**Energy Best Deal**

Trainers’ notes and session plan 2017 - 18





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**Introduction**

This toolkit is designed to help advisers provide activities, information and advice to clients to ensure they are not paying more than they need to for their energy, and where they are struggling to pay their energy bills, highlighting where help is available. Advisers are welcome to provide tailored information to the client at their own discretion, however we recommend arranging an Energy Best Deal extra appointment for clients who need further advice.

**Subject information**

The toolkit contains all the key information for the topics covered. Any additional information that is given should be taken from an up-to-date and accurate source such as:

* The Energy section of [the Citizens Advice website](http://www.adviceguide.org.uk/).
* Other online services as appropriate.

**Trainers are encouraged to feedback to the Energy Best Deal delivery team with any feedback about training materials or resources.**

If you have any comments, please contact: energybestdeal@citizensadvice.org.uk

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###### Toolkit Overview

This toolkit contains a series of activities to help advisers and volunteers provide guidance and information to clients who are struggling to pay their energy bills or simply paying too much.

The objective of these activities is to inform clients so that they are empowered to make a confident and appropriate choice for their own circumstances.

The materials in this toolkit were designed by Citizens Advice for the delivery of group sessions as part of the Energy Best Deal programme.. EBD should ideally be delivered in small group settings (such as tenant groups, parents groups, pensioners, home start groups) and also adapted for use with frontline workers (such as Home start volunteers, tenancy support workers, and children’s centre staff).

**How and when to use this toolkit**

The activities in this toolkit can be used in the following ways

* As a single session with a group of clients
* Individually depending on a client’s energy needs (see below)

**Activities**

**1** – Quiz

**2** – Changing Energy Supplier

**3** – Choosing the right energy deal

**4** – How to switch energy supplier

**5** – Smart Meters

**6** – Getting help with energy bills

**7** – Saving energy in the home

**8** – Action plan

Questions and Close

Evaluation

**Making the right choices**

**Switching and Smart Meters**

**Getting help and saving money**

**Checking understanding**

**Lesson objectives**

The Energy Best Deal programme aims to raise consumer awareness of switching and how to save money on their energy consumption, so clients can make informed decisions to reduce their energy spend.

Key objectives are;

* To understand key terms that relate to energy contracts
* To consider annually whether the energy tariff is best for the client needs
* To understand the importance of checking annually
* To able to identify ways of saving energy in the home
* To be confident when considering switching tariff and or supplier
* To know how to begin tackling energy debts, and where to get advice
* To know where to go for further sources of help and information.

**Session specific guidance**

**Manage expectations –** Make it clear to clients that the session is an *introduction* to energy and how to save money and that if they want more detail, they will have to make that clear to the adviser.

**Signpost and empower –** Ensure that clients are aware that after the session they will have a clear idea where to go to answer certain queries and to get further assistance.

**Timings** – All times are only guidelines. Trainers are welcome to be flexible; if that means expanding some activities and dropping others, that’s up to the trainer.

**Low-pressure commitments** – It should be stressed that this is NOT a situation to feel pressure about, and that it is a safe learning environment.

**Evaluation –** helps us to develop and identify the effectiveness of our programmes of work so we’d welcome feedback at the end of the session.

**Top tips**

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**Session Plan**

This session is intended to take around 60 minutes to deliver, if every activity is undertaken.

Advisers should choose the activities suitable for the audience.

**Red** activities – Are **essential** to most session on this topic

**Amber** activities – Are generally **highly recommended** but not essential

**Green** activities – Are generally **optional** activities, if time allows

The size of the bubble indicates roughly how much time – relative to the session - to spend on an activity.

**Energy Best Deal**

Introduction to Energy Best Deal campaign

Citizens Advice and energy regulator Ofgem have been involved in this programme since 2008, with funding coming initially from the Department of Energy and Climate Change (DECC) and then various energy suppliers. The programme provides advice on how to ensure consumers are not paying more than they need to for their energy, and where they are struggling to pay their energy bills, highlighting where help is available. Consumers have the confidence to choose the best energy deal.

The best advice to give your clients is that they should talk to their supplier about their circumstances and ask what their supplier can offer them to reduce their energy bills. Then they can speak to other suppliers to compare deals offered and choose the best based on their circumstances. They can also take advantage of the help available from suppliers and Government initiatives.

