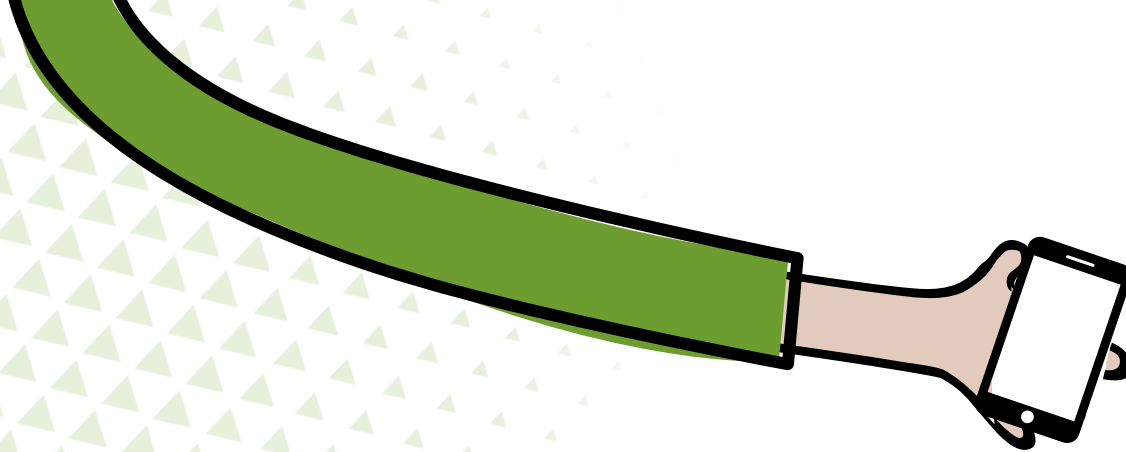


SAVING ENERGY IN SOCIAL HOUSING

Use our Model to Help your Tenants Save Energy in their Homes



Co-funded by the Intelligent Energy Europe
Programme of the European Union



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Disclaimer:

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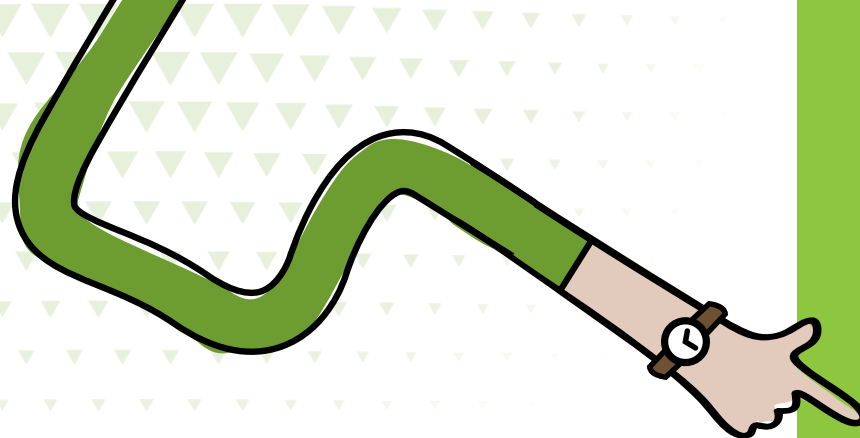
1.0



EXECUTIVE SUMMARY

This Guide has been written to help social housing organisations (SHOs) to provide energy saving advice to their tenants by means of their neighbours (Energy Ambassadors). All of the information and resources provided in the Guide can be adapted depending on the needs of an organisation and the context in which it operates.





I.0 EXECUTIVE SUMMARY BACKGROUND:

The TRIME project, co-funded by the Intelligent Energy Europe programme of the European Union, ran from September 2014 to August 2017 and was delivered in five EU Member States.

The project centred on creating a model that recruits and trains tenants to be volunteer Energy Ambassadors (EAs) who can provide energy saving advice to their friends and neighbours. Once the training is complete the SHOs support the EAs to find households interested in receiving energy saving advice and keep regular contact to ensure they are able to fulfil their roles.

TRIME stands for Trias Mores Energetica.

'Trias Energetica' is based on a model developed by the Delft University of Technology to act as

a guide when pursuing energy sustainability in the building sector. The Trias Energetica model considers that energy savings from buildings have to come first on the path to environmental protection. The model outlines 3 elements that need to be addressed in order to lower energy consumption:

- ▶ Reduce energy demand
- ▶ Use renewable energy where possible
- ▶ Efficient use of fossil fuel



The TRIME project partners found that social housing tenants are, at varying levels, receiving support to make their homes physically more energy efficient. To ensure the physical energy efficient measures have an impact the project partners decided to develop a model that would address behaviours needed in the home to lower energy consumption. 'Mores' is Latin for behaviour, and it is the 'M' in the TRIME acronym that is key to helping social housing residents save energy.





I.O EXECUTIVE SUMMARY BENEFITS OF TRIME:

The TRIME energy saving advice model was developed, implemented and refined over a period of 36 months.

7 SHOs, and 3 partners with expertise in energy saving approaches and behaviour changes, have prepared this Guide in order to share their learning and help spread energy saving advice.

The energy saving advice model can help to achieve the following aims:

- ▶ Supporting the reduction of carbon emissions;
- ▶ Alleviating some of the poverty social housing tenants experience through helping change their energy consumption behaviour. This in turn can potentially lead to lower bills.
- ▶ Increasing commitment within your own organisation to environmental sustainability.
- ▶ Helping tenants to benefit from increased social interaction with their neighbours. The model helped make them feel more engaged in their neighbourhoods and provided a way for them to build relationships with people in their local areas.



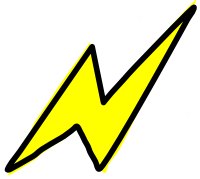
AMBASSADOR INTERVIEW



Read this short interview with Mohamed Rahali an Energy Ambassador who promotes social interaction as a benefit of TRIME. Mohamed is a tenant of Vilogia and lives in the city of Croix, France.

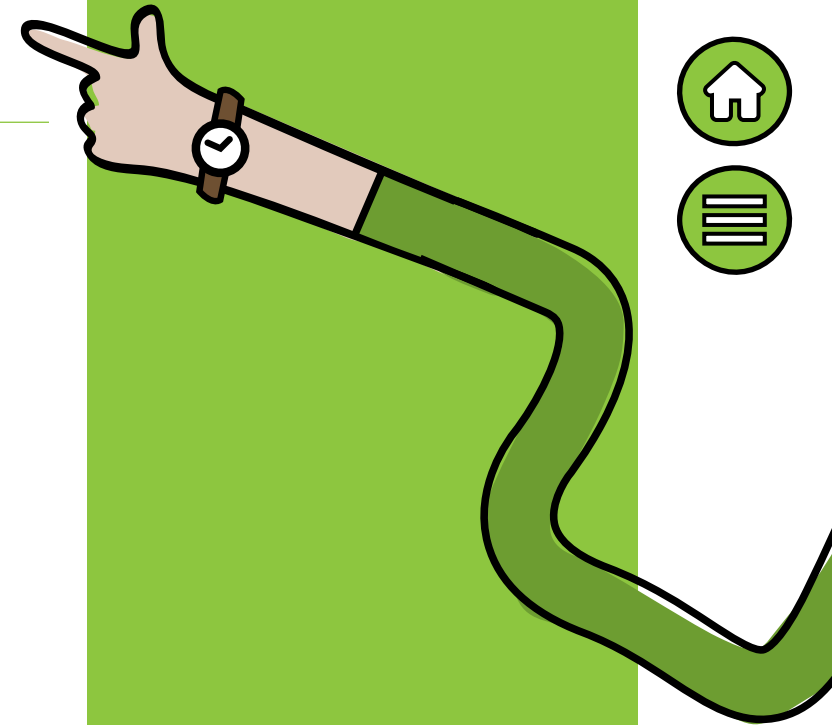
- ▶ **Why did you decide to become an Energy Ambassador?**
- ▶ Because I was unemployed, I had some spare time. I'm a social person and I thought that it was a great opportunity to help my neighbours.
- ▶ **What was the best part of becoming an Energy Ambassador?**
- ▶ I think there is a lack of social relations in the neighbourhood. The routine of everyday tasks doesn't give people a lot of time to meet each other. So, as an Energy Ambassador I was able to meet my neighbours and build new relationships with my neighbours. It was also an opportunity to learn new things.
- ▶ **Do you think it's a good idea to continue parts of the TRIME project?**
- ▶ Yes of course, especially for energy bills charges but this initiative requires time to motivate people.





I.0 EXECUTIVE SUMMARY TRIME RECOMMENDATIONS FOR HOUSING ORGANISATIONS:

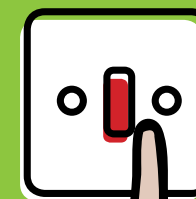
- ▶ Experience in TRIME has shown that organisations that have a strong corporate commitment to environmental sustainability (covering physical, operational and behavioural aspects) are best placed to implement an effective energy saving advice model. The SHOs with a strong corporate commitment to environmental sustainability are well thought of by their tenants who are keen to engage with initiatives that help further improve the energy efficiency of their homes, and can thus easier engage with them.
- ▶ The energy saving advice model outlined in this Guide requires adequate staff and financial resources. The guide provides a summary of costs in Section 6.
- ▶ The model may need to be adapted depending on a country's legal requirements for an SHO. For example an SHO may need to check what advice, or guidance, they are allowed to provide with relation energy efficiency measures and bill savings.



I.0 EXECUTIVE SUMMARY

FACTORS THAT CAN BE CONSIDERED KEY TO SUCCESSFUL IMPLEMENTATION OF THE ENERGY SAVING ADVICE MODEL:

1. The model is most likely to have the highest impact when delivered in tandem with other energy saving initiatives such as retrofit, tariff switching campaigns, smart meter installations or support to buy electrical appliances.
2. SHOs may wish to provide incentives such as electronic tablets or vouchers to spend on an energy efficient appliance.
3. EAs should all have one point of contact in the SHO that they can refer to when in need of support to carry out their role.
4. In order to recruit tenants to be EAs and to be part of an energy saving advice scheme, the model relies on securing the support of customer facing SHO colleagues.
5. It is recommended that the model may also benefit from establishing a way to monitor energy savings before the recruitment of EAs starts.
6. Establishing timeframes for the model helped with recruiting EAs and monitoring activity.
7. Communication methods between the SHO and tenant must be adjusted depending on the tenant's needs.
8. For SHOs that do not have easy relationships with their tenants it may be better to work with local partners to build networks that can recruit and support the EA.
9. The use of a competition or challenge can be a helpful way to hook people into saving energy.
10. Consider the use of data sharing protocols, such as privacy agreements with the tenants.



I.0 EXECUTIVE SUMMARY

THE STAGES OF THE ENERGY SAVING ADVICE MODEL ARE:

Recruitment Stage (June - August)

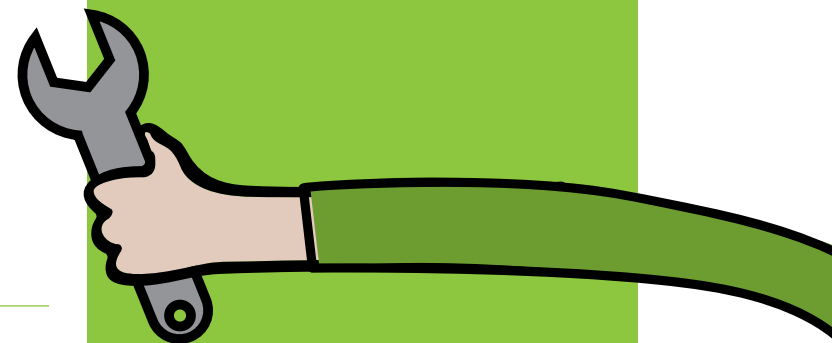
- ▶ **Task One:** Using staff networks and knowledge of local areas select a neighbourhood that would most benefit from energy saving advice.
- ▶ **Task Two:** Make contact with as many households (tenants) from the chosen site as possible to identify initial interest and to find out if they would like to receive energy saving advice.
- ▶ **Task Three:** Provide your shortlist of tenants with more information about the energy saving advice model, and to identify whether or not they would like to be an EA or a household that receives advice.
- ▶ **Task Four:** Make sure the Energy Ambassadors receive a timetable of what will happen, and what will be expected from them over the coming months.

Training Stage (August - September)

- ▶ **Task One:** Send some warm up materials to the trainee EAs.
- ▶ **Task Two:** Deliver training sessions for the trainee EAs.
- ▶ **Task Three:** Organise a refresher training session for SHO colleagues.
- ▶ **Task Four:** Set up a register to indicate which tenants have completed training and are ready to be EAs.

Advice Stage (September/October - February/March)

- ▶ **Task One:** Prepare the new EAs before they are deployed in your local areas to provide advice.
- ▶ **Task Two:** Deploy the EAs into the neighbourhood to share the energy saving advice with households.
- ▶ **Task Three:** SHO staff keep in regular contact with EAs and households.





SUCCESS

I.0 EXECUTIVE SUMMARY IMPLEMENTING AN ENERGY SAVING ADVICE MODEL:

The energy saving advice model was prepared and refined through a series of team project meetings and focused workshops.

