south east water

Preparing the foundations for our vulnerability services

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5 out of 5

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Contents

1.   Introduction

The Vulnerability Sub Group will be aware that we are in the process of co-creating an overarching Vulnerability Strategy for the services and support we offer to customers in vulnerable circumstances. To do this, we are working collaboratively with staff, customers and third party organisations and referral agencies to not only identify what is important to focus on, but also to create the best approaches and solutions - so the service we offer is always accessible and the best it can be.

The activity that supports the co-creation of our Vulnerability Strategy is now underway and being led by co-creation specialists CAG Consultants, who have come recommended by two members of the CCG. CAG Consultants' proposal is circulated for information in the meeting papers.
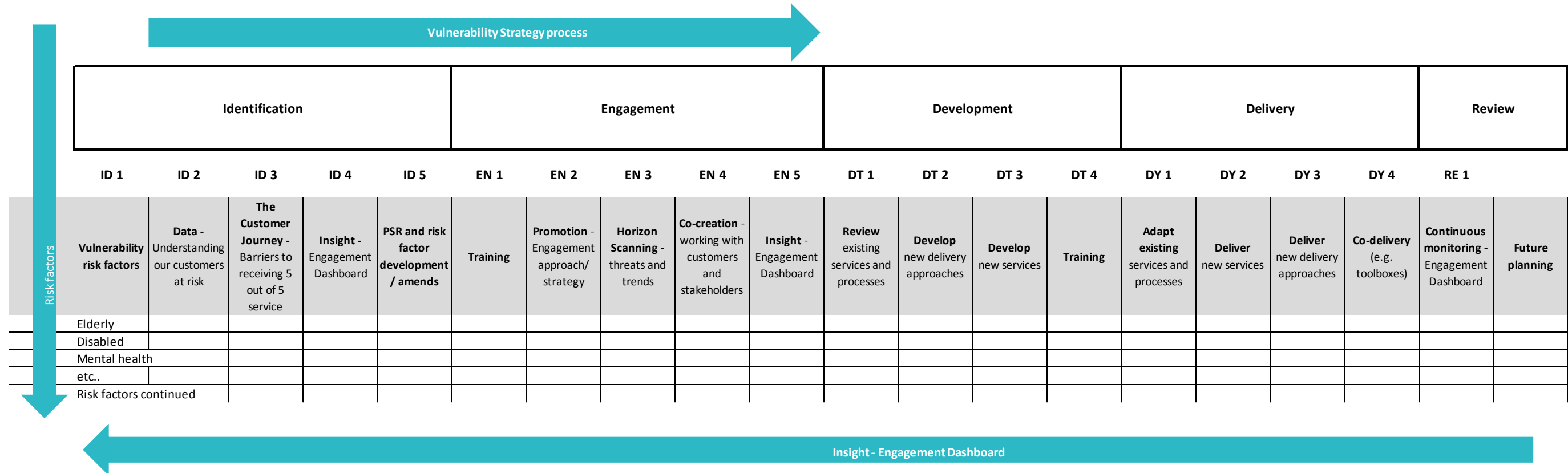
However, in parallel with the co-creation activity happening, we have been undertaking considerable work internally to bring together a number of different elements of work. In summary, we have been:

- taking stock of:
    - what we know about our vulnerable customers - so far
    - whether we have captured all the risk factors that might put a customer into vulnerable circumstances
    - whether our current processes and services work for customers in vulnerable circumstances
- making sure our:
    - staff training is fit for purpose
    - our services and support remain in-line with the changing or future needs of customers in vulnerable situations (via horizon scanning)

This document captures where we are with that internal `stock take and assurance' exercise; this is important groundwork that we are putting in place now to ensure that we are ready to deliver the key components of our Vulnerability Strategy when that is finally developed.

