



Cabinet Office

# ENERGISING COMMUNITIES

WORKING WITH VOLUNTEERS TO  
TALK ABOUT ENERGY

This e-book is a short guide on how to get the best from a programme using volunteers to help other residents save energy in their homes. It is written for anyone who works with volunteers around energy, and although it is written in the context of Housing Associations, it should be useful to people in different situations. We've based it on findings from the Social Action Energy Pilot (SAEP), run by Global Action Plan with six housing providers and funded by the Cabinet Office.

We suggest a framework for the steps of finding, training and supporting volunteers to get involved and measuring the impact they achieve. As it's a framework, it won't tell you exactly how to do everything, but there are suggestions of further sources of information. If you work with volunteers already you are probably doing a lot of the things in the book, and we hope that everyone will find suggestions to improve aspects of their volunteer programmes.

Global Action Plan has 20 years' experience of running volunteer led energy use reduction programmes, experience which is behind the tools and resources used in the SAEP. For more information about any of the items set out in this e-book please contact Global Action Plan.

Throughout the book, we give case studies and quotes from staff, volunteers and recipients of the SAEP, and we are grateful for all who took part, from Aster Communities and Synergy Housing, Community Gateway Association, Gentoo Group, Riverside, Newlon Fusion and Poplar HARCA.

“The programme encouraged me to go out and relate to others as part of the community.”

Volunteer

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# CONTENTS

<b>HOW TO USE THIS E-BOOK .....</b>	<b>4</b>
<b>INTRODUCTION.....</b>	<b>6</b>
WHY USE VOLUNTEERS?.....	6
VOLUNTEERS AND ENERGY SAVING.....	7
<b>STAGE 1: RECRUITING VOLUNTEERS.....</b>	<b>9</b>
1.1 DEFINING THE VOLUNTEER TASK .....	9
1.2 PLANNING THE RECRUITMENT PROCESS.....	11
1.3 ADVERTISING THE OPPORTUNITY.....	12
1.4 SELECTING.....	13
<b>STAGE 2: SUPPORTING VOLUNTEERS .....</b>	<b>16</b>
2.1 TRAINING.....	16
2.2 FOLLOW-THROUGH FROM TRAINING TO DELIVERY.....	20
2.3 FOLLOW-UP TRAINING.....	21
2.4 KEEPING IN TOUCH.....	22
<b>STAGE 3: ENGAGING WITH HOUSEHOLDS .....</b>	<b>23</b>
3.1 MAKING CONTACT .....	23
3.2 DEALING WITH DIFFICULT SITUATIONS .....	26
3.3 CONTEXT OF THE CONVERSATION .....	29
<b>STAGE 4: MONITORING AND EVALUATION .....</b>	<b>30</b>
4.1 DETERMINE THE QUESTIONS.....	31
4.2 DEFINE YOUR OUTCOMES .....	31
4.3 PLAN YOUR DATA COLLECTION.....	32
4.4 EVALUATE THE RESULTS.....	36
<b>CELEBRATE .....</b>	<b>37</b>
<b>POSTSCRIPT: POTENTIAL OF WORKING WITH VOLUNTEERS FOR THE FUTURE.....</b>	<b>38</b>
KEEPING VOLUNTEERS ENGAGED .....	38
BUILDING BETTER RELATIONSHIPS.....	38
PROVING THE VALUE OF ON-GOING SUPPORT .....	39
<b>GLOSSARY .....</b>	<b>40</b>
<b>BEHAVIOUR CHANGE APPROACHES.....</b>	<b>41</b>

## HOW TO USE THIS E-BOOK

You can work through this book stage by stage or dip into the section that is relevant to your project. Each section provides a high level view on best practice, things to think about and links to related topics.

Pages are colour-coded to help you navigate, and include a “Top Tips” in each section. A lot of the ideas and tips provided are transferable, and can be applied in other volunteer projects that you are running.

### TOPICS COVERED IN THIS GUIDE

<b>How volunteers can help with energy saving</b>	Explains how working with volunteers can deliver wider community benefits and outlines the importance of considering behaviour change when planning an energy saving programme.
<b>Recruiting volunteers</b>	Explains the importance of thinking about the skills or commitment that you might need to complete the task. Covers what you need to consider before you begin recruiting, possible methods and pointers for making the right candidate selections.
<b>Supporting volunteers</b>	Describes ways to train, support and maintain contact with your volunteer network to ensure it is a positive experience for all.
<b>Engaging with households</b>	Provides information to support volunteers to make conversations easier, addressing difficult topics that may crop up during resident engagement.
<b>Monitoring and evaluation</b>	Signposts helpful tools and resources to help you plan your evaluation approach.
<b>Celebrate</b>	Looks at the importance of celebrating the success of the programme and provides some suggestions on how to make this stand out.

