



EnergyMeasures

Tailored measures supporting energy vulnerable households

D2.1

Report on internal capacity building for staff engaging with energy poor



<http://www.energymeasures.eu>



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February 2022



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About EnergyMeasures

EnergyMEASURES is working to address energy poverty in seven European countries, namely: Belgium, Bulgaria, Ireland, Netherlands, North Macedonia, Poland and the United Kingdom. The project comprises two complementary and synergistic strands of work.

The first strand involves working with energy poor households to improve their energy efficiency through a combination of low-cost measures, and changes in energy-related behaviours and practices. Recruited householders will be provided with low-cost energy measures and empowered to change their energy-related behaviours and practices through an approach that takes account of existing housing conditions and is reflective of their lived experience.

The second strand comprises working with municipalities, energy authorities, housing associations and other relevant actors to assess how current multi-level institutional contexts affect efforts to alleviate energy vulnerability in the participating countries. This knowledge will be used to develop and support the implementation of policy and practice measures which will address structural issues that combine to trap households in energy poverty.

Through this work the project contributes to reducing participants' vulnerability to energy poverty, while at the same time cutting household energy consumption and associated GHG emissions.

For more information see <http://www.energymeasures.eu>

Description of the deliverable and its purpose

This deliverable draws from the work in T1.2 to outline and carry out an approach to internal capacity building for staff engaging with the energy poor within the EnergyMeasures project. The report provides an account of the activities that were carried out to date. These include the development of a step-by-step guidebook based on the action plan for each target group developed in T1.2, the provision of participatory training workshops and ongoing support for partners' staff and volunteers which included one-to-one meetings to assess and support the implementation of the project's methodology.

Glossary

WP	Work Package
DoA	Description of Action
EP	Energy Poverty

1 Introduction

The second work package (WP2) of the EnergyMeasures project is designed to realise the household engagement programmes in seven countries (BE, BG, IE, MK, NL, PL, UK). These programmes will support energy-poor households from target socio-demographic groups to change their energy-related practices and behaviour and to consequently reduce their energy use. In this context, Task 2.1 draws from the work in T1.2 to outline and carry out an approach to internal capacity building for staff and volunteers engaging with the energy poor within the EnergyMEASURES project.

The ongoing capacity building process involved strengthening the skills, instincts, abilities, and resources of staff and volunteers involved in household engagements indirectly as project administrators and coordinators or directly as energy advisors. This group of people had different levels of experience in working with the energy poor. There are several staff members that have worked on energy poverty and have engaged vulnerable households for more than twenty years. For others, particularly volunteers, this project was their first time working and engaging vulnerable groups. For that reason, capacity building activities were co-designed so that the consortium could benefit from the expertise of skilful project members and took different formats so that their configuration and content could be relevant for all levels of experience.

This deliverable represents the outcome of this work comprising an account of the capacity building activities that were carried out to date. There are four sections in this report. This first section offers an introduction and background to the deliverable. The second section briefly describes the activities that aimed to provide ongoing support to the staff of the project partners. The third section comprises a brief presentation of the guidebook developed with elements of co-production to support the work of staff and volunteers working as energy advisors. The fourth section describes the different training workshops carried out as part of the capacity-building strategy. The final section considers some lessons taken from the described activities and provides considerations for future capacity building activities for the EnergyMeasures project.

2 Continuous Support

Ongoing support was given to each partner's staff, especially during their initial engagements with households to assess the implementation of the methodology. This support was aimed at enhancing skills and expertise among partners, growing peer support and collaboration, and reviewing and adapting project tasks and their related activities according to the changing situation of the Covid 19 pandemic. Ongoing support was provided through three main formats: bi-weekly meetings with all partner organisations, one-to-one meetings with each country, and formal and informal phone and email communications. Each format will be briefly described in this section.

2.1 *Bi-weekly meetings*

Bi-weekly meetings have been held since the beginning of the project totalling 32 sessions and have been attended by at least one staff of every partner. During these meetings, staff working in the consortium organisations have had the opportunity to share their country updates and raise any concerns related to the project's implementation. These sessions have also offered a peer-to-peer learning space where partners present recruitment and engagement innovations and motivate each other drawing from their own

experiences. These spaces have also been key for keeping partners updated about any project news and discussion about upcoming deliverables.

2.2 One-to-one meetings with partners

One-to-one meetings with each country have been scheduled approximately every month from September 2022 when engagement activities and preparations were commenced by all partners. These sessions had a duration of 30 to 60 minutes and have been held in-person and online. To date, 21 meetings have been held in total. During these meetings, staff and volunteers met with the project coordinators to share relevant updates about their engagement plans, the challenges they are facing and explore ways in which project coordinators can provide support. A meeting minute has been kept for each one of these meetings. These notes include the topics that were discussed, a list of relevant questions raised by partners that might need to be addressed during the bi-weekly meetings or general meetings, and a list of future steps to be undertaken until the next meeting. One-to-one meetings have been particularly useful to keep a personalised support approach for each partner. This has allowed project coordinators to know when a partner is facing challenges related to household engagement and answer financial and administration questions.

2.3 Formal and informal ongoing communication

Finally, as part of the internal capacity activities, ongoing support in the form of informal and formal communication has been also provided to partners. These have included phone and email queries, as well as scheduled meetings with specific partners throughout the project duration. Queries have included questions about financial and project reporting data and clarification about quantitative and qualitative data collection, among other enquiries.

