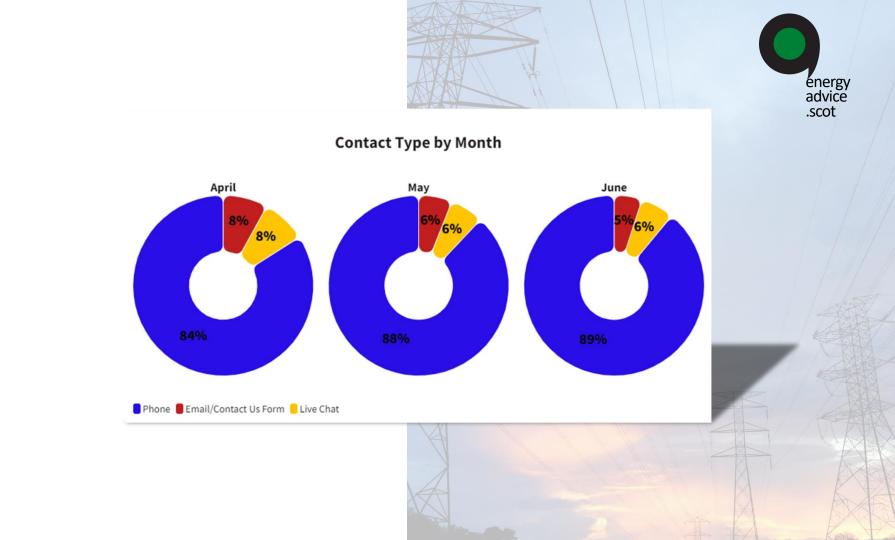
Continued Focus on Vulnerability

Advisors have gone through a series of training on vulnerability. We are using our advisor's knowledge alongside insight software to identify vulnerable customers.





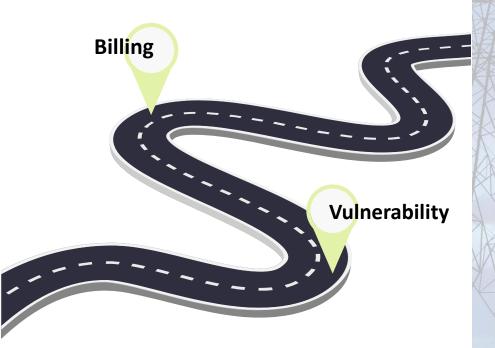






Operational Areas of Focus for Q2





Billing

As billing issues continue to be the most common reason for calls, we are focusing on supplier understanding of issues behind billing worries. This will fit well with Ofgem's investigation into billing.

Vulnerability

As mentioned, vulnerability has been a continued focus. We are continuing to use technology to assist in the identification and support of vulnerable customers, to further improve customer outcomes.

12,723

CALLS FLAGGED BY INSIGHT

1,033

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✓ Previous Page					1 2 3 4 5	6 Last Page
	Play call	Time	Name	Call Summarization	Number	Primary Call Wrap-Up
		4 Jun 2024, 13:02:36	~	Multiple customers are experiencing issues with their electricity bills, including lost spots and unsuccessful attempts to get their electricity meter read more	2033	Default
	>	4 Jun 2024, 13:02:07		The customer is calling about a car repair and discusses their past experiences with BMW. They express anxiety and stress due to previous car issues a read more	2040	Default
	>	4 Jun 2024, 12:50:01		The customer calls advice dot school to inquire about a family member's missing phone number. The agent takes down the necessary details and provides read more	2051	Default
	>	4 Jun 2024, 12:43:31		seeking a refund for work done on a boiler, including a previous request for a quote and payment made through a debit card. Th	5038	Default