The project team is very grateful for feedback gathered from SHOs external to TRIME and the support received from an advisory board (made up of Housing Europe, the Dutch regeneration company Twinstone, the UK based Energy Saving Trust, the Flemish Housing Association Federation, the European Federation for Living and EASME).

The Guide starts by providing an overview of the project and key factors to consider when embarking on implementing an energy saving advice model. This is followed by partners' experience of delivery during TRIME and then,

in Section 5, a step-by-step guide and links to resources that will help other SHOs implement the model. The step-by-step guide is aimed at SHOs, but can be adapted to other organisations operating contexts.

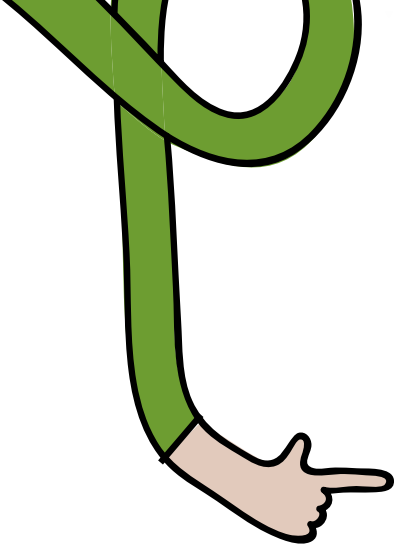
The Guide is comprehensive and, through case studies and interviews, shares the learning from all partners in the project. If there are questions, or you would like to discuss our learning further, you can contact any of the partners through clicking on the icons in Section 2.1.

One of TRIME's aims was to create an energy saving advice model that can be replicated by other SHOs across Europe. The TRIME team is pleased they have delivered this and created a Guide that shares learning and makes replication easy. The Energy Ambassadors and households require a lot of support to succeed in saving energy, however the efforts of any SHO to do this will show high returns.

The TRIME team have already secured pledges from 18 SHOs who intend to replicate all, or part, of the energy saving advice model presented in this guide. The TRIME team recommend that 1 member of SHO staff, as part of their role, can support 10 EAs, and each EA in turn can support 10 households. Therefore for every member of staff implementing the model 100 households can be helped to save energy. The TRIME team estimate that per SHO staff member, supporting 100 households, this will result in electricity savings of 6200 kWh per year and gas savings of 11.600 m³ per year. This is a reduction on the average household bill of 62 kWh of electricity and 116 m³ of gas per year, accounting for a financial saving of 74 €.*

*This information is based on analysis of TRIME SHOs from Holland, and has used the Dutch average energy consumption and price levels for 2017.





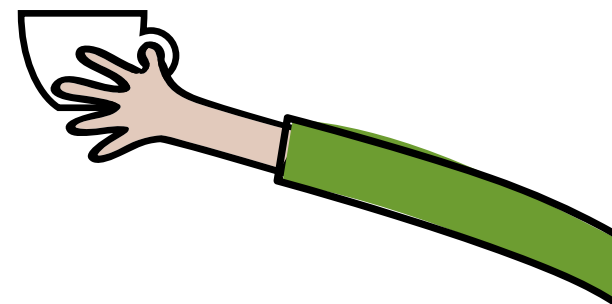
2.0 INTRODUCTION TO THE GUIDE

Numerous projects have looked at how to change peoples' behaviour when it comes to using energy; however few have focused on how to change the behaviour of people with limited financial resources. TRIME is a project that was set up to improve energy saving actions amongst social housing tenants.

This Guide was prepared following the development and implementation of an energy saving advice model by social housing organisations (SHOs) as part of the TRIME project. The Guide pulls together the results of a project and can be used as a tool by other SHOs to set up an energy saving advice model for their tenants. This online resource provides flexible

step-by-step instructions, advice and materials that can be used to set up similar models in contexts relevant to your organisation.

The TRIME project had 10 partners from five EU Member States, and as part of the Intelligent Energy Europe Programme was co-funded by the European Commission.



2.1 TRIME PARTNERS

As you go through this tool you may have questions for the TRIME partners, please click on the logos to the right to access contact details.

The team was made up of SHOs and experts from a university, behavioural analysis organisation and technology company.



THE SHO_s WERE:

UK: Clarion Housing Group



France: Logirep and Vilogia



Belgium: Zonnige Kempen



Netherlands: Eigen Haard and Havensteder



Spain: Sestao Berri



ADDITIONAL EXPERTISE CAME FROM:

Netherlands: Delft University of Technology

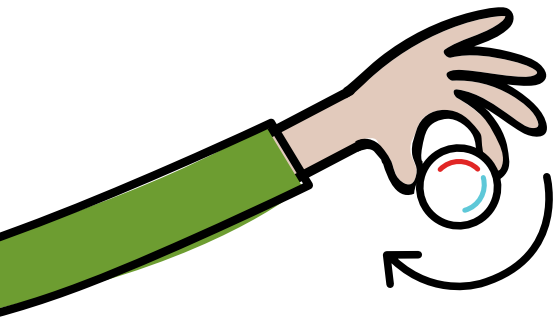


France: Intent Technologies



Belgium: U-Sentric





2.2 WHY DID TRIME TARGET SOCIAL HOUSING TENANTS?

Social housing tenants are considered to be at a higher risk of poverty as a result of unemployment and lower income jobs.

The TRIME project set out to try and alleviate some of the poverty social housing tenants experience through helping change energy consumption behaviour which would in turn potentially lead to lower bills. As a result of these actions the team hoped social housing tenants would also see the environmental benefits of saving energy, and feel good about it, encouraging them to continue this behaviour into the future.

The team also hoped a benefit of the TRIME energy saving advice model would be to improve local relations and help tenants feel more socially empowered.



2.3 PROJECT OBJECTIVES

- ▶ Create a community of social housing tenants to achieve a long lasting change in behaviour with respect to the use of energy in their homes. This change was to help increase the affordability of energy and hopefully give tenants greater spending power when managing their household finances.
- ▶ Create an energy saving advice model (using tenant 'Energy Ambassadors' (EAs)) that other SHOs, across Europe, can adopt and continue to use in the future.





3.0

THE ENERGY SAVING ADVICE MODEL

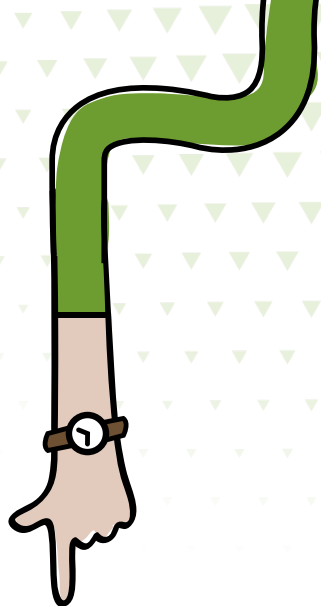
The model used by the TRIME team has been shown to be adaptable to different organisations and different countries' contexts.

It is a simple approach that focuses on training tenants to be EAs who can provide energy saving advice to their friends and neighbours. The team chose not to use paid professionals, or their own staff, to provide advice; instead they focused on empowering tenants to become EAs. SHOs that had previously used tenants to provide peer to peer advice were able to advise the team about the benefits of using such a model with regards to increasing the reach of the messages and encouraging stronger local relations. The TRIME team found that the EAs were trusted by their neighbours to provide advice, and the tenants felt that the SHO was investing in their neighbourhood by training local

people and supporting them to improve local relations.

This section describes factors which are key to successfully setting up and implementing an energy saving advice model.





3.1

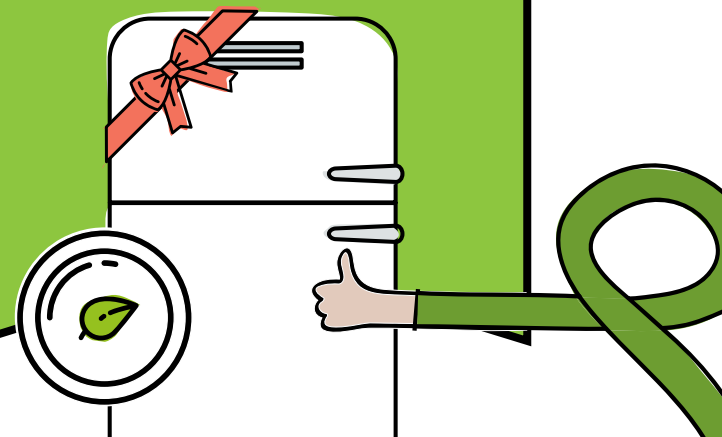
KEY INFLUENCING FACTORS

- 1 The model is most likely to have the highest impact when **delivered in tandem with other energy saving initiatives** such as retrofit, tariff switching campaigns, smart meter installations or support to buy electrical appliances. We know this because one of the TRIME partners, Eigen Haard, retrofitted their properties, and provided advice on buying electrical appliances before they started to provide energy saving advice.
- 2 The EAs are all volunteers and not paid for their work. However, some **SHOs may wish to provide incentives** such as electronic tablets or vouchers to spend on an energy efficient appliance. You will need to make sure these incentives do not impact on the drive to save energy, for example some EAs may change their approach to providing advice if they are driven by the incentive offered. You will also need to make sure an incentive fits with your organisation's policies, and does not negatively impact any statutory benefits the EA receives.

CASE STUDY

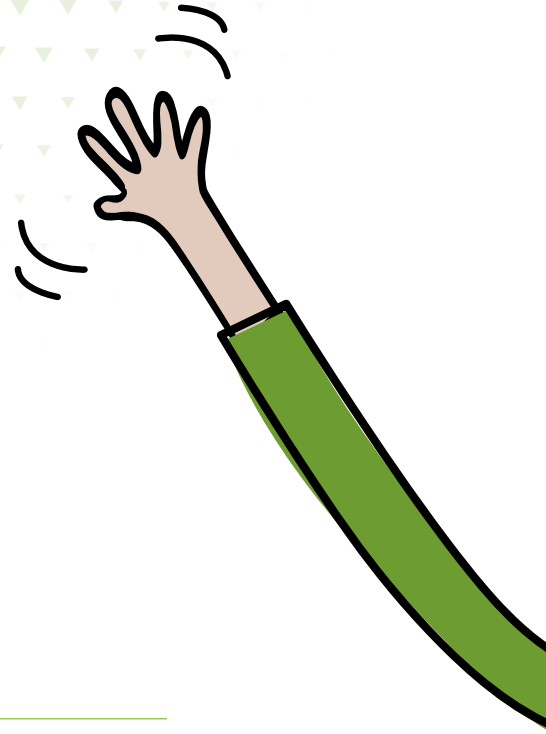
The impact of an SHO being committed to saving energy

Eigen Haard, an SHO based in Amsterdam, retrofitted a number of their properties that later went on to receive energy saving advice, and they also provided tenants with support on how to buy energy efficient appliances. The tenants were very receptive to receiving further support to save energy as they could see the SHO that manages their property is very committed to improving the environment and helping them save money. Eigen Haard made good use of the work they had already done to help reduce their tenants' energy costs. This meant they were very successful in helping households save energy during TRIME.



3.1 KEY INFLUENCING FACTORS

- 3 The EAs should have **one point of contact** in the SHO that they can refer to when in need of support to carry out their role. This will ensure they build a relationship with at least one staff member who they can contact before and after visiting households, and reach out to if they need support with the advice they are giving.
- 4 In order to recruit tenants to be EAs and to be part of an energy saving advice scheme, the model relies on securing the **support of customer facing SHO colleagues**. The SHO colleagues are important in terms of promoting the scheme, identifying which tenants need the most support, increasing commitment to the model within the organisation, identifying possibilities for further roll-out in the neighbourhoods of the SHO, and ensuring continuity of the project in case of changes in personnel.



CASE STUDY

Why it's important to secure the support of SHO colleagues

Vilogia, an SHO based in France, used a variety of methods, such as door knocking, leaflets and telephone calls, to recruit EAs. However, they found it difficult to recruit EAs as the team working on TRIME was not made up of customer facing staff. Vilogia therefore decided to train their customer facing colleagues to be able to talk about TRIME and provide energy saving advice. The result was that 130 staff were trained and they went on to help households based in Northern France. As a result of the training staff were pleased they could provide energy advice and that they could support tenants to be volunteer EAs.

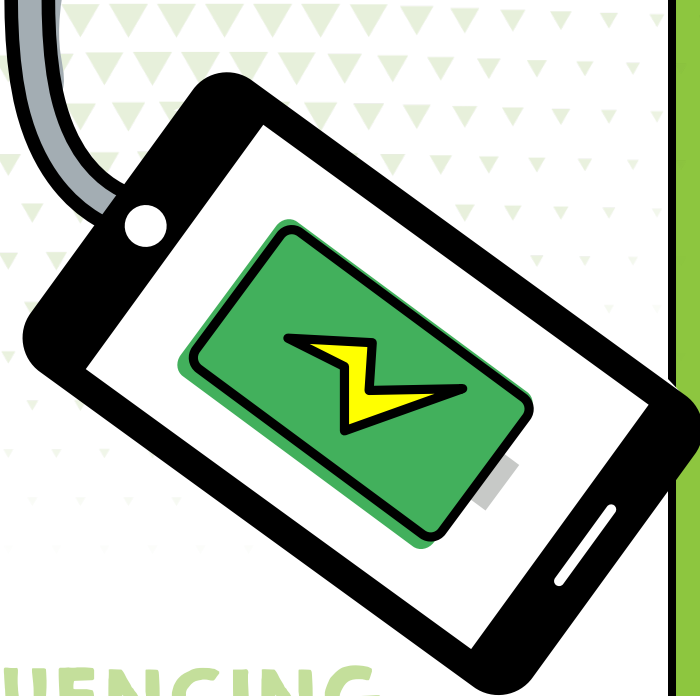


3.1 KEY INFLUENCING FACTORS

5 It is recommended that the model may also benefit from establishing a way to **monitor energy savings** before the recruitment of EAs starts. Monitoring could be done using a smart meter or manual meter readings that are then displayed on an application, or just kept on paper. The smart meter, application and paper readings can all be used

by tenants so they can see their savings. See section 7 for more information.