3 Guidebook for Energy Advisors

The goal of the guidebook is to provide energy advisors with a step-by-step guide and checklist to find the household's potential savings in energy consumption. The guidebook aims to support energy advisors in collecting data and guiding householders through the necessary behaviour changes and energy measures that can help participants address energy vulnerability and live in a more comfortable space.

The initial guidebook was developed in June 2021 using elements of co-production in partnership with staff from all consortium members. Co-production is a highly person-centred approach that enabled partners to work together and combine their strengths, knowledge, expertise and resources to build a tool that would aid householders to find their potential savings in energy consumption and build a plan to do the necessary behaviour changes to address their energy vulnerability and live in a more comfortable space. Co-production of the guidebook was largely undertaken during the consortium's bi-weekly meetings and general workshops, where partners talked through the different elements to assess their clarity, significance for the project's objectives and relevance for their own contexts. Recognising that co-production is a developmental and incremental process, the guidebook was revised at the end of the year to take account of the on-ground experiences with households and will continue to be updated throughout the project.

The guidebook is divided into six sections. Figure 1 presents a summary of the engagement process described throughout the document. The first section aims to guide the registration process. During this

procedure, the eligibility self-assessment is described, as well as the way in which households will be identified (the participant ID) to monitor the process of the project and to study aggregate results while protecting the personal data of participants. The section also outlines the way in which the participant will provide consent to participate in the process. The section ends by describing how to input information about the household composition (sex, age, health condition and occupation) and general details about the dwelling (type of dwelling, tenure, roof type, type of insulation and windows) need to be inputted.

The second section provides recommendations for the planning of the first household visitation. This includes the process of making a first visitation appointment, where the goal of the visit and the approximate duration is communicated to the householder, and the data protection guidelines that will be followed throughout the process. Questions about the visit are answered during this stage and an appointment at an adequate time for the householder is set. Householders are also informed about the information that will be required during the visit, such as the energy bills from the previous year (electricity, gas, and other types of fuel).

The third section guides energy advisors through the first household visitation. During this visitation, data is aimed to be collected through a discussion with the householders and by undertaking a tour of the household to gather information about the physical and technical aspects of the dwelling and to look at energy-using appliances, including measuring power consumption using energy monitoring adapters. As part of visit, householders are asked to collect energy billing data to analyse consumption patterns.

The guidebook first provides information about how to begin the visit including explaining again the purpose of the visit, the steps that will be followed throughout the visit, and mentioning again the data protection guidelines. Soon after, a list of ethical and technical considerations is detailed to provide crucial information to energy advisors that do not have experience in engaging the energy poor or doing energy audits. Soon after these recommendations, the process of completing the initial questionnaire and interview is specified. This section explains the nature of each of the questions included in the questionnaire and the type of information that need to be inputted. An example of these explanations is included in Figure 2. The section continues by providing energy advisors information about how to end the visit which includes explaining the participate the future steps of the EnergyMeasures programme and thanking them for their time. Finally, the section ends by explaining how energy advisors can complete their first visit report. This details the analysis of the qualitative and quantitative data that needs to be undertaken, and how to select a list of recommendations of energy behaviour changes and a package of no-cost and low-cost measures appropriate for the dwelling to devise a tailored behaviour change plan for the householder to implement. A copy of the report template is included in D2.3.