|--|

energy advice .scot

			TO SERVICE STATE OF THE SERVIC			
A customer named calls to inquire about a missing hot plate she ordered online. She explains that she paid for it online but hasn't received read more	5017	Default	3.3	Low No Income Customer Requests Es	(2) •••	▼
a customer, is on sick leave and unable to pay bills, and is looking for legal aid to help with their financial situation. They need to pay b read more	2010	Default	3.3	Low No Income Homelessness	(5) (3)	♥
The speaker expresses their desire to receive support for their mental health issues, struggles with drugs and family members, and struggles with ther read more	2051	Default	0.0	Customer Requests Es At Disadvantage At Risk Homelessness	(2) ••• (1) (1) (1)	₹
salls a service to inquire about her daughter's mental health problems and potential housing options. The representative explains that universal read more	5011	Default	3.0	Homelessness At Risk Mental Health Patien	(3) ••• (1) (1)	₩
A representative from an employment advice company calls a customer who had previously called for help regarding a dispute related to an incident at w read more	2051	Default	0.0	At Risk Victims Of Abuse Or At Disadvantage	(2) (2) (1)	♥
A customer named calls an advice website to complain about ongoing bills for her electricity bill. She had previously complained about a bill for read more	2033	Default	3.0	At Risk	(1)	♥

Case Study



Elaine called us worried because she received a bill stating she was £200 in debt. Elaine pays £45 every fortnight at the post office and is not normally in arrears Elaine lives with her husband and they both get state pension.

Our agent had a long conversation with Elaine who was initially only concerned about the debt, after asking if her usage had changed, it became clear she was using more heating due to her husband suffering from prostate and lung cancer and requiring a warm home.

Although our agent identified the vulnerability, our insight software also caught it due to the words 'terminal' and 'cancer'.

Elaine was advised on speaking to her supplier to be listed on the priority services register and requesting an affordable payment plan. She was then referred onto the EHU for further support.

Elaine also received a call back from our welfare team who advised her of additional support she would be able to claim based on her husband's diagnosis. They are currently awaiting a decision on Attendance Allowance and Pension Credit.

ISO 22458

We transitioned to the new standard in two stages. These stages were completed in November 2023 and February 2024.

We introduced further measures to support vulnerable customers such as:

- Appointment of a Vulnerability Champion
- Research, mapping, and creation of a community profile to understand customers vulnerabilities
- Enhanced training
- Use of technology solutions such as insight to enhance identification of vulnerable customers



Gas Standing Charge Campaign

Policy Update

Throughout the summer months we have been running a campaign to make customers aware of the issue with gas standing charge build up.

We will continue the campaign until the end of September.

The campaign the campaign was supported by **26** community organisations across Scotland



Scottish Government Ministerial Roundtable on Energy Consumers

The meeting will focus on the RTS switch off, social tariffs and standing charges

Focus on Microbusiness Customers

As 98.2 % of Businesses in Scotland are small, we expect to see an increase in calls from microbusiness customers and have had a focus on training the team and improving engagement with non-domestic suppliers.

Ofgem and Ofwat Vulnerability Summit

Andrew Bartlett will speak during the summit on transforming the industry culture on vulnerability





Thank You



Extra Help Unit



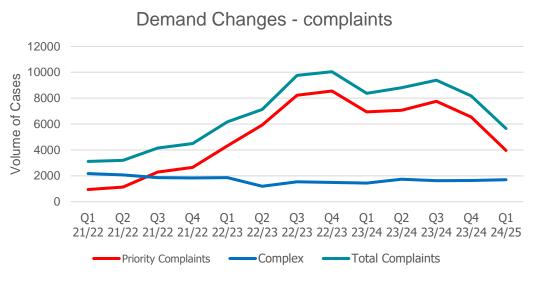
Supplier Liaison Update

28th August 2024

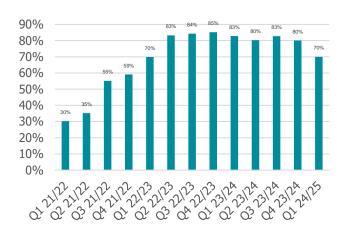
Natasha Gilmour, Angus McMillan, George Holmes

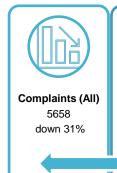


Casework Volumes Q1 24/25



% of complaints classed as priority







Priority complaints 3956 down 39%



Complex Complaints 1702 up by 4%



Enquiries 532 down by 43%



Self Disconnection Cases 3397

down by 42%



Ask the Adviser 204 down by 29%



Telephone Calls 14133 (98% of calls) down by 24%





EHU Performance 24/25	Q1 24/25	Q2 24/25	Q3 24/25	Q4 24/25
85% of domestic consumers surveyed satisfied or very satisfied with overall quality of service	93%			
80% of domestic consumers surveyed satisfied with outcome achieved	86%			
90% of cases checked meeting required quality standards	96%			
95% of domestic complaints resolved with a positive outcome*/ change	97%			
95% of priority complaints raised with supplier within 48 hours of being received	97%			
90% of complex complaints raised with supplier within 15 days of being received	94%			
80% of domestic complaints resolved within 85 days	88%			
75% of domestic priority complaints resolved within 28 days	92%			





"The gentleman was an absolute legend. He was caring and understanding. The moment he got involved things got sorted. He made me feel like I was human."

