

My Electric Avenue

Customer Engagement Plan

for Relevant Customers

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The formal title "I²EV" is used for contractual and Ofgem reporting purpose.*



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1. Introduction

a. The My Electric Avenue project

The My Electric Avenue project is led by EA Technology, with project partners Scottish and Southern Energy Power Distribution Limited (SSEPD) (the host Distribution Network Operator), Northern Powergrid (collaborating DNO), Nissan (EV supplier), Fleetdrive Electric (EV rental programme management) and Zero Carbon Futures¹ (charging point network developer). In addition there are two academic institutions supporting the project, the University of Manchester (providing network modelling and analysis), and De Montfort University (providing socio-economic data gathering and analysis).

The project is funded by Ofgem's Low Carbon Networks Fund (LCNF).

The forecasted growth in electric vehicle (EV) sales is expected to cause an increase in peak-time demand for electricity both locally and nationally. At the local level there is a risk that low voltage (LV) cables will become overloaded where multiple EVs are connected for charging at the same time and during peak hours in electricity demand, e.g. in the early evening peak when people return from work.

The project will deliver two strands of innovation. Firstly, a new commercial arrangement will be developed whereby a non-DNO manages a LCNF project on behalf of a DNO (traditionally it is a DNO that won funding under the LCNF and carried out the project). Secondly, a programme of trials using real customers and real EVs will be carried out, to assess the impact of EVs on local electricity networks. The results of these trials will be of interest and will be communicated to the GB DNO community, to UK Government, to the energy industry and to the general public – we will begin to understand what an 'EV ready' street of the future may look like, and what the implications might be for our electricity network.

The trials will assess the impact on an LV feeder of a cluster of EVs in daily operation in a given neighbourhood or business campus. The project will trial a technical solution which would avoid the need for significant investment in the local network to cope with this increased demand. Therefore the project will deliver two separate trials, one 'Cluster' and one 'Social'.

The 'Cluster trials' will aim to simulate a 2030 network; these clusters will be in both residential situations (charging at home) and in business situations (fleet cars charging at work).

The non-cluster 'social trial' EV users will be monitored under a data collection exercise of customer driving and charging habits and demographics, and will be individuals and fleet hire users.

b. Who are we engaging with and why?

The project focuses on the electricity network that supplies homes and small businesses - the LV network. Electricity networks are built to provide energy to customers in a secure, reliable, and sustainable way. The project will trial and demonstrate practical and cost-efficient solutions to alleviate the potential impact of clusters of EVs being charged on a local network. For the cluster trials, we will offer an exclusive trial package (subject to availability) including a preferential rental agreement for an EV on the condition that customers participate as part of a local group, or cluster. In return for the preferential rental agreement, we will ask that they take part in surveys and commit

¹ Previously called "Charge Your Car (North) Ltd"

to share with us their experience of driving an EV, their charging habits etc. The ‘Social’ trials are for customers who do not want to, or are unable to participate as a group, and who will not be asked to take part in surveys but will have driving and charging habits recorded. For these customers standard rental agreements will apply. Both of the trials have a limited number of spaces available and will be offered subject to availability and eligibility (based on checks outlined below). We need to directly engage with customers to recruit for the trial programme and to communicate the outputs and learning from the project.

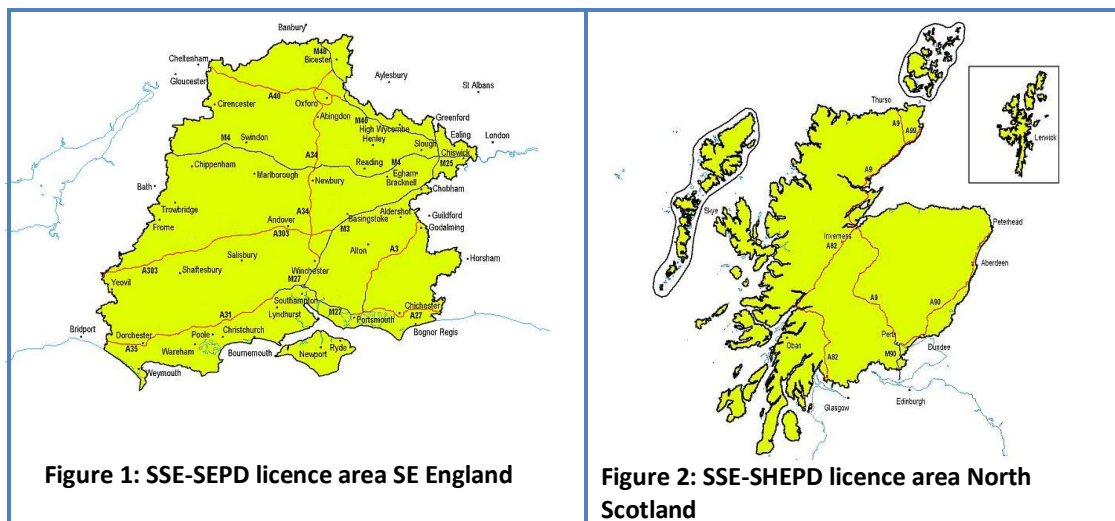
Engagement means:

- Communication with customers through a variety of media, to raise awareness of the project, its trials, results and benefits arising from the project
- Communicating with and engaging directly with customers to recruit them for the trials
- On-going communication with customers taking part in the trial programme for survey purposes, feedback and to pick up any issues or highlights
- Provision of clear channels of contact for trial participants for any issues arising during the lifetime of the trials (EV maintenance, general queries etc.)
- Managing customers leaving the trial programme
- Managing decommissioning of charging points and return of EVs at end of the trial period

This Customer Engagement Plan (CEP) details the arrangements that the project has made for engaging with ‘relevant customers’. A relevant customer is defined as ‘a customer with a profile class of 1, 2, 3 or 4 as defined in Part 2 of Schedule 16 of the Distribution Connection and Use of System Agreement (DCUSA) and includes both domestic and small business properties.

c. How will engagement be targeted?

The project will focus on engaging customers for trials in the SSE network areas in central southern England (Figure 1) and the north of Scotland (Figure 2), and Northern Powergrid’s licence areas in Northeast England, Yorkshire and north Lincolnshire for the first six months of the project. Postcodes for these areas are found in Appendix A. After six months there is the option to widen the scope to the rest of Great Britain with support of other DNOs.



Under the conditions of the funding agreement, at least seven clusters must be established, each consisting of a minimum of ten trial participants per cluster, in the first twelve months of the project². Figure 4 outlines the scheduling approach that will be taken to trial recruitment for both cluster and social trials.