The set-up of monitoring can be difficult to organise and it may be helpful to consider using an external agency to help with any energy monitoring you may wish to do.



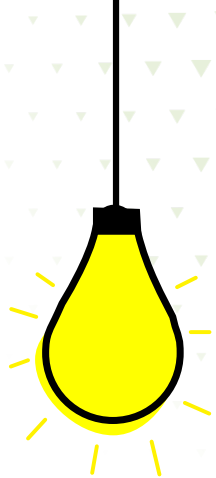
CASE STUDY

How TRIME used a Digital Platform to Monitor Energy Savings

The TRIME project monitored energy savings to assess the impact of the advice provided. To ensure that enough energy saving data was collected, the team looked at ways to set up a collection system that posed as little burden as possible (for the EAs, tenants receiving advice, and SHOs), but could provide a large amount of individual data and be compliant with European privacy legislation. The TRIME team used a paper based data collection method (for households with limited internet access) and two digital applications that were created and managed by Intent Technologies. The first application helped tenants to collect their own energy consumption data and visualise the savings, and the second helped the EAs to collect energy consumption data on behalf of tenants that did not have internet access.

The second application, could operate in an off-line mode and helped prevent the EAs having to record information on paper and then transfer it to the online application. The applications were the most effective way to collect lots of data and monitor energy; they ensured the effort required to record data was minimal and that it was as accurate as possible. The team also found it effective to record meter readings on paper, especially in households where there was limited internet access. The TRIME project benefited from the expertise of Intent Technologies and TU Delft to collect and analyse the data; it is recommended that if large scale monitoring is required for your energy saving advice model a specialist company is engaged to set systems up and analyse the energy saving data.





3.1 KEY INFLUENCING FACTORS

6 The Team found that **establishing timeframes** for the model helped with recruiting EAs and monitoring activity. It's suggested that it is best to give energy saving advice during periods when the highest levels of energy can be saved, for example, during the winter months in northern Europe.

7 **Communication methods between the SHO and tenant** must be adjusted depending on the tenant's needs, for example some tenants prefer discussions that are face to face, whilst others prefer using technology such as text, or email.

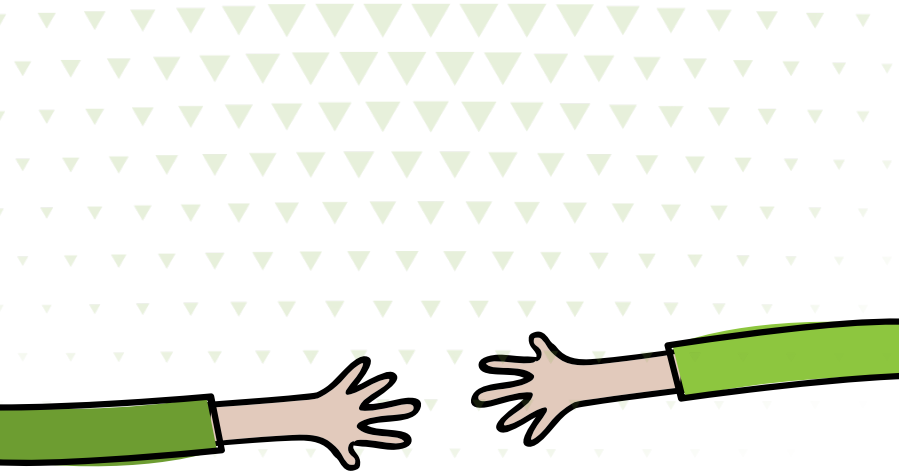
Communication between the SHO and the tenants is needed at each stage of the model; the SHO should ensure that it effectively raises awareness about the benefits of saving energy, provides clear information about becoming an EA and offers useful advice and training to its EAs. In turn the EA should be prepared to feed back to the SHO on the impacts of the project in the community. It is also important to make sure that communications about energy saving are consistent (in terms of messages and brand) across the organisation.

CASE STUDY

The importance of Setting Timeframes

The team first trialled the model in 2015-16, and found that the recruitment of EAs needs to start in June, followed by one last push in September. The SHOs advise that interacting with households and EAs during summer can be difficult as people are on holiday and prefer not to be thinking about having to save energy in the winter months. It's suggested that some contact during the summer makes the final recruitment of EAs in September easier as tenants are aware about the model and are ready to start thinking about saving energy in the colder months. The training of EAs should be complete in October and providing advice should start no later than November.





3.1 KEY INFLUENCING FACTORS

- 8 For SHOs that do not have easy relationships with their tenants it may be better to **work with local partners** to build networks that can recruit and support the EA. Local partners often have good contacts within communities that can use their influence to promote the energy saving advice model.
- 9 Getting neighbours and friends to save energy can be difficult if they are not shown what is in it for them. The use of a **competition or challenge** can be a helpful way to hook people into saving energy.

CASE STUDY

Working with Local Community Groups to Roll Out the Energy Saving Advice Model

Havensteder, a Dutch SHO, rolled out the energy saving advice model using EAs in three neighbourhoods. In the beginning, in all of the neighbourhoods, Havensteder found some of the tenants were not satisfied with the SHO's work and therefore did not want to engage as an EA or tenant that would receive advice. Havensteder decided to approach local partners that they have a good working relationship with, such as the government, welfare organisations, subcontractor and tenant organisations, to ask for their help to recruit EAs. The local partners are viewed well in the neighbourhoods and were able to help find tenants already active in their areas to become EAs. As a result of local partner involvement the EA approach is now secured in the three different neighbourhoods and will continue after TRIME. Using local partners has also helped the tenants begin to rebuild relationships with Havensteder as they can see they are trying to support them.

CASE STUDY

Creating an Energy Challenge

TRIME has created an online Energy Challenge which is interactive and encourages households to select eco-gestures that they could commit to in order to save energy and save money. You can see the Challenge [here](#). You can also contact Clarion Housing to discuss adapting the Challenge to suit your organisation – it might be interesting to see what the most commonly selected eco-gestures are.

The Challenge could be delivered as a competition, for example by seeing how many households on certain estates, or streets, commit to eco-gestures (energy saving tips). The team found it was hard to create a competition based on kWh or costs as it is hard to make this fair given varying household numbers and property types. We therefore focused on small tips that can help change energy saving behaviour.

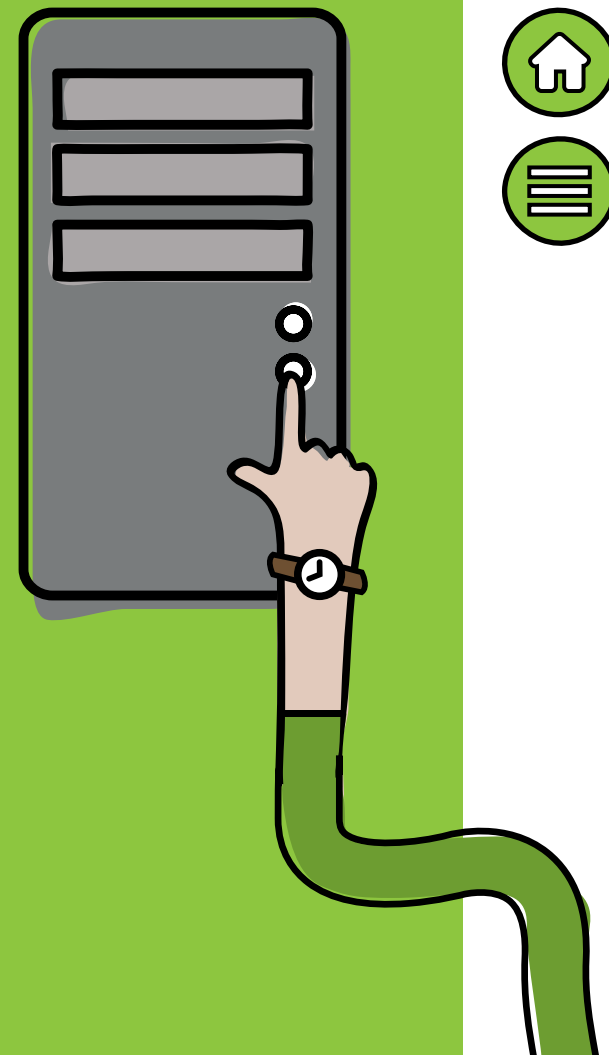
The Challenge ranks eco-gestures in terms of the most energy and money tenants can save using the '€' and '£' symbols. The Challenge seemed to work best when staff were encouraged to participate, this meant they could also help tenants select and carry out their eco-gestures.

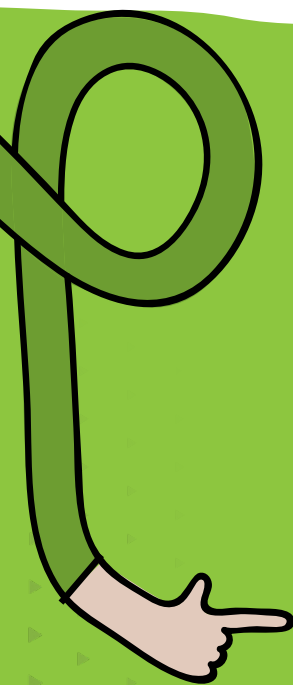


3.1 KEY INFLUENCING FACTORS

10 The final key factor to consider is **data sharing protocols**. For some organisations the energy saving advice model will involve practical delivery and limited monitoring of results. For organisations that wish to monitor energy saved using an application or smart meter services from third party organisations, and that want to have oversight of

the eco-gestures taken using the Challenge, then a privacy agreement with the tenants will be required. These agreements will also need to be accompanied by data sharing agreements with any third party providers of applications and/or smart meters. These should all be in place before the EAs start to provide advice.





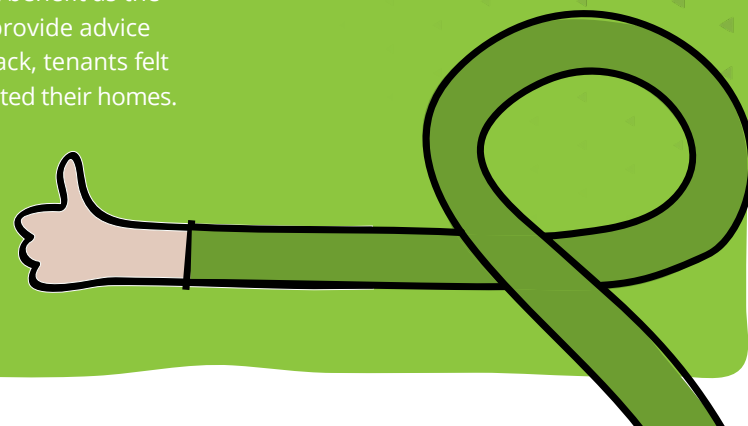
4.0 PRACTICAL EXPERIENCE OF DELIVERING THE ENERGY SAVING ADVICE MODEL

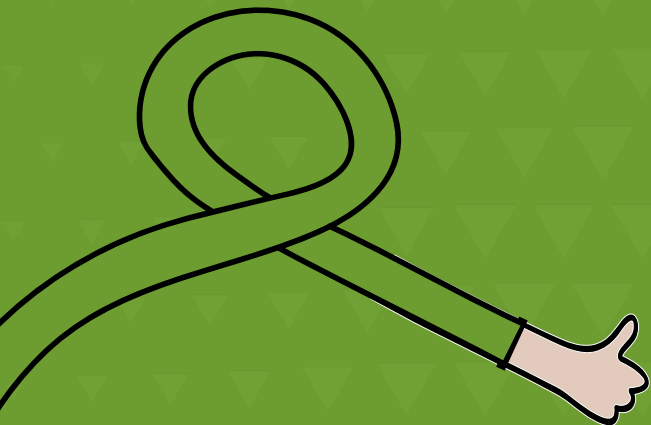
The step-by-step guide (found in the next section) outlines an energy saving advice model that was developed over a period of 36 months, and has been tried, tested and refined.

The model and the approach of using tenant EAs to provide advice is based on organisations being able to adopt a flexible approach to providing energy advice.

Working with tenants as EAs, the team found they had to adapt the training and

support depending on individual and local needs. Whilst this required some extra time and resource it was of great benefit as the EA was better prepared to provide advice and, based on verbal feedback, tenants felt comfortable when the EA visited their homes.