A [postscript](#) considers possible future volunteering opportunities, and a [glossary](#) and [Appendix on behaviour change tools](#) complete the book.

The table below lists all of the top tips found throughout the book, with links to the relevant section.

## TOP TIPS

## TOP TIPS

### Recruiting volunteers

- [Ensure you understand the requirements of the roles, so you can match volunteer skills with the tasks in your project.](#)
- [Give yourself a good lead in time and consider public or school holidays, as well as the Housing Association staff and Senior Management time needed to support the programme.](#)
- [Communicate the role clearly and emphasise the benefits to potential volunteers.](#)
- [Be clear on the type of volunteer you want to represent this project and be discerning – just because someone wants to volunteer does not mean they will be right for this programme.](#)

### Supporting volunteers

- [Use an experienced trainer to deliver your training and help volunteers work through strategies to deal with common problems.](#)
- [End with an action planning session, so that everyone is clear on the next steps.](#)
- [Consider using drop-in sessions, coffee mornings or further training to get volunteers together and increase their skills.](#)
- [Agree at the training how often you will keep in contact, and how.](#)

### Engaging with households

- [Pre-communicate the initiative to households – either through letters, leaflets or an article in the community newsletter to increase the likelihood of uptake.](#)
- [Be prepared for questions from tenants and help volunteers have the confidence to respond. Give volunteers clear signposting information for when they are 'out of their depth'.](#)
- [Encourage volunteers to use friendship networks and other 'warm' opportunities that will reduce the barriers to participation.](#)

### Monitoring and evaluation

- [Think through your monitoring and evaluation plan before you start your project.](#)
- [Consider the questions you want to answer to determine what information is important.](#)
- [Map how you will collect, store and analyse the data, including how long after the programme you will continue to collect follow up information.](#)
- [Ensure that you have considered how to evaluate the data so you can make robust conclusions.](#)

### Celebrate

- [Celebrate by taking volunteers somewhere special such as a local attraction.](#)
- [Consider ways that you can reward volunteers, such as vouchers, or a Community Award.](#)
- [Recognise volunteers in your community newsletter or the local paper!](#)
- [Celebrate and provide recognition not just at the end, but along the way.](#)

# INTRODUCTION

Volunteers are well-placed to access networks in the community and can reach people that Housing Associations may struggle to engage through other methods.

Through simple interventions volunteers can provide support and resources to their communities which promote positive actions and provide triggers to help embed change. However, to gain the most benefit from volunteer-based projects, a good structure of recruitment, training and support is needed to ensure they generate the best outcomes and the most effective interventions.

Using information gained from the Social Action Energy Pilot (SAEP) run in six Housing Associations by Global Action Plan for the Cabinet Office, and using information from other projects and sources, this book provides tips and advice for making the most effective use of volunteers in energy saving conversations which promote behaviour change in relation to energy use.

We look specifically at some of the challenges around:

- recruiting and managing volunteers
- training and support
- engaging with households
- measuring volunteers' impact.

Before getting into these details we will consider firstly the reasons for using volunteers and how they can best be used to promote energy efficiency.

## WHY USE VOLUNTEERS?

Volunteers can act as trusted messengers (see [Behaviour Change & Energy Use](#)), giving the message of your project credibility in a way that can sometimes be lost when it is coming from an “organisation” rather than from a person. As a trusted messenger, volunteers can:

- highlight and demonstrate the behaviours people are being asked to do
- act as positive role models, showing recipients that, “if someone like me can do this, I can too.”
- break down barriers that may arise through mistrust of authority – i.e. convey energy saving messages from a utility company or provide details of independent organisations such as the Citizen's Advice Bureau to give residents impartial advice.

“One lady told me, ‘I wouldn't normally take part in something like this, but because it's you ...’”

Volunteer

Volunteers are an effective way of getting your message out to more people or to have more of an impact. Effective use of volunteers will also provide a wider benefit to the community and the volunteers themselves (see [The Millennium Volunteers Programme](#) for extensive information on the personal and community benefits identified through volunteer programmes).