2. Our Vulnerability Strategy process

The below image shows the process that has been developed to inform the foundations of the Vulnerability Strategy:

	Vulnerability Strategy process																			
	Identification					**Engagement**					**Development**				**Delivery**				**Review**	
	ID 1	ID 2	ID 3	ID 4	ID 5	EN 1	EN 2	EN 3	EN 4	EN 5	DT 1	DT 2	DT 3	DT 4	DY 1	DY 2	DY 3	DY 4	RE 1	
Risk factors	**Vulnerability risk factors**	**Data -** Understanding our customers at risk	**The Customer Journey -** Barriers to receiving 5 out of 5 service	**Insight -** Engagement Dashboard	**PSR and risk factor development / amends**	**Training**	**Promotion -** Engagement approach/ strategy	**Horizon Scanning -** threats and trends	**Co-creation -** working with customers and stakeholders	**Insight -** Engagement Dashboard	**Review** existing services and processes	**Develop** new delivery approaches	**Develop** new services	**Training**	**Adapt existing** services and processes	**Deliver** new services	**Deliver** new delivery approaches	**Co-delivery** (e.g. toolboxes)	**Continuous monitoring -** Engagement Dashboard	**Future planning**
	Elderly																			
	Disabled																			
	Mental health																			
	etc..																			
	Risk factors continued																			

Insight - Engagement Dashboard

This process is based on what we know from the Ofgem Consumer Vulnerability Strategy Progress Report model and Project Inspire lead by Zoe McLeod. It is intended to focus our actions towards informing our strategy in collaboration with customers and stakeholders.

It is important to note that the process is not prescriptive and lessons learnt throughout can feed back in to the process i.e. implementation of new services may increase our interaction with customers and subsequently increase our understanding of who they are and how we can engage with them.

3.   Our activity so far

The following tables are a 'stock take' of our activity so far with suggestions for future and ongoing actions based on what we know now.

Identification:

	Activity	What has been done	What do we need to do
Who are our vulnerable customers and what are their needs?	ID 2 - Data analysis (SEW vs public data)	We have analysed data from Experian, KCC and the Index of Multiple Deprivation (IMD) to establish the overall demographic of our supply area and to draw comparisons with the rest of the country. With the knowledge we have gained from external sources we have been able to evaluate our own data and current understanding of our customers in vulnerable situations to highlight any gaps.	Use the understanding gained about our supply area to further target and prioritise the engagement activities of the Customer Care Team. Investigate the gaps identified to establish if/how we can help those customers.
	ID 2 - Data mapping to identify higher risk areas	Data mapping of areas showing digital access (Get Digital Heatmap), benefit details (Department for Work and Pensions), housing data (Experian) as well as our own data sources for debt and vulnerability visits.	Cross reference the mapped data to help prioritise the engagement activities of the Customer Care Team.
What are the vulnerability risk factors that create barriers to them receiving a 5 out of 5 service?	ID 3 - Customer journey mapping to determine barriers to service	We realise that some customers may not have contacted SEW, because they are or have been in a vulnerable situation and we may therefore not have captured what their version of the customer journey might look like. As a starting point, we have mapped our key customer journeys (change of occupier, no water, making a payment) to check if our current processes and services are adequate for the needs of customers in vulnerable situations from what we know now.	Check the journeys via the co-creation workshops with staff, customers and stakeholders to establish any gaps in our understanding of the journeys and establish the weak points along those journeys from the customer perspective.
	ID 1 - Understanding vulnerability risk factors	Our Priority Services Register and understanding of vulnerability has developed over time through our interactions with customers and has been updated based on how and what we have learnt about vulnerability. We have initially based our understanding of the different vulnerability risk factors using existing published sources.	Develop a suite of our own vulnerability risk factors based on what we have learnt from other sources as well as our own understanding of our customers' needs. We can then work to prioritise the vulnerability risk factors based on customer needs during usual service and in times of supply interruptions.
	ID 4 – Insight	We have approached RICA (consumer research for older and disabled people) to 'mystery shop' our vulnerability services and processes to advise on improvements. BSI 18477 – The British Standard for Inclusive Service Provision sets guidelines to help organisations provide a fair, flexible service that can be used by all consumers equally, regardless of their health, age or personal circumstances. We are working towards achieving this standard. A Board Engagement Programme has been developed to capture insight. Board members have spent time in CCT and there are opportunities to attend workshops and visit customers in the field.	Review and implement the improvements identified. Share, learn from and promote the insight.