4.0

PRACTICAL EXPERIENCE OF DELIVERING THE ENERGY SAVING ADVICE MODEL

The EAs in the TRIME project became trusted by their neighbours to provide energy saving advice. The EAs were able to approach households in a friendly way that helped to improve their own relationships with local people and to support communities to work towards saving energy. The approach in this Guide is focused on working with tenants as EAs as in addition to providing energy saving advice through a trusted network of local people, the SHO also benefits from improved relationships and levels of trust between the SHO and tenants.

“



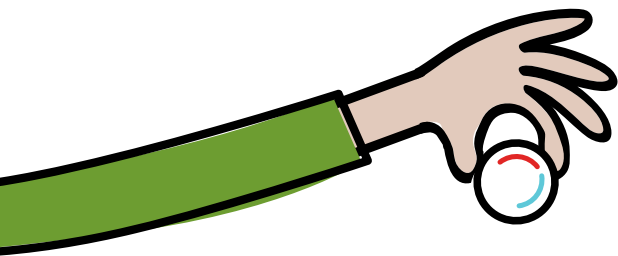
TENANT INTERVIEW

Read this short interview with a tenant, Yolanda Torrico, who lives in a home provided by Sestao Berri in northern Spain:

- ▶ **Do you feel better equipped about what to do to save energy in the home?**
 - ▶ I felt very comfortable with the Energy Ambassador because he explained how to save energy in my home. He came with a toolbox and explained how to reduce water consumption, how LED lights work and how much each appliance consumes. Now, for example, I turn off the TV when I'm not watching it.
- ▶ **Would you take part in such a project again?**
 - ▶ Yes
- ▶ **What did you like best about TRIME?**
 - ▶ The visit made me understand how to save energy in my home.

”





4.1 FINDINGS - ENERGY BEHAVIOURS

We used research into understanding energy behaviours in the home to shape communication and training materials. Please see Reports Section on website to access research into energy behaviours in the home. The high-level results found:

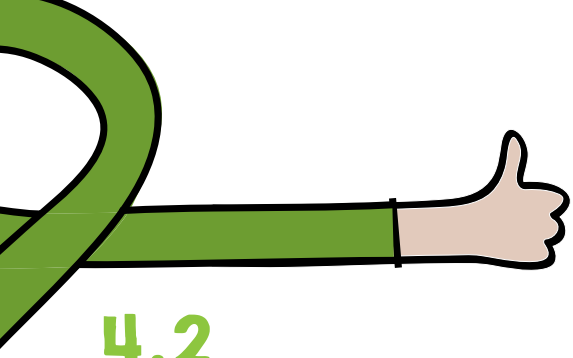
- ▶ Most social housing tenants do pay attention to the energy they use, as this is one way they can try to save money. They also:
 - Are aware of big actions they could take to save energy, such as turning the thermostat down by 1 degree.
 - Try to buy energy efficient appliances if they can afford to.
 - ▶ Some SHOs found that tenants may find it hard to save energy because they feel under pressure socially to be buying appliances that use lots of energy, or leaving their lights on in their home to show they can afford to do so.
- ▶ Tenants may think about saving energy at particular times in the year, such as during the winter festive season, when they may want to spend their money elsewhere on items such as gifts and food.
- ▶ Some tenants were also motivated by seeing how their neighbours save energy and wanted to participate in receiving advice as a group.

COMMUNICATIONS

It's important to understand some of the drivers behind tenants' use of energy, as this will influence the material prepared for the EAs to use. The materials available, as part of this guide, are designed so that SHOs can adapt them to suit their local context, as a one-size fits all approach is not suitable.

Below are two examples of how the communications material was adapted by partners to fit with their organisation. One example is adapted for the winter festive season in Belgium and one is the generic poster used in the UK.





4.2 FINDINGS - IDEAL EA PROFILES

To shape the role of the EA and to recruit the most suitable tenants the SHOs worked together to profile the ideal EA. The SHOs drew on their experience of working with tenants in other projects to establish an ideal EA profile. The ideal EA:

- Shows some understanding of the technical aspects related to saving energy.
- Shows some interest in energy saving, or is already an environmentally friendly and eco involved citizen.
- Is a communicative, confident and social person as this helps in their role to assist households provide support and guidance where needed.
- Has good motivational skills to encourage their peers to see the benefits of saving energy.
- Shows they can use their initiative to deal with unforeseen situations and find interesting ways to share knowledge.



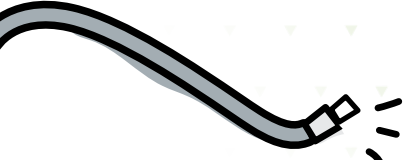
AMBASSADOR INTERVIEW



Read this short interview about Oddy Folgert's time as an Energy Ambassador and the reasons she, and other tenants, want to participate in a project about saving energy. Oddy is a tenant from Eigen Haard, a SHO in the Netherlands.

- **Why did you decide to become an Energy Ambassador?**
 - I saw the advertisement in the Eigen Haard magazine and thought it fitted with my interest in sustainability, and I wanted to learn more about it. I also liked the idea of the social aspect of the job; I wanted to know my neighbours better. I wanted to inspire them and help them.
- **What was the best part of becoming an Energy Ambassador?**
 - The home visits and giving advice. I also enjoyed the social aspect, one day I drank coffee with an older lady for two hours! My nicest visit was with a very enthusiastic younger tenant. She sent me a message a few days later to say she had already bought a lot of energy saving materials like radiator foil. And she even convinced her boyfriend to shower for a shorter time!
- **Why do tenants participate in TRIME?**
 - It is not actually for the money saving. It is more the social aspect and to learn more about sustainability.
- **Did the training help you?**
 - Yes the training is very important. I learned how to transfer my knowledge to the tenants. That made me stronger, and more confident, when visiting the households.
- **What works best in approaching households?**
 - Face to face contact and to use your own network. For me it didn't work very well to go from door to door of houses where I didn't know the people living there.





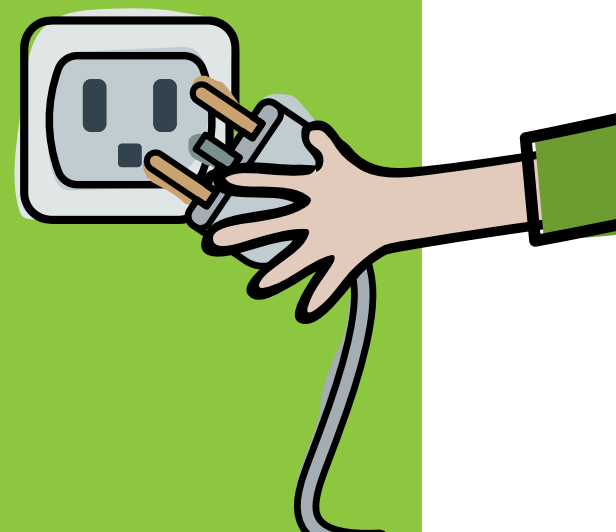
4.3 FINDINGS - AN IDEAL ENERGY SAVING ADVICE MODEL

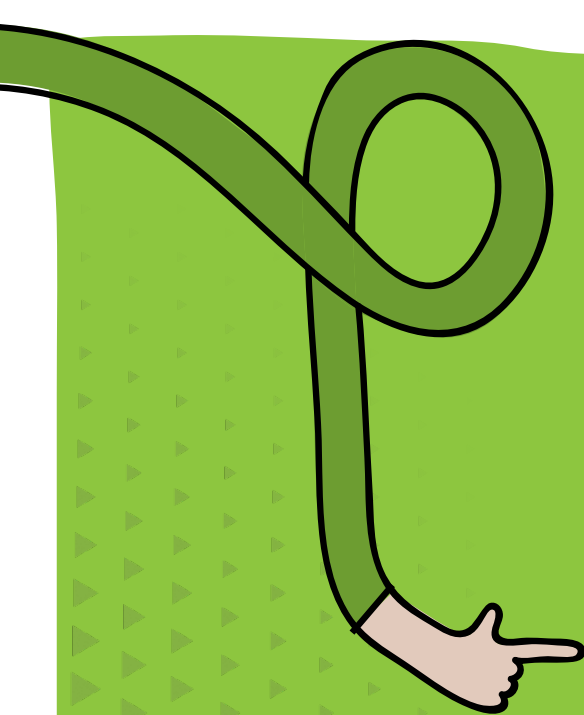
To ensure a workable energy saving advice model at the end of the project we decided to focus on encouraging tenants to save energy during the winter periods that TRIME covered. We called these Heating Season One and Heating Season Two. We used the learning we gathered from research into other advice models, energy behaviours in the home and evaluation of ideal EA profiles to trial the model in Heating Season One. It is highly recommended that you commit to piloting the model in one area, or estate, before rolling it out further.

We found that a 3-stage approach to delivering the energy saving advice model is best. This covers:

- ▶ **Recruitment of staff and EAs**
- ▶ **Training of EAs**
- ▶ **Advice the EAs give to households**

By splitting the approach into 3 stages, it is easier to manage the tasks and to clearly explain to the EAs their role.



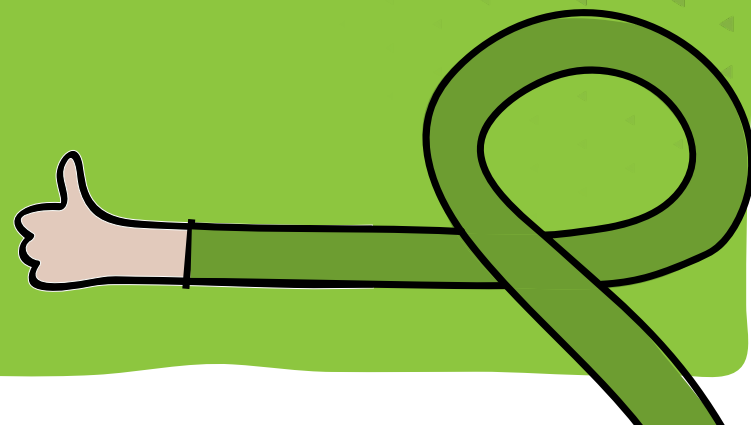


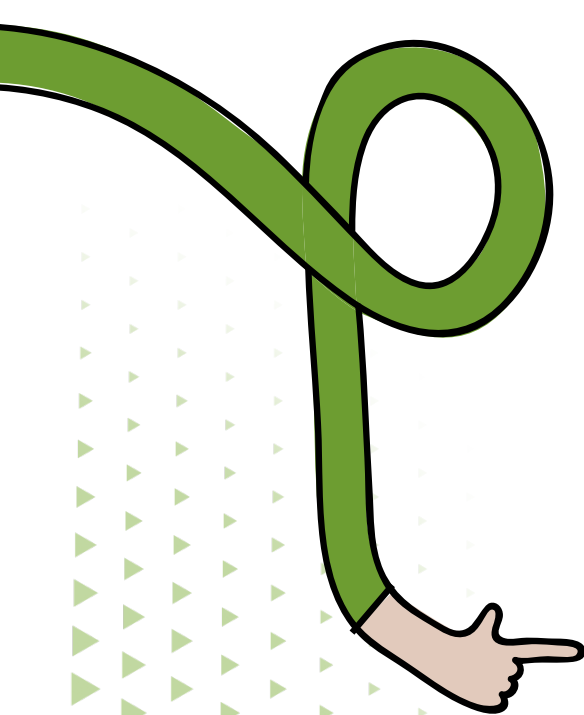
5.0 STEP-BY-STEP GUIDE TO THE ENERGY SAVING ADVICE MODEL

This section is designed to help SHOs with the practical application of the energy saving advice model.

As already set out, there are three stages to the model, and these can be adapted depending on the context and specific situation. This section provides resources

you can adapt to suit your energy saving advice model. (Some of the resources may have logos and names you can remove.)



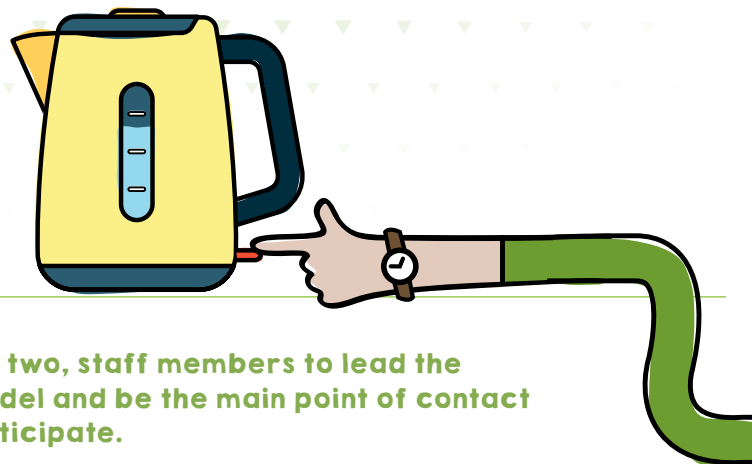


THE THREE STAGES OF THE ENERGY SAVING ADVICE MODEL

- ▶ **RECRUITMENT STAGE** (JUNE - AUGUST)
- ▶ **TRAINING STAGE** (AUGUST - SEPTEMBER)
- ▶ **ADVICE STAGE** (SEPTEMBER / OCTOBER - FEBRUARY / MARCH)



5.1 STARTING OUT

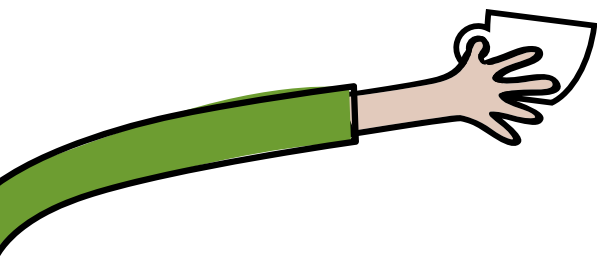


It is important that your SHO selects one, or two, staff members to lead the implementation and management of the model and be the main point of contact for colleagues and tenants that want to participate.