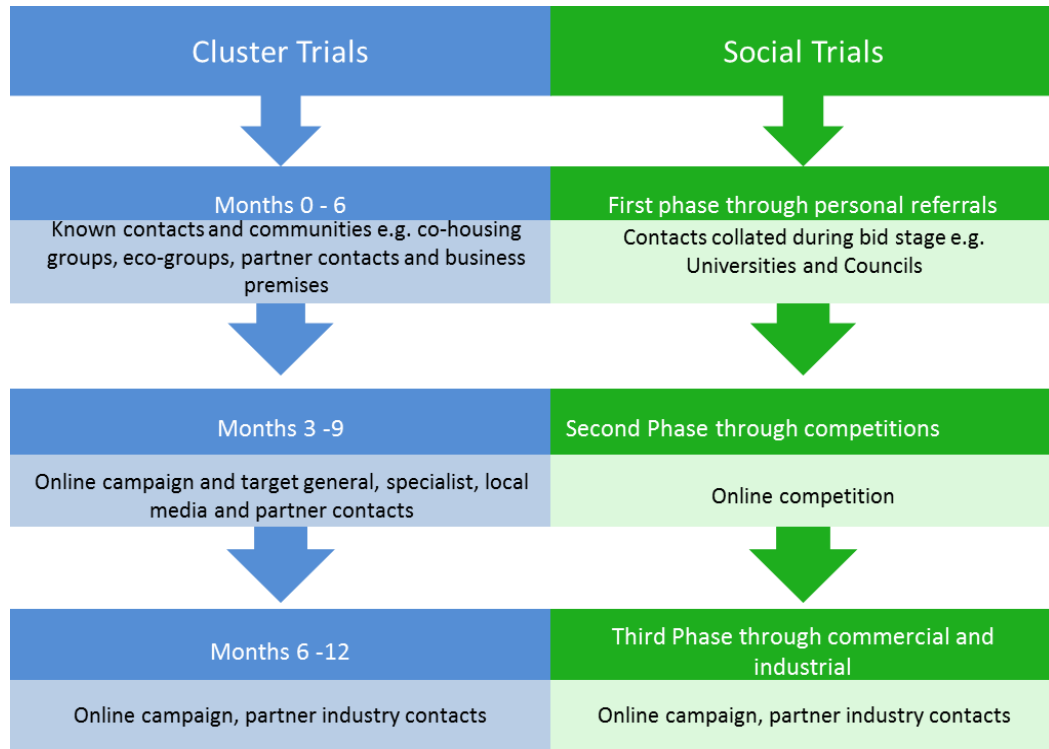


Figure 4: Trial engagement scheduling

In the second phase, a competition will be launched under the name of ‘My Electric Avenue’, to invite people to come forward to apply to take part in the trials, either as local groups (for the cluster trials) or as an individual (social trials). Both trials have a limited number of spaces available and minimum numbers will be set in advance. This will give the project a focus around local communities, and social media will be an effective channel for such an approach. The onus will be on communities themselves to identify the desired number of people who would be interested in taking part in a trial. Communities where local residents have already worked together on low carbon or other projects, provide good examples. Engaging with, for example, the Chair of a social housing group or community group will be ideal as they should know the area, the people within it, and be able to champion the trial offer. The third phase will look to commercial and industrial clusters of fleet users; ‘clusters’ of work colleagues using EVs and charging them at their place of work. Northern Powergrid and Zero Carbon Futures have connections with major OEM fleet users in the North East. For a spread of different scenarios ideally at least one cluster will be on business premises.

The process for customer engagement is defined in Section 2.

² Twelve months from Ofgem signing off the Customer Engagement Plan

2. Communications Strategy

Governance requirement: the plan must include: a communications strategy which sets out inter alia: (a) any proposed interaction with a Relevant Customer or premises of a Relevant Customer or proposed interruption to the supply of any Customer for the purposes of the Project, and how the Customer will be notified in advance; (b) on-going communications with the Relevant Customers involved in the Project; and (c) arrangements for responding to queries or complaints relating to the Project from Relevant Customers.

a. Customer interaction

Customer interaction will be through engagement in the trials, and will mean that customers who are eligible, and are selected to participate (under limited availability), will rent an EV for the duration of the trial. Those participating in the Cluster trials will be renting an EV under a preferential group or package rate, and have an EV charging point with an intelligent control box installed in their home, or place of work. It is expected that the majority of those participating in the Cluster trial will be domestic, rather than commercial 'fleet' customers but with one or two business clusters. Each trial will last approximately 18 months. Under the social trials, each trial participant will have the use of an EV for the trial period (up to 18-24 months) but no additional equipment will be installed as part of the trial. Customers participating in the social trials will rent the EV under the standard agreements offered by Fleetdrive Electric. A key aspect to widespread deployment of EVs will be in understanding customers' attitudes and behaviours to managed EV control. The project's social science partner, De Montfort University, will engage with customers in the clusters through surveys and other preferred methods of communication to explore customer feedback.

Customers lie at the heart of the project, and support will be provided at every stage of the trial lifecycle to ensure that customers' needs are met and exceeded wherever possible. To participate, customers will be asked to sign an agreement to participate in the trial for 12-18 months. To produce credible results it is essential that the trial continues, and data is gathered over 12-18 months. Therefore commitment to the trial is crucial. The agreement customers will be asked to sign will highlight this need for their commitment to the whole length of the trial. If a participant withdraws and defaults on their payments for any reason, the car and charging point will be recovered.

Below details the customer engagement process which will be used for setting up the trials, together with the communications strategy that will be used to recruit and communicate with customers throughout the lifetime of the trials and the project.

i. How will the project engage customers for the trials?

The communications strategy will include the utilisation of the following channels:

- Personal contact/referrals
- PR - Media lists will be developed for the distribution of press releases, key project information, opinion pieces, editors' letters etc. A media pack will be produced. Target

media outlets will be both national and regional, encompassing specialist publications in the motoring/green/electric/low emission vehicle sectors, plus the energy, environmental, engineering, community/low carbon community sectors

- Website/s – project’s own website and partner websites
- Resource pack – to contain everything required for potential participants to engage with their neighbours, such as a letter template to circulate to neighbours with a tear-off slip for registering interest, posters for community notice boards, etc. This will be available for download from the website
- Social media (drawing on the existing social presence of Fleetdrive Electric and Zero Carbon Futures):
 - Facebook (encourage people to recruit neighbours/friends)
 - Twitter (news updates etc.)
 - YouTube (a short initial video to be produced)
 - LinkedIn (spread word about the project via online business networking)
- E-newsletters, to people who opt in via the website
- Other marketing/communication channels of partners e.g.:
 - EV charging point companies
 - Energy Saving Trust
 - Low Carbon Vehicle Partnership
 - Local Authorities that are highly motivated to encourage EVs (via their sustainability officers)
 - Green residential developments and cohousing, gated communities
 - Green newsletters, Low Carbon Communities Network
 - Companies with a sustainability agenda, via organisations such as Business in the Community
 - Trade associations (e.g. BVRLA etc.)
- Events – speaking at existing events, and other possible opportunities such as EV test drive events – using presentations, displays and printed materials. An events calendar will be developed.

The My Electric Avenue project website (myelectricavenue.co.uk) will promote the project and publicise information regarding the Cluster and Social trials. It will allow people to find out more information about the project. It will be designed to be clear and user-friendly. A site plan and detailed content is to be developed, however navigation is likely to be based around menus such as the following:

- Home
- About
- News
- FAQs
- Technical
- Partners/Links
- Contact

The website will have the functionality to enable customers to check eligibility for the trials, to see latest project news and related articles. There will be a map of the UK with dots showing where interested applications for the project trials have come from (there will be no way to identify the street or in the case of a village, the actual village itself). E-newsletters will provide updates during the early stage of the project. News updates will automatically feed into Twitter.

Recruitment for both the Social and Cluster trials will be priority leads in the first instance (see Figure 4). Competitions will be run through the website and targeted local media with the support of Zero Carbon Futures and Fleetdrive Electric. Relevant exhibitions and events will be used to promote the trial opportunity.

ii. Recruitment for Cluster trials

Interaction with customers will begin at the recruitment stage. Project partners will look to identify project ‘champions’, that is, customers who are willing to publicise the trials within their local area and encourage others to participate. These champions could be individuals who indicate particular interest in the trial and the energy and willingness to contact their neighbours or community leaders who are prepared to use their existing links as a conduit to publicise information. More than one person may wish to work together to provide this role. There will not be specific eligibility criteria to perform this role. When a ‘champion’ is identified within a potential cluster, EA Technology and the project partners will work with that person(s) to engage with the local community in order to find ten or more people interested in taking part in a trial. At this stage ‘interested’ will mean indicating that they would like to have more information to participate as an EV customer in the project. Promotional exhibitions and events will be held by partners (ideally) within participating DNO areas to boost awareness of the project in the local areas and foster support within local communities. Fleetdrive Electric will arrange for free EV drive sessions for interested parties to help build interest with potential customers and recruit to the trials. It is anticipated that the ‘snowballing’ effect, will support recruitment of customers to clusters; that is, we will recruit participants through word-of-mouth. Interested customers will be encouraged to speak to their neighbours and friends in their local area to promote the trials and recruit as many customers as possible.

