Energy Ambassador Recruitment and Ideal Profile, and Use of Toolbox

D2.5 and D2.6

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TRIME is a Pan-European project helping social housing customers reduce their energy use; enabling them to save money and live a healthier lifestyle.

TRIME context

TRIME is a project aimed at Social Housing tenants. The project aims at helping residents to save energy and specifically to teach them the behaviours that would reduce their energy consumption. Our biggest challenge has been to develop confidence in residents and make sure we have a long lasting effect. The TRIME team decided to support participating tenants during two full heating seasons. In addition, we introduced the Challenge, an online energy saving advice tool that could help deliver additional outcomes.

Inspired by diverse reports and by successes made by other projects, TRIME set a goal to prove that real energy savings can be made. The Energy Ambassador part of the project was based on a process that provided monthly monitoring, meter readings and IT support for the tenants in order to show them the real results of any behaviour change with regards to energy that they would save.

Evaluating various aspects related to energy savings and using the results of U-Sentric's research into using appliances in the home, we realised that economic reasons, i.e. saving money, was very important for social housing tenants when reducing energy and the one that appealed to them a lot. We wanted to show them explicitly that saving energy could make them save a real sum of money, improve their everyday comfort and help them to switch on "green habits" in their everyday life.

TRIME focused on engaging closely with tenants. Our aim was to teach, train and convince SHO tenants to become Energy Ambassadors. The developed concept was for residents to become EAs and act as a bridge between the SHO and other tenants. Not only would another tenant be trusted more easily and be perceived as less intrusive, giving "friendly" advice and not "professional" ones but we believed that tenants actions, engagements and, let's say "on site chain effect", could stimulate a real community feeling which was proved to be a powerful tool to change energy use together. We believed that this tenants-neighbours community would be able to achieve longer and better energy saving results and create friendship through a common aim and mutual help.

The Energy Ambassadors Model was based on several steps completed in the run up to and then during heating periods. Ambassadors were recruited and trained, and then received appropriate tools to help engage other tenants and create energy savings.

1. Energy Ambassadors recruitment

Recruiting the Energy Ambassadors was the biggest challenge in the project. We found it difficult to motivate tenants and found that many were not ready to act for their community. We have seen that this motivation and the recruitment channels varied from one country to another. National and local cultures vary from one Social Housing Organisation (SHO) to another, as does the way SHOs function and work with tenants. We have discussed and considered these aspects a lot within the TRIME team and in the end we agreed there could be a variety of ways to recruit EAs, and these would be based on local experiences and on how we wanted to deliver TRIME in our own organisations.

It was perceived, that in some countries and within some SHOs, the digital culture is very high and the connection between both parties: SHO and the tenant, is basically made that way. Social Media, platforms and other digital tools helped to gather an impressive number of participants. The information flow was very fast and let TRIME spread quickly all around the neighbourhoods. This was the case at Eigen Haard, a SHO from Amsterdam. Eigen Haard uses these kinds of tools a lot in other projects and activities with tenants and those are the ones that have the largest impact.

Elsewhere, SHOs felt that “being close to the tenant”, working with them face to face, was a way to trigger initiatives and build projects together. This approach was used in France, Belgium and also in Rotterdam, as this way of functioning was not only culturally prioritised but also fully inscribed in SHOs organisational and strategic models. The UK and Spain also tried this approach, but struggled to engage large numbers of tenants.

Despite these approach, all SHOs were trying to focus on two main aspects that would help recruit the biggest number of participants, both EAs and tenants, there were: knowledge of housing site and communication tools.

Knowledge of the Pilot Sites

This aspect was about trying to find out the most about the local environment and people in a district where the project would be set up. It is also necessary to understand the local actors/partners/organisations that would possibly be helpful to promote the project or take part in it. Several questions should have been posed while reviewing the site:

- What are the relations in the neighbourhood?
- How is the SHO perceived generally by tenants?
- Have any actions, on the same subject, already been carried out in this district?
- Who are the community champions of the neighbourhood? (In terms of

volunteering or other)

- Who are the local partners or actors to integrate (social centre, Town hall, associations, employees of the SHO working on site etc.)?

