

VULNERABLE
CUSTOMER EVENT

DIGWYDDIAD
CWSMERIAID BREGUS

Workshop Report

Virtual Event

March 25, 2021



Introduction

In November 2018, we launched our strategy for supporting customers in vulnerable circumstances. This strategy published under the title of 'Supporting Our Customers – Working at the heart of our community', detailed how we intended to improve our services to customers that need our support most. In particular, it focused on 5 priority areas:

- **Data** - working with other utility companies, government and government agencies to proactively identify customers that are likely to need our help.
- **Priority Services** – improving the support that we provide to customers in vulnerable circumstances, based on what those customers tell us would help them, and increase the number of people registered for our priority services
- **Financial Vulnerability** – providing schemes to identify and help low-income households, as well as providing advice on how to reduce charges in other ways and understanding what other support they may be entitled to.
- **Partnerships** – building on our network of partners, making sure that we are working with the representatives of customers with specific needs and raising awareness of the services we provide.
- **Training** – ensuring that our people can recognise and understand the factors that will make customers vulnerable and empower them to make the decisions needed to ensure that every vulnerable customer gets the help they need.

Back in 2018, few of us could have imagined how the world we live in was going to change, as it has in the last year or so and the impact of Covid-19 on our communities, friends and families will be felt for generations. It has certainly highlighted the importance of the work that we, alongside many other organisations, do to support those that struggle to access our services.

Therefore, I was really pleased to host our first virtual conference on 25th March 2021, bringing together over 80 representatives from our partner and stakeholder organisations to share the progress that we have made in the last few years, and to talk about what more we could do together to support customers in vulnerable circumstances.

We were lucky enough to have keynote speeches from our partners in Welsh Government, Cartrefi Conwy and Wales & West Utilities, looking at the areas of priority services data sharing, the benefits of community partnerships and how we can best use the information in our businesses to improve our services.

We have summarised the main points of discussion in this report, as well as our plans for taking them forward.

I would like to take this chance to thank everyone that attended and for their ongoing support. We can achieve so much when we pool our ideas, our people and our resources and, in doing so, truly make a difference to those customers that need our support most.

Samantha James
Managing Director Household Customer Services
Dŵr Cymru Welsh Water



Summary of feedback

Data sharing

- Many delegates are interested in understanding more about Project JIGSO, how they can contribute to and access it. Everyone could see the value and benefit of sharing priority services information
- Some local authorities already use a system to capture vulnerable customer information, linked to social care and assumed this was already shared.
- Many local support services struggle to identify which customers would benefit from their services and a central repository/source of information would help them reach out to those that need support.
- Some delegates questioned whether there was a common view on what vulnerability is and also whether people want to be classified as vulnerable.
- There is a 'fear' about not complying with the General Data Protection Regulation (GDPR) that needs to be addressed.
- Suggestions for Project JIGSO
 - Customers to upload their own change in circumstances (particularly where their vulnerability is transient)
 - Ability to filter information by location, nature of vulnerability, whether served by a water meter
 - Ease of use is critical.

Partnership working

- Lockdown has taught us that, in some cases, virtual contact with customers (or clients) is a better service. Many more people are using, and have got used to, the technology. However, we still need to recognise that this won't work for all and in some cases it is necessary to work with carers/family members.
- Some utility companies are working with younger members of their communities to develop Apps for signing people up for support.
- County Voluntary Councils (CVCs) and regional advisory networks could be a opportunity to develop the 'hub' concept. A number of partnership networks have evolved over lockdown, examples quoted included Denbighshire Council's community directory and the partnership between the Autism Director, DWP and WRU.
- Referrals are really important but there are some areas that need to be addressed in order for them to work:
 - Referral process needs to be 2-way
 - There needs to be regular engagement between referral partners
 - Whilst virtual communications have worked well, in some cases it is difficult to really address customer needs unless you are meeting face to face
- GDPR is seen as a barrier by many organisations
- Partnership success in one area can be seen to come at the expense in another area and there is a need for a more uniformed approach. A way to address this could be to define the 'top 10' support schemes across various organisations and communicate consistently to all customer service teams (something similar is in place between local authorities and advice sector).



What we are going to do next....