In addition to ‘snowball’ customer recruitment, Fleetdrive Electric and Zero Carbon Futures will work with their existing customers and contacts to promote the project. Any interested customers already on Fleetdrive Electric and Zero Carbon Futures’ current databases who have indicated a willingness to participate in trials or EVs from past activities or conversations will be included in the mail out list to receive an initial information pack.

An information pack, including necessary information required to form a cluster will be sent to interested parties and organisations to disseminate information locally. This will be provided both electronically and in hard copy and could be uploaded on to local websites. The pack will include information on:

- Future predictions for EVs and their impact on networks and need for the project
- Objectives of the project
- Project partner details

- How the project is funded
- Eligibility to take part
- Brief summary of how a customer can get involved, including information on the Technology and charging point installation, and a customer's obligations under the trial
- Summary details on the Nissan Leaf available as part of the trial (i.e. driving range)
- How the charging point will be installed and the necessary short outage to the individual's connection (up to 30 minutes)
- Contact details for further information, sign up or issues

If after receiving and fully reading through this information pack, customers remain interested in participating, they will be encouraged to provide an initial statement of interest to the project partners. The statement of interest will be recognised as a formal invitation from the customer for project partners to carry out necessary assessments (please see Appendix C for details of checks to be carried out). The assessments will be carried out to ensure that the customer is eligible for the trial. Realistic timings for trial set up will be communicated to customers from the outset once a cluster has been established, to manage expectations and minimise any potential disappointment arising from (unlikely) delay due to project technicalities.

Customer informed of eligibility to take part in trial

Both the Social and Cluster trials have a limited number of places available, and rely on the customer passing the assessments described below. Project partners responsible for carrying out the assessments and feasibility tests will explain that the trials are subject to suitability of the local LV network, availability and eligibility to customers. If all checks undertaken by this point conclude that the customer is eligible for the trials, Fleetdrive Electric will notify them that they could potentially form a cluster and that they can actively start to recruit other participants. All parties will ensure data security as described by the Data Protection Strategy and will carry photo identification with them when interacting with customers.

Credit checks

One of the assessments mentioned above includes a credit check. The EVs provided as part of these trials will be rented from the project partner Fleetdrive Electric, and therefore it is important that customers understand that they will be subject to Fleetdrive Electric's checks.

Fleetdrive Electric will carry out credit checks on those who are interested. This information will remain confidential and be held securely by Fleetdrive Electric. If a customer fails any of the assessments (including the credit check), or there are insufficient numbers to take part, Fleetdrive Electric will inform the customer, and cluster as a whole, that they are 'unsuitable'. Project partners will not divulge reasons for the customer failing the assessments to avoid any possible embarrassment for the customer involved, unless requested to do so by that customer. The information Fleetdrive Electric collects and holds on customers during this process can be made available if requested (in writing) by individuals.

Details of Fleetdrive Electric's standards for data protection and credit checks are in the project's Data Protection strategy (p.10).

Other checks

Other checks which are required to check eligibility for the trial include a charging point survey and a Power Line Carrier (PLC) survey. The charging point survey will be carried out by Zero Carbon Futures and will assess a customers' premises suitability for a charging point. The PLC survey will be carried out by ANDTR to check that communications are possible in the area. Details for these surveys are included in Appendix C.

Contractual confirmation

Once customers have been determined as eligible and there are enough participants to form a cluster, Fleetdrive Electric will send a hard copy information pack as described above. This pack will also include contractual information and information for arranging the installation of the charging point. The contract will include the following details of the rental agreement with Fleetdrive Electric:

- Duration of agreement
- Payment details
- Key information regarding possible charges (late payments, excess mileage and maintenance)
- Actions regarding missing payments
- Use of your information (in particular safe guarding credit information)
- Maintenance services included and breakdown cover included as part of the contract
- Standard terms and conditions of the rental agreement
- Options in case of equipment failure
- Useful contact numbers regarding breakdown (24 hour cover) and for general rental enquiries, any maintenance queries or help on use of EVs (9am-5pm Monday to Friday)

As mentioned earlier, the contract will reflect the need for commitment from the customer for the whole length of the trial. It will also include the permission to use and store the data as set out in the Data Protection Strategy. The contracts will only be binding if enough customers sign up.

The trial depends on clusters of participants. It could be that during the 12-18 month trial a network is rearranged for maintenance. Temporary rearrangements should not affect the overall results of the trial. Long term rearrangements should be avoided by the local Distribution Network Operator (DNO) for the trial, but if necessary, a second monitor controller can be fitted to an alternative substation should a feeder be reconfigured to be supplied by that substation. This may affect the results of the trial but will not affect the customer.

When sufficient contracts are confirmed for a cluster, Fleetdrive Electric will enter the customer details on their system for the lease and provide contact details to Zero Carbon Futures to arrange installation of the charging point with the customer.

iii. How will customers be engaged with, once the trials start?

Appointments with customers will be made to suit customers' availability at all times, in order to install the intelligent control box and charging point, and to take delivery of the EV. EV driving awareness sessions will be organised with the clusters as required.

Welcome pack

Trial participants will receive a welcome pack from Fleetdrive Electric, in both hard copy and electronic copy. This will include the following for cluster trial participants:

- Background to the trial, why it is needed and FAQs
- Maintenance, safety information for the electric vehicle
- Safety information for the charger and any other equipment in participants homes
- Who is involved
- Useful contact numbers
- Introduction pack from De Montfort University explaining:
 - Who will be involved from De Montfort University including photos of project team
 - Options for communications with De Montfort University (email, telephone or letter)
 - What they will be asking and what options are available for surveying
 - Roughly when they will be contacted by De Montfort University
- Information on downloads from the car or the charging point will be given including:
 - What data is recorded
 - How it is transmitted
 - How it is kept secure
- Important information regarding their obligations to the trial and contract conditions should they default on their payments for any reason
- A telephone number and email for EA Technology and SSEPD in case of problems
- In the event that customers experience a problem, a checklist of information that customers will be expected to give over the phone/via email to help EA Technology and Project Partners resolve the problem as quickly as possible
- Statement of preferred method of communication, to be sent back to the project partners for reference.

Fleetdrive Electric will be the main point of contact for customers on the project during recruitment, to streamline communication through one project partner. After this, EA Technology will hold and control access to data and contact will be made via the relevant partners or subcontractors. Fleetdrive Electric will still provide the customer care service for the vehicles themselves, and provide mid contract updates, but EA Technology will be the main point of contact for the project.

Installation of the charging point

Once all the contractual paper work is complete, Zero Carbon Futures will arrange for the charging points and intelligent control boxes to be installed. Communications will be via the customer's preferred medium with confirmation in the post.

A short interruption to the household's electricity supply will be required to connect the charging point to their electricity supply and a convenient time for this will be agreed with the household

(using a method of communication agreed with the customer). As well as arranging a convenient time, customers will be asked which route of entry representatives of Zero Carbon Futures should use when visiting their house to install the charging point. Any safety requirements required of the customer will also be agreed (e.g. ensuring pets and children cannot go near the area where work is carried out). When installing equipment in homes, care will be taken to keep disruption to the householder to a minimum. All staff will carry identification.

EV delivery to the customer

Fleetdrive Electric will deliver the car and provide aftercare support.

The electric vehicle handover will include:

- Driver card with emergency and other contact numbers
- Delivery and training at an agreed time

Each vehicle will display a My Electric Avenue branded sticker with website address, to promote brand awareness of the project.