- What are the current projects in the district, concerns, that had a positive reaction from the tenants?

The results of the initial first a study should be used to adapt the recruitment strategy for the district and to determine the tenants to be targeted.

It is interesting that when we picked the pilot sites for TRIME, we chose a mixture of locations that either had the best possible conditions (e.g. good relations between neighbours, freshly renovated buildings) which have helped stimulate positive attitudes and already have triggered social actions; and locations where housing stock needed serious refurbishment and where talking about energy was a delicate but a seriously necessary subject. It was essential to fully listen to tenants and provide advice that targeted their energy issues. It was found a thermal re-fit or a new construction can be a good opportunity to launch energy related actions, linking the technical improvements of the building with behaviour changes.

2. **Communication with Residents**

It was agreed the TRIME communication needed to be simple and clear, and use the same overall branding (common logos and same themes to all of the documentation). This approach was to ensure we gave confidence to the tenants, captured their attention and they linked to common themes throughout the whole project (helping them keep the same references). In TRIME, we used flyers, posters, a movie and teasers like our icebreaker or top tip pack. These were distributed directly via email, in the SHOs offices, in the social centres, the town hall or posted in social media.

Before starting to recruit tenants to participate in the project it was important to inform them about the existence of the project without necessarily asking them to participate. The team decided against a “commercial” approach as we didn’t want to frighten tenants and instead just wanted to raise awareness about energy savings for anyone interested. Several techniques were used: door to door, social media, SHOs websites, sending information letters, posters, coffee mornings, phoning or any other kind of opportunity (programmed events in the district) for EA’s and tenants to meet. By introducing the concept of energy saving to tenants we managed to identify the most reactive people and thus approach them to be potential Energy Ambassadors.

3. Energy Ambassador Recruitment Outcomes

Having acquired knowledge about the site and established good communications, we were able to determine key tenants in the neighbourhoods. These tenants became valuable for the project, they were contacted and engaged on the EA Programme. We think most of them were interested as they saw it was a way to save money; however we also think a large number of them were motivated to join TRIME as they could see they would be helping each other, create relations in the neighbourhood and do something for the community.

Nearly all of TRIME partners confirmed that the incentives were needed in order to attract and recruit tenants. The electronic tablet for the EAs worked very well in most of scenarios because it was a gift but at the same time it became a working tool that helped to visualize the energy consumption of EAs and people they helped. It also was used to help set energy saving goals for other participants, call them via Skype or just consult the training that we forwarded to EAs in PDF format. The internet connection was a plus and helped to check online the offer of energy providers or any other information needed that could help in everyday tasks of Ambassadors.

It is very important to underline that the privacy aspect was a big issue for a lot of tenants. Recruiting them was breaking into their family lives, their private circle, and their everyday life. A lot of tenants in Social Housing save already as much as they can, because of their economic conditions, so there is very little you can help them to save. All kinds of activities: meetings, conferences, basic information were helpful in order to pass on the advantages of energy saving and their impact on their energy bills. All had to be done respectfully and politely as sharing their data and sharing aspects of their life was uncomfortable for some of them.

The external risks were also part of the project and influenced participant's recruitment. We had to consider energy law changes, energy provider changes, works that were done on the building during which we could lose tenants attention. In recent months, other circumstances impacted our TRIME actions too. For example the Paris terrorist attacks made people more careful and distant to open a door, engage conversation or participate in large public meetings.

4. Energy Ambassadors Training

The aim of the EA's training was to provide the necessary knowledge and tools they needed to be able to help and to advise their neighbours on energy saving. SHOs proposed either theoretical training which was a kind of energy course or a practical training which consisted of a visit in future tenants home and discussion about an energy saving plan. A lot of us did both.

Our theoretical training courses are available on the TRIME website in Dutch, French, Spanish and English and can be re-used by any other SHO or organization that aims to work with people on energy subject. The training courses have all been adapted to the style and approach usually taken by the participating SHOs. Common themes and subjects covered by the training are:

• The basic knowledge about energy

• Eco-gestures

• Understanding how to read energy bills

• Meter Reading: to read meters and compare savings

The training sessions lasted mostly 1h30 and were delivered to small groups

of tenants in informal sessions; we offered refreshments and a chance to chat in order to establish a friendly atmosphere.