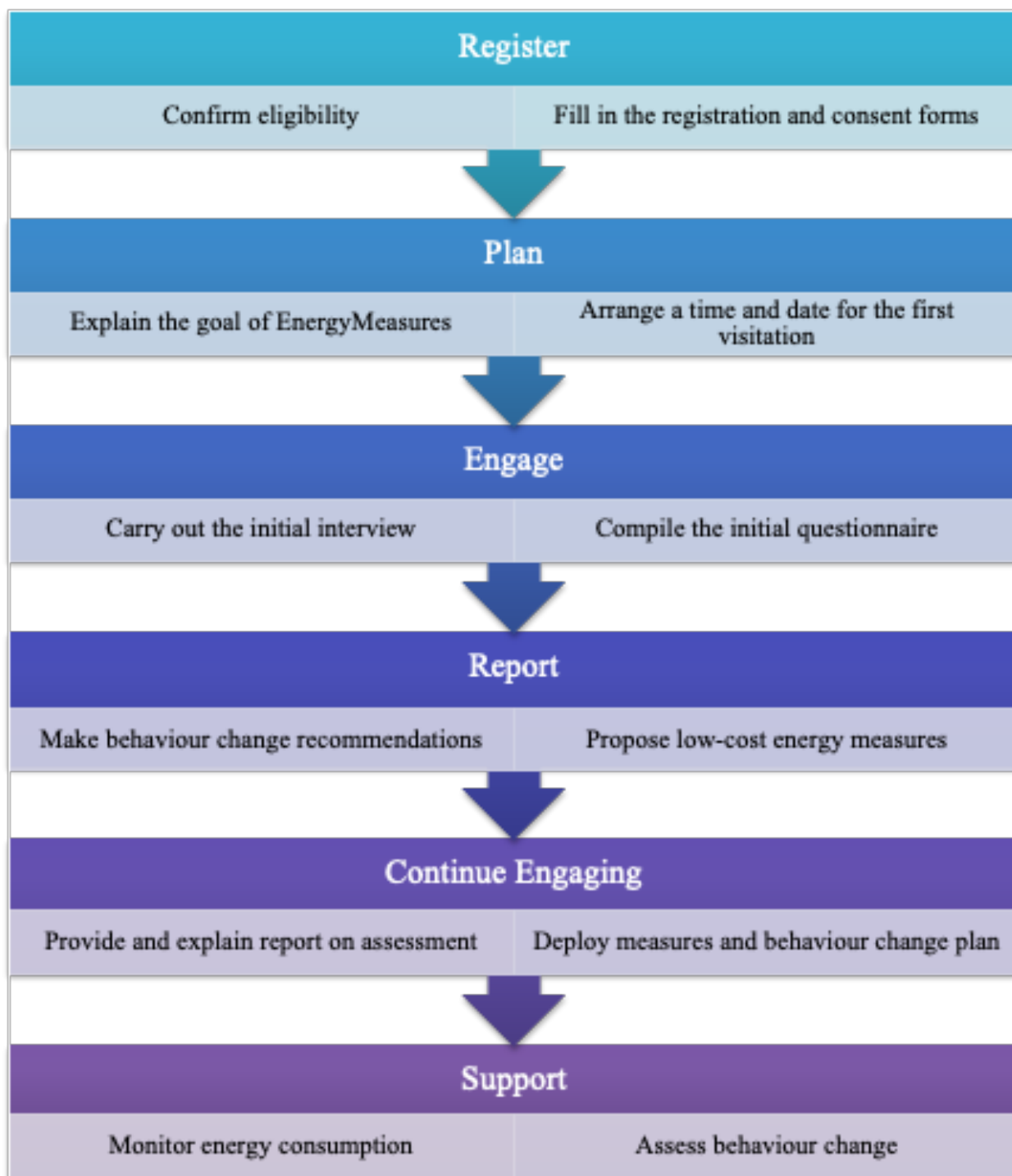


Figure 1: Steps for engaging a household within EnergyMeasures

Q5. How is your home heating controlled?

“Local controls on radiators” are a manual valve that can be turned up or down or off depending on whether the room needs to be colder or warmer. Turning the valve adjusts the amount of hot water flowing through the radiator and therefore how much heat is emitted.

“Thermostatic controls” are slightly more advanced than manual valves since the temperature can be set at the temperature that the householder wants the room to be. This means that the radiators can manage themselves for most of the time.

A **“heating system that is centrally controlled”** differs from space heating in that the heat generation occurs in one place, such as a furnace room or basement in a house or a mechanical room in a large building.

A **“thermostat”** is a device that controls the heating and air-conditioning systems in your house. Thermostats may contain “timer settings”.

“Heating zones” are controlled by different thermostats.

Q6. What maintenance is done on your heating system?

If the equipment has a proper maintenance, whether it is done by the householder or subcontracted. The **“Frequency”** will also be chosen among “Once a year”, “Less than once a year”, “Only when it breaks down” or “No maintenance is done”.



Figure 2: Example of explanations provided in the guidebook for every question of the questionnaire

The guidebook continues by outlining the process for undertaking the second household visitation to householders participating in the EnergyMeasures project. Information about doing the second visitation includes the way in which the behaviour change plan and the accompanying recommendations and low-cost measures are to be presented and how the project participant sheet needs to be filled which includes (i) a confirmation of completion of household visitation; (ii) an acknowledgement receipt of energy measures; (iii) the agreement of the participant to household behaviour change plan.

Lastly, the guidebook provides information about how to provide ongoing support to householders, six and twelve months after the second visit, as well as the other channels in which support will be given such as regular text alerts, email bulletins and social media updates to keep householders engaged.

The guidebook, therefore, provides a useful tool to help staff and volunteers involved in the EnergyMeasures project to understand and navigate the process of engaging households and finding their potential to save in energy consumption and guide them through the necessary behaviour change to address their energy vulnerability and live in a more comfortable space.

4 Participatory Workshops

Over the initial eighteen months of the project, the capacity building strategy also included four training workshops for the staff of partners who are involved in engaging households. This training was a mixture of instructor-led classroom and participatory training, with hands-on interactive role play and group activities.

The participatory component of the workshops offered partners an opportunity to engage in discussions and collaborative activities that enabled them to explore opportunities and challenges at the different stages of the project. These discussions involved sharing on the ground experiences and reflecting on these to respond to ongoing difficulties and enhance the consortium's collective knowledge.

4.1 Workshop # 1 Engaging the Energy Poor

The **first workshop**, titled Engaging the Energy Poor, was held 18 January 2021 online and had a duration of 90 minutes. The workshop was designed to present the key findings from completed deliverables in work packages 1, 6, 7 and 8: most notably, deliverables 1.1, 1.2, 6.1, 6.2, 6.3, 6.4, 7.1, 7.2, and 8.1, and to support partners in devising the country implementation plans for each of the participating countries, namely: Ireland, Netherlands, Belgium, Poland, North Macedonia, Bulgaria, and the United Kingdom. A slide of the workshop is included in Figure 3. as an example of the information provided to the attendees.

1. Registration and initial gathering of data

- Following confirmation that a household wishes to participate, householders should be invited to register with the project, and arrange their first visitation.
- Registration may be completed in a number of ways, participants should be asked to provide the following basic information:
 - Contact name, telephone number and email address;
 - Confirmation that they meet the criteria for participation in the project;
 - Address of dwelling (including any specific access information);
 - Number of persons living in the household;
 - Size of dwelling;
 - Number of rooms;
 - Sources of energy used in dwelling

Figure 3: Example of a slide presented in Workshop # 1

The workshop dealt with common issues experienced by project partners across the participating countries including how to adapt and integrate behaviour change approaches to their respective engagement activities, registration and initial data gathering, the first household contact (including alternative visitation approaches in light of the ongoing COVID-19 pandemic), data analysis and evaluation, the second household visitation, and what follow up supports should be given to householders. This workshop became an important milestone to

support the subsequent design of country specific project implementation plans that have become a source of learning from each country's context and a significant tool to consider and reformulate strategies necessary to meet the project targets as planned.