Volunteers can leverage the power of networks in the community, through personal connections and through groups they are involved in. They can reach people who are harder to reach through traditional engagement methods such as community newsletters or leaflets. In the SAEP, this was exemplified by volunteers drawn from:

- a befrienders group who already worked with isolated members of the community
- members of ethnic minority or religious groups who could share messages at their groups
- members of an ESOL class who could use this as an opportunity to practise their English skills but also to connect with non-English speaking members of their community.

"It was great getting involved. I focussed on the pensioners in our neighbourhood & now, instead of seeing them every now and then, I make a point of going to see them every week."

Volunteer

Beyond the scope of your project, volunteers can connect people together, providing a link between communities and neighbours, and developing a community feeling that can encourage a wide range of further actions to take place.

## VOLUNTEERS AND ENERGY SAVING

Energy bills have been rising steadily and are projected to continue to rise, meaning that many people now struggle to pay their energy bills. The two main approaches to improving energy efficiency are to improve the fabric of homes and to help residents adopt habits which cause less energy waste.

Most energy efficiency work to date has involved updating the fabric of homes (e.g. to Decent Homes standards), but this has not always delivered the target savings. Domestic energy use is highly influenced by the lifestyles, or behaviours, of occupants (see [Domestic Energy Use Study](#) for a detailed look at the factors involved), so helping residents adopt different behaviours can have a large impact on energy use.

[Behavioural insights](#) show that lack of awareness is not usually the barrier to changing behaviours, but that motivation, ability or triggers to act may be missing. Through simple interventions volunteers can provide resources which promote clear actions and provide a trigger to act.

There are many tools which can be used to develop a behaviour change campaign, and the most appropriate tool will vary depending on the behaviour you wish to target. It is beyond the scope of this e-book to cover the different tools in detail, but basic information on a few tools is included in the [Appendix on behaviour change approaches](#).

The main point to remember is that you can use the tools to:

- Understand the behaviours of your audience by asking yourself relevant questions
- Developing an approach which removes barriers to the desired behaviour, as well as promoting the benefits
- Ensure that your plans are easy to understand, desirable to your audience, relevant and timely.

We are social creatures and are heavily influenced by what is going on around us. Volunteers can help to connect people together and demonstrate a social norm around energy saving, thus providing the important link between volunteers and behavioural change in the community – to reduce the energy consumption of residents.

The [next section](#) covers how you identify what you want from volunteers and then plan to recruit them.



## STAGE 1: RECRUITING VOLUNTEERS

The most important part of an effective volunteer engagement programme is, of course, the volunteers, and finding the right volunteers will make a huge difference to the success of the programme. The diagram below represents a framework for recruitment.



### Planning your recruitment

This process will vary in timescales depending on the community and the specific project requirements, however housing associations in the SAEP felt that two months a suitable timeframe for them to complete this process.

## 1.1 DEFINING THE VOLUNTEER TASK

It is important from the very beginning of the project to manage the expectations of the volunteers, and of any staff who will be working with the volunteers. Not all volunteers feel equally confident or are able to commit the same time or do the same activities, therefore it is essential to have clearly defined volunteer roles and tasks and communicate these at the start of the project.

The volunteer task can vary widely depending on the project you are running, for example:

- Providing information at events
- Passing on energy saving information or packs to other residents through personal networks and contacts
- Collecting data from residents to inform a project you are running
- [Undertaking home visits to provide specific and tailored advice and support.](#)

Different volunteer groups will have different levels of ability to commit to a project, and you may want to break the task into different sizes for people with different capacities. See the table below for example considerations.

### SAMPLE PROJECT TASK LIST

<b>Putting up posters or delivering leaflets</b>	4 hours  One off activity – possibly no contact with other people.
<b>Engaging with residents about energy saving</b>	3 or 4 days  Attending training, visiting neighbours, may be performing repeat visits. Needs to be confident to talk to people and good language skills. Can be done during evenings and weekends.
<b>Data entry of information collected</b>	3 hours  Can be done from home and at any time, but with potential sensitive information/personal details. Needs to be computer literate.