The training would cover a topic such as:

• The basis of energy: What is energy? When is energy used? , Where does energy come from? Why should we save it?

Or;

• Daily energy and eco-gestures: 1kWh, what is it? What are the energy labels? How to properly adjust your heating? Tips for saving heating or lighting. What is the relation between temperature/humidity? How to choose white goods and electrical appliances for your home?

Each topic covered was followed by a conversation and examples to assure the understanding of the subject.

The aim of the practical training was to give EAs a method and tools so that they can best fulfill their mission. For most of the SHOs the first EA visit to the tenants was organised jointly with SHO staff in order to show the EAs how to communicate, what to do, on which aspects to focus and how to stay as unobtrusive as possible. Such tasks are not practiced in their everyday life and not all of them were familiar with behavioural and communication tips. It was the role of the SHO to introduce them and assure that all future contact with potential participants was delivered using these behaviours.

The tenants were very positive about the training and about what they learned. A lot of testimonies took place on training sessions, a lot of questions were asked. The lessons were of mutual sharing. SHOs were sharing knowledge about energy and the tenants about life in their dwellings, their needs, problems but also about very positive examples in their community life and their added value to good live together and helping each other. The neighbours met and created social connections, started to talk and exchange which was one of the biggest added social value in this project.

5. Energy Ambassadors Tools

In order to perform his mission, the EA was equipped with a tool box.

The box contained physical energy saving objects that were used to help tenants start sustainable actions. This tool bag helped the EA and the tenants to facilitate a discussion about the daily use of energy in the context of the home. The TRIME team selected toolbox objects that would help social housing tenants to develop a wider energy saving approach. This toolbox consisted of items such as a thermometer, watt-meter, multi-plug with surge protection, low-flow aerator, shower timer hourglass. The items can show the tenants ways they can save energy easily. The items could vary depending on the country, SHO and the context.

The EAs were eager to work with tools.

It became clear, that the tools needed to be adopted according to the situation, tenant needs and the type of dwelling. When attending an old building not yet retrofitted, the EA showed simple supports, for example aluminum reflecting sheet, in order to show the tenant how to prevent heat loss. In new houses and freshly renovated dwellings, tenants looked for tips and more behavioural solutions that could influence their energy bills. Simple suggestions like using sockets with a switch or intelligent plugs to turn off devices from “stand by” mode were very helpful.

Another kind of tool that we decided to test in the TRIME project, were the monitoring tools. Some houses were equipped with smart meters, which would help the tenants visualise energy use via an internet site, they saw real time energy consumption (without having to check the meters), or even do so when they are out of their house. Some of the TRIME EAs were equipped with Smappee, an object and an app, which would let them read real time consumption of any electrical appliance in their homes. To complement these tools, the EAs were provided with an internet site page called MyServices, equally accessible to all participating families, and a special TRIME application for EAs that would help them to collect all participant data, even those without internet access and share them with the TRIME team and SHOs. The electronic tablets and internet access ensured the EAs could support TRIME actions efficiently.

Most of the tenants were interested in monitoring and data sharing only for their own information and personal use; they were not ready to let anyone analyse it for the project results. In the context of privacy issues we came across a lot of tenants not wishing to participate in TRIME. Tenants were not keen on sharing their individual data with other companies, even for profit of scientific reasons. This project proved that other kind of monitoring approach or scenario must be proposed to tenants because this issue will be hard to break through.

We learned that matching the infrastructure of meters and devices that were installed to read the data was complex and time consuming. In most cases the installation took much more time than anticipated and allocated and diverse wrong functioning issues were recorded during the works like:

- Incompatible devices which meant meters were difficult to read Wrong data transmission because of the connection problem
- Devices not reading correctly the electrical appliances which influenced on wrong functioning of data transmission
- Signing contracts with energy providers which enable data sharing

All these aspects have been time consuming as the technology is not mature and still innovative.