**Activity 1 – Icebreaker quiz**

**Handout 1a/1b**

**For advisers** – The following activity (handout 1a) is multiple choices and intended to make a client think about their energy bills and how they might be able to save money.

**Practical tips –** Trainers should print out copies of the quiz and also the answers to each of the questions. They can be printed in colour, but will also be clearly legible in black and white as well. If trainers are expecting to do this session multiple times, it is recommended they laminate the cards so they can be used repeatedly.

**The activity** – Trainers should ask clients to select the answers to the questions. If the session is being delivered to a group rather than on a one-to-one basis, then the activity should be undertaken in pairs. If time is short the quiz could be displayed on the screen to facilitate a group discussion.

**Feeding back** – After the pairs have been matched, the trainer should guide a group discussion around the answers. Factsheets can be provided then, or after the activity.

**Social policy –** Trainersshould explore the social policy and equality issues that were raised within the quiz, for example Fuel Poverty. Briefly explain the work at Citizens Advice around social policy. Ask participants to ‘flag up’ any thoughts throughout the session.

**Learning summary** – summarise that managing household bills, including fuel bills, can be challenging. However, there are ways in which we can make savings on our fuel costs – as well as in the amount of energy we use in the home – which we will be covering in the session.

**Activity Two – Changing Energy Supplier**

**Handout 2 /3**

**For advisers** – The following activity is intended to help clients understand what is involved in changing Energy supplier and address some of the possible concerns they may have in doing so.

**Practical tips –** Check with your energy supplier first, check what tariff you’re on, think of switching as a regular thing to check annually.

**The activity** – Trainers should ask the group if they have every thought of switching energy supplier but haven’t got around to it. Why haven’t they switched? What puts then off?

After discussing with the group if anyone has or hasn’t switched energy supplier, and their experiences, it is also important to touch upon what information energy suppliers must provide to clients to help them make informed decisions about their energy cost.

**Adviser notes;**

Energy companies must keep you informed by:

* regularly giving you personalised information about the cheapest tariff they have for you
* giving you an annual summary containing a range of information to help you understand your current tariff and compare it with others
* providing you with a personal projection that estimates your likely energy costs over the next 12 months in bills and other communications
* explaining price changes in pounds and pence
* providing tariff information labels (similar to food labels) to make comparisons easier
* displaying tariff comparison rates (similar to APR for credit cards) on bills and other communications so that you can quickly and approximately compare the costs of different tariffs.

**Check** whether everyone knows how to read their meter and bills and knows what is meant by a tariff; give additional information if required (including handout 2 ‘understanding your energy bill’ and handout 3 ‘reading your energy meter’).

Summarise the main points referring to the powerpoint slides that they need to think about when considering changing energy supplier.

**Remember** – There are no right or wrong answers, each client will have their own needs to consider.

**Learning Feedback** – switching energy company is not difficult as people may think and there can be real benefits in doing so.

**Activity Three – Choosing the right energy deal**

**For advisers** – The following activity is intended to help clients think about the right energy deal for them and to help them understand that changing energy supplier shouldn’t be a daunting experience.

**Practical tips –** Trainers should ask the group to think about what is important to them when choosing an energy supplier. E.g. price, customer service

**The activity** – Trainers should slip the group into small groups and ask them to list what is important to them when choosing an energy supplier. During this time the trainer can demonstrate how they can find the deals using the Citizens Advice price comparison tool.

**Adviser’s notes;**

**What is a price comparison site PCW?**

Internet price comparison sites are a great way to shop around for energy as they can help consumers decide which tariff is best for them. Confidence Code approved sites are independent and the options and prices you find on them will be calculated and displayed in a fair and unbiased way.

Consumers can use our (Citizens Advice) comparison website: energycompare.citizensadvice.org.uk

Alternatively consumers can use one of the approved online price comparison services listed on goenergyshopping.co.uk/confidence-code. These websites are accredited to the Confidence Code, run by Ofgem the independent regulator.

Most of the switching sites search for the best deal based on price. However, some will find the best deal based on other preferences or priorities such as capped price deals or green tariffs. Some sites also show how different suppliers compare on customer service.