It took a number of months to fully prepare model for the purposes of TRIME. We therefore suggest you start planning your approach to the model at least 6 months before launching the recruitment stage.

It would be ideal if your SHO could commit to embedding the model all-year round and keep the EAs engaged on a constant basis. This would increase energy savings, help promote the profile

of becoming an EA, and further embed energy saving with your tenants and colleagues. If this is not possible then it will also have a significant impact if delivered over 9 months – from June to March. The guidance below is based on delivery over a 9 month period as this was what the majority of TRIME SHOs committed to. This ensured there was enough time to recruit staff and EAs, and that advice was given during the coldest parts of the year.

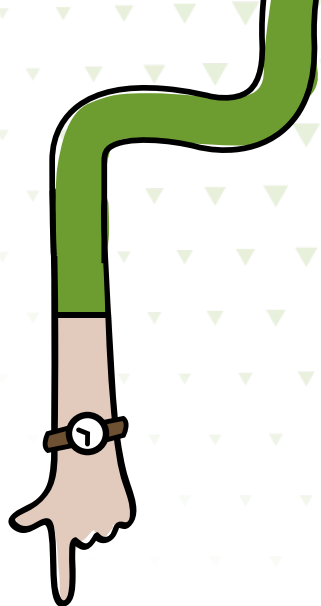


THE DRIVERS

In the starting out phase, the expectations of the energy saving advice model for the SHO, for the EAs and for the tenants should be made clear. The drivers for your SHO to provide energy saving advice will help you assess and answer the following:

- ▶ What will be communicated as the goal: cost saving, energy saving, or the social aspects?
- ▶ What are the EAs and tenants expected to do during the project?
- ▶ What information is required from the EAs and from the tenants? (An EA register can be a helpful tool to manage this. The register can help SHOs oversee the EAs and provide a list of tenants for the EAs to contact. See 'Advice Resources' box for an example template.)
- ▶ Is there a competition, or challenge, element? How will this be implemented?
- ▶ How will the energy saving results and overview of achievements be presented to the EAs, households and SHO colleagues?





5.2 THE RECRUITMENT STAGE (JUNE - AUGUST)

The following set of tasks will help an SHO recruit EAs. Not all of the tasks need to be followed and all can be adapted to suit local contexts.

CASE STUDY

Adapting the Energy Saving Advice Model to Recruit EAs and Provide Advice

Eigen Haard joined TRIME to learn more about using EAs to stimulate energy-efficient behaviour of their tenants. Eigen Haard adapted the TRIME model to recruit EAs from all of the properties they own throughout Amsterdam, and not just from one specific pilot site. Once they had recruited the EAs they asked them, as per the recruitment tasks, to use their own networks to find tenants that needed advice. Eigen Haard found this worked well, but decided to adapt their recruitment stage as the impact of advice was small because of the limited network of each EA. Halfway into the project Eigen Haard decided to start using their own network, to recruit the tenants for the EAs to provide advice to. By linking the EA and tenant in need of advice together it was found Eigen Haard reached more people in need of advice. Through adapting the tasks Eigen Haard was successful in terms of reach and providing energy saving advice to 155 households.



5.2 TASK ONE ENGAGING SHO STAFF

Initially, the staff in the SHO that are leading the implementation of the energy saving advice model will need to secure the support of colleagues to ensure they can help recruit and support the EAs.

It is important to engage colleagues that have contact with tenants and are willing to learn more about saving energy. It is suggested the following works best when recruiting colleagues:

- ▶ Display posters around office buildings and use the intranet to promote meetings and mini-training sessions about the energy saving advice model and learning how to save energy.
- ▶ Recruit staff working in the area that will be targeted by the energy saving advice model, e.g. rent collection teams, repairs engineers, community services and neighbourhood officers.
- ▶ Hold training sessions for colleagues to help them learn about saving energy; once a session is complete ask them to sign a pledge to support EAs and households to save energy.

Once staff support has been secured it is time to move on to recruiting the Energy Ambassadors. The EAs will need to be provided with the necessary training that helps them give energy saving information to households in their local areas. They should feel confident enough to offer tips (about eco-gestures to select) and demonstrate energy saving actions.

STAFF TRAINING RESOURCES:

- ▶ Staff Training Slides available [here](#)

SHO STAFF INTERVIEW



Read this short interview with Cesar Aranzana about using the Energy Saving Advice Model in a SHO. Cesar works for Sestao Berri, a SHO based in Spain.

- ▶ Did you feel prepared enough to provide the Energy Ambassador training?
- ▶ Yes, because the knowledge required was not very difficult to learn and as a project team we were very motivated to get the preparation right.
- ▶ Would you personally take part in such a project again?
- ▶ Yes, because the goal is to raise awareness of how to use energy in your home efficiently and in the end tenants get to save on their bills, and know how to use the appliances in their home. It's good to help them in this way.
- ▶ Do you think the project influenced the way your SHO is interacting with tenants with regard to energy saving?
- ▶ Yes, now we are working to improve our customer service and include advice about energy.



5.2 TASK TWO SELECTING A NEIGHBOURHOOD

You should start this task in June, however you may want to select neighbourhoods you will work with earlier in the year as this will help with better planning for delivery of your energy saving advice model.

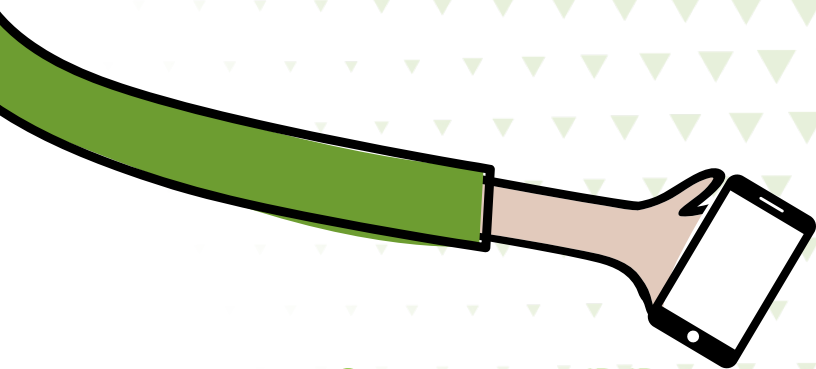
Using staff networks and knowledge of local areas select a neighbourhood that would most benefit from energy saving advice. The best areas are those where the housing stock has recently received retrofit measures. It also helps if your SHO has good connections with local community networks that could support recruitment and promote the energy saving advice model. Having local community facilities that you can use for training and events is very helpful.

Selecting local partners and networks should be done on the basis of which tenants can be supported, or engaged to save energy. For example, it might be attractive to involve organisations that help tenants that have financial problems, because these tenants might benefit most from the cost savings as a result of energy saving. However, in practice these tenants may not be a very motivated because their focus is managing their daily budget and not with saving energy.

- ▶ IDENTIFY NEIGHBOURHOOD PRIORITIES
- ▶ PROFILE OF HOUSING STOCK
- ▶ COMMUNITY NETWORKS
- ▶ LOCAL FACILITIES
- ▶ RELATIONSHIP WITH YOUR TENANTS

▶ DECIDE ON NEIGHBOURHOODS





5.2 TASK THREE GENERATING INTEREST ABOUT THE ENERGY SAVING ADVICE MODEL

Make contact with as many households (tenants) from the chosen site as possible to identify initial interest and to find out if they would like to receive energy saving advice.

This task is about securing interest from tenants that might want to receive energy advice or become EAs. The contact should secure interest and permission to visit the household to discuss the energy saving advice model further; it would be good practice to secure an indication from the tenant about suitable times and dates for a visit.

The method of contact will depend on whether you have the tenant's telephone number or email address, and your knowledge of whether they like to be contacted by phone, letter or email. Multiple channels may have to be used to reach households.

At this point it is also worth making sure that those interested in being an EA understand the level of commitment you will want from them. Outlining that realistic targets will be set for the EAs, may help them understand the role they are interested in. A target could be based on the TRIME project findings which saw EAs visiting 8-11 households once a month during the advice stage. The 8-11 households was the average number each EA saw. They all fed back that it was the maximum number they felt comfortable supporting given the time commitment they had to make.

SECURE INTEREST

Some examples of how to secure interest include:

1. Email tenants to ask if they would like to learn more about how to save energy.
2. Send text messages - use a text messaging service to promote the model and ask if tenants want to be EAs. The text should have a simple reply option for tenants to use if they are interested in becoming an EA.
3. Embed a pre-recorded message about the energy saving advice model on your telephony system.
4. Send all tenants a postcard about how to save energy and invite them to be an EA or receive advice.
5. Use social media to generate 'likes' that relate to saving energy, or run an online survey; make sure to promote the EA role if using this method.
6. Create simple questions that can be used by colleagues that come into contact with tenants; the question should identify people that want to save energy and to be contacted for a further discussion about the EA role.



The communications should lead to households showing interest and this should lead the SHO to make a list of those that want to be EAs and those that want to receive advice about how to save energy.

Those households that want to receive advice should form a list of contacts the EA can approach when they start out (see Advice Stage, Task 1).

The following guidelines have been identified as best practice to be followed when making first contact with households in pilot site:

RECRUITMENT RESOURCES:

The following templates and examples can be found [here](#).

- ▶ Introductory letter to promote energy saving and generate interest about becoming an EA
- ▶ Script for introductory telephone calls, emails and texts
- ▶ 'Save Energy, Save Money' leaflet
- ▶ Recruitment Poster



GUIDELINES ON HOW TO MAKE CONTACT WITH TENANTS WHEN RECRUITING THEM TO THE ENERGY SAVING ADVICE MODEL:

Activity	Detail
Contact a lot of tenants (the method should be based on what works best for your SHO)	In order to recruit Energy Ambassadors and households that will receive advice you must have contact with as many tenants as possible. This means dedicating time and resource to making the first contact.
Use existing processes: don't re-invent the wheel	To make contact with tenants try working with existing structures, e.g. working with the rent collection teams, repairs engineers, community services, neighbourhood officers.
Work smart, not hard	Door knocking, dedicated events/meetings and letter drops are useful but they have proven to be resource intensive and not very effective during this stage of the recruitment phase. Instead telephone and email tenants, and attend events/meetings that are being held by other colleagues or local community groups.
Focus on benefits	Your simple questions should provide tenants with a reason to participate by focusing on what they stand to gain e.g. 'Can we help you save money on your energy bills?'
Move on!	Don't spend time convincing tenants to join in with the energy saving advice model. If they say no, put them on a reserve list to contact at a later stage.



5.2 TASK FOUR FOLLOW-UP CONTACT AND PROVIDING FURTHER INFORMATION

This task ensures that you make contact with your shortlist of tenants to provide them with more information about the energy saving advice model, and to identify whether or not they would like to be an EA or a household that receives advice.

RECRUITMENT RESOURCES:

The following templates and examples can be found [here](#).

- Follow-up letter to tenants interested in becoming an EA

IDEAS FOR FOLLOW-UP CONTACT WITH TENANTS INTERESTED IN BECOMING AN EA OR BENEFITING FROM ENERGY SAVING ADVICE:

Activity	Detail
Open day / Event	If your chosen site is located within a neighbourhood with suitable facilities you could choose to run an open day event, inviting the tenants that have already indicated they would like to hear more about the model and ways to save energy. If you choose to hold an event, make it worthwhile by providing a small incentive or link up with a community event that has already been planned.
Personal phone call from SHO	Having made initial contact now is the chance to follow up with a personal phone call and provide more detailed information about the model and ways to get involved. A personal phone call to tenants that have indicated they would like to get involved will also provide an opportunity for them to ask questions.
Personal visits	While it is more resource intensive, personal visits to individual households or community groups to discuss the model and how to get involved in more detail could be more effective. Remember it's unlikely that 'cold-calling' will be effective, so if visiting a household get a date booked in that suits them.



5.2 TASK FIVE CREATING A TIMETABLE AND SETTING EXPECTATIONS

Once you have compiled a list of EAs for the local area make sure they receive a timetable of what will happen, and what will be expected from them over the coming months.

It is important at this time to confirm any EA incentives. The TRIME team found that providing an electronic tablet (preferably with internet via 4G to avoid problems with wifi passwords of tenants' wifi networks) worked for both purposes of an incentive and helping the EA carry out their role. We offered a tablet and ensured all EAs signed an agreement with the SHO about how it could be used.