Accent Research Q1 2024

Accent Customer Research

cases closed March, April, May 2024

Customer Satisfaction Research



91% felt happy with the referral process



85% felt the EHU helped them find a way forward



92% felt happy with the length of time to resolve case



65% felt their mental health improved after EHU support



76% felt less alone after EHU support

Outcomes Q1 24/25



87% felt they were kept informed



79% felt less stressed after EHU support



Financial redress

£1,692,478



Fuel Bank Foundation Partnership

27 fuel vouchers totalling £894

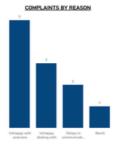


"At last someone listened. I felt supported. I wish I'd not waited as long to get help. I felt completely overwhelmed and that no one was listening until I was put in touch with the Extra Help Unit.

Operational Support & Challenges

"I have mental health problems which means that I don't cope with life and problems as well as others.." Accent Research Q1 2024

Complaints made against EHU



Complaints against the EHU are reviewed quarterly to identify any learnings or gaps in process and training. 45% of complaints were linked to outcome achieved.



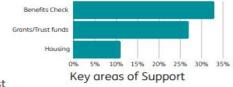


Extra Help Unit



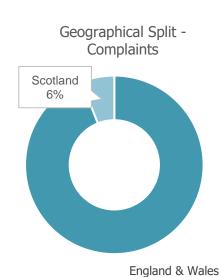




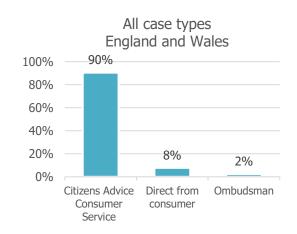


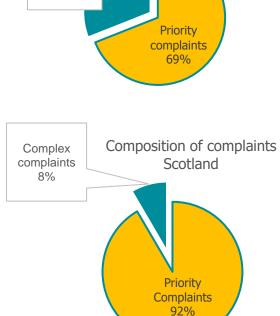


Referral Partners – Across the nations



94%





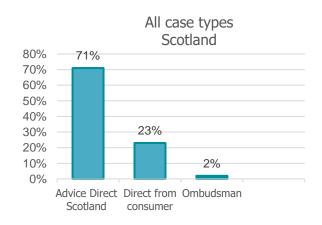
Complex

complaints

31%

Composition of complaints England &

Wales









citizens advice scotland

Extra

Help

Unit

Successes

> Finalist - Energy Champion of the Year Group Achievement

Resources

- 2 secondees Ovo and British Gas
- Recruiting 4 Caseworkers

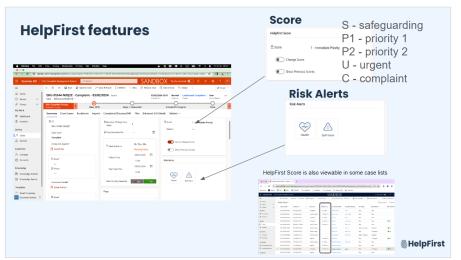
Training

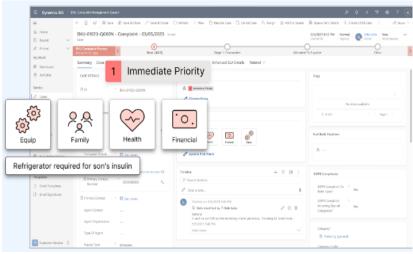
- > Development Session spotlight on advocacy in house
- Developing Helplines Skills Helplines Partnership
- Meter regulations Office for Product Safety & Standards
- > Excel training Paul Brown Training Ltd