4.2 Workshop #2 Innovative strategies for recruiting households

The **second workshop** titled innovative strategies for recruiting households was held online on April 15th and had a duration of two hours. The session focused on sharing the innovative elements that were included as part of the consortium partner implementation plans to reflect on different ways of engaging households, recognise the strengths of these approaches, and see the extent to which they can be useful for other partners. The workshop developed as follows:

1. Each partner had three to five minutes to present one innovation.
2. Other partners were given the opportunity to reflect on the usefulness of the innovation in their context and ask clarification questions.
3. At the end of the workshop, partners were provided with a list of lessons that were drawn from the literature on household engagement.

A slide of the session is included in Figure 4 as an example of the type of innovations covered.

2

Innovative strategies for recruiting households

Country / Organisation	Innovative Element
Netherlands	Liaise with foodbanks who can promote the <u>EnergyMeasures</u> project by adding a flyer in each food bag. Target migrant communities by liaising with church organisations.
Bulgaria (<u>EcoEnergy</u>)	Liaise with local authorities, particularly municipal communications offices to promote the project among homeowner's organisations.
Macedonia (<u>Habidom</u>)	Distribution of leaflets in households already managed/contacted by the organisation.
Ireland (UCC)	Identify and reach out to local organisations so that they can act as gatekeepers for the project in their localities.
Ireland (Energy Action)	Train city wardens and caretakers on the importance of energy efficiency measures so that they can identify and encourage energy saving practices in their complexes.
Scotland (<u>Tighean Innse Gall</u>)	Recruiting and engaging households through key local newspapers. Raising public awareness through radio stations broadcasting in local languages (Gaelic).



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EnergyMEASURES
Household Energy Supports

Figure 4: Example of a slide presented in Workshop # 2

The session was well received by project partners. It originally was scheduled as a one-hour activity. However, participants asked for more time to delve into the innovations in more detail and discuss how these could be replicated in their own contexts.

Finally, this is a summary of a list of lessons for recruiting households drawn from case studies in the literature that was provided to participants part of the session.

- ***Encourage face to face advice and support***

Respondents expressed a preference for face-to-face encounters rather than internet or phone interactions because they felt that they could be better heard and understood. Face to face advice was widely felt to offer scope to be heard and understood, especially amongst those who struggle to communicate for a number of reasons. Furthermore, complex situations could be explained more easily in a face-to-face encounter while allowing the possibility of sharing photos and other documents that evidence their energy related issues.

- ***Work through professionals embedded in communities***

Those aiming to engage with hard-to-reach energy users can work through or with professionals working on the ground with communities such as health professionals, GP surgeries, housing officers, housing repair teams or foodbanks.

- ***Build networks and partnerships***

Som Energia, a citizen energy cooperative in Spain identifies households that have defaults on bills and passes this information to the department of social services in the city council. They then cover the cost of energy efficiency measures with social services.

- ***Be alert to the possibility of interesting challenges and unintended consequences***

Practitioners often report the co-occurrence of energy poverty and other social issues such as mental health problems and social isolation, which represents unique challenges. This is also the case of the pandemic for this project. Service providers working in the UK noted that recognising the needs and expectations of energy poor households can require labour intensive work and 'bending the rules' of official policy frameworks, such as eligibility criteria.

- ***Just get on with it***

Addressing energy poverty needs a slow and considered approach, ensuring that we get to grips with its complexity and engage with its multiple facets. However, it's important to keep in mind that many ideas and solutions come while we have hands-on the project. Is also much to be said for having a go and developing ideas through reflective practice. This might be doing work in spite of the wider context.

- ***Assigned support staff to each household***

People expressed the desire to have one person assigned who would handle their case from start to finish.


- ***Involve households in decision making on what kind of energy measures they consider adequate, particularly when engaging older people.***

Day (2010)¹ found that a feeling of older people's interests being marginalised and their voices unheard was common in energy poor households.

4.3 Workshop #3 Update on Household Recruitment Strategies

The **third workshop**, titled Update on Household Recruitment was held on the 16th of November (online) and had a duration of two hours. During this event, partners presented to the whole consortium their updates on household recruitment and data collection. For the section on household recruitment, each partner had five minutes to introduce their main methods for recruiting participants, provide a detailed description of their most effective method and outline the main barriers faced when recruiting households. Figure 5 shows an example of a slide used to present this information. Attendees had 5-10 min to ask clarification questions to the partner presenting as well as share any relevant reflections that arose from the presentation.

WP2: Update on Household Recruitment



University College Cork, Ireland
Coláiste na hOllscoile Corcaigh

- ❑ Main methods for recruiting households
 - ❑ Printed communication materials
 - ❑ Created a dedicated phoneline
 - ❑ Identified key areas for leaflet dropping
 - ❑ Displayed posters at supermarkets, community centres, libraries, NGOs
 - ❑ Liaise with local organisations including Carbery Housing and NCE Energy Hub
 - ❑ Word of mouth – which has been so far the most effective
- ❑ We are facing two main barriers
 - ❑ Organisations are not being as responsive as we had expected
 - ❑ Fears of Covid are making people either cancel appointments or feel uneasy during recruitments
- ❑ We have quoted low-cost measures from different suppliers and have selected one that offers discounts when buying in bulk.