RECRUITMENT RESOURCES:

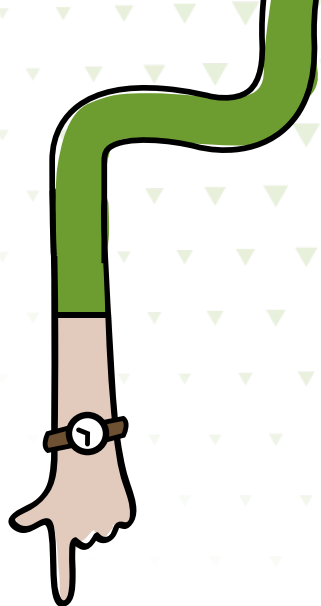
The following templates and examples can be found [here](#).

- Agreement between SHO and EA for use of the tablet.

EXAMPLE TIMETABLE OF EA ACTIVITY:

Activity	Date
Letter to congratulate tenant and confirm their selection as an EA	Mid-August
Invite EAs to training	End of August
EAs to complete 3 training sessions	September
SHO staff to set up regular support meetings for EAs - this will help with feedback and troubleshooting (could take the form of group or individual meetings)	September - April
EAs and SHO staff to work together to schedule energy advice days/events (i.e. days when they will provide households with energy saving advice, this could be door knocking days or specific events)	September
EAs to give advice and support to local households and hold energy advice events	October - March
EAs to provide monthly meter readings (if required) and feedback to SHO staff (could be done over email or face-to-face at support meetings)	October - March
EAs to attend a closing/celebration event	April





5.3 THE TRAINING STAGE (AUGUST - SEPTEMBER)

The objective of this stage is to provide all EAs with a basic knowledge and understanding of energy saving tips (recommended eco-gestures)

It is also suggested the SHO provides a basic kit of energy saving devices that the EAs can use when meeting households. TRIME developed a toolbox that enabled EAs to carry out practical energy saving demonstrations about how to save energy.

The TRIME Team also found that during this stage it was useful to provide staff with refresher

training. This helped them to be better prepared to support the advice stage.

The following set of tasks will help train the EAs. You can see an overview of the tasks in a chart on the following page. Not all of the tasks need to be followed and all can be adapted to suit local contexts.

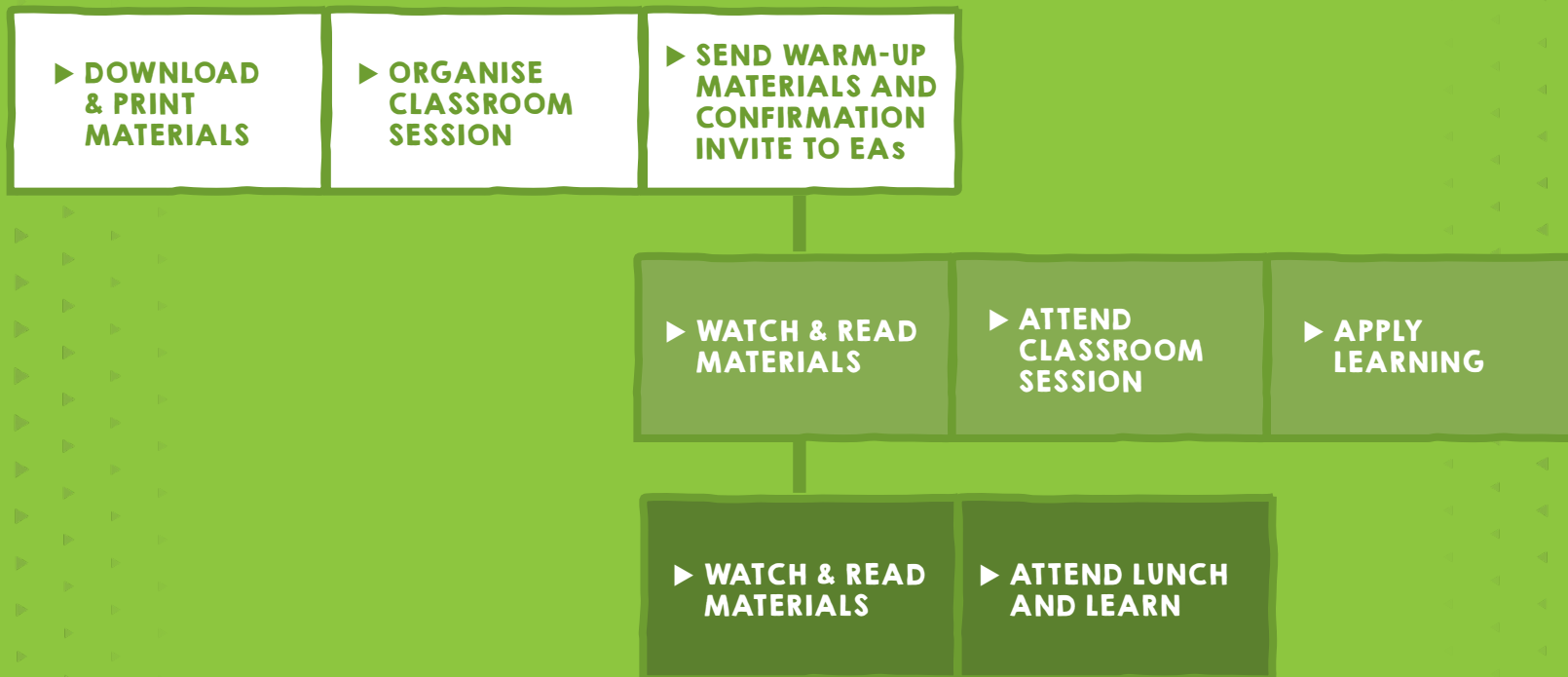
CASE STUDY

The Toolbox

All of the SHOs that participated in the TRIME project provided a toolbox to each of the EAs. The toolbox cost around €65-150 and comprised of a bag containing affordable items such as draught excluders, radiator foils, power down plugs, light bulbs and thermometers. The toolbox enabled the EAs to feel more confident and professional when explaining how to save energy. The toolbox was for demonstration purposes only, households were then encouraged to buy the energy saving items from a store of their choice. You can find out more about the toolbox by clicking on the next 'Resources' box on page 41.



5.3 THE TRAINING STAGE



SHOs  EAs  SHO COLLEAGUES 

AUGUST

SEPTEMBER

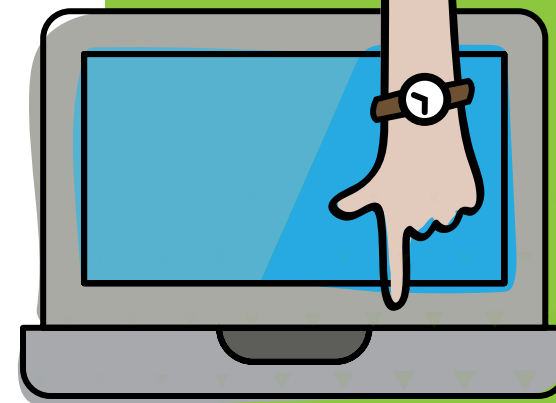
5.3 TASK ONE

WARM-UP TRAINING MATERIALS

Send some warm up training materials to the trainee EAs.

The materials should help the trainee EAs start to understand the type of energy saving advice they will be giving and help give them a head-start in the training sessions.

Useful warm-up materials include a copy of the energy saving film ([click here to watch](#)) and some of the top eco-gestures to take.





5.3 TASK TWO TRAINING THE EAs

Deliver training sessions for the trainee EAs. SHOs will need to book, in advance, suitable facilities and send invites to the EAs. The EA training is likely to take 2 to 3 days depending on requirements. In the Training Resource Box you will find 3 recommended training sessions and associated quizzes which are titled as follows:

- ▶ Training – How to become an Energy Ambassador Day 1
- ▶ Training – How to become an Energy Ambassador Day 2
- ▶ Training – How to become an Energy Ambassador Day 3
- ▶ Training – How to become an Energy Ambassador Day 1 Quiz
- ▶ Training – How to become an Energy Ambassador Day 1 Quiz cont.

The third training day is only required if you want the EAs to help with meter readings. Inviting experts from outside your organisation

(e.g. a technician from an electricity company to explain the energy meters or a technician to explain about the boiler) may generate interest and help motivate the EA. In addition, focus on the practical tips rather than dry theory about energy and how a meter works.

Part of the training sessions should focus on introducing ways the EAs can incentivise and engage households to participate. The TRIME Team found the online challenge tool helpful in terms of engagement, as it provides a way to talk about saving energy using a visual and participatory tool. (See the Case Study in Section 3 for more information about the challenge.) If using a challenge or competition you should include training on it as part of the above sessions.

THE INCENTIVES

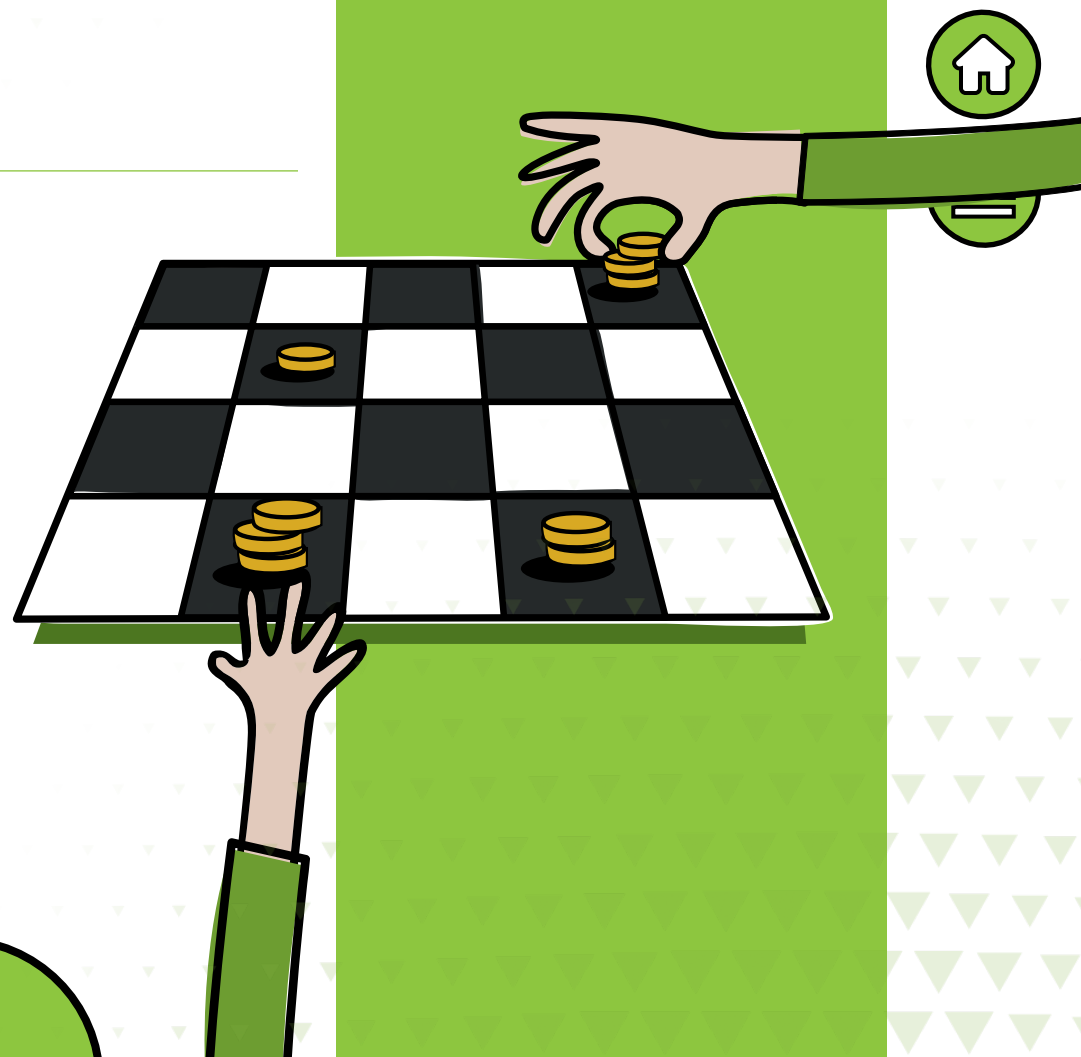
Your SHO will need to decide about incentives the EAs could use when working with households. The type of incentive will depend on what your organisation is comfortable with, but could range from offering households a free energy saving gadget such as a power-down plug, to a gift voucher to spend on an energy efficient appliance or gadget. The incentives should also be covered at one of the training sessions.



5.3 TASK THREE REFRESHER TRAINING FOR SHO COLLEAGUES

Organise a refresher session for SHO colleagues, this could be in the form of a 'lunch and learn' drop-in, or an informal classroom session.

The refresher session should build on the engagement and training that took place at the very start of the recruitment stage (see previous pages on recruitment). SHO colleagues supporting the energy saving advice model should be provided with an overview of the training the EAs will receive; it would be helpful to send them the same video and list of tips (eoc-gestures). This will help in case of questions from tenants or EAs, and it will also support SHO staff to provide energy saving advice when relevant.





5.3 TASK FOUR KEEPING TRACK OF EAs

Once the training is complete then set up a register to indicate who has completed training.