After discussing with the group what would be important to them, use the power point slide 5/6 to summarise making an informed choice and also using a PCW.

Remember

**Adviser notes;**

As with insurance for products or mobile phone packages, consumers should check that they are on the best energy deal for their circumstances at least once a year.

**Information required in making an informed choice**

Before a consumer decides to change their energy deal (i.e. switch payment method, tariff or supplier)

Key information to know:

* the details of the tariff they are currently on - including the tariff name, standing charge and unit rate, and whether there is an exit fee (if they don’t know, they can contact their supplier, all of this information is also located within the consumer's bill)
* how much energy they used in the last year
* how they currently pay for their energy
* any benefits they may be getting, and
* their postcode

**Learning feedback -** it is important to be clear about what is important to you when choosing a supplier and a deal. There are comparison sites to help us work out the best deal for your particular requirements.

**Activity Four – Switch energy supplier**

**For advisers** – The following activity is designed to help a client decide what they need to do if they decide to switch energy supplier. It should also be highlighted that switching supplier isn’t something that should be carried out once; clients should check every year and follow the same process, as discussed in the earlier activities.

**Practical tips –** Trainers should make sure that clients understand the difference between fixed rates, capped, and payment methods.

**The activity** – Trainers should read through the five key steps using the power point slide 7 and check group understanding – explaining as needed. Using slides 8/9 then work through the slides explaining what the different terms mean. Then ask the group what different payment methods are available, e.g. direct debit, standard credit, and prepayment meters.

**How do I choose the best deal?**

Before switching, it is important to decide what sort of deal is best suited to you - for instance an internet deal is unlikely to suit someone who does not own, or has infrequent use of, a computer. There are many different types of deals available, the most common are:

* **dual fuel** – if you buy gas and electricity from the same supplier they may offer you a small discount. Be aware that dual fuel isn’t always the cheapest and it can be cheaper to get gas and electricity from different suppliers;
* **fixed term** – this means the price of the energy unit will not change for the duration of the deal, but bills could still increase if more energy is used; and
* **internet deals** – suppliers may offer discounts to customers who receive their bills over the internet.

Fixed term deals may state that the customer can only switch to another deal or supplier after a fixed period. If the consumer wishes to switch before the set period they will have to pay an exit fee (similar to mobile phone contracts).

**Remember** – Switching isn’t something to be done once, check every year you’re on the best deal for you energy

**Adviser notes**

Demonstrate a PCW if you have time or use slide 11 and then move to slide 12 going

through the 5 steps to switching supplier.



When using switching sites look for the OFCOM accredited logo

<https://www.ofcom.org.uk/phones-telecoms-and-internet/advice-for-consumers/costs-and-billing/price-comparison>

**Top tips**

Before switching take a photo of the meter reading

You have 14 days cancellation the contract after signing the contract with a new supplier, if you change your mind.

Switching usually takes 3 days (after the 14 day cooling off period)

The new supplier makes all the arrangements with your existing supplier. Many PCW will make the switch for you, at no cost to you.

**If the consumer encounters any problems during the switch or is unhappy about the process they can contact the old or new supplier or Citizens Advice consumer service (03454 040506, or for the Welsh language service 08454 040505) for help and advice or visit citizensadvice.org.uk.**

Keep a log;

* The date of agreeing the deal
* Details of the new deal
* The meter reading the day you signed the contract
* Keep all letters/emails
* Names and contact numbers for the people you spoke with
* Final bill from your old supplier

**Feeding back** – check the groups understanding and reassure clients if they need help we can assist – book a face to face appointment.

**Other things to consider**

**Group buying –** another saving option

**Collective purchasing and switching**

There are benefits to joining together with your neighbours and combining your buying power to get better electricity and gas deals. For more information visit: gov.uk/collective-switching-and-purchasing

**Oil clubs**

Joining an oil club means the club will negotiate with suppliers for the best bulk purchase price for heating oil. The club can help your cash flow by allowing you to order smaller amounts four times a year but still benefit from the bulk pricing. For more information visit the Citizens Advice website: [www.citizensadvice.org.uk/oilclubs](http://www.citizensadvice.org.uk/oilclubs).