		We have engaged with Southern Water and Thames to discuss regional consistency for vulnerability.	
	ID 5 – PSR	Work is underway to development the PSR in-line with the Energy sector (Water UK and Energy Networks Association - ENA) so that data can be shared between utility providers.	Continuous review to ensure that our PSR is in-line with current and future needs of customers. Prioritisation of PSR codes to ensure customers in vulnerable situations are contacted in order of risk to their needs during interruptions to supply

Engagement:

	Activity	What has been done	What do we need to do
How can we remove the barriers to receiving a 5 out of 5 service?	EN 1 - Training	Induction training for customer service new starters includes information on understanding, recognising and reporting vulnerability. They are asked to review case studies and discuss triggers to identifying vulnerability. We have had several external suppliers conduct specific vulnerability training including Waterwise, Samaritans and Dementia. Vulnerability Champions from across the business are being recruited to cascade vulnerability awareness and information to teams.	Review any gaps in knowledge and training once the vulnerability risk factors and co-creation workshops identify areas for development. Review staff training to ensure all necessary staff are well equipped and informed to deal with enquiries and situations. Continue to implement necessary third party training programmes. Ensure Vulnerability Champions are appropriately trained, informed and engaged. Develop more ways to communicate with all staff i.e. Corporate Induction to include more vulnerability content
	EN 2 - Promotion (internal and external)	The CCT visit team meetings across the business to raise awareness and understanding of vulnerability. Staff are advised how they can identify vulnerability and how to report this internally. The CCT attend many community events to advise communities of the services we provide. A 'Useful Tip's leaflet has been developed in conjunction with UKPN and other utilities offering consumers advice on how to save energy and money on their household bills. We are working with stakeholders to raise awareness of the services we offer currently and receive referrals from organisations. Example stakeholder engagement: • More Radio – 'random acts of kindness' – awareness of PSR • Community Chest funding of local charity Parity (press release issued)	Review and update our literature and Code of Practice to ensure content remains current. Continue to promote the great work of the CCT internally and externally. Planned issue of internal communications newsletter 'Spout' to highlight the work of CCT internally. Update of Communications Plan for engineering schemes to raise awareness of vulnerability to teams.
What changes do we need to make to meet the needs of customers in vulnerable situations now and in the future?	EN 3 - Horizon scanning	We have appointed Steve Brown of Waterwise to complete a horizon scanning exercise to determine future threats and trends. This will be informed by the data analysis exercise.	Plan for the identified threats and trends within our Vulnerability Strategy and business as usual activities where necessary.
	EN 4 - Co-creation	We have appointed co-creation specialists CAG Consultants to assist us in collaboratively developing our Vulnerability Strategy. They are running workshops over the coming months	We will be able to test our customer journeys via the workshops as well as further understand our vulnerability risk factors, inform our PSR and help prioritise the engagement activities of the CCT.

		with staff, customers and stakeholders to ensure our strategy delivers the best service we can offer.	We can then implement and update services and processes as per the Vulnerability Strategy.
How can we reach all of our customers in vulnerable situations?	EN 5 – Insight	We have gained insight from our work with the energy sector and the shared PSR development. We are developing a Vulnerability Engagement Dashboard that will capture ongoing insight and feed in to business.	Review and update our services and processes accordingly. Continue to network and research to gain insight.
	EN 2 - Stakeholder mapping	We have reviewed and updated our stakeholder list alongside our understanding of our customer base to ensure we have captured all relevant community and area stakeholders.	Liaise and build relationships with those stakeholders Continuous review of the stakeholder list Review and prioritise the engagement activities of the CCT.

Development, delivery and review:

The development, delivery and review stages will be informed via collaboration with customers, staff and stakeholders to ensure that services fit the needs of customers. We have already implemented changes based on our ongoing engagement activities to date:

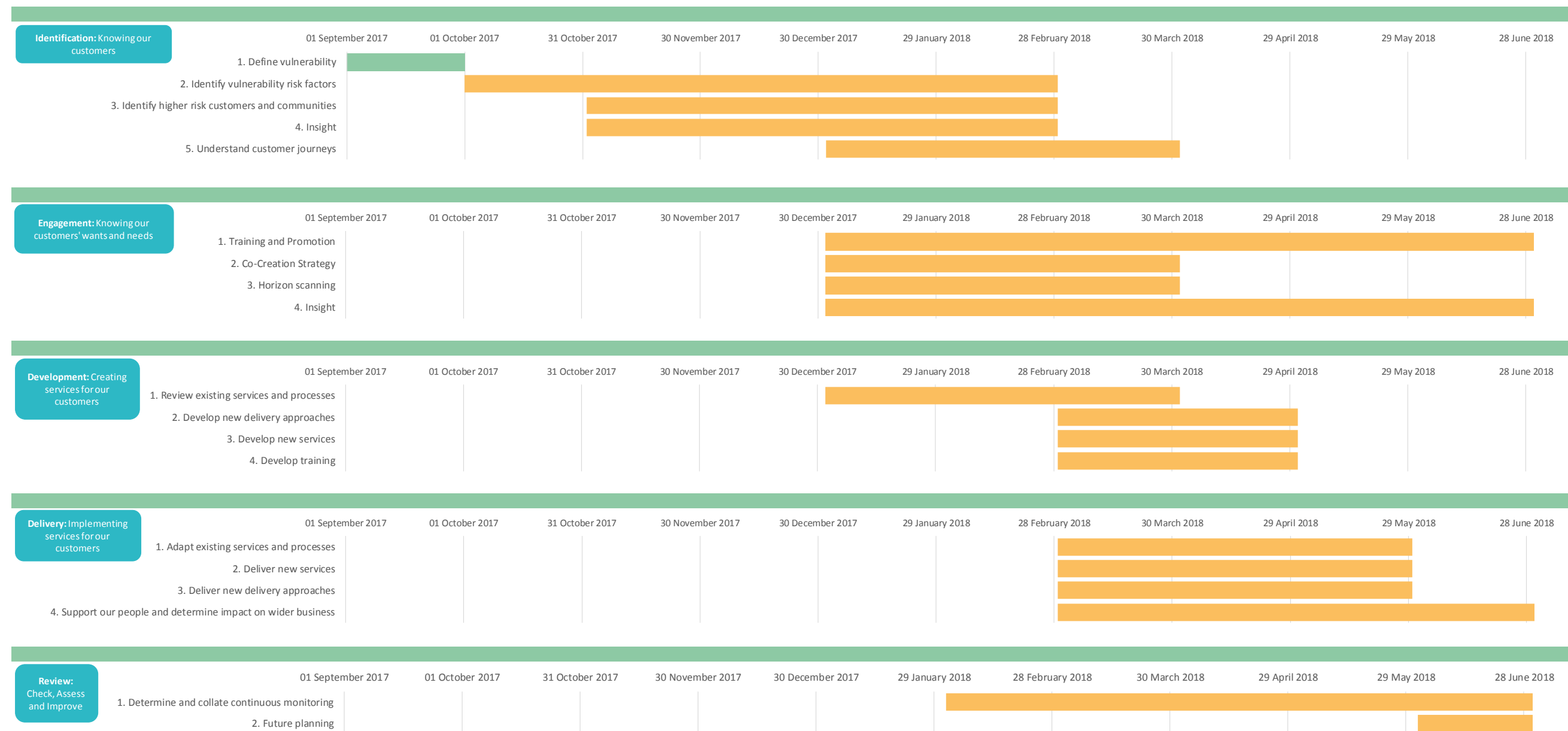|	Activity	What has been done	What do we need to do
What changes do we need to make to meet the needs of customers in vulnerable situations now and in the future?	DT 1 – Review existing services and processes	The CCT has been developed as a Centre of Excellence – a dedicated telephone line has been set up to ensure customers are directed straight to the appropriate team to handle their enquiries. CCT have developed an Incident Management proposal to ensure CCT field teams are on hand to assist during periods of no water – this includes the development of a standby rota for CCT.	Review and implement learnings from the co-creation workshops.
	DT 3 – Develop new services	An equipment advisory service is being developed that will give staff the ability to further assist customers by directing them to products suitable for their needs. A CCT member has been assigned to develop, promote and champion the service.	Review and implement learnings from the co-creation workshops.
	RE1 – Continuous monitoring	We are investigating possibilities for gaining and monitoring feedback from CCT field teams i.e. leaving a feedback card.	Review and implement learnings from the co-creation workshops.

4. Next steps

To make the journey from where we are now to where we want to be, we have set out the following aims to focus our ambitions for customers in vulnerable situations:

- *To ensure we understand the needs of customers in vulnerable situations*

- *To understand the range of vulnerability risk factors that may mean that our service is not always accessible to all*

- *To understand what the barriers are to customers in vulnerable situations being able to fully access our services*

- *To ensure customers in vulnerable situations are adequately supported in-line with their needs – especially in times of service failure*

- *To ensure our services and support remain in-line with the changing or future needs of customers in vulnerable situations*

- *To ensure we can access and engage with hard to reach groups so that all customers' voices are heard and acted upon*

These aims are to be considered in conjunction with our Engagement Strategy aims and our company vision "to be the water company people want to be supplied by and want to work for".

5. Timeframe of activity

Below is an indicative timeframe of activity ahead of the creation of the Vulnerability Strategy:

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