Fleetdrive Electric will arrange a post-delivery ‘follow up’ call with the customer a week after the EV has been delivered to check if the customer has any further queries. The call will be arranged at a convenient time for the customer.

iv. Recruitment for social trials

Customers will be recruited using the same approach to the Social trials as they will be to the Cluster trials. Customers applying for this element of the project will be subject to the standard rental agreement offered by Fleetdrive Electric; the preferential rate is only offered to Cluster trial participants. Some of those participating in the Social trial may already have EVs.

The process for this part of the project will be quicker and easier for all parties involved than that of the Cluster trials because further recruitment of neighbours is unnecessary. Customers who are interested in participating in the Social trials will still need to pass the eligibility criteria but as these customers will not have control equipment installed, they will not require the PLC communications checks.

Welcome Pack

Customers applying for the Social trials will receive the same information pack from Fleetdrive Electric (in hard and electronic copies) as those participating in the Cluster trials. If after receiving this information pack, customers remain interested in participating, they have passed the credit check and charging point survey and there are still available places on the Social trial, will receive a Welcome Pack (in hard and electronic copies) once contracts have been signed. The Welcome Pack will include:

- Reiteration of the trial and why it is needed and FAQs
- Expectation and requirements of the participants

- A contract for the car
- A self-complete questionnaire on demographics
- Maintenance and safety information for the electric vehicle
- Useful contact numbers
- What usage information will be recorded in the car
- How it will be downloaded and kept secure
- How such information would be used
- Who would use the information
- How data would be kept safe
- A consent form, to be returned to Fleetdrive Electric. Customers will be sent a copy of the consent form once signed by all parties
- A contact phone number and email for any problems regarding the information required
- Statement of preferred method of communication, to be sent back to the project partners for reference

Customers will be asked for permission for the Project partners to install a device to monitor data about the car on an anonymous basis and for customers to fill in a short questionnaire about themselves when taking on the car lease.

Delivery and customer support

These will be the same as for the Cluster trials.

b. On-going communication with customers

Maintaining communication with customers over lengthy trials is crucial to ensuring the delivery of results. During the course of the trial, Cluster trial participants will be contacted by De Montfort University to understand more about their everyday driving and charging habits. De Montfort University will also gain participants' feedback on the Technology. This will focus on adjustments in driving behaviour, problems encountered, any concerns they may have and satisfaction levels with the Technology. Customers will receive an information pack from De Montfort University, including:

- Who will be involved from De Montfort University including photos
- Options for communications with De Montfort University (e.g. email, telephone or letter)
- Roughly when they should expect to be contact to be made by De Montfort University

Customers will be contacted by De Montfort University to agree a convenient time and format for all the surveys. Customers will be invited to provide feedback in different ways, for example:

- Workshops at a central location to the community
- Tele-surveys
- Written surveys
- Web forums
- Individual internet questionnaires
- Face-to-face interviews

The aim is to use a range of media for feedback and surveying that are convenient to customers. De Montfort University will ensure data security as described by the Data Protection Strategy. All staff will carry identification.

Contact numbers

Customers will also be contacted by Fleetdrive Electric to carry out a post-delivery follow up check that the user is happy with using the vehicles. Customers will also have contact numbers for:

EV servicing: 0844 824 0707 Option 2

Breakdown or accidents: 0844 824 0707 Option 1

Breakdown cover through Fleetdrive Electric is provided by the AA or the RAC.

Fleetdrive Electric will perform maintenance checks at three monthly intervals. Customers will be contacted to arrange this at their convenience. For these checks, customers will receive a reminder from Fleetdrive Electric (by email, telephone or letter as agreed with the customers) to arrange the date.

At nine, six and two months before the end of the trial period, customers will receive a letter outlining their options for the final stages of the trial. This letter will explain that the trial is coming to an end and they will be given the choice of giving up the vehicle at the end of the trial period or signing a new lease to retain the vehicle under standard terms and conditions. For those interested in continuing with a normal lease, the letter will clearly outline details on the differences between the new lease and the trial lease. Following the issue of the letter, customers will be contacted (via their preferred method) to confirm their decision. Customers will be advised to either sign a new lease, or contact the project partners to agree a convenient time for the car to be collected (after the 18 month period).

Regardless of their decision, customers will be contacted a final time by De Montfort University to hold a final post-trial survey and provide the opportunity for feedback on the whole trial experience.

Other potential impacts of the Technology

It will be explained to participants that the technology controls the charging cycles of EVs to prevent the network being overloaded. It is expected that this can be carried out whilst ensuring that the EV users still have charged EVs when they require them. However, the objective of the trial is to establish whether this is the case. The project may conclude that there are scenarios where the control cannot ensure the EVs are sufficiently charged or additional intelligence is required.

There is therefore a risk that participants could experience inconvenience if the car is not charged sufficiently. The mitigation measures proposed for technology failure will be available if participants indicate there is a problem. This will be explained to potential participants. Contact numbers will be the same as listed in Sections f and h.

Mitigation

Arrangements will be made to ensure that customers are not unduly inconvenienced if an EV is not sufficiently charged or the technology fails. These may include replacement with alternative hire car and claim expenses for petrol, or reverting back to previous car and claim expenses for petrol or an alternative means to charge. Different arrangements may be appropriate for different clusters and these will be arranged with Fleetdrive Electric. This information will be included in the information pack and during events. Customers signing up will be asked to indicate their preferences. Arranging mitigation will not affect recruitment timescales.

c. Queries, compliments and complaints

As project lead, a general enquiries telephone number and email at EA Technology will be provided for the duration of the project. Support will be available between 8:30am-5pm Monday to Wednesday, 8:30am – 4pm Thursday and Friday. The contact number for EA Technology will be: 0151 347 2221 and customers will be encouraged to use this number during these operating hours.

DNO staff will be provided with information about the project and how to respond to queries, compliments and complaints about the project.

The complaints procedure and log held by EA Technology are described in Appendix B.

i. Fault fixing

EA Technology will manage any calls regarding faults during the office hours listed above. The local Distribution Network Operator will provide a 24 hour emergency contact number to provide emergency or out of hours support in situations where the customer is not able to charge their electric vehicle due to a fault with the Technology installed in the DNO substation. Substations with the monitor controllers will be recorded. The contact number for the relevant Distribution Network Operator will be provided in the information pack given to participating customers. EA Technology and the relevant DNOs will have fault resolution processes in place prior to commissioning technology in substations. These will include:

- Spare units and information at depots so that faulty units can be replaced quickly with response staff briefed in how they should replace units.
- Training and information for customer service personnel about the technology, where it is located and the information they should give to customers 'phoning in, the fault identification process and how to alert response staff.

Information on the process will be outlined in the welcome pack.

A fault with the technology may prevent the electric vehicle being charged as required, but it will not cause an interruption to supply in customers' homes and does not fall within the remit of an 18 hour restoration standard. However, it is important for DNOs to treat any faults in relation to this project with the same sense of urgency as those that occur in normal network operations. Where the fault is

in the monitor controller the relevant DNO will endeavour to repair or replace the monitor controller in the same timescales, and using the same processes that would be used for any other normal fault on the network. However, in the event of a simultaneous major supply incident affecting many customers (e.g. during exceptional weather conditions), the DNO will prioritise the restoration of supply to customers who have lost the entire supply to their homes.

Where faulty intelligent control boxes are reported, a replacement will be installed the next working day by a suitable contractor arranged by EA Technology and project partners.

A log of faults will be kept

ii. Interruption of supply

In advance of the installation, customers will be advised that in order to install the EV charging point they will experience a short interruption (up to 30 minutes). This will be indicated in the information pack and it will be explained to the customer by Zero Carbon Futures or their contractors and carried out at a convenient time. Contingency plans will come into effect if the planned interruption exceeds the estimated 30 minutes.

