

Home Response Customer Recruitment and Engagement Plan-  
Update following Coronavirus pandemic and associated public health  
measures

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## 1. Customer Recruitment and Engagement Plan Objectives

Drawing on Repowering's experience of community engagement and innovation trials, as well as sector best practice such as EnergyWise, the following objectives have been determined in collaboration with project partners:

- Use trusted networks and individuals to communicate a clearly defined offer which provides tangible short- and medium- term benefits
- Reach out to 500-600 households in order to recruit 160 into trial
- Recruit a small number of customers (approx. 10) into a pilot to test communication messages, materials and approach, alongside installation testing
- Maintain engagement throughout the trial to minimise dropout rates and maximise benefits
- Capitalise on the opportunity to engage customers on broader fuel poverty and energy efficiency measures
- Adopt best practice approaches by drawing on experience of Repowering and other projects
- Proactively assess potential risks at all stages of the project and identify mitigation strategies
- Meet data protection requirements
- Continuously review and improve approach
- Capture and disseminate learnings for the future

## 2. Roles and responsibilities

As Home Response is being delivered by multiple partners, it is important to be clear on their roles and responsibilities for the different work packages. With regards to customer recruitment and engagement, this is particularly critical to avoid confusing or frustrating customers and negatively impacting their perception of the project. To mitigate this risk, Repowering is acting as the lead for all customer communication, ensuring a streamlined process. The organisation will work closely with other partners to coordinate their input.

Organisation	Role / responsibility
Repowering	<ul style="list-style-type: none"><li>– Engagement lead</li><li>– Project partner and client liaison</li><li>– Attending all home visits, including installations and technical follow-ups</li></ul>
GLA	<ul style="list-style-type: none"><li>– Home Response website</li><li>– Client Participation Agreements / legal</li></ul>
Moixa	<ul style="list-style-type: none"><li>– Technical delivery</li><li>– Data for DSR benefit updates</li></ul>
Clients	<ul style="list-style-type: none"><li>– Identification of suitable properties</li><li>– Introduction to customers</li><li>– Review of communication materials</li><li>– Building access</li><li>– Connection with fuel poverty/energy efficiency referral organisations</li></ul>

### 3. Project Benefits

It is important to be clear on the project benefits for clients and customers for several reasons. For example, as we are not restricting our target demographic to early adopters, we are having to provide a tailored approach to ensure the project is appealing and accessible to as broad a demographic as possible. Moreover, while there is a lot of complexity on the technical side of the project, it ultimately needs to be translated into an attractive and straightforward offer.

#### 3.1 Client offer

- No cost – budget available to support involvement
- Estimated 600-800 households engaged on energy efficiency and low carbon innovation
- Reduction in carbon intensity
- Increased engagement with tenants
- Increased referrals to additional support provision

#### 3.2 Customer Offer

- Local employment through recruitment of Energy Champion roles
- Customer thank you: £50 per household per year of participation in vouchers or equivalent
- Up to £50 per household per year DSR value share in vouchers or equivalent
- Opportunity for participants to create a community fund and vote on fund priorities
- Free access to Moixa app for monitoring energy usage
- Offer of one-to-one energy advice, directly or through referral organisations

### 4. Recruitment and engagement process

The following process draws on Repowering’s experience of engaging local communities on emerging energy technologies, as well as other successful projects such as EnergyWise. For example, experience has shown that it is essential to trial the recruitment and installation process with a small number of households before moving to full-roll out. In addition to testing communication materials, this enables the project partners to test their collaboration methods, to ensure as effective and smooth a delivery as possible. This is particularly important when faced with the additional challenge of recruiting potentially vulnerable customers into the trial, to minimise any disruption.



#### 4.1 Confirm shortlist of suitable properties/households with clients

The shortlisting process is an important first step in identifying suitable properties for the trial. Based on client discussions so far, all have an asset register that can help identify whether a property will be technically suitable. Following this, some additional screening may be carried out. For example, one of the clients has highlighted that certain groups of tenants may have 'trial fatigue' and may want to speak to these residents in advance before confirming that they can be approached. We are also concerned about involving particularly vulnerable households, such as supported housing units, if engaging with the trial may have a detrimental impact on them. Following the initial technical shortlisting, we will explore such issues with the clients and ensure any further screening is compliant with data protection requirements and equality legislation.