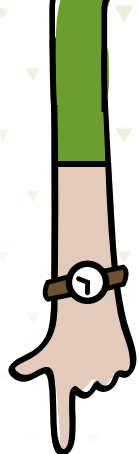
This should be used by the SHO to record regular contact with the EA. The register should also set out which tenants the EAs are going to provide advice to and when. See 'Advice Stage, Task 1 and 3', for further guidance on frequency and contact methods.

ENERGY AMBASSADOR TRAINING RESOURCES:

The following templates and examples can be found [here](#).

- ▶ Energy saving advice video
- ▶ Training Slides covering 3 sessions and tailored to suit SHO's in the UK, Spain, France, Belgium and The Netherlands
- ▶ Training evaluation form for use after the training sessions
- ▶ List of suggested Tool Box items
- ▶ A template for the Energy Ambassador and Tenant Register





5.4 THE ADVICE STAGE (SEPTEMBER/OCTOBER - FEBRUARY/MARCH)

This stage focuses on deploying the EAs to provide their energy saving tips and use the toolbox to motivate neighbouring households to save energy.

The following set of tasks will help the EAs provide energy saving advice. The charts on pages 43 and 45 provide an overview of the tasks. Not all of the tasks need to be followed and all can be adapted to suit local contexts.

CASE STUDY

Adapting the Advice Tasks to Suit Local Context

Zonnige Kempen, a Flemish SHO, is set in a rural setting and has adapted the TRIME findings to provide a professional framework for the Energy Ambassadors including 3 x 4-hour sessions of training with a certificate, a code of honour, insurance, bi-directional feedback opportunities, facilities such as a tablet and a toolbox and cost remuneration. Dedicated support is given to the Energy Ambassador by the SHO Co-ambassador (an SHO employee) mostly in direct contact by visits and telephone calls. Zonnige Kempen adapted the advice tools to meet their tenants' needs. They found that 40% (48/113) of tenants receiving advice during TRIME did not have an e-mail address or the ability, or desire, to use one. So they ensured advice was given

through face to face contact and by leaving tips that were suited to the tenants needs. For example, A6 magnetic action cards with tips were developed by Zonnige Kempen on 4 different themes; heating, hot water, electricity and overheating (the latter also included information on correct ventilation techniques). Tenants are asked by the EA to choose some of the tips to apply and tick the box accordingly. Tenants also have the possibility to insert their own tip and add remarks. Tenants then stuck these action cards on their fridge. Energy Ambassadors can use these cards as a framework to start discussing and informing the tenant on energy savings. By adapting the materials Zonnige Kempen successfully provided energy saving advice to 125 families during TRIME.





5.4 TASK ONE

PREPARING EAs TO PROVIDE ADVICE



SHOs  EAs 

SEPTEMBER

OCTOBER





5.4 TASK ONE PREPARING THE EAs TO PROVIDE ADVICE

Prepare the new EAs before they are deployed in your local areas.

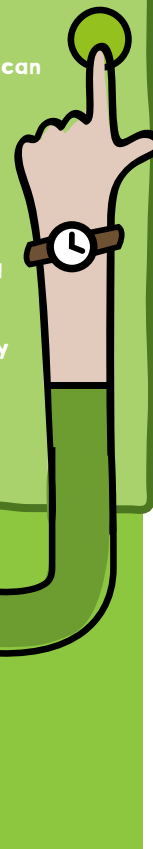
Preparation should include producing registers for the EAs with any pre-arranged dates and times of meetings already filled in, and a list of names and addresses of households who have expressed an interest in receiving energy saving advice. The households in the register will most likely be those that expressed an interest to receive advice during the recruitment stage (see Recruitment, Task 2). As the EAs progress through the Advice Stage they may recruit additional households and add these to the register.

SHOs should also set up the electronic tablets (if using one), print the materials and purchase the EA toolboxes. These materials should be delivered to the EAs' houses. Leaflets with an overview of energy saving actions that tenants can take are a very helpful tool for the EA. Small gadgets for the tenants to keep such as a shower timer or a led bulb can be considered as well.

ADVICE RESOURCES:

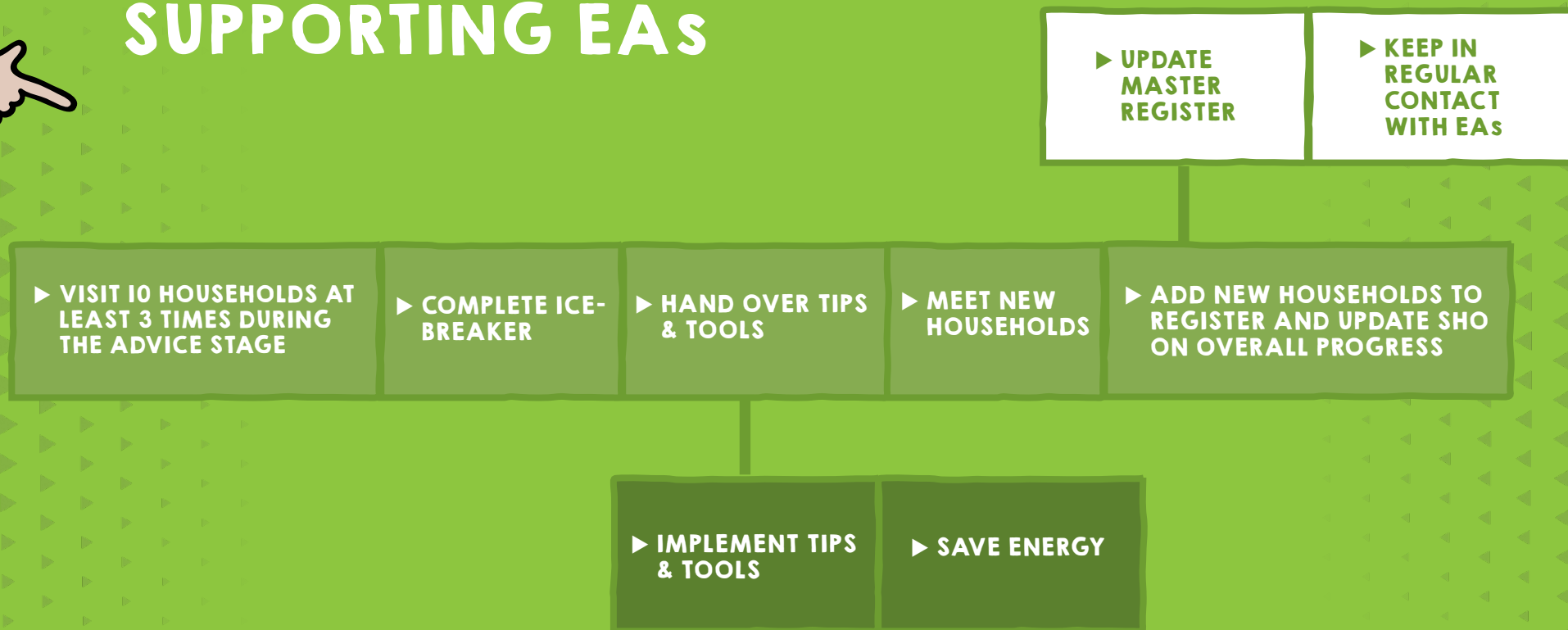
The following templates and examples can be found [here](#).

- ▶ A list of energy saving tips (eco-gestures)
- ▶ Template ICE breaker quiz
- ▶ A template Energy Ambassador and Tenant Register
- ▶ 'Want to save money on your energy bills?' Example of Belgian energy saving tips that were placed on a magnetic postcard



5.4 TASK TWO AND THREE

GIVING ADVICE AND SUPPORTING EAs



SHOs



EAs



HOUSEHOLD



SEPTEMBER/OCTOBER

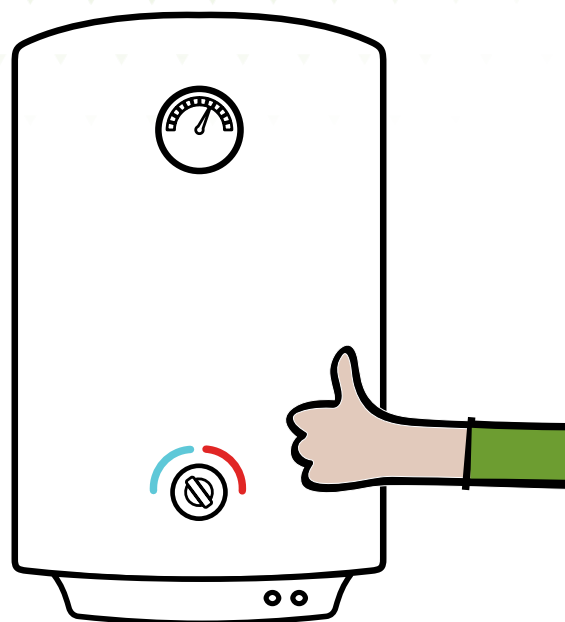
FEBRUARY/MARCH

5.4 TASK TWO GIVING ADVICE

Deploy the EAs into the neighbourhood to share the energy saving top tips and demonstrate the tool box to households.

This is the exciting stage, whereby the EAs are able to visit households and talk through the tips and items in the toolkit; the household should be left feeling they are better equipped to save energy.

At the first visit the EA should schedule further monthly visits that will continue until the end of the Advice Stage. The advice of the EAs was most effective with at least three visits per household.



METER READINGS & ENERGY BILLS

If you decided to take individual household meter readings (to see the year on year energy savings) then the EAs, at the first meeting with households, should take a meter reading (if meter readings are not taken automatically by smart meters). They should also ask to see an energy bill from the same month in the previous year. The energy bill from the previous year will enable the energy used during the past 12 months to be calculated, which will form a baseline for seeing how much energy is saved in the coming months as a result of advice provided. (See Section 7 for further advice on taking meter readings and monitoring.)



5.4 TASK THREE SUPPORTING THE EAs

This task is for SHO staff to keep in regular contact with EAs and households.

It is important that SHO staff continue to provide support to participants, as energy saving can be quite a complex advice area. It is worth noting that the saving of energy is dependent on a property type and household composition, and at times the EA may need additional support to help address these aspects. There are 3 suggested support steps:

ADVICE RESOURCES:

The following templates and examples can be found [here](#).

- ▶ A template to store meter readings
- ▶ Example 3 x Monthly email bulletins



STEP ONE:

SHOs to call the EAs

SHOs should aim to keep in contact on a regular basis (ideally weekly) to:

- ▶ Check how the visits are going - Who did they visit? How are the tips and tools being received?
- ▶ Check whether EAs have recruited any new households/tenants (if they have, collect their details and update the register).
- ▶ Resolve any issues or concerns EAs may have.

STEP TWO:

Send a monthly motivation email, or letter, to all tenants participating in your energy saving advice scheme.

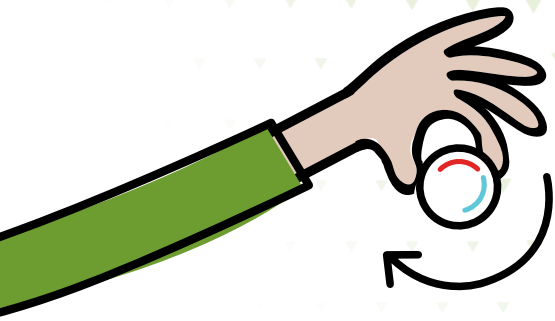
SHOs should send the email, or letter, to all participating households and EAs within the first week of each month to inspire, motivate and encourage them to try new actions and reduce their energy consumption.

STEP THREE:

Call households every month to retrieve meter data

If you are recording energy savings manually, then you will need to include this step as part of your regular check-ins with the EAs. SHOs could support the EAs by calling each participating household at the end of each month to gather meter readings. If your meter data is not collected monthly, the energy consumption data may be less robust, and it will be more difficult to see what energy saving advice has had an impact. If you're using smart meters to submit meter readings automatically, you may be able to skip calling households to get meter readings. (Remember, if you are collecting energy consumption data, you will need to get a baseline; see Advice Stage, Task Two.)





5.5 REVIEW AND REPEAT

The model presented here has a two - three month break each year.

The break enables time to review results and give the EAs a rest. However, it can easily be adapted so that it runs continuously. It is suggested that once the heating season closes the EA work is reviewed, this should entail:

- ▶ Analysing the savings made
- ▶ Evaluating the advice EAs have given
- ▶ Evaluating the experience of the EAs

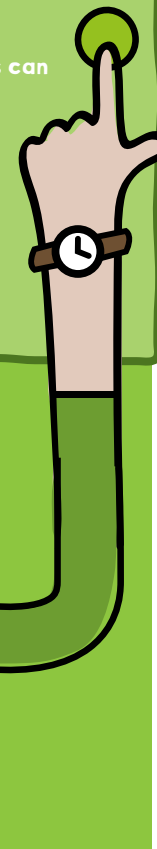
The results of the EA advice and experiences could be presented at an event to reward, and celebrate, the hard work of staff, EAs and tenants.

The results should also be used to refine the energy saving advice model in your SHO so it is even more effective the following year.

REVIEW RESOURCES:

The following templates and examples can be found [here](#).

- ▶ Advice on how to analyse the results
- ▶ Questionnaire that can be used to evaluate advice given and the experiences of the EAs





6.0 ESTIMATED COSTS

The costs will depend on the size of the model implemented by your organisation. Estimates are based on the TRIME partners' experiences of 1 staff member working with approximately 10 EAs and 100 households.