There should not be an outage when equipment is installed at the substation. If in unusual circumstances an outage is necessary, this will be discussed with potential cluster participants. If they think that it is acceptable to them and their neighbours, they can choose to continue with the trial. At least a fortnight's notice will be given and all those affected will be given written notification of the time and duration. This notification period is longer than required for PSR customers. The network will be checked for PSR customers. If any are present, SSE will ensure that they have the information in an appropriate format and can contact SSE to discuss any concerns.

iii. Withdrawal from the project

The rental agreement that customers will be asked to sign will include a clause to the effect that a customer signing up to the trial cannot withdraw part way through the project. A critical aspect of this trial is to obtain data from the same participants for the duration of the trial period. In addition to a contractual clause, Fleetdrive Electric will explicitly explain to customers during the process of signing up to the trial that they will not be able to withdraw, unless under exceptional circumstances.

Should customers default on the payments for their EV for any reason, Fleetdrive Electric will arrange a convenient time to collect the car from the customer, and complete the contract termination in line with their contractual obligations. Zero Carbon Futures will also arrange a time convenient for the customer to remove the charging point from customers' homes, ensuring that this is done so in accordance with the with IET Code of Practice for the Installation of EV Charging Points. Zero Carbon Futures will ensure that the customer's electrical system is left in a safe and secure manner, following the removal.

There will be no other penalties enforced on the defaulting participant beyond those detailed within Fleetdrive Electric's standard vehicle rental agreement.

The project will only be installing equipment (i.e. charging points, active socket of an Esprit device and associated cabling to their consumer unit) at the properties of the 'clustered' customers included in the technical trial.

Once the trials are complete equipment will be removed from customers' premises, however it will be left in place should a customer choose to retain their equipment. It will be highlighted that if they keep the equipment once the trial has ended the customer will have to accept an ongoing responsibility for the maintenance of the equipment.

It is of note that there may be unforeseen circumstances where some or all of the equipment has to be removed, for example if issues are identified with the equipment, the charging cycles, or the installation during the trial.

3. Priority Services Register customers

Governance requirement: *the plan must give information on the Priority Services Register Customers who will be involved in the Project and how they will be appropriately treated (including providing information to any person acting on behalf of a Priority Services Register Customer in accordance with condition 26 of the Electricity Supply Licence, where applicable)*

All DNOs maintain a Priority Services Register to ensure the well-being of vulnerable customers³.

The project will not specifically target customers on the Priority Services Register (PSR) so any details obtained will be through the process outlined above. However, when/if a customer responds and wishes to participate, they will be checked against the relevant DNO's PSR record to ensure that these customers are contacted and dealt with in an appropriate manner, and in accordance with standard procedures for PSR customers (as outlined in SSEPD's Code of Practice). For example, appropriate means to communicate will be provided if speech is a problem. As the project team are not explicitly targeting PSR customers for the trial, numbers should be minimal. PSR customers will therefore be treated on a case-by-case basis, with engagement and communication conducted in an appropriate and considered manner for the duration of the trial. As previously noted, if an outage is required, SSE will ensure that the information is in an appropriate format for the PSR customers.

In line with SSEPD's Code of Practice, where PSR customers are being communicated with, checks will be in place to ensure that the information has been understood and that the customer understands what they are signing up to. In addition, where a person is acting on behalf of a PSR

³ <http://www.ssepd.co.uk/Customerservice/PriorityServices/>

customer under condition 26 of the Electricity Supply Licence, the same information will be provided to that person. We will work with that person on behalf of and with the PSR customer to ensure that all communication is clearly understood and both parties are in full agreement before signing up to a trial.

An example of how we will check that the PSR customer (and the person acting on their behalf, if applicable) understands the information shared with them and what they are committing to is by asking them to explain some of the key information back to us before proceeding with the next steps, i.e. processing their application. Again, as the project is not explicitly targeting PSR customers, the same approach will be taken in each applicable instance.

The customer's supply will be interrupted for a short period during the installation of the trial equipment at the customer's property; however this equipment will only be installed with the customer's explicit consent at a convenient time. This is the standard procedure for all participating customers. Should any customer be adversely affected by the planned short interruption, for example if essential medical equipment is used at home, and are unable to make alternative arrangements for the planned interruption, they will be classed as unsuitable for the trial and informed by Fleetdrive Electric.

As customers will be contacted by Zero Carbon Futures to check if their home is eligible for a charging point, this can be used as an opportunity to discuss (discreetly) the impact of the short interruption to customers' power and allow appropriate measures to be taken, for those who are able to make alternative arrangements prior to the planned interruption.

De Montfort University and Fleetdrive Electric will use communication medium appropriate for participating PSR customers throughout the trial. Fleetdrive Electric will ensure that the EV is serviced at suitable times to meet the need of PSR customers.

The links below provide full details on how the process is managed:

<http://www.ssepd.co.uk/CustomerService/>

[http://www.ssepd.co.uk/uploadedFiles/Controls/Lists/Resources/Sample_Resources\(1\)/SSEPDCodeOfPractice.pdf](http://www.ssepd.co.uk/uploadedFiles/Controls/Lists/Resources/Sample_Resources(1)/SSEPDCodeOfPractice.pdf)

4. Customer consent

Governance requirement: *the plan must give details of how any consent that may be required as part of the Project will be obtained.*

The My Electric Avenue project is based on the trial of new Technology produced to control EV charging points at customer's premises, on real networks using actual current measurements. Because of this customers form a central part to the trials. Therefore customer consent is an important aspect of the Customer Engagement Plan. Customers participating in both the Cluster and Social trials will be required to give full consent to the project.

All customers who register interest for both the Cluster and Social trials will be given a comprehensive information pack covering all the information required (see section 2 d and 2 e). Before taking part in the trial, all participating customers will be asked to read all information thoroughly and understand the terms and conditions of participating in the trial, sign the trial consent form and return it to Fleetdrive Electric.

In addition to the standard terms and conditions for participating in the trials, customers (or clusters) may be asked for their permission to use photographs of them with their EV or quotes. If customers decide to give their permission, their photograph will be shown with their first name only, and nearest town/city. These photographs and quotes will be used to promote the project on marketing materials.

This document and the Data Protection Strategy outline how customers will be contacted, what data will be collected and how that data will be used and protected. EA Technology will seek customer consent again should any aspect covered within each of these documents require amending during the trials. This consent must be given prior to any change. Customers will be informed of the required change and asked to sign an amended consent form explicitly documenting the changes.

5. Safety information

Governance requirement: the plan must provide details of any safety information that may be relevant to the Project.

Customers involved in the trials will receive guidance to ensure their safety, however it is not expected that any activity will pose a significant risk to safety for members of the public or the Project Partners' staff. Installation of the charging point and control box is the activity with the most customer engagement. The key risks for this activity are:

- Access issues – such as working in cupboards above head height, unfamiliar or unfriendly animals within the property, exposure to the elements whilst working in externally mounted meters boards. Installers will carry out risk assessments and agree procedures with the customer to ensure everyone's safety
- Installation of charging points to be in accordance with the IET code of Practice for the Installation of EV Charging Points ⁴
- Allocated parking space for the EV and location of the charging point to a safe place for charging to avoid excess trailing leads
- Fully waterproof sockets for safe charging outdoors
- Safe earthing arrangements, particularly with Protective Multiple Earthing (PME), and avoidance excessive earth loop impedance, in accordance with IET code of Practice for the Installation of EV Charging Points
- Safe use of the charging plug – the EV charging plugs cannot be used for any other purpose. Customers will be fully briefed on how to safely use the charger
- Identifying and recording charging points – in case of any faults, an asset management plan will be developed to record and monitor the condition and status of charging points to avoid any health and safety hazards.