- Define suitability criteria and data needed for shortlisting
- Clients to use asset management systems to provide shortlist
- Conduct further screening with clients

## 4.2 Design and test materials and approach

### 4.2.1 *Key principles*

Home Response is a reasonably complex project, with multiple partners. Communication (oral or written) needs to balance transparency with clarity, so that customers can:

- Make an informed decision to participate and know that they can refuse or leave at any time
- Understand how their personal data is being used and how they can change this
- Understand the benefits of the project as communicated through ongoing materials
- Have one point of contact for the duration of the trial, including installation visits

### 4.2.2 *Design / Testing process outline*

The plan for creating the various marketing materials and processes follows a standard Plan-Do-Check-Act framework, incorporating a focus group to ensure messages translate as desired to customers. Clients have also requested sign-off on key materials.

- Gather necessary information from project partners (e.g. eligibility, installation process, incentives)
- Clearly define scope, objectives, roles, incentives and timeframes of testing process
- Draft processes/procedures, materials and messages for review
- Review by clients
- Recruit participants for focus group
- Focus Group 2
- Refine processes, materials and messages following feedback
- Final sign off by clients

### 4.2.3 *Proposed customer journey*

We understand that most customers will want the trial to cause them as little disruption as possible, particularly in terms of home visits. This must be balanced with ensuring that they are fully briefed before signing up to the project, and the likelihood that some households will need follow-up visits to resolve any technical issues. The proposed customer journey takes these two needs into account. The following table details the different steps of the customer journey. The customer's awareness of the journey experience will be simplified and tested.

Key:

	Home Response (HR) team action
	Customer action
	Outcome



#### 4.2.4 Key communication materials

Customer recruitment and ongoing engagement will require a range of materials to be produced. These include:

- 'Warm up' letter from clients to potential customers, with branding
- Leaflet for Community Energy Champion to introduce project when door-knocking
- Community Energy Champion script
- Expression of Interest form
- GLA website
- Customer Terms and Conditions
- New customer information pack to include:
  - Contact details
  - During the trial
  - Leaving the Trial
  - End of trial
- Regular update newsletter including rebate
- Exit feedback form (if leaving before end of trial)
- End-of-trial letter
- End-of-trial questionnaire
- Post-trial O&M requirements

#### 4.2.5 Focus Group 2

Repowering has already carried out an initial focus group session in summer 2018 to get more general feedback about the project. A second focus group will help ensure that the project's key messages are communicated effectively. This group will ideally be drawn from client tenants, who could go on to participate in the trial, and/or from Repowering's network of local residents who have previous experience of contributing to such groups. We will endeavour to create a group that reflects the diversity of the target population, including age, gender and language skills.

Our experience and research of other projects suggests that focus groups are self-selective by nature, and it is difficult to get a representative group. Data protection requirements will limit the degree of screening that can be done to identify different characteristics of potential participants. It is also difficult to create a 'one-size-fits-all' set of materials, due to the level of diversity in the target demographic. Nonetheless, we believe that this focus group can still provide valuable insight into the effectiveness of our drafted materials and processes, as many issues are cross-cutting.

#### 4.3 Recruit and train locally-based Community Energy Champions

Repowering is already using locally-recruited Community Energy Champions to engage with local communities more effectively. EnergyWise also successfully used a field-team for recruitment. There are many benefits to adopting this approach, including access to local knowledge and networks through the Champions, and increased levels of trust from customers.

Recruitment, training and coordination must be carefully thought through to ensure Champions have the skills and confidence they need and are used effectively. This will be managed by Repowering. As the project is reasonably complex, and requires customers to sign a participation agreement, the Champions will only be providing a short summary of the project and securing an Expression of Interest form from potential customers. A core member of the Repowering team will

be responsible for briefing the potential customer on the full details of the project and managing the relationship from then on.