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Figure 5: Example of a slide presented in Workshop # 3

For the updates on data collection, partners briefly explained the process they were undertaking to collect relevant data for the project, mentioned their main data collection tools used during the engagement process and the main challenges that they were facing related to collecting data. Following the presentations, partners were also given 5 to 10 minutes to ask for clarification questions and engage in a group discussion. Figure 6 shows an example of a slide used to present this information. A photo of the workshop attendees (29 in total) is included in Figure 7.

¹ Day, R. (2010). Environmental justice and older age: Consideration of a qualitative neighbourhood-based study. *Environment and Planning A*, 42(11), 2658–2673. <https://doi.org/10.1068/a43109>

WP4: Update on Data Collection (Ireland)



Our main data collection tools are:

- ☐ Briefing form (paper format)
- ☐ Consent form (paper format)
- ☐ Registration form (online using Survey Monkey)
- ☐ Interview schedule (paper format, answers are recorded)
- ☐ 1st visit questionnaire (online using Survey Monkey)
- ☐ Follow up visit questionnaire (online using Survey Monkey)

Our main challenges are:

- ☐ Meter readings are often difficult to get because these are locked or inaccessible
- ☐ Available energy bills often only cover the last period



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Figure 6: Example 2 of a slide presented in Workshop # 3

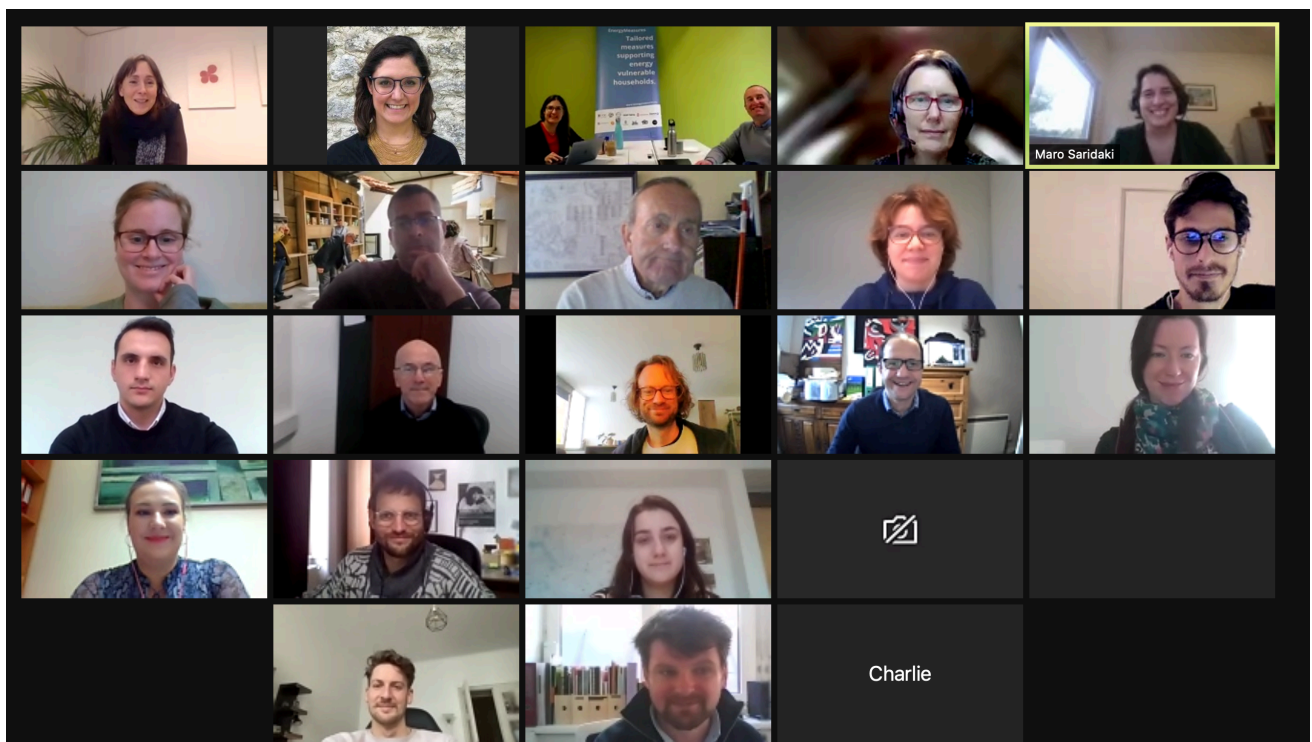


Figure 7: Photo of attendees taken during Workshop # 3

4.4 Workshop #4 WP2 Workshop

The **fourth workshop**, focused on WP2, was held on the 3rd and 4th of November. The event involved a mixed in-person and online format (in person at Dublin and online on Teams) of a duration of one and a half days. Figure 8 presents an image of the workshop agenda, and Appendix 1 provides the complete notes taken during the workshop.