It is advised that the staff member is supported by a manager, who can oversee the model and be a second point of contact. The manager will usually spend about 2 days a month on the energy saving advice model. The costs and advice here can be changed depending on the scale of the model to be rolled out in your SHO.

The starting out phase will require staff time of about 2 days a month, over 6

months. The staff time should be used to fully prepare to launch the model and fully address the questions set out in Section 5.1 Starting Out.

Following the 3 stages of the energy saving advice model the estimated costs, post the starting out phase, are set out below.



THE RECRUITMENT STAGE

(JUNE - AUGUST)

Staff

The preparation of materials and delivery of tasks will take about 2 days a week. The staff member will need to dedicate time to finding sites to roll out the model, preparing promotional material and carrying out dedicated recruitment tasks. Staff will also need to prepare materials and book venues for the training stage.

Materials and Recruitment Resources

Promotional materials should not be a significant cost. It is anticipated that you will need to spend about €1000 - €2000 on posters, leaflets, venue hire and refreshments for recruitment events. If a monitoring system (smart meters and/or a monitoring app) is used, the costs for this should also be included (these will vary between country and energy company that installs the meter).



THE TRAINING STAGE

(AUGUST - SEPTEMBER)

Staff

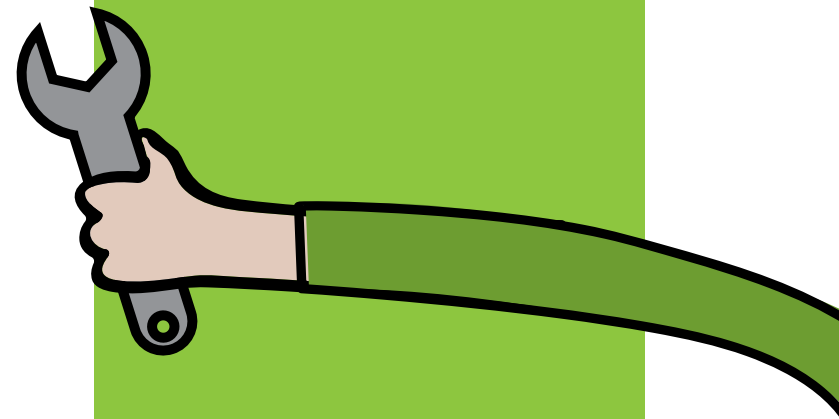
During this time staff will continue to make contact with the EAs and provide training sessions. The EAs will need dedicated support to make sure they have the right materials and feel confident to start sharing energy saving advice. Staff will most likely continue to spend 2 days a week implementing the model.

Materials and Recruitment Resources

The training costs should take into account venue hire, refreshments and travel costs for EAs to get to training sessions.

At this stage the EAs will also need to be equipped with materials to discuss energy savings with households. If your target number of households is 100 then you will need to spend approximately:

- ▶ €200 on leaflets
- ▶ €1500 on tool boxes, for 10 EAs (covering 10 suitcases and 10 x low cost energy saving items)
- ▶ €1500 on 10 tablets and internet access



ADVICE STAGE

(SEPTEMBER/OCTOBER - FEBRUARY/MARCH)

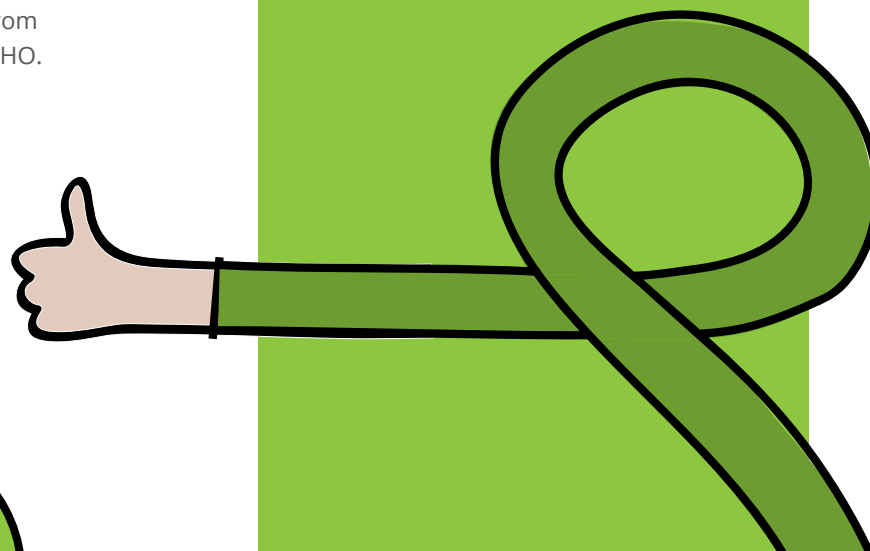
Staff

EAs should be feeling confident by now that they can approach households and feedback to the SHO. It is anticipated the staff member will spend 0.5 days a week checking in with the EAs and organising more materials.

Materials

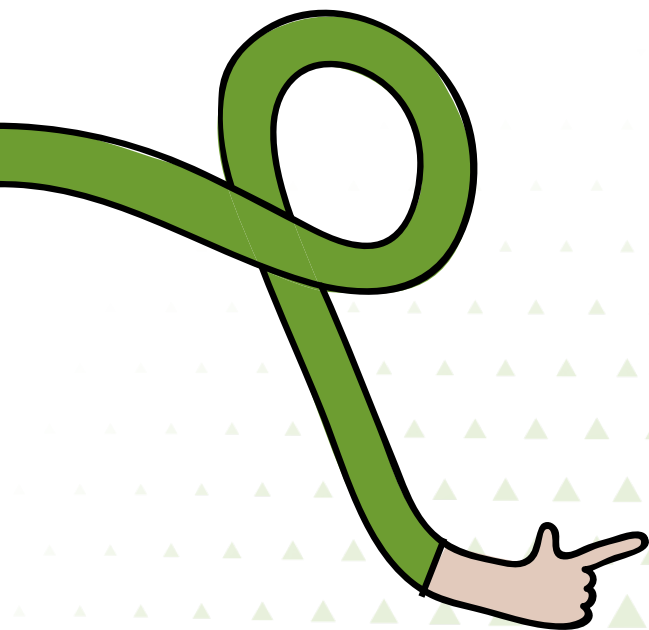
It might be necessary to print more materials or introduce some energy saving incentives. The cost will depend on the needs of each organisation.

At this stage the SHO will need to factor in costs for any events they may wish to hold for their EAs and households with a view to rewarding them and sharing results. Again these costs may vary from €500-€1500 depending on the needs of the SHO.



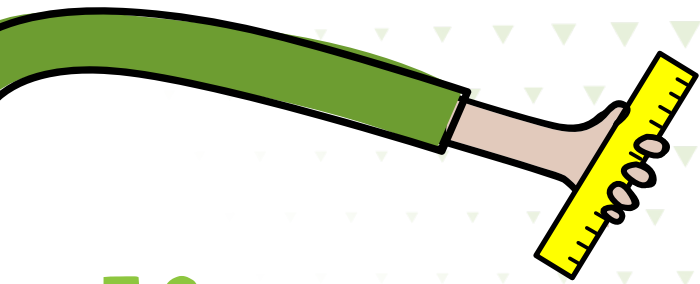
OVERVIEW

OF POTENTIAL COSTS TO SET UP AN ENERGY SAVING ADVICE MODEL



Staff Time	Materials	Cost of Materials	Resources	Cost of Resources
Recruitment Stage				
1 x staff member, 2 days a week for 12 weeks	Posters, leaflets, letters to recruit EAs and advise households about energy saving model	€500 - €1000	Venue hire and refreshments (to promote the model and recruit EAs and households	€500 - €1000 (depending on number of events held and their location)
Training Stage (including materials needed for Advice Stage)				
1 x staff member, 2 days a week for 8 weeks	Leaflets and top tip materials to give to 100 households	€200	Venue hire and refreshments for training	€500 - €1000 (depending on number of events held and their location)
	Suitcase of energy saving items (1 for 1 EA costs about £150)	€1500	-	-
	Tablet and internet access (1 for 1 EA costs about €100-150)	€1500	-	-
Advice Stage				
1 x staff member at 0.5 day a week for approximately 25 weekst	Optional - print additional leaflets and incentives	€200 - €500	Venue hire and refreshments for closing event	€500 - €1500





7.0

TIPS FOR HOW TO MONITOR AN ENERGY SAVING ADVICE MODEL

As mentioned in Section 3, it might be of merit in some organisations to monitor the energy savings made and eco-gestures adopted as a result of the advice provided.

The main reasons for monitoring are to provide feedback to households on their savings, and help assess the impact of the advice given. We would suggest the following tips based on our experience:

- ▶ Decide early on the purpose of the data collection.
- ▶ Then decide on what data will be collected, how it will be collected and when this should happen. For example you might want to collect gas and electricity readings, and you could do this monthly using paper or a smart meter.
- ▶ Use a brief questionnaire when the EA first meets with households to gather information on household composition, size of property, energy rating of the property, what sort of appliances are used and general energy using habits. The questionnaire should be done at the start and finish of the Advice Stage as it will help provide context to the energy readings.
- ▶ Explain to the EAs and the households that the monitoring will help them see their energy savings and will help the SHOs monitor the impact of the advice they give. Also explain what data will be collected and how the data will be analysed.
- ▶ Data analysis takes a lot of time, so the results should not be promised too soon to the tenants.

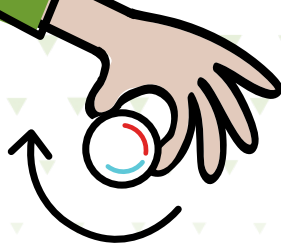
MONITORING PROCESS

If it is decided that monitoring is carried out, it can be done in three ways:

- a. Via a smart meter and an app for visualisation. This poses little strain on the EA and tenants, but needs additional infrastructure.
- b. Via manual meter reading using an app for visualisation. This takes more effort for EA and/or tenant, a smart meter is not necessary, but an app needs to be available and internet is needed for the EAs and tenants.
- c. Via manual meter reading using pen and paper (templates with dates filled in are useful – see ADVICE RESOURCES). This can be done with smart meters and old meters and requires no additional tools or infrastructure. However, it does require more effort and time from the EAs/tenants.



7.0 TIPS FOR HOW TO MONITOR AN ENERGY SAVING ADVICE MODEL



The method of monitoring used depends on the situation of the EAs and households, and on technical and financial possibilities within the organisation.

Try to find local solutions for apps that suit the local situation best.

Don't forget that if monitoring is going to be used to show the energy savings established during the Advice Stage, then it is necessary to have the energy consumption in the previous period available by e.g. requesting the energy bill of the previous year (if available). With this, the energy savings can be

calculated. See 'Advice Stage, Task Two' for more information and click [here](#) for a simple guide on to how to calculate savings.

For more information on the TRIME project's monitoring please see the report titled 'Data Analysis'. It can be found in the resources page on the TRIME website [here](#).

CASE STUDY

Experiences of Monitoring an Energy Saving Advice Model

The TRIME project monitored energy saving to enable partners to assess what worked well and what could be improved. The monitoring also provided households with direct feedback of how much energy they were saving. Data was gathered on actual energy readings, eco-gestures the households carried out, characteristics of the household and property (such as age of tenants and energy ratings of building and appliances). EAs and SHOs were able to gather data using a mixture of smart meters, digital platforms and paper records. Households were interested about their energy savings, but it was not always the

main motivator for them. A number of households preferred to be involved in getting energy saving advice for the social interaction and ideas about saving money.

Overall it was felt that monitoring was valuable for an SHO to see the impact their work is having. It was found many households benefited from using a display unit to see their energy savings, however after a month they would stop looking at the unit. For example, Vilogia (a French SHO) found that after the first month of seeing savings on a display screen people began to feel less inclined to look at the energy readings.





8.0

THE TRIME PROJECT RESULTS

Our results are presented here to help you set targets.

► SOCIAL INTERACTION

All participating EAs and tenants benefited from increased social interaction in their local neighbourhoods, and all have fed back they feel more socially empowered as a result of being involved in the TRIME energy saving advice model.

► AVERAGE SAVINGS

The average energy saving per household bill was 62kWh of electricity and 116 m³ of gas per year, accounting for a financial saving of 74 €.*

► 14 EAs

Amongst participating SHOs we had on average 14 EAs per SHO.

► 8-11 HOUSEHOLDS

Each EA helped 8-11 households.

► 18 SHOs

18 SHOs, outside of the TRIME project, signed-up to deliver an energy saving advice model in their country and help support around 27,000 households in the coming years.

THE PLEDGE

The number of SHOs that have expressed an interest to deliver an energy saving advice model has been very encouraging and will deliver significant lasting impact. The SHOs signed a pledge to commit to deliver a similar Model across their estates indicating that the model developed is needed and welcomed. See [here](#) for an example of the pledge that non-TRIME SHOs signed up to.



THANK YOU FOR READING!

We hope you found this Guide useful. Remember, for more information you can visit us online at <http://www.trime-eu.org> or speak to the TRIME Team directly using the below contact details:

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