- Identify possible recruitment avenues through client e.g. local anchor organisations
- Outline recruitment/management responsibilities, training and deployment timeframes
- Use/Adapt Repowering's current Champion job description for role
- Recruit
- Design and conduct training (incl. project briefing, key facts document, conversation guides, data compliance, personal safety)
- Provide ongoing support and refresher training

*Extract from Community Energy Champion Job Description:*



**Community Energy Champion**

**Up to £120 per week (dependent on outcomes achieved)**  
**Part-time, home-based**

Repowering London are looking for two new members of our Fuel Poverty team, who are committed to making a difference to local communities in Lambeth.

The role is to engage and inspire members of your local community, by making them aware of the services that Repowering can offer to help reduce household energy bills.

As a Community Energy Champion, you will play a fundamental role in ensuring that Repowering is able to reach and support those most in need.

Ideally, you will live in Lambeth and will be responsible for engaging in activities to identify and engage with vulnerable people living locally, who are most likely to be impacted by the effects of fuel poverty. You will then refer them to Repowering for specialist support to enable them to stay warm and well in their home.

In light of Coronavirus, recruitment of new Energy Champions will be through virtual communication rather than face to face.

#### 4.4 Main recruitment phase and installations

This stage will be informed by the pre-installation testing although we do not expect to see major changes in the overall process as similar approaches have worked previously.

Our approach to the main recruitment phase balances:

1. The desire to maximise participation by following up with undecided or unresponsive households, with:
  2. The understanding that some of these households may be less engaged and therefore more likely to drop-out at a later stage.
- Client to send 'warm up' letter to target households
  - Community Energy Champion (CEC) conducts door-knocking, leaving flyers with contact details for households that do not answer. Champion returns up to three times if there is no answer
  - Customer completes EOI form with CEC or contacts Repowering using details on flyer / on GLA website
  - Repowering contacts customer to arrange First Home Visit and sends information pack (including Terms and Conditions) for customer to review in advance
  - **First Home Visit:** Repowering will answer any questions on T&Cs, show the hardware to be installed, complete and initial property survey and questionnaire, and confirm with the

potential customer if they are suitable for the trial. The prospective participant will also be provided with the “During the trial” info sheet, “Leaving the trial” info sheet and “End-of-Trial” information sheet.

Repowering will endeavour to communicate the following key messages:

- A customer can leave the trial at any time without penalties;
- A renting customer who moves will automatically leave the trial.
- Any “Thank you” gesture received by a customer when joining the trial will remain with the participant even if he/she decides to leave the trial before the end.

In line with best practice, the potential customer will not be asked to sign the Terms and Conditions during the First Home Visit, to avoid them perceiving any pressure to do so. Repowering will leave the document with them and follow up between three and seven working days later.

- Customer signs Terms and Conditions
- Repowering sends a New Customer Information Pack.
- Repowering arranges Second Home Visit with customer for hardware installation and system check including installation of App and answering any additional questions.
- Repowering carries out Second Home Visit with customer
- Repowering contacts customer one week after home visit to check they are satisfied

#### 4.5 Ongoing engagement

Customers will be supported throughout the trial by Repowering and given an email address and phone number to contact if needed during office hours.

As customers will be asked to participate in the trial for 12 months, it is important to keep them engaged throughout that period. This is likely to influence how much they feel they have benefited from the project. It is also likely to increase their willingness to evaluate the project and to engage with us to arrange home visits if technical issues need to be investigated.

An example update newsletter will be included in the recruitment phase and New Customer Information pack, so that customers know to look out for it in emails/post, are aware of the benefits of reading it, and understand any more technical information given, such as monetary savings from trial participation.

Repowering has offered to provide additional fuel poverty and energy efficiency services to customers, if desired. This is to capitalise on the opportunity to engage with such a high number of social housing residents. Clients have now indicated that they have existing relationships with local organisations that provide at least some of the range of services possible. Introductions are being made so that contact details and referral processes can be incorporated into the ongoing engagement plan.