Working in Partnership



Development of Services - HelpFirst & Portal











EHU Portal Update





Referral Trends Q1 2024/25

Top 8 category codes Q1 (Apr - Jun)	England	Scotland	Wales	GB Total Q1	% change from Q4 23/24
PPM Self Disconnection /Affordability	2,974	278	158	3,410	Down 41%
Disputes bill, customer not responsible	265	11	18	294	Up 4%
Unable to Credit Meter PPM (Technical Fault)	213	28	15	256	Down 24%
Inaccurate bill or inaccurate estimated bill	138	5	9	152	Up 1%
Supply point administration query (MPRN/MPR/MPAS)	117	1	4	122	Up 28%
Unaffordable payment plan offered	92	5	4	101	Up 7%
Debt Recovery Practices (PPM Not Threatened)	81	0	2	83	Down 19%
Meter provision or exchange	64	2	3	69	Down 36%

Key year on year changes:



85% increase in 'Disputes bill, customer not responsible' cases compared to Q1 2023/24 when 159 cases were logged.



16% decrease in self-disconnection cases compared to Q1 2023/24 when 6,977 cases were logged.



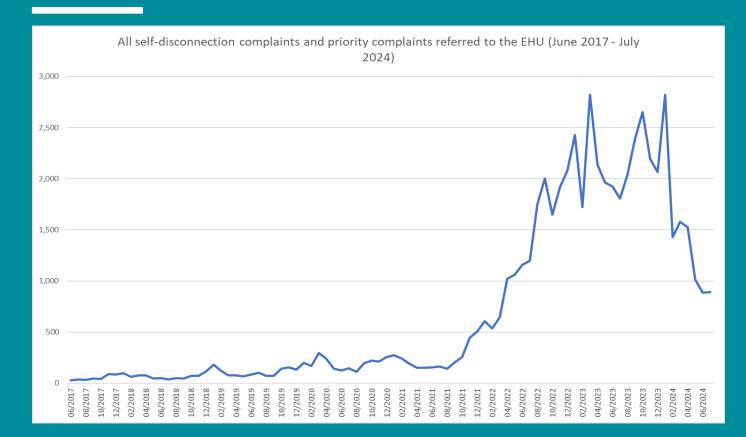


What will be the impact of return to winter weather and October price increase?





Affordability crisis: Changing volumes of self-disconnection cases





Cross sector analysis

- 1st sample of cross sector analysis completed, and analysis from next quarter underway
- Broadened the range of subject areas our analysis covered
- No major surprises, but certain trends underlined and useful comparisons between suppliers identified in some areas
- Broadly positive feedback from suppliers on data packs and analysis shared
- Fed into Tripartite reporting to Ofgem showing more rather than telling
- Further improvements and evolution to follow





Key take aways from analysis

- Sudden reduction in self-disconnection volumes in February and March, allied to a change in tone, reduction in resistance and other support options becoming available at several suppliers
- Too many cases when backbilling is not being automatically identified by systems and teams at suppliers – both prior to EHU involvement and even in the middle of EHU cases
- Debt follow up and customer support for consumers with affordability concerns widely different across suppliers
- Multiple cases involving consumers raising complaints about their legacy meter being replaced by a smart meter
- Erroneous Transfer cases show that often one or both of the suppliers involved has refused to take action to resolve



Working Together

Detail in responses, and verifying balances



Appropriate use of deadlock



Planning for bank holiday's during festive season





Questions?





Break

11.20am – 11.30am



Inclusive Service Kitemark



Julie Walker & Jo Howcroft August 2024



About BSI

- BSI's Royal Charter was granted in 1929 and is 'in perpetuity'
- Established in 1901, BSI is the UK's National Standards Body and was the world's first
- We are non-profit distributing 100% of profits are reinvested in BSI
- We work for the public good to improve, standardise and simplify business systems
- We are independent of outside influence (no shareholders)
- We are a purpose driven business focused on Organisational Resilience





About the Kitemark

- Keeping people safe for 120 years
- Unique to BSI
- High business confidence (78%)
- High consumer confidence (70%)
- Unparalleled mark of quality, safety & trust
- UK Superbrand & one of the worlds earliest trademarks still in use
- Robust certification process
- Integrity at its heart





When it matters most
Trust the BSI Kitemark**

bsi.

making excellence a habit."