**Activity Five – Smart Meters**

**For advisers** – The group may have different views on ‘smart meters’ depending on their ages, and also whether they have had a smart meter installed already. There has also been various opinions good and bad so if possible keep to the main facts, as it isn’t our role to sell ‘smart meters’ to clients, just help them understand the benefits of ‘smart meters’ if they chose to have one installed. At some stage, as energy suppliers discontinue the old meters, smart meters will become the norm.

The meter updates information about usage through a secure network to your energy supplier on a regular basis and to your IHD. It is a wireless system and the **consumer do not need to have to have Wi-Fi in their home** and the smart meter will not use their Wi-Fi connection if they have one.

**Top tip –** Smart Energy GB have many free resources which can be ordered ahead of the session for handing out. They also have a HDI tool which can be used to demonstrate the tool.

**Activity -** The following activity is about asking the group if they know what a smart meter is. Does anyone have one? If not, by the end of the activity the group should have a good understanding of ‘smart meters’ and how the HDI can help them manage their energy consumption.

Use the power point slide 9 to inform the group about smart meters.

**Trainer notes:**

Smart meters are being installed in homes across Great Britain, replacing traditional meters (including prepay meters). They are paid for in the same way as your current meter.

Consumers should be offered two pieces of equipment. They are the smart electricity and gas meters and an ‘in-home display’ (IHD), sometimes called a smart meter display or a smart energy monitor.

The IHD will display the amount of energy the consumer is using in pounds and pence for credit meters (or KWh if they prefer), and for prepayment meters the amount of credit remaining, and debt outstanding. IHDs will also be able to provide historical data about energy usage.

Smart Energy GB [FAQs](https://www.smartenergygb.org/en/faqs?category=what-are-smart-meters) on ‘what are smart meters?’

[smartenergygb.org/en/faqs?category=what-are-smart-meters](http://smartenergygb.org/en/faqs?category=what-are-smart-meters)

**The process of getting a smart meter**

The bill payer is responsible for the smart meter installation. Landlords cannot stop a smart meter being installed if they do not pay the bill (unless it is explicitly written into the tenancy agreement that they can).

Residents in Housing Assocation properties, who have gas and electric included in their bills, may get a Smart Meter installed by the Housing Association, if it is the housing association that pays the bills.

If you want a ‘smart meter’ installed contact your energy supplier to discuss and arrange.

Switching suppliers

Suppliers cannot refuse to switch consumers if they already have a smart meter installed; however there is no obligation at the moment to install a new smart meter with IHD compatibility.

If clients have a problem with the installation of their smart meter they can report it to Citizens Advice consumer service.

**Activity Six – Getting help with energy bills**

**For advisers** – There can be help available with energy bills, which many people don’t know about. In this activity we would like the trainer to go through some of the possibilities and also look at where you can find out more information.

**Activity –** theactivity isabout finding out what the clients already know about what help is available to help with fuel bills. Capture points down on the flip chart.

Use power point slide 11 - 14 to work through the available options, explaining each point briefly, as the following slides go into further detail on each;

* Slide 13 – **Priority services register** - If you are of pensionable age, disabled, chronically sick or have sight/hearing difficulties you can qualify for your supplier’s Priority Service Register (PSR). Talk to your supplier to see if you qualify.
* Slide 12 – **Warm Home Discount**
* Slide 21 - **Help from the Government**
* Slide 21 - **Initiatives where you live**

**Trainer’s notes –** remember each individual’s circumstances will be different, so please make sure everyone understand the information. People on low incomes can get free benefits check so it is wise to suggest this.

**Learning feedback –** managing household bills, including energy bills, can be challenging. There are ways in which we can help make savings on our energy costs by seeking help that is readily available. Please do make an appointment if further help is needed.

**Activity Seven – Saving Energy in the home**

**For advisers** – The following activity is a small group exercise so slip into groups of four.

**Practical tips –** You want to print off copies of Handout 4 as it might be easier.

**The activity** – This activity is designed to make the group think about saving energy in the home, where might quick and simple savings be made.

Bring the groups back together and ask them to share their thoughts on the savings they have identified. Using the EBD booklet summarise ‘tips for saving energy’.