#### 4.6 Leaving the trial

Customers can leave the trial at any time, for any reason. They will automatically leave the trial if they move home and are renting their property. They will need to contact Repowering through the given contact details. A Repowering Officer will arrange a home visit to disconnect the hardware,

uninstall the App and fill in an exit feedback form. There will be no penalties for leaving the trial early and any welcome vouchers and rebates will remain with the participant.

#### 4.7 End of trial

Home Response project partners initially assumed that, as a default, clients would want all technology to be removed from customers' homes at the end of the trial. However, based on clients' feedback, we are now exploring options for the equipment to stay. The end-of-trial process reflects that some customers may choose to retain the equipment continue, and others may opt to have it removed. All customers need to receive a final "Thank you" gesture as agreed and be clearly informed of their options.

- Agree new participation agreement for households wishing to continue
- Contact participants to thank them for participation and offer opportunity to continue

*Customers wishing to leave:*

- Arrange end-of-trial home visit for removing hardware
- Attend home visit, disconnect hardware and help customer remove App
- Fill in End-of-Trial feedback form with customer at home visit

*Customers wishing to retain hardware:*

- Send O&M requirements for hardware post-trial
- Provide
- Fill in End-of-Trial Feedback form via email / on phone

#### 4.8 Post-trial

Based on their experience of a previous trial, one client has raised concerns about the post-trial O&M process and communication. We recommend that we outline and agree a review with the client after the trial has finished. This would ensure, for example, that any customer concerns resulting from End-of-Trial communication by the Home Response team, would be addressed.



## **6. Client Requirements**

Input from clients is essential for developing an appropriate customer recruitment and engagement approach. It will also ensure a positive legacy post-trial. Our potential clients want to help ensure the project would be a success for their residents, but they also need to get appropriate sign-off for any allocation of resources. It is therefore important to set out the level of input required from them at each stage of the trial. For this reason, there is an agreed budget allocation to support the costs of their meeting the requirements summarised below.

### **6.1 Pre-trial scoping / planning**

- Assist target property short-listing
- Assign Project Officer for liaison

### **6.2 Participant recruitment and fuel poverty/energy efficiency engagement**

- Review participant Terms and Conditions
- Review draft recruitment material
- Send letter to target residents, informing them of upcoming contact by Home Response
- Provide Repowering with information and materials for referring fuel poor residents to existing programmes
- Provide contact details that Repowering can give to tenants if they need to contact landlord regarding other issues

### **6.3 Ongoing participant engagement/technical support**

- Review standard project newsletter / savings communications and add logo
- Brief staff responsible for resident engagement/ support on the project so that any enquiries can be referred to Repowering

### **6.4 Installations**

- Consent to installations
- Update asset register

### **6.5 End-of-trial**

- Review end-of-trial communication letter, including participant consent for retention of equipment/de-installation

### **6.6 Post-trial**

- Agree post trial O+M package for equipment, for communication with customers
- Review project reporting and contribute feedback

## **7. Customer Requirements**

As with the clients, it is important to clearly communicate customer requirements from the beginning. This is so that they can provide meaningful consent to participation. We will also ask participants to specify any needs early on, for example in communication methods, so that the project team can minimise disruption.

During the client engagement process, it has been asked whether leaseholders can participate in the trial and, if so, whether they will have any additional requirements. These have been incorporated at relevant stages of the trial.

### **7.1 Recruitment**

- Speak to Community Energy Champion about project (door-knocking) / Read introductory information on letter or online
- Sign Expression of Interest (EOI) form capturing: Name, address, preferred contact details.
- Following EOI, arrange home visit to discuss project and participation agreement
- Read participation agreement ahead of home visit
- Attend home visit – ask questions, allow check of home for suitability
- Final read and sign of participation agreement
  - If a leaseholder, agree to own hardware and be responsible for maintenance after trial

### **7.2 Installation**

- Arrange installation visit
- Attend home installation visit

### **7.3 Ongoing engagement / technical support**

- Participate in trial for minimum period of 12 months
- Arrange and attend up to two additional home visits for any technical issues
- Vote for allocation of community funds if desired