Appointments will be agreed with the customer in advance to protect and respect customer privacy. All members of staff carry photographic identification and a password can be agreed with the customer prior to the visit to check identity when an appointment is made. Once complete, the installation of equipment will not expose the customer to additional safety risks. Project staff will clearly and politely discuss any temporary onsite arrangement that need to be made during the installation time, these arrangements may include the need to keep the doors closed to keep children and pets away from work activities or other similar measures.

Appendix A - Postcode eligibility – SSEPD and Northern Powergrid licence areas

Northern	Postcode
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⁴ Developed by ISL Technical Committee 1.1 EV Charging Equipment Installation, *Code of Practice for Electric Vehicle Charging Equipment Installation*, 2012.

	Letters	Numbers						
	AB	1-3	10-13	15-16	21-25	30-38	41-45	51-56
DD	1-11							
FK	15-21							
G	83-84							
HS	1-2							
IV	1-28	30-32	36	40-49	51-56			
KA	27-28							
KW	1-3	5-17						
KY	13							
PA	20-49	60-78	80-88					
PH	1-26	30-44						
ZE	1-3							
SSEPD: Southern	BA	7-15	20-22					
	BH	1-25	31					
	BN	17-18						
	DT	1-5	9-11					
	GU	3	7-20	24	26-35			
	HP	9-15						
	OX	1-6	8-14	18	20	33	44	
	PO	1-22	30-41					
	RG	1-17	21-28	30	40			
	RH	14						
	SL	0-9						
	SN	1-16	38					

	SO	14-24	30-32	40-43	45	50-53		
	SP	1-11						
	TW	1-8	11-19					
	UB	1-10						
	W	3-5	7	13				
Northern Powergrid	DH	1-9						
	DL	1-17						
	HG	1-5						
	NE	1-13	15-49	61-71	99			
	SR	1-8						
	TS	1-28						
	YO	1-3	5-8	11-14	17-18	21-22	25	

Appendix B - Management of Customer Complaints, Compliments and Enquiries

1. INTRODUCTION

1.1 This procedure sets out the principles that shall be followed when receiving a customer complaint (as defined in appendices B2 and B3) or compliment and ensures that we handle all types of customer contact in a consistent and professional manner.

1.2 A customer, or someone on the customer's behalf, can make a complaint or compliment orally (in person or by telephone) or in writing, including email. If the contact is received prior to 1700 hours on any working day, that shall be the date of receipt. If it is received after 1700 hours on any working day or on a day that is not a working day, it shall be classed as received on the first working day following the day on which it was received.

1.3 Customer complaints and compliments or enquiries regarding this trial can be made directly to EA Technology or SSE Power Distribution (SSEPD).

2. RESPONSIBILITY

2.1 It is the responsibility of the business receiving the customer complaint or compliment to ensure that they are logged correctly and promptly in a common electronic database set up for this project by EA Technology.

2.2 The Project team at EA Technology shall monitor entries to the database on a regular basis to ensure accuracy and consistency and to enable management reporting.

2.3 EATL will pass details of all complaints, complements and enquiries to the relevant DNO to all the DNO to carry out their responsibilities as 'The Gas and Electricity (consumer Complaints Handling Standards) Regulations (2008)'

3. COMPLAINTS

3.1 Upon receipt of the complaint, it shall be determined whether it is a 'new' complaint or an 'existing' complaint.

If it is a 'new' complaint, it shall be uploaded to the Complaint Database, ensuring all relevant details are captured. If it is an 'existing' complaint, the new correspondence shall be clearly linked to the previous complaint and uploaded to the Complaint Database, ensuring all relevant details are captured.

Letters should be date stamped prior to being uploaded.

3.2 Where the complaint cannot be immediately resolved (on the customer call for instance), an appropriate member of the project will make contact with the customer within 1 working day of the complaint to: (i) acknowledge receipt of the complaint; (ii) make an apology; and (iii) make the customer aware of our Complaints Handling Process and offer to send them a copy of this process.

3.3 Where a complaint is not resolved on the first working day following receipt of that complaint, additional information must be recorded, see appendix B1 for details.

3.4 Efforts shall then be made, giving consideration to having a face to face meeting, to resolve the complaint within 10 working days from the date of receipt. If the person dealing with the complaint is unable to resolve it within the initial timeframe, it shall be escalated to the appropriate Manager who shall again aim to resolve the complaint within the next 10 working days. If after a further 10 working days and independent review this cannot be resolved, a deadlock letter shall be sent to the customer, again providing them with our Complaints Handling Process for reference.

3.5 A complaint shall only be marked resolved once we have carried out all actions we have agreed to take and the customer is satisfied with the final resolution.

3.6 Should a customer claim to have made a previous complaint, but we are unable to source that complaint, a note shall be made on the new record indicating that no trace of the existing complaint can be found.

3.7 If a complaint has been deemed resolved and a customer indicates that it is not resolved, the existing record shall be reopened and the customer made aware and offered a copy of our Complaints Handling Process. This type of complaint shall be immediately escalated to the next higher level from the complaint manager who had dealt with it last. The complaint shall not be closed until it is demonstrably a resolved complaint.

3.11 When a customer complains about the same or substantially the same issue as has been previously resolved by us within a 12 month period, this shall be logged as a repeat complaint. Reference shall be made to the original complaint number.

4. ENQUIRIES

4.1 Enquiries shall be handled in a similar manner to complaints. We shall aim to resolve enquiries within 10 working days and these shall be logged on the database to ensure records are maintained.

5. COMPLIMENTS

5.1 Upon receipt of a compliment it shall be date stamped (if letter) and uploaded to the Complaints Database, ensuring all relevant details are captured.

5.2 The appropriate manager shall be notified and shall inform those staff being commended by the customer within 5 working days. If applicable, the customer contact shall be shown to the appropriate staff.

5.3 The record shall be closed only when the staff have been informed and managers must be confident all relevant staff have been informed of the compliment.

APPENDIX B1 – REQUIRED INFORMATION FOR COMPLAINTS / COMPLIMENTS

Details required when registering a complaint or compliment:

- The date of receipt of the customer complaint

- If the complaint was made orally (telephone or in person) or in writing (including email and fax)
- The name and contact details of the customer making the complaint or on whose behalf the complaint is made
- A summary of the customer complaint
- A summary of the advice given or action taken or agreed with regard to the complaint. Where actions are taken, we must record the timing of these actions.
- If the customer complaint has been resolved and the basis upon which we consider the complaint to be resolved
- The agreed method for future communication (if any) with the customer

Should the complaint be an existing complaint, the following (in addition to the above) will need to be recorded:

- Whether it is the same complainant making the subsequent complaint and, where different, the name and contact details of the complainant making the subsequent complaint.

Additional details required where a complaint is not resolved by the end of the working day on which it was first received:

- The steps that we have taken following the customer complaint
- The date on which the complaint was resolved
- The date by which we are required to resolve the customer complaint
- The date on which we issued our deadlock letter.

APPENDIX B2 - DEFINITIONS

The following are definitions adopted by SSE and deemed appropriate for this LCNF Project

Complaint	Means any expression of dissatisfaction made to an organisation, related to any one or more of its products, its services or the manner in which it has dealt with any such expression of dissatisfaction, where a response is either provided by or on behalf of that organisation at the point at which contact is made or a response is explicitly or implicitly required or expected to be provided thereafter
Existing Consumer Complaint	Means a consumer complaint which has been received by the project and whose details have been or should have been recorded by the project

(The Gas and Electricity (consumer Complaints Handling Standards) Regulations, 2008, p2)

Resolved Complaint	A resolved complaint is a consumer complaint in respect of which it is reasonable to conclude that there remains no outstanding action to be taken by the project, because the relevant consumer who made the complaint or on whose behalf the complaint was made (i) has signalled satisfaction with the action already taken; or (ii) has agreed that, whilst he or she may not be satisfied or wholly satisfied by the outcome, the project has taken all action that could reasonably be expected of it in the circumstances; or (iii) has not made further contact with the project within 28 days of despatch by the project of its substantive response to the complaint. [For the avoidance of doubt, in case (iii) the date at which the complaint should be treated as resolved is the date at which the letter was despatched.]
Repeat Complaint	A repeated complaint is where the customer makes contact to express dissatisfaction with the same or substantially the same matter that was the subject of a previously resolved complaint.