**Kitchen**

* Use the right hob size for the pan that you are cooking with
* Low energy light bulbs
* Always turn taps off fully
* Switch off lights when leaving the room
* Only boil the water you require when boiling the kettle
* Cook food in batches in the oven, and eat for lunch/dinner the next day
* Wash laundry at 30 degrees
* Turn appliances off at the wall
* Don’t put hot food in the fridge (wait until it cools down or the fridge will have to work harder to cool things down)

**Living room**

* Close your curtains to keep in the heat
* Switch off lights when leaving the room
* Turn off appliances at wall and unplug mobile charger when not charging mobile
* Try to use your phone off-peak as calls are often cheaper. Look on the internet for cheaper alternatives to 0345 or 0370 numbers, such as regional landlines.

**Bedroom**

* Close your curtains to keep in the heat
* Switch off lights when leaving the room
* Don’t leave computers/laptops on standby
* Turn appliances off at the wall and unplug mobile charger when not charging mobile
* Use a thicker duvet during winter to stay warmer without having to turn the heating up

 **Bathroom**

* Close your curtains to keep in the heat
* Switch off lights when leaving the room
* Always turn taps off fully
* Don’t let water run when brushing teeth, only use to rinse
* Take showers, not baths
* Ask your water provider if they can provide you with a water saving device for your toilet cistern

**General house**

* Loft and cavity wall insulation
* Immersion heater jacket
* Turning down the heating
* Draft excluders

**Activity Eight – Action plan**

**For advisers** – The following activity is an **action plan** intended to help clients think about one action they will take following the session. Split the group into pairs for this and give them post it notes to write their thoughts on.

**Practical tips –** Trainers should encourage clients to refer to the EBD booklet as it has lot of useful information in and contact numbers for suppliers.

**The activity** – Trainers should recap the following points;

* check which tariff you’re on, is it the cheapest, if not change it
* Contact your energy supplier for help on energy efficiency
* If you’re on a low income speak with your energy supplier to see what help is available
* If you have fuel debt problems, contact your local Citizens Advice, National Debtline for help.

**Feeding back** – There is no further feeding back of this activity.



**Remember** – you should always try to get free debt advice from your local Citizens Advice: we’re impartial and confidential, and help clients with debt problems every day.

**Questions and Close**

It is important to check everyone has enjoyed the session and not leaving confused about anything, and they know where to go for help and support if needed. Ask clients to make an action plan when they get home; making small changes can lead to big savings in the long term.

Now it is time to hand out the **Evaluation forms**

**Evaluations**

Please hand out the feedback questionnaire immediately after the session and encourage **all attendees** to complete it. We will use the completed feedback questionnaires to do follow-up interviews with a random selection of attendees.

The more questionnaires that are returned to us, the more accurate and useful the evaluation will be. The information supplied on the questionnaires will be treated confidentially, and **will never be used for marketing purposes**.

In particular, **please encourage attendees to provide their telephone numbers** on the questionnaires. We need to do a large number of interviews to make sure that the evaluation is accurate, but people are often reluctant to provide their phone number. Phone numbers provided on the questionnaires will **only** be used for follow-up interviews and will **never** be passed on to anyone for marketing purposes.

A random selection of both frontline advice workers and consumers will be contacted by our evaluator around four weeks after the session. If would be helpful if you could **remind people who attend the sessions that they may receive a phone** **call** regarding the session in around a month’s time. The interview will last around 10-15 minutes. For members of the public the interview is focused on the actions they have taken to get a better deal on their energy since the session. For frontline advice workers, the interview is focused on whether the session has helped them in their advice work. Anyone who provides their phone number and then decides they don’t want

**Further Information**

Further resources and information can be found at:

The **Citizens Advice Consumer Service**, providing clear and practical consumer advice over the phone and email. They can be contacted [here](https://www.citizensadvice.org.uk/consumer/get-more-help/if-you-need-more-help-about-a-consumer-issue/), or by calling 03454 04 05 06 (05 for welsh speakers) between 9-5pm Mon-Fri.

**Useful websites:**

Citizens Advice Advice - [www.citizensadvice.org.uk/](http://www.citizensadvice.org.uk/)

Energy UK - [www.energy-uk.org.uk](http://www.energy-uk.org.uk)

Energy Made Clear - [www.energymadeclear.co.uk](http://www.energymadeclear.co.uk/)

National Energy Action - [www.nea.org.uk](http://www.nea.org.uk)