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Organizational commitment Principles & strategy



Identifying Vulnerable consumers



Inclusive design



Resources To support service delivery



Responding to Vulnerable consumers



Monitoring Evaluation & Improvement

Areas to be tested	Requirements
Competence	Training Protection of staff welfare
Vulnerable consumer - contact	Clear and easy to understand information Ease of access to make a complaint
Customer Feedback & complaint resolution	Compliance with regulatory or internal complaints handling processes
Accessibility	WCAG 2.2 guidelines (working towards AA standard) Quick and easy access to services to support customers in vulnerable situations
Payment & account control	Ensuring flexible payment options are available. Any debts sold on or have outsourced collection, the organizations used have some form of vulnerability training
Management Information	Monitoring, recording and evaluating data from across the organization and from external customers and stakeholders. Use of data to measure outcomes Use of date to continually improve

Kitemark test measures are sector specific - tailored specifically to demonstrate best practice across the UK Regulators



BS ISO 22458:2022 BSI Kitemark for Inclusive Service - Benefits





STRENGTHEN SKILLS



BRAND PROTECTION AND TRUST





Inclusive Service Kitemark™ - Certified

A further 10 clients in application status (as of August 2024)































































Certification Process

Gap **Implement** Assessment Assessment standard & assessment (Stage 1) (Stage 2) Kitemark measures Optional stage to Assess service Assess prepare for effectiveness of strategy, policies ISO 22458: 2022 formal

and processes



assessment

Kitemark

certificate

Maintained

assessment

through regular

issued

implementation



Questions



Energy Team Update



Supplier Liaison Meeting 28th August 2024



Contents

- 1. Publications, blogs and consultation responses
- 2. Team updates
 - Energy Retail Markets
 - Net Zero Homes
 - Energy Network and Systems

Recent publications

<u>Fixing the foundations: The need for better targeted support for energy consumers</u>

Get Smarter: Ensuring people benefit from Smart Meters

Citizens Advice consumer advice and advocacy annual report 2023-24

Through the roof: rising rents, disrepair, and evictions



Recent Blogs

- Laying the right foundation: why targeted bill support is essential for the next phase of the net zero transition
- Al and Energy: What does the future hold?
- The energy affordability crisis is far from over
- Complaints figures drive customer service in energy market to new lows
- What's next for the smart meter rollout?

Consultation Responses

- We responded to <u>Ofgem's call for input on the future of domestic price</u> <u>protection</u>, to <u>Ofgem's call for input on affordability in the domestic retail</u> <u>market</u>, and <u>Ofgem's statutory consultation on the future of the ban on</u> <u>acquisition-only tariffs ('BAT')</u>.
- We responded to <u>Ofgem's consultation on Supplier GSOP Payments Inflation</u>
 <u>Uplift</u>, the <u>government's consultation package on new standards for energy</u>
 <u>smart appliances and load control organisations</u>, and the <u>Ofgem consultation</u>
 <u>regarding the price cap operating cost allowance review</u>.
- We responded to government consultation regarding the energy price cap operating cost allowance review, to government consultation regarding the Review of Electricity Market Arrangements (REMA), and published a <u>Public Letter</u> urging Ofgem to reconsider their proposal to remove the ban on acquisition only tariffs ('BAT').

Energy Retail Markets Team: updates

Current policy/advocacy work

- In August, we published a report (<u>Fixing the Foundations</u>) calling for better targeted bill support for energy consumers, through reforming the Warm Homes Discount. We also published a <u>blog</u> highlighting the need for support in June.
- We published a <u>blog</u> about the smart meter rollout, where we set out what the Government and suppliers need to do to ensure the smart meter rollout delivers on its promise.
- In June, we published our latest <u>Star Rating</u>, accompanied by a <u>blog</u> and <u>historic star rating</u> <u>data</u> going back to 2017. These showed customer service ratings across the industry are among the lowest ever, driven by high numbers of complaints.