### **7.4 End-of-trial**

- Arrange end-of-trial home visit if hardware is removed
- Complete end-of-trial questionnaire

### **7.5 Post-trial**

- Comply with terms of O+M agreement

## 8. Data Sharing and Security (GDPR Compliance)

As Home Response is a multi-partner project, recording data in several different ways, the risks of a personal data breach are increased. To mitigate this risk, it is important that that all roles and processes are clear from the beginning. Clients have also asked for a clear risk assessment and management approach to be outlined before they are willing to agree participation in the trial.

Data collected	Information Flow	Data type	Collected by	Owned by	Shared with
Name, address, phone number, email address	Paper: <ol style="list-style-type: none"> <li>1. Collected by a Repowering representative on a paper form.</li> <li>2. Transferred that day to Repowering Office in Brixton (forms not stored overnight in representative's home) or posted using secure tracked service.</li> <li>3. Recorded in a secure and GDPR compliant data store</li> <li>4. Assigned a reference number for anonymity</li> <li>5. Used by Repowering to contact resident about project throughout project</li> <li>6. Address shared with Moixa when arranging installation / technical visit</li> <li>7. Data deleted at end of trial, unless explicit consent given for other specific communication purpose</li> </ol>	Personal	Repowering	Repowering	Moixa
	Email enquiry <ol style="list-style-type: none"> <li>1. Received by Repowering via email</li> <li>2. Recorded in a secure and GDPR compliant data store</li> <li>3. As above</li> </ol>	Personal	Repowering	Repowering	Moixa

## 9. Risk Assessment and Management

### 9.1 Recruitment

Risk	Potential Impact	Mitigation
Customer does not understand trial because it is not communicated simply and clearly.	Not enough people signed up, or those that do participate misunderstand and become frustrated by unmet expectations.	Collaborate with client to review materials in advance. Reinforce messages at first home visit and at install.
Customer signs up and then finds out they are not suitable for trial.	Frustrated that time is wasted and cannot make most of opportunity.	Ensure suitability criteria are identified in advance with partners and screen interested residents at EOI and between EOI and sign-up stage. Ensure other ways to engage in energy efficiency measures etc are offered if not suitable e.g. energy audits, switching advice etc.

### 9.2 Installation

Risk	Potential Impact	Mitigation
Customer does not understand why technician is visiting.	May not let technician in, or not link the installation to the project, or think the technician can fix something in their home.	Representative from Repowering to visit with technician, preferably same person from first home visit. Provide landlord contact details if they need other help.

### 9.3 Trial

Risk	Potential Impact	Mitigation
Customer is unclear whether to speak to energy provider, landlord or Home Response team if confused about energy bills.	Customer does not address problems with their energy supplier or technical energy issues with landlord.	Give clear contact details for different organisations, with simple explanation of roles. Include in regular project updates.
Customer moves home and does not tell team.	Technology may continue to capture data from new tenant without their permission	Include messaging on regular update newsletters for new tenants. Work with clients to find other system solutions (e.g.

		flagging on property database) and asking relevant stakeholders (e.g. housing officers, estate managers and RMOs) to highlight tenancy changes.
Customer does not understand ongoing benefits of DSR.	Customer disengages from trial	Test messaging in advance and adapt as necessary
Technology fails and customer does not respond to arranging a home visit.	Customer cannot continue in trial	Use reasonable effort to contact customer, explaining benefits to continuing

#### 9.4 End-of-Trial

Risk	Potential Impact	Mitigation
Customer does not understand the financial or environmental benefits of their participation	Customer wishes to have equipment removed	Homes Response to review customer feedback during trial and in end of trial questionnaire and provided tailored responses to issues raised

#### 9.5 Post-Trial

Risk	Potential Impact	Mitigation
Customer does not understand or comply with O&M procedures	Cannot fully benefit from ongoing DSR services	Ensure full handover of O&M to relevant stakeholders post-trial.

END