We received very interesting feedback from Smappee usage. Most of participating SHOs have encountered installation problems. But Zonnige Kempen and Vilogia confirmed that once properly installed, Smappee delivered interesting and valuable information to the tenants and its specifications were very positive, especially for individual houses and those were the PV energy production was installed. The app was quite demanding and really made for people who like to take control on the functioning of their home or the apartment. It was a little too developed for simple, everyday home usage and we would not recommend giving to all households.

In addition to the tool box, paper documents were created with the purpose of guiding the Ambassador during his/her visits and guiding the eco-tenant during the heating season.

These included:

• The IceBreaker: A small questionnaire that helped to find out whether the tenant was a high or low energy consumer. This document aimed also to "break the ice" during the first meeting between ambassadors and the resident.

• Top Tip pack: a select number of eco-gestures and associated savings, depending on country, that, to helped tenants realise how much they can save.

• List of other eco-gestures separated into 2 categories: actions and behaviours, to give tenants some good reasons to change their everyday behaviour.

• Meter reading cards (if no hardware to access to App): Document used to record the consumption of the different meters.

Tenants had different degrees of knowledge about energy saving and information needs. We understood that some of them needed basic knowledge and some of them asked for very precise information about, for example, LED-lighting.

We found out that despite tools and tips tenants need more information and explanations on existing energy devices than they already had at home like mechanical ventilation or thermostats.

A lot of questions were asked about programming, scenario choosing or simply the impact of good regulation of these devices. We realised that residents often did now know how to use a programmer or what functions could be set. This is a significant finding from our experience, and we hope to feed it back to the energy industry and that kind of solution providers. These devices are still too difficult to use and their wrong usage, is influencing the high cost of energy bills. We noticed that even some of the SHO workers were not able to set programmers properly or were unable to guide tenants on how to best use them.

In the second TRIME heating season, we introduced the Challenge, an interactive, online tool that in a nice ergonomic and graphically well-designed way, informs us about various eco gestures related to various themes and places: lights, kitchen, bathroom etc. It was very positively received by the users, can be used by any other SHO in Europe, as it has been translated in to 4 languages, to promote good energy behaviour. The TRIME partners all agreed that an option that calculates real money value, per country, per price would be interesting to add; however they were limited by time and cost and so did not add this into the tool during the heating season.

We talked about transforming the Challenge into a leaflet or a memory card with ecogestures to stick on the fridge. We are still promoting the Challenge and talk about it during workshops that we are preparing in each TRIME country these months.

All participating Social Housing Companies insisted that once support or tools were promised, then these must be maintained and provided. In TRIME some tools were late or didn't appear at all during the heating seasons, which was negatively received by tenants.

Ideas for improving (depending on budget) the EA tools are as follows:

-Tool that allows calculation of expected energy consumption as function of building characteristics and building user characteristics.

-Tool that allows calculation of financial saving as function of a specific energy saving measure taken in a given situation.

- Tutorial movies on SHO websites explaining eco gestures (this should be specific to each country and SHO) would be very helpful.

6. **Energy Ambassadors Tasks**

SHO staff provided EA volunteers with all necessary knowledge about the project and its goals, trained them about it using IT and applications tools required and taught a range of behaviour change measures.

SHO staff assisted and guided the EAs whenever needed so that they could execute their tasks correctly. In TRIME, the EA was to set an example for the other tenants to follow, he/she was the proof that proposed behaviours work and that they were easy to do.

Along with providing knowledge and feedback and indicating ways to reduce other tenants energy bills the EA was in charge of monitoring participating households' results.

The EA monitored the energy consumption monthly using TRIME 'My Services' application to read meters. This visualisation of energy saved was to assist the EA and the participating families, as they could the results of their efforts. The impact of this will be explored in the final report. It provided indicators and results to the TRIME international team. The TRIME model was designed to demonstrate that actions carried out strengthened the sustainable behaviour of our tenants. It is to show that changing behaviour can save residents money.

The interaction between SHOs and the EAs was very positive. The regular meetings, phone calls or coffee meetings exchanges were taking place during heating seasons. It was a win-win situation and a great opportunity for SHOs to work close together with their tenants. The meeting served to "reframe", "listen", "guide" and "advise" and most of all to check if the project was on the

right track in the EA hands.