 EnergyMeasures Tailored measures supporting energy vulnerable households WP2 Workshop Hybrid via MS TEAMS platform 2 and 3 December 2021		
AGENDA		
DAY1: THURSDAY, 2 DECEMBER 2021		
Click here to join the meeting		
Irish time	Topic	Speaker / Moderator
In-person arrival & coffee from 10:30		
Opening and Welcome		
11:00	<i>Energy Action open the two-day workshop</i>	Brian McSharry & Charlie Roarty
Getting to know you exercise		
11:10	<i>It's your time to shine</i> - Short group activities and discussion	Niall Dunphy
Workshop Introduction and Expectations		
12:00	<i>Overview of workshop goals and expectations</i> - Outline what we want from the workshop - Group discussion	Breffi Lennon
Project Management		
13:00	<i>Revised grant agreement update</i>	Niall Dunphy
LUNCH [13:15 Irish time]		
Household Engagement		
14:15	<i>Working through the project guidebook</i> - Presentation of the Project Guidebook and how to use it effectively	Niall Dunphy
 Engagement – Strengths and weaknesses 15:15 <i>Flower activity exercise</i> - Small group activities drawing on past experiences for developing best practice approaches to engagement Paola Velasco-Herrejón		
Engagement – What to expect? What to do? What to avoid? 16:15 <i>Engaging vulnerable households</i> - Discussion on what has worked, what hasn't worked, and what has been most challenging for partners. Breffi Lennon		
DAY 1 CLOSE [17:15 Irish time]		
Evening Meal at Skylon Hotel Time: 19:00		
DAY 2: FRIDAY, 3 DECEMBER 2021		
Click here to join the meeting		
Irish time	Topic	Speaker / Moderator
Project Management and Coordination		
9:00	<i>Project management update & Discussion</i> - Progress review - Review of resources - General assembly	Niall Dunphy
BREAK [10:15 Irish time]		
Household Engagement		
10:30	<i>Engagement and Data Collection</i> - Sharing yesterday's main takeaways - Templates, tools, and forms from the guidebook	Niall Dunphy Breffi Lennon
Moving forward – next steps to ensure we are well and on track		
11:30	- Discussion on project video - General planning and discussion - Any other business	Thomas Stollenwerk Niall Dunphy
CLOSE [12:00 Irish time]		

Figure 8: Workshop # 4 Agenda

The workshop was organised around four participatory activities.

1. The first activity evolved around participants' expectations about the workshop itself so that there could be a participatory design of the workshop content and identification of partner needs for an optimal learning experience. This exercise was conducted using MIRO Board for online attendees and post-its for in-person participants. Following the exercise, the facilitator proceeded to integrate all interventions on the MIRO board. Figure 9 shows an image the end result of the session.