(Electricity Distribution Price Control Customer Service Reporting - Regulatory Instructions and Guidance: Version 1, 2010, p11)

APPENDIX B3 – COMPLAINT SCENARIOS

The following scenarios shall be recorded and reported as complaints:

- Where a customer reports discourteous or unhelpful behaviour by project staff
- Where a customer reports a lack of or misleading information about the project
- Where a customer complains about Staff not turning up at appointed times
- A customer complains about equipment damage as a result of a power surge and intends to pursue the matter in the small claims court
- A customer's equipment has been damaged because of a power surge and the customer complains and seeks compensation from the company
- Complaints from MPs, Independent Connections Providers (ICPs), IDNOs (Independent Distribution Network Operators) and other customer representatives
- Complaints about frequent failure of the installed technology and systems leading to undue inconvenience

The following scenarios must not be recorded as a complaint:

- Where a customer calls to report an unplanned loss of supply or failure of the technology
- Where the customer makes contact to pursue a claim under the Guaranteed Standards of Performance (unless expressly complaining at the same time)

The following scenarios must not be reported as resolved complaints:

- Where a course of action has been agreed with the customer but not yet completed
- Where further information or contact from the customer is pending

References

Statutory Instruments, (2008), The Gas and Electricity (consumer Complaints Handling Standards) Regulations

Electricity Distribution Price Control Customer Service Reporting - Regulatory Instructions and Guidance: Version 1, 26 May 2010

APPENDIX B4 –COMPLAINT HANDLING PROCESS

Complaints Handling Process

If, unfortunately things have gone wrong then you can use the following process to let us know.

How to contact us

The easiest and quickest way to resolve a complaint is to telephone us on one of the following numbers any time Monday to Friday 8.30 am to 5.00 pm:

EA Technology	0151 347 2221
Southern Electric Power Distribution	0800 980 1395
Scottish Hydro Electric Power Distribution	0800 980 1394
Northern Powergrid Emergencies (Northeast)	0800 668 877
Northern Powergrid Emergencies (Yorkshire)	0800 375 675

Alternatively, if you are unable to phone or would prefer to write, you can contact by post using the addresses detailed below, or by email.

myelectricavenue@eatechnology.com

distribution.complaints@sse.com

EA Technology Limited
Capenhurst Technology Park
Capenhurst
Chester
CH1 6ES

Southern Electric Power Distribution
Julie Thame
SSE Power Distribution
55 Vastern Road
READING
Berkshire
RG1 8BU

Scottish Hydro Electric Power Distribution
Donna Cameron
SSE Power Distribution
Inveralmond House
200 Dunkeld Road
Perth
PH1 3AQ

Complaint Handling Statement

Sometimes things can go wrong, so we have produced this Complaint Handling Statement to show what will happen if you have cause to complain to us.

Our Process

All our staff are trained to offer you the best possible customer service and will do their utmost to help you. If they need to involve their manager, they will do so to ensure the matter is resolved as quickly and easily as possible.

As part of resolving your complaint, we will offer you an explanation and an apology. We will also take remedial action and may award compensation in appropriate circumstances.

Step 1 – Aim to resolve your problem within 10 working days

When you telephone us with a problem, our staff will attempt to resolve matters with you directly. However, if necessary your complaint will be escalated to an appropriate member of staff or specialist.

If you write to us with a problem, we aim to resolve matters within 10 working days. We may try to contact you by telephone to help with this resolution.

However, if we cannot resolve your complaint fully or have not agreed a form of resolution within 10 working days of your first contact, then we will escalate your complaint.

Step 2 – Aim to resolve your problem within the next 10 working days after escalation

If unresolved, your complaint will be passed to a senior manager who will do everything possible to address your concern and reach a positive conclusion.

If we still cannot resolve your complaint fully or have not agreed a form of resolution within this second 10 working days period, then we will escalate your complaint to the next step.

Step 3 – Aim to resolve within the next 10 working days after second escalation

If still unresolved to your satisfaction, we will escalate the matter further to aim to reach a resolution within the next 10 working days.

Step 4 – Independent Review: Aim to resolve within the next 10 working days

If your complaint remains unresolved to your satisfaction we shall pass your complaint to an alternative manager for independent review. We will aim to resolve your complaint within the next 10 working days.

The Energy Supply Ombudsman

If you remain unhappy after receiving the response from the alternative manager, you can ask us to 'deadlock' your complaint. This means we will send you a letter which states we have been unable to resolve your complaint to your satisfaction. Once you receive a deadlock letter, you can contact the Energy Supply Ombudsman using the contact details provided below.

You can contact the Energy Ombudsman without a deadlock letter, if we fail to respond to your complaint within the timescales stated in our complaints process. For example, the alternative Head of Business does not respond within 10 days or if 8 weeks have elapsed since you registered your complaint.

Please note that you may be referred back to us if you have not escalated your complaint via our formal complaints process outlined above.

The Ombudsman will carry out an independent investigation on your behalf. Any decision the Ombudsman makes will be binding on our Company, but not on you.

As part of resolving your complaint, the Ombudsman may ask us to make an apology or give an explanation. They can also ask us to take remedial action and may require us to award compensation in appropriate circumstances.

The Energy Supply Ombudsman Contact Details

Telephone – 0845 0550760 or 01925 530263

Textphone – 18001 08450511513 or 18001 01925 430886

Email – enquiries@energy-ombudsman.org.uk

Website – www.energy-ombudsman.org.uk

Consumer Direct

Consumer Direct is part of Trading Standards. Consumer Direct advisers offer independent, impartial advice. If you are a domestic customer, you can contact them at any point regarding your complaint:

Telephone 08454 040506

Website – www.consumerdirect.gov.uk

If you are a business customer, you can contact Consumer Direct for basic advice.

Appendix C – Step-by-step recruitment process

The following steps explain the various checks that will be undertaken to establish a customer's suitability to take part in a trial, with the anticipation of that customer then utilising the 'snowball effect' to recruit neighbours to form a cluster. These steps will include:

Geographical check (within participating DNO area)

Once initial contact has been made with an area where there may be a potential cluster, the first check will be that it is in an appropriate area of the country (for the first six months this will be SSE and Northern Powergrid's licence areas). The first check that can be carried out by potential participants but also by partners is to confirm that they live within one of the postcode areas in Appendix A (first six months).

Confirmation of interest after initial information pack sent

As well as contact details for potential individuals, a request will be made for a central contact who is able to disseminate information and help arrange further recruitment events. The best form of communication, email, telephone or letter will be agreed.

Survey of the LV network and transformers (if monitors can be installed on substation)

A survey of the LV network and transformers will be carried out to ensure that the equipment can be installed. This will also provide information of which homes can form a cluster as this is dictated by the feeders to which they are connected. This information will be provided to initial potential participants so they can work to attract further participants in suitable areas. It will also give an indication of the number of EV charging points that can be connected to the feeders depending on their loading and construction.

Charging point survey

Zero Carbon Futures will carry out a home or workplace survey to assess suitability for charging point installation. Ideally this will be scheduled to take place at the same time as the Power Line Carrier (PLC) survey (see below), to lessen any disruption and inconvenience to the customer.