Sometimes, we found, that some EAs had changed things in their ways, which was not necessarily a bad thing, but it was essential to remind them regularly of the objectives of the project. The EAs were our best feedback and advisors; they alone knew the reality of the field. We have profited out of it, listened to them, without imposing too much and letting them use their own methods and neighbours relations to gather the biggest number of people to follow the EA programme. The TRIME team understood they need to keep the EAs engaged and enthusiastic.

Here is the example of EA Ambassadors tasks during a heating season:

Monthly visits from November to March to read the meters and advice other tenants. After providing the toolbox to the EA, we suggested to them to make a 1st visit in their own building and to show them how to deal with other future recruited tenants.

Here are the steps that were asked the ambassadors to follow during the first visit:

- Begin with the Icebreaker
- Check if the dwelling is equipped with low consumption light bulbs or inform the tenant where he can ordered them on the internet
- Check the devices on standby, use the watt meter to prove what the TV consumes energy when in standby mode, propose the solution of the switch plug or other device
- Check that the refrigerator is well placed (away from a hot source and spaced far enough from the wall)
- Check that the dwelling is well insulated (door flange, aluminum reflector, windows well closed, etc.) and check the thermostat settings (19 day, 16 night)
- Give the record of actions and behaviours to be carried out to the tenants as well as the "Top Tip Pack".
- Review the tenants previous year's energy bill, or invoice from SHO, and read the meter.

During the visits of the following months, the ambassadors were asked to bring back the record of actions and behaviour with the tenant to see what progress was done and what was to improve.

SHOs knew it was a risk that some EAs may move, get ill or find a new job. The SHO kept a track of EAs and households they worked with, and picked up support for the families if something changed with the EA. Some EAs felt

like they were part of the SHO team, they viewed their tasks as a new job. We received questions about recruitment opportunities after both heating seasons.

7. Energy Ambassadors Profile

The role of an EA can be quite demanding, and we can now define some features of the perfect candidate.

It would be preferable if a candidate could have a little technical background, show some interest in energy saving or was already an eco-aware. He/she must be open-minded and willing to discover new knowledge and be ready to change his habits. But learning and understanding is not enough, the Energy Ambassador must also be able to transfer his knowledge efficiently. In a way, the EAs are “teachers” and need to be able to explain well what they know and what information TRIME team has provided him. He must be able to explain things clearly without being too technical in order to access to any kind of household, or situation.

The EA must be a communicative, social person. Their function is to assist the families and advise them on daily actions. The EA should be present at organised meetings, visit other tenants’ homes to give a hand and above all to guide the households they work with so that they can exchange experiences and motivate themselves to participate in a common action, which is to lower their energy bills.

This role of driving, and motivating, other participants (households) is the most important one. He must have a volunteer profile, and he must be friendly with other neighbours. A good spirit of initiative is also important to face unforeseen situations and find new and interesting ways to pass on his knowledge.

Here are some EA characteristics we encountered during TRIME:

- Already engaged in environmental issues
- Active in neighbourhood life
- Good IT skills and happy to help other people
- Hospital workers, and carers, who are ready to help others
- Handymen who already repair electrical appliances for neighbours and friends

We realised that for some of our tenants saving energy was not a priority because of other life needs such as food, home and clothes. Some tenants were just too busy in their everyday job, life problems, to be ready to give some time for other activities, such as energy saving.

Having worked with engaged tenants, we realised that sometimes people come to this kind of project for personal profits which would be revealed after certain time in the project. By participation they thought that they can also promote their own small businesses, get in touch with right people for personal profits etc. It was the role of the contact person from SHO to keep them on the right track and in line with project objectives.

Most of the encounters with EAs and tenants were very positive and worth making. We met a lot of fantastic engaged people who took their time to work with us and see their neighbours. One of the added value elements to this project has been the friendships created and social exchange.

TRIME

THE PARTNERS

The TRIME project team includes the following organisations:

Circle Housing
Enhancing Life Chances

ZONNIGE KEMPEN

intent TECHNOLOGIES

TU Delft Delft University of Technology

Vilogia
Bien dans ma ville

LogiRep
Groupe PolyLogis

EIGEN HAARD

u-sentric
design, with people

Havensteder

sestaoBERRI

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