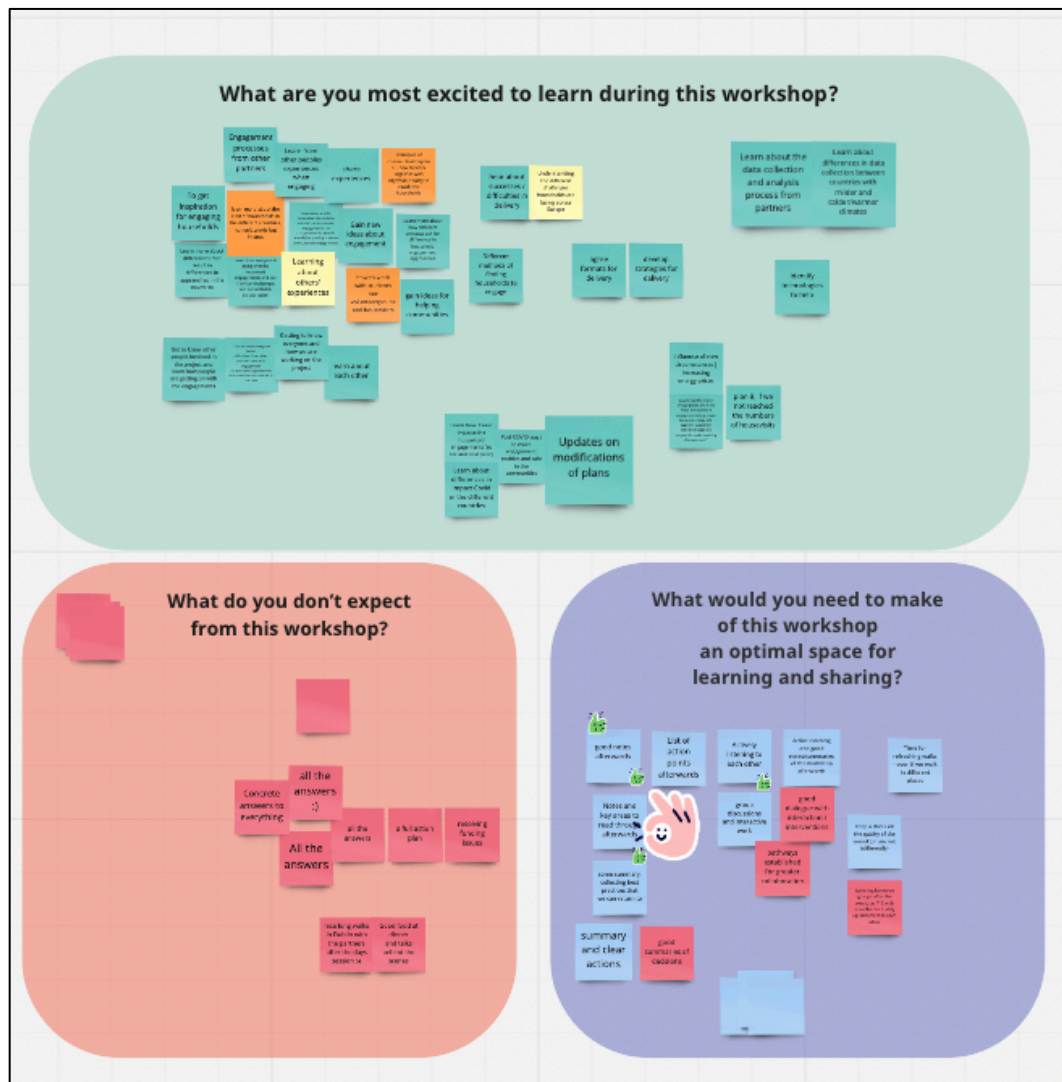


Figure 8: Workshop # 4, Exercise 1 MIRO Board notes

2. For the second activity, attendees were provided with the revised guidebook for energy advisors. During this exercise, workshop participants provided input in the form of comments, questions and suggestions, which contributed to the co-production of the up-to-date version of the guidebook. This session became a significant way ensure that strengths, knowledge, expertise and resources from all project staff and volunteers were integrated to build the tool, which is described in detail in Section 2 of this document.
3. In the third activity, titled flower exercise, participants had to draw from past experiences for developing best practice approaches to engagement. For this purpose, they were broken up into groups of three to four people. Groups that worked online were supported by a MIRO Board, and in-person participants had the opportunity to sketch their flowers with markers and flip chart paper. Each group was asked to draw a flower with a centre and an equal number of petals to the number of participants in your group. Once all groups had their flowers, participants had to discuss their individual strengths and weaknesses related to household engagement. Then, participants had to proceed to fill

in the centre of their flower with the traits that all had in common. Subsequently, each participant had to fill in their own petal with strengths and weaknesses unique to them— unlike any other member in their group. After this exercise, all workshop attendees came back to the main group and shared their findings. Figure 9 shows an image of the MIRO Board that resulted from this activity.

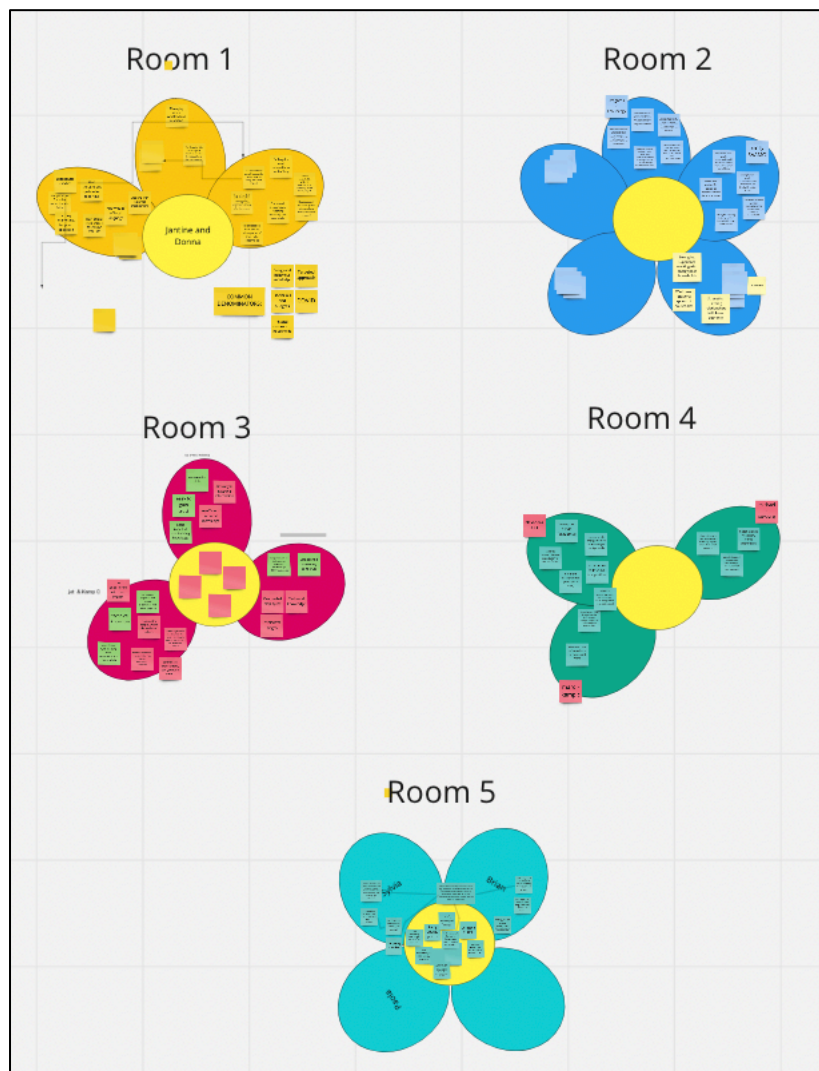


Figure 9: Workshop # 4, Exercise 3 MIRO Board image

The list below summarises the common reflections that aroused from this exercise:

Flower exercise common reflections:

- Difficult to manage cases, workload, and reporting. Lack of time is becoming an important challenge to adequately support households and reach the project goals.
- Difficult to access the target groups. Many households are interested in the project but not all meet the eligibility criteria.
- Poverty, in general, is conducive to a tight mental space to deal with problems, dealing with energy expenditure, as one problem, requires mental space that people often do not have.
- Households have different capabilities, there is a scale of capabilities and it's difficult to find appropriate ways to support each household.