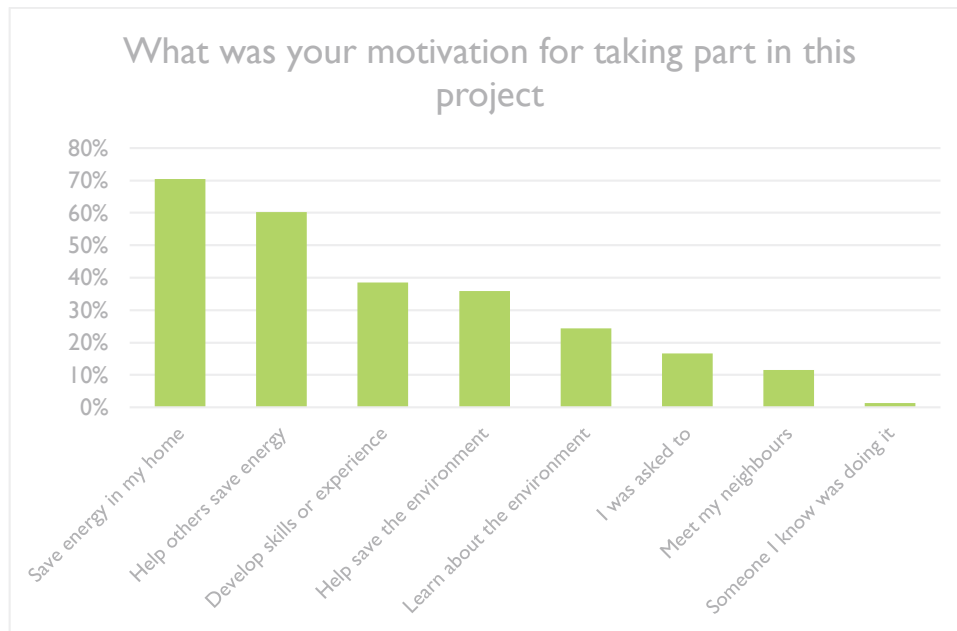
**A volunteer who is also the parent to a small child, may have less time available to volunteer than someone who is retired – ensure the size of the task is appropriate to their capacity.**

By categorising the task, you will find it easier to define the type of volunteer that you need for each part of your project. Clearly, if the role requires someone to interface with the public, you would ideally want a confident communicator with good English skills.

Across GAP's extensive involvement of volunteer training programmes, a significantly higher drop-out rate occurs when volunteers are asked for larger commitments in terms of time and expertise, especially if they have been asked to lead a team, speak to people they don't already know, or give a talk or formal presentation to a group. The easier the 'ask' for volunteers is, the lower the drop-out rate.

It is also important to consider volunteer motivations in order to define a task that volunteers will benefit from. Volunteers should feel that they are personally benefitting from the training (through learning about the subject and developing new energy skills and communication skills) as well as helping the recipients of the project. In our pilot, the biggest motivation for volunteers to sign up was learning something about saving energy in their own home, with helping others save energy as a close second (see the graph below).

When considering each potential task it is useful to identify how it represents an opportunity for a volunteer – e.g. gaining a new skill, developing confidence or meeting new people. This will help volunteers apply for volunteer positions that are mutually beneficial.



Why trainees took part in the Social Action Energy Pilot

Once the volunteer role and benefits are defined you can begin to plan the recruitment.

## 1.2 PLANNING THE RECRUITMENT PROCESS

Plan your volunteer recruitment carefully to ensure that resources are not wasted and so that your volunteers come out of the programme keen to get involved in future projects. As you build larger networks of volunteers, future recruitment can become easier with more 'known' and trusted volunteers for you to call on.



### TIME LINES

#### Ensure at least 2 months lead in time for recruitment

Recruitment and selection of suitable volunteers is a process that can take longer than expected due to the complexities of reaching different groups.

#### Avoid school holidays and other significant dates

School holidays, religious festivals etc. can impact on people's availability, child care arrangements, and willingness to engage in other activities. If your activities need to take place over these times, give the project extra lead in time, and anticipate that there will likely be higher drop-out rates. These holiday periods can also reduce the opportunities for volunteers to engage with households through routes such as existing school networks.

### Arrange dedicated volunteer management

Housing Association Officer time is needed to manage, monitor and assist with the initiative, including senior manager support to acknowledge that volunteer management takes time.

The amount of time required will depend on the size of the project, tasks involved and number of volunteers. This often means more time than you think so build in some contingency to your plan. Tasks may include:

- Arranging training
- Designing or organising training material development
- Weekly/regular contact with volunteers
- Management of data collection
- Managing stakeholders

It is important to think about how you are going to reach enough potential volunteers with the right skillsets, and in the appropriate volume to deliver your volunteer programme.