PLC survey to check that the communications are possible in the area

ANDTR will carry out a PLC survey to check that the communications are possible in the area. This will require access to plug sockets either in customer's homes or any local community buildings, as well as their local distribution substation. Where possible, we will test plug sockets at community buildings, avoiding the need to enter customer's homes near the end of feeders. This may not be possible in each instance and therefore it is expected that some of customers will need to allow testing in their homes. Local contacts and 'ambassadors' will negotiate with customers and managers of community buildings to find the most convenient time and make arrangements for the checks to be carried out. The test, which will be performed by ANDTR, will involve plugging in a CE marked device into any plug socket on the premises (in customers' homes or in community buildings) to send a signal back to the substation. If this signal is received at the local substation then it is likely that the area will be appropriate to take part in the trials. The test normally requires a

short visit of up to 30 minutes. This process will be explained fully to willing homeowners and managers of community buildings prior to the testing. All staff carrying out the test will carry ID.

Credit checks

Fleetdrive Electric will carry out credit checks on those who are interested. This information will remain confidential and be held securely by Fleetdrive Electric. If a customer fails any of the assessments (including the credit check), or there are insufficient numbers to take part, Fleetdrive Electric will inform the customer, and cluster as a whole, that they are 'unsuitable'. Project partners will not divulge reasons for the customer failing the assessments, unless the customer asks for access to this information, to avoid any possible embarrassment for the customer involved. The information Fleetdrive Electric collects and holds on customers during this process can be made available if requested (in writing) by individuals.

Snowball recruitment

Once a customer's eligibility has been determined from the assessments above, they will then be asked a series of questions to establish their ability to recruit a cluster. Examples of the types of questions are:

1. Do you think you can get *at least nine* of your neighbours, or people who live in the streets close to you, to hire an EV as well? (We can tell you exactly which streets a cluster could be on and help with recruiting)
2. Are you and your fellow neighbours prepared to have your driving and charging habits and experiences recorded?
3. Do you think you and your fellow neighbours would be prepared to respond to questionnaires or surveys (face to face, on paper, telephone or web, to be agreed)?
4. Do you think you and your fellow neighbours would give some basic information about yourselves and your family?

A more detailed information pack will then be sent to (identified) potential participants, if there are sufficient numbers recruited to form a cluster.

Contractual confirmation

Once customers have been determined as 'suitable', there are sufficient numbers to form a cluster and places on the trials are still available, Fleetdrive Electric will send an information pack as described above as a hard copy. This pack will also include contractual information and information for arranging the installation of the charging point.

Once customers have signed a contract, they will be sent a Welcome Pack by Fleetdrive Electric. At this point, Fleetdrive Electric will upload the demographic data to the central server.

Installation of the Technology and charging point

Once all the contractual paper work is complete, Zero Carbon Futures will arrange for the charging points and intelligent control boxes to be installed.

The monitor controller at the substation will be installed by the DNO or its appointed contractor first so that communications can be checked when the installation of the charging point is carried out.

Appendix D – Draft Customer Consent Form Wording

Consent form: to have an Electric Vehicle charging point and control technology installed, to allow your data to be gathered, and to participate in the My Electric Avenue trial.

(Customer Copy)

As part of participating in the My Electric Avenue project (the project) I give permission for EA Technology Ltd, and participating companies in the project (known as the 'project team') (including Scottish and Southern Energy Power Distribution and their authorised partners and agents) to install an electric vehicle (EV) charging point at my address to gather information about the electrical energy required to charge an EV and what impact that has on the local electricity network in order to predict what future use of EVs might look like. This has no impact on my energy supplier.

I agree to participate in surveys about my experience as a condition of participation.

I further acknowledge and accept that the information and data gathered from my property may be used by the project team to create statistics, validate models, and analyse customer behaviour. The project team may combine this information with other publically available information and my address to help build a network model and allow SSEPD to continue to deliver an electricity network for customers' needs.

The information will be collected by a control box installed in my home and sent by Power Line Carrier (PLC) to my local substation. Substation monitors installed in the electricity substation that supplies my premises will automatically collect this information and communicate it remotely to a central server.

I consent to my charging point being controlled remotely and understand that this may limit the ability to charge at certain times of day.

The charging points will be installed by Zero Carbon Futures and located in an agreed place in my premises for charging my EV. There will be a record of each monitor's serial/batch number and location.

To provide a good service and meeting regulatory and legal responsibilities, I acknowledge and accept that the project team may monitor and record any communications they have with me, including phone conversations and e-mails. When they contact me, they may use any information they hold about me to do so. They may contact me by letter, e-mail, phone, text message and other forms of electronic communications or by visiting me. They will agree a preferred method of communication with me in advance.

I am entitled to have a copy of the information EA Technology, its partners and its agents hold on me, and to have any inaccurate information corrected.

I may have a copy of the information that is collected from me. This information is specific to me at my address and therefore, in the event that I sell or cease to occupy the address which is connected to a charging point and linked to a substation monitor, as part of the project I agree to notify EA

Technology or SSEPD within 14 days of any sale, letting or underletting or any parting with possession of my property.

I agree that once I have signed up to an electric vehicle as part of the trial, I will not be able to withdraw from the trial, unless under exceptional circumstances.

By signing this consent form, I confirm that I have read, understood and agree to the terms and conditions of participating in this project, and have read, understood and agree to the processes detailed in the Customer Information pack. In addition, by signing this, I agree to receiving contact about My Electric Avenue related information from the project team.

Name:

Signed: **Date:**

Consent form: to have an electric vehicle charging point and control technology installed, to allow your data to be gathered, and to participate in the My Electric Avenue trial.

(EA Technology Copy)

As part of participating in the My Electric Avenue project (the project) I give permission for EA Technology Ltd, and participating companies in the project (known as the 'project team') (including Scottish and Southern Energy Power Distribution and their authorised partners and agents) to install an electric vehicle (EV) charging point at my address to gather information about the electrical energy required to charge an EV and what impact that has on the local electricity network in order to predict what future use of EVs might look like. This has no impact on my energy supplier.

I agree to participate in surveys about my experience as a condition of participation.

I further acknowledge and accept that the information and data gathered from my property may be used by the project team to create statistics, validate models, and analyse customer behaviour. The project team may combine this information with other publically available information and my address to help build a network model and allow SSEPD to continue to deliver an electricity network for customers' needs.

The information will be collected by a control box installed in my home and sent by Power Line Carrier (PLC) to my local substation. Substation monitors installed in the electricity substation that supplies my premises will automatically collect this information and communicate it remotely to a central server.

I consent to my charging point being controlled remotely and understand that this may limit the ability to charge at certain times of day.

The charging points will be installed by Zero Carbon Futures and located in an agreed place in my premises for charging my EV. There will be a record of each monitor's serial/batch number and location.

To provide a good service and meeting regulatory and legal responsibilities, I acknowledge and accept that the project team may monitor and record any communications they have with me, including phone conversations and e-mails. When they contact me, they may use any information they hold about me to do so. They may contact me by letter, e-mail, phone, text message and other forms of electronic communications or by visiting me. They will agree a preferred method of communication with me in advance.

I am entitled to have a copy of the information that the project team holds on me, and to have any inaccurate information corrected.

I may have a copy of the information that is collected from me. This information is specific to me at my address and therefore, in the event that I sell or cease to occupy the address which is connected to a charging point and linked to a substation monitor, as part of the project I agree to notify EA Technology or SSEPD within 14 days of any sale, letting or underletting or any parting with possession of my property.

I agree that once I have signed up to an electric vehicle as part of the trial, I will not be able to withdraw from the trial, unless under exceptional circumstances.

By signing this consent form, I confirm that I have read, understood and agree to the terms and conditions of participating in this project, and have read, understood and agree to the processes detailed in the Customer Information pack. In addition, by signing this, I agree to receiving contact about My Electric Avenue related information from the project team.

Name:

Signed: **Date:**