Coming soon

- A report on the debt protection gap in the non-domestic retail market
- A blog on the increase in billing issues



Net Zero Homes: updates

Current policy/advocacy work

 We worked with colleagues in Housing to produce <u>Through the roof</u>, a report outlining the poor living standards and high costs of living in the private rented sector. This report continued our call for higher energy efficiency standards in the sector as a means to reduce costs for tenants while providing a better standard of living.

Coming soon

- Report on consumer experiences of redress under Government energy efficiency schemes
- Blog on the need for energy flexibility services to serve all consumers and for protections for TPIs to be implemented swiftly now the consultation has closed
- Report on the attitudes of landlords to energy efficiency improvements and the support that could be provided to improve delivery of measures
- Report on the new consumer protection regime needed for net zero measures such as insulation and low carbon heating



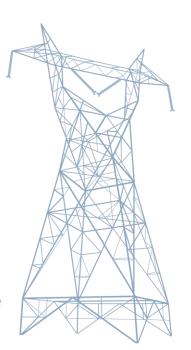
Energy Networks & Systems Team: updates

Current policy/advocacy work

- Stage 1 is being finalised of our work whether consumers are getting value from £100s millions of energy network innovation funding
- Engaging with Ofgem in the development of the RIIO-3 price controls for electricity transmission and gas networks to ensure they deliver for consumers
- The work continues to develop a strategic partnership with the National Energy System
 Operator to ensure consumer interests are central to the energy transition and their key
 role in it

Coming soon

- Publications following research on whether current price controls (RIIO-2) are delivering value for money for consumers and recommendations for improvement
- Publication of research into ensuring Community Benefits for hosting energy infrastructure represent the right balance for consumers and those affected



Policy update: CAS Social Justice Team



Dr Matthew Lee Senior Policy Officer (Energy)

Data Insights

- > Demand for energy advice is now entrenched and enduring
- > Jan 2021: 10% of clients sought energy advice. Jan 2024: 16% of clients sought energy advice. **59% increase**.
- > 2023-24: 101,000 pieces of energy advice provided
- > Q1 2024-25: 99% YOY increase in advice given on PPM discretionary credit; 14% YOY increase in fuel voucher advice



Cross-advice Data

- > Worries about energy intersect with other issues
- > Advice in relation to relation to utilities, including energy, was more likely to be given as the sole advice type (65%) than to be given with other types of advice (35%)
- > Where other advice given on generic topics: 55% of occasions other advice related to benefits; 1 in 5 of occasions related to debt
- > Where other advice given on specific issues: 37% of occasions related to foodbanks
- > 1 in 12 clients receiving utilities advice got info on Crisis Grants



Affordability and Social Tariff

- > Energy bills remain too high for too many people
- > 2023-24: 24,424 pieces of advice on fuel vouchers (23% increase on 2022-23)
- > High energy bills have detrimental impacts on people's lives
- > CAS supports a social tariff aimed at people living on low incomes



Energy Debt

- > £6.4 million in energy-related debt from over 2700 clients. Debt amount increased by 28%; number of clients increased 10% on 2022-23
- > Average energy debt is £2,600. Rural energy debt is over £3,000
- > Energy debt compounds harms that people in vulnerable situations face
- > A range of debt reduction measures required: payment matching and outright forgiveness



Standing Charges

- > Standing charges add to the cost of energy consumption, sometimes in unfair ways.
- > CAS supports standing charge reform.
- > Important to protect households that would lose out from a shift to unit rates
- > Tariffs targeted at people who would benefit. Potential benefits/pitfalls of rising block tariffs?



Radio Teleswitching

- > Approx. 250,000 RTS households in Scotland
- > RTS is generating concern in Scotland's rural communities
- > Are we ready for what comes next?
- > Rural households report ongoing problems with smart meters



Heat in Buildings

- > CAS hopeful this legislation will be included in Programme for Government
- > Potentially significant legislation but not much public awareness
- > Prohibition of polluting heating systems after 2045
- > Property purchasers to meet minimum energy standards by 2033; PRS landlords by 2028
- > Development of heat networks



www.cas.org.uk

Matthew.Lee@cas.org.uk



Produced by Citizens Advice Scotland [DATE] Scottish charity SCO 16637 and company limited by guarantee 89892

Any other business?

Provisional dates for future meetings:

20th November 2024 12th February 2025 14th May 2025





Close

Thank you everyone!