## 1.3 ADVERTISING THE OPPORTUNITY

Take time to review existing or potential volunteer networks. In the SAEP, the most successful recruitment methods targeted volunteer and tenants groups with a history of participation with Housing Association projects. Existing networks can include:

- existing volunteers who have worked on previous projects
- residents who have previously expressed an interest in volunteering
- existing volunteer organisations, such as local befriending charities
- existing networks of community organisations, such as ESOL classes, churches and other places of worship and community centres

Even when you have a large pool of existing volunteers to recruit from, consider if there are any social groups that are not represented - it would be valuable to try and recruit additionally. There can be a risk that some areas of the community are consistently missing out on projects if their area or demographic is not being targeted through your existing volunteers.

A quick internet search should identify existing community groups that you can connect with for targeted representation on a programme.

To encourage people to sign up to your programme, it works best to keep initial sign up surveys short and to the point and with simple language to avoid confusion. At its simplest, this would capture the volunteer's name, contact information and availability, but you may wish to add information on demographics or motivations if you are looking for deeper volunteer analysis.

The way of communicating with potential volunteers about the opportunity is also important.

## RECRUITING METHODS AND CONSIDERATIONS

### Personal contact is time consuming but effective

Having a direct conversation with potential volunteers is the most effective mechanism. Many Housing Associations have existing lists of potential individual volunteers – people who have expressed a specific interest in volunteering or those who have been in touch through previous engagements (such as receiving support). Both groups are likely to have a low take-up rate unless the request is accompanied by personal visits or phone calls, to allow questions to be asked. Bear in mind that expressions of interest may not translate into subsequent involvement.

In the SAEP, these conversations resulted in a 57% sign up rate, but contributed a smaller number than targeting existing groups.

### Targeting groups of existing volunteers can also be fruitful

Volunteers and voluntary groups with a history of participation or with existing relationships with the Housing Association are much more likely to take part. However, if you pass a single message on to the community group rather than engage with individuals directly or follow up robustly, volunteers may be less clear about the purpose of the initiative.

In SAEP this route had a 40-50% recruitment rate and provided the largest number of volunteers.

### Leaflets or posters may have little impact, but can increase awareness

Often unsuccessful in recruiting volunteers directly, but these could legitimise requests for engagement made through other routes if it increases people's awareness of the request before an approach is made. These should be used with caution as the cost of design, printing and distribution could often be more effectively spent in direct engagement with potential volunteers.

No volunteers were recruited through this route for SAEP.

Not all of those who put themselves forward as volunteers will necessarily make good representatives. If you have accurately defined your tasks, you will have a much better sense of the type of volunteers that you are looking to engage, through a robust selection process.

## 1.4 SELECTING

When selecting volunteers for your programme, consider the individual's attitudes, skills and knowledge, and whether these match with the programme aims and the specific task you are looking to assign them.

To test this, it is important to collect some standard information from your potential recruits. This can be done through paper applications, online or email applications or phone calls.

In addition, the table below outlines some questions you might want to consider when designing and reviewing applications.

## SELECTING VOLUNTEERS – EXAMPLE CONSIDERATIONS

<b>Attitude</b>	Would the individual be a good representative of the Housing Association?
<b>Confidence and resilience</b>	Is this individual confident enough to approach your target audience? Do they have a positive attitude that will help them deal with difficult conversations or experiences?
<b>Willingness to undergo necessary checks</b>	If you want volunteers to work with vulnerable groups, would they be willing to undergo a DBS check (see <a href="http://www.gov.uk/disclosure-barring-service-check/overview">www.gov.uk/disclosure-barring-service-check/overview</a> for information about when this is needed)
<b>Availability</b>	Can the individual commit to the full volunteer programme? Do they have other commitments that might compromise their involvement?
<b>Existing skills</b>	Does the volunteer communicate clearly and have enough knowledge of the language of the target audience? Does the individual have any other skills which might prove valuable? Is the individual incentivised to develop new skills from this programme?
<b>Areas of interest</b>	Consider asking about personal areas of interest: e.g. environment, energy saving, befriending, young people, media, conservation, etc. to inform your broader volunteer programme management.
<b>Existing knowledge</b>	Why would the individual be interested in learning about the topic? Do they have any knowledge that would complement the programme?
<b>Networks and social groups</b>	Is the individual connected to any target audience? Does the individual have an existing network that can expand the reach of your programme or engage future volunteers?