- There are different household 'profiles' based on e.g. the extent to which they are able to receive necessary information; can stay engaged in the longer term; are 'organised'; and in terms of their relation towards 'the system'.
 - There is a risk that those that are easiest to help get help the cost of those households that face more challenges (e.g. being less well-organised).
 - Householders often refer to conspiracy theories to make sense of the high energy costs
 - Householders have often the feeling that suppliers and the government are taking advantage of them
 - Rising energy prices are likely to be a challenge for helping households.
4. The fourth and final activity participants shared, in small groups, good and bad engagement experiences. Drawing from these experiences, partners discussed their findings and built a list of what to do (best practices) and what not to do (to avoid) during household engagements. The following lists present a summary of the best engagement practices drawn from the exercise and the practices that workshop attendees recommended to avoid.

Best engagement practices

- Involve the local authorities and procure official endorsement from them. Build their trust from the beginning. Local municipalities can help liaise with other organisations, promote the project, and build trust.
- Build on existing projects – don't reinvent the wheel
- Liaise with local organisations that are actively engaging with the local community, such as homeowners' associations, NGOs, Universities, foodbanks,
- Share information with organisations that might benefit from the project.
- Train local experts and heads of homeowners' associations. This can be done through e-learning.
- Do events in the centre of targeted neighbourhoods that aim at mutual household learning and inspiration.
- Alling to similar campaigns in public buildings such as libraries.
- Find ways to break the ice and open conversation when engaging households.
- Be attentive to the use of language and local language preferences – for example, Gaidhlig is used by most in the Outer Hebrides, so speaking in Gaidhlig makes people feel more at ease.
- Be mindful of literacy or any other difficulties in people.
- Offer to help with something if need be – a vulnerable older person may need help taking the washing in, filling the kettle, mowing the lawn! Aiding householders can help to build trust.
- Have 'quick wins' at hand such as LED bulbs to show a quick, easy, efficient way of saving energy in the home. This could open doors for the householder to engage in more changes.

- Be attentive to the person and the situation. Aim to be in a space where you feel comfortable and so does the householder. Follow your intuition about when is best to ask a question or when to stop.
- Be realistic about the amount of support that you can provide households. Set expectations and ensure clarity - this helps both the household understand what support is available and helps the advisors to meet the expectations.
- Identify issues clearly and provide clear and feasible solutions.
- Coaches need to consider the number of recommendations provided and the way that this information and other advice is given to households.
- Be well informed about energy-related technical issues. When householders have the perception that you know what you are talking about, they listen. Use simple terms and make sure that you are understood.
- Discuss behaviour changes in a conversation rather than stating facts.
- Remember that all engagements are a two-way process.
- Have everyone in the EnergyMeasures help doing the engagements so that everyone is acquainted with the engagement process.
- Keep to the project guidelines.
- Encourage open discussions that may lead to referrals to other organisations or government agencies, for example, if someone needs financial advice as well as support with energy savings.

What to avoid when engaging households

- Don't oversell the project. Be clear about what the project can do and what it cannot do.
- Don't patronise participants.
- Do not judge and keep an open mind. Letting someone into their home can be intrusive and make people feel nervous. Stay positive and optimistic.
- If you don't know the answer – don't make one up. Tell them you will speak to someone and get back to them.
- Don't be afraid to admit if a mistake was made or something didn't go as planned.
- Bring the engagement to an end if you feel uncomfortable. Stay safe.
- When liaising with organisations, "be careful who you work with".
- Avoid talking about poverty, the climate crisis and any other issues when starting conversations with householders.

A photo of the workshop attendees (28 in total) is included in Figure 10.



Figure 10: Photo of attendees taken during Workshop # 4

5 Conclusion

An essential ingredient in capacity-building is transformation that is generated and sustained over time from within; transformation of this kind goes beyond performing tasks to changing mindsets and attitudes.

(United Nations, 2020)²

This deliverable provided an account of the capacity building activities that were carried out to date to support the ongoing work of the EnergyMeasures project. These activities included the development of a step-by-step guidebook based on the action plan for each target group developed in T1.2, the provision of participatory training workshops and ongoing support for partners' staff and volunteers which included one-to-one meetings and bi-weekly meetings to assess and support the implementation of the project's methodology.

The capacity building activities have been based on an approach that capacitates project partners from within, rather than from a top-down paradigm. Participation has been the key component of the approach, offering partners an opportunity to engage in discussions and peer support that enabled them to explore opportunities and face challenges at the different stages of the project.

Capacity-building activities conducted to date and described in this deliverable confirmed that a participatory approach that includes co-design of tools and strategies continue to be a key component to building relationships among project partners. These relationships and interactions have contributed to helping staff and volunteers to produce long term positive change in project participants, helping them to change attitudes behaviours around energy that are sustained over time. Staff and volunteers felt engaged as their opinions, suggestions and concerns have been taken into consideration throughout the project as a result of their interaction in the different formats of capacity building activities offered. This has also meant that project challenges and successes have been shared and continue to motivate partners amid a difficult context such as the Covid 19 pandemic.

Capacity building activities will therefore continue, and will do so in a participatory way, to respond to ongoing difficulties and enhance the consortium's collective knowledge.

² United Nations. (2020). *Capacity-Building*. United Nations; United Nations. <https://www.un.org/en/academic-impact/capacity-building>