- Continue to work with Welsh Government and Project JIGSO team to develop data sharing platform, including reviewing conference feedback.
- Investigate the options for an advice hub, looking at examples in other water companies and in other sectors, and develop a proposal to undertake a trial by the end of March 2022.
- Complete our 2 water resilient community projects in Rhyl and Rhymney-Bargoed, building learnings into our plans and as well as ensuring that community relationships transition from the projects to our day-to-day activities.
- Explore new services to help low-income households
 - Income maximation and signposting
 - Lowest bill guarantee
- Plan for our next conference will be announced by Autumn 2021



Appendix A: Agenda

- 09:30 **Welcome and introduction:** Peter Davies, Customer Challenge Group Chair
- 09:40 **Welsh Water overview:** Sam James, Managing Director of Household Customer Services, Welsh Water
- 09:55 **Welsh Water film:** Using data
- 10:00 **Guest speaker:** Tony Bracey, Head of Programmes, Welsh Government
- 10:10 **Breakout Session:** Applying the project JIGSO concept to benefit vulnerable customers
- 10:25 **Welsh Water film:** Providing assistance
- 10:30 **Guest speaker:** Mark Jones, Incomes Recovery Manager, Cartrefi Conwy
- 10:40 **Breakout Session:** Identifying and reaching vulnerable customers
- 10:55 **Break**
- 11:10 **Guest speaker:** Nigel Winnan, Head of Customer & Social Obligation, Wales & West Utilities
- 11:25 **Panel Q&A:** Chaired by Alun Shurmer
- 11:45 **Summary:** Sam James
- 12:00 **Event closes**

Appendix B: Delegate list

Alun Evans	Citizens Advice
Catherine Reed-Hughes	Care and Repair
Parry Declan	DWP
Ewelina Dobczynska	Shelter
Jane Healey	Carers Wales
Jonathan Johnson	CC Water
Lia Moutselou	CC Water
Lynda Corre	
Neil Williams	Care and Repair
Rhodri Williams	CC Water
Shian Thomas	The Wallich
Jo Kenrick	NED
Agnes Xavier-Phillips	Glas Cymru
Karen Cross	Red Cross
Alun Shurmer	Welsh Water
Claire Price	MV Homes
Dawn Grant-Crichton	Care and Repair
Ffion Davies	Blind Vetrans
Shackleton Janine	CC Water
Jones, Byron	Caerphilly Council
Lisa Mcculla	DWP
Mandy Price	Care and Repair
Paul Elliott	Cardiff Community Housing Association
Richard Thomas	Care and Repair
Solitaire Pritchard	Pobl
Gareth jones	Glas Cymru
Wayne Rees	Glas Cymru
Siwan Williams	Welsh Government
Amanda Derbyshire	Care and Repair
Evans, Colette	United Utilities
Dylan Mcclellan	Energy Saving Trust
Forum	PennySmart
Jo Woodward	Groundwork
Julie Pierce	Citizens Advice
Louise Edwards	Citizens Advice
Mari Arthur	CCG
Owen Paul	JCP Employer and Partnership Team
Richard Weaver	Citizens Cymru Wales
Stacy L. Williams	Ynysmon
Nina Jones	Glas Cymru
Sorahan Rachel	DWP
Jo Harry	Care and Repair
Ian Krawyczynski	Glas Cymru

Audrey McMullan	DWP HOLYHEAD
David Pownall	Advocacy Services
Elizabeth Willington	Valleys to Coast Housing
George Williams	Cizens Advice
Jo Sutton	Denbigshire council
Kate White	TGP Cymru
Louise Lewis	Shelter
Grice, Mark	Severn Trent
Peter Hughes	Energy Saving Trust
Ruth Jenkins	Newydd Housing Association
Sue Parry	Citizens Advice
Jessica Simmons	Conwy council
Emyr Roberts	Glas Cymru
Ian Catterall	Citizens Advice
Lovatt Beverley	DWP
Deborah Fellows	Newport city homes
Emma Griffiths	TGP Cymru
Himalee Rupesinghe	The Autism Directory
Joanna Seymour	Warm Wales
Kathy Lye	Age Cymru
Lucy Beavan	Shelter
Richardson, Michele	Alzheimers Society
Sandra Davies	Care and Repair
Thomas Milne	Energy Saving Trust
Sophie Lewis	Energy Saving Trust
Nick Rushbrooke	Glas Cymru
Stephanie Martin	Bristol Water
Lee G Jones	Merthyr Tydfil Housing Association
Nikki Jones	Denbigshire council
Williams Eleri	DWP
Cath Thomas	DWP
Debra Wakeham	Care and Repair
Emma Simons	Blind Vetrans
Jackie Blackwell	Citizens Advice
Jonathan Cosson	Warm Wales
Kristy Grigg	Care and Repair
Hamer Lyn	DWP
Jones Melanie	DWP
Rebecca Iddon	Valleys to Coastal Housing
Ian Catterall	Citizens Advice
Deb Bowen Rees	NED
Neil Webb	Glas Cymru
Ceinwen Jones	Conwy Council
Kayleigh Ford	Citizens Advice
Joanna Gulliford	Welsh Government, Water Branch
Elizabeth Warwick	Wales & West Utilities

Kate Newton	Dwr Cymru Welsh Water
Peter Davies	Customer Challenge Group Chair
Mark Jones	Cartrefi Conwy
Nigel Winnan	Wales & West Utilities
Tony Bracey	Welsh Government
Sally Thomas	
Lynne Darbyshire	