Many of these answers will only emerge from one-to-one discussion with the potential volunteer. Some responses (such as lack of availability) can be used to rule out individuals. Other responses such as existing skills and knowledge can be used to plan the training and support which will be necessary.

A project in which every person understands their role and obligation is much more likely to work cohesively as a team, but also it should help to minimise the amount of volunteer support required.

By introducing the elements outlined in the above table into the selection process, you are likely to end up with fewer, but better suited volunteers. Including this check in your wider volunteer engagement process may also help you categorise volunteers into their most suitable styles of voluntary work, e.g. if someone is not confident in engaging strangers but has good computer skills you may ask them to work on another project or assist you in any compiling of data and information instead, thus helping you to make the most of your broader volunteer network.

It is important to try and align your application process across all of your volunteer projects (particularly if you have a database for searching and sorting your volunteer information) – this way you will build a consistent set of information which will help you make connections to people on future projects.

“We recruited a diverse range of people, ages, cultures etc. - a massive mix of people who were interested in taking part. There was a massive feeling of inclusion and we met everyone’s needs, including a lady in a motorised wheelchair.”

Housing Association Co-ordinator

### TOP TIPS – Recruiting volunteers

#### TOP TIPS

- Ensure you understand the requirements of the roles, so you can match volunteer skills with the tasks in your project.
- Give yourself a good lead time and consider public or school holidays, as well as the Housing Association staff and Senior Management time needed to support the programme.
- Communicate the role clearly and emphasise the benefits to potential volunteers.
- Be clear on the type of volunteer you want to represent this project and be discerning – just because someone wants to volunteer does not mean they will be right for this programme.

## STAGE 2: SUPPORTING VOLUNTEERS

### 2.1 TRAINING

Good training provides multiple benefits for volunteers; it communicates to them what it is that you want them to do, brings them together as a group, and empowers them to speak confidently on the subject. A competent trainer will create a safe space where volunteers can make mistakes and also grow in both knowledge and skills.

Co-training for Housing Association staff and volunteers was a powerful way in the SAEP of providing volunteers with greater insight into what their landlord is doing, and informing staff about issues facing their tenants.



#### TRAINING GUIDELINES

##### **Determine what knowledge and competency is needed**

Training should be designed to take everyone from a base level to a place where they feel confident having everyday conversations on the subject.

Depending on what you are aiming to achieve volunteers don't necessarily need to be or become experts on the topic. It is important not to assume that volunteers have any prior knowledge of the subject or the project, or of volunteering.

##### **Help volunteers understand both what you want them to do and why**

This will help volunteers to deliver information as requested rather than take short cuts, for example by posting information through the letterbox when you actually want them to speak directly to householders.

##### **Use mixed approaches to take account of how different people learn**

Formal, face to face training is the most effective when designed to get volunteers up to speed with the project and ready to begin delivery after attending only one training session, but providing volunteers with on-going access to support is critical to ensure they continue to be engaged.

Making training highly interactive engages the volunteers and gives them a chance to practice activities that they will be carrying out during the project. This was achieved in the SAEP through role play in pairs or small groups, which helped volunteers get over feelings of embarrassment or nerves that are usually associated with public, group activities.



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**Make the training a  
'safe space'**

It is important that volunteers have can ask questions and make mistakes, before they start communicating with other residents.

Make the most of the knowledge in the room, but be sure to correct myths or mistakes.

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**Maximise the use of  
visual elements**

Hand-outs can provide a practical process to explore and explain the link between energy use and money. A visual 'story board' of the process can also be helpful.

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**Consider timing  
carefully**

If training is split into different sessions, requiring volunteers to return multiple times, this can lead to significant drop out rates if people are unable to attend both parts of the training. Even if the total training time is the same, multiple sessions can be seen as a larger commitment than a single longer session.

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**Help volunteers  
envisage what  
comes next**

Volunteers should be clear when leaving the training what their next steps will be. End training sessions with volunteers writing a personal action plan, which can be shared with the coordinator from the local housing association. This helps the volunteers to think through how they will begin to carry out the activities, and gives the coordinator information to support the volunteer. This approach has been demonstrated to improve follow-through on actions, through a process of social contracting and visualising completion of the action (demonstrated in the academic study on voting behaviours: Greenwald, Carnot, Beach & Young, 1987).

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**Plan for people  
dropping out**

Plan out in advance what will happen if any of the selected volunteers are unable to make their intended training sessions, for example due to last minute changes in childcare needs. Have a clear idea as to whether non-attending volunteers will no longer be able to participate in the programme, or whether there can be follow up or one to one training sessions.

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The following two pages highlight the training used for the SAEP.



### Global Action Plan interactive energy training

During the SAEP training sessions were carried out with each of the housing associations, using an activity-based approach, including an energy game to help trainees understand how much energy appliances use in their home, role playing conversations and exercises on prioritising energy saving actions.

#### SAEP Volunteer Training topics

- Energy literacy (watts, kilowatt hours, £ and the main uses of energy in the home, tariffs, how to read an energy meter)
- Energy saving actions ranked by impact on energy bills
- Myth-busting: common misconceptions about energy saving
- Aims of the project and project materials: contents and purpose of each element
- Engagement techniques and dealing with problems which may arise
- Where to go for other information and support
- Next steps and action planning

Training material from the SAEP can be found on:

[www.globalactionplan.org.uk/energisingcommunities](http://www.globalactionplan.org.uk/energisingcommunities)

"It has really made me think twice about what I use and how much things cost. I now just want to share this information so my family can save too."

Volunteer

## CASE STUDY: TRAINING

The biggest impact of the training was raising knowledge and awareness of the energy savings from simple actions. 82% of volunteers who completed the feedback reported an increase in knowledge. Volunteers reported an increased insight into the energy use of appliances and gadgets they use in their home. They also reported that this practical information gave them confidence to target the key sources of energy wastage with simple actions.

"The most useful part was finding out how much energy you use in different parts of the home and how we can use less by making small changes".

Volunteer

[The training] "helped me to see practical zero cost ways in which energy can be saved and how to communicate it to others."

Volunteer

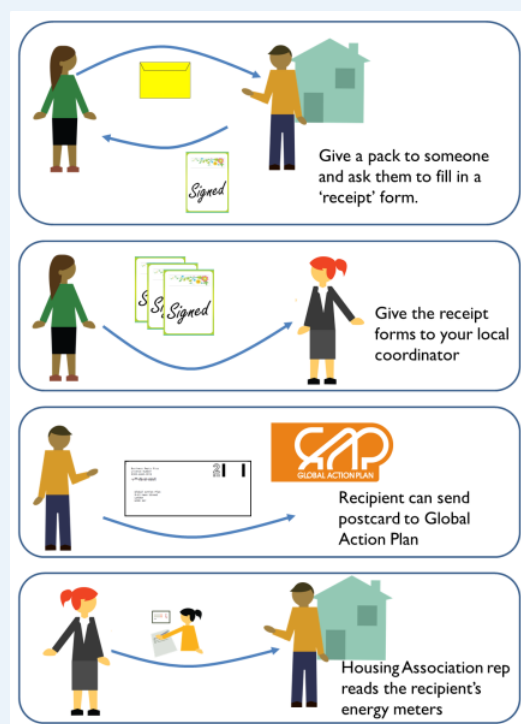
In addition to the core knowledge and tips, volunteers reported an increased confidence and motivation to go out and engage their community in energy saving. This demonstrates the effectiveness of the model in inspiring and equipping participants to carry out social action. Of those completing the feedback form, 78% reported an increase in confidence and 75% reported an increase in motivation.

The course explored practical solutions, did not require any expert knowledge, was just one day and had a short-term and small ask in terms of engaging residents.

All of this translated into a very high follow through rate of 95% from the training to action, despite being offered on a "no obligation basis".

A 'story board' (see right) helped explain the process to be followed.

Volunteers agreed that it encouraged and motivated them to be more involved in their local community.



## 2.2 FOLLOW-THROUGH FROM TRAINING TO DELIVERY

Training can often be an end-point in itself, but there are factors which increase the proportion of trainees becoming active volunteers.

### INCREASING FOLLOW-THROUGH

<b>Consider offering training on a 'no obligation' basis</b>	<p>This can increase attendance at training sessions, which can in turn increase the number of participants. Having made the commitment to attend the training (an initial small ask) many people will then agree to take part in further actions as they have invested in the programme, and have a greater understanding of what will be expected of them.</p> <p>Volunteers who attend but then choose not to take part can still benefit from the training personally.</p>
<b>Help volunteers write a personal action plan</b>	<p>An action plan should be specific both about what the volunteer will do and when. This enables the local coordinator to gauge the extent to which a volunteer is ready to go, and helps the volunteer to clarify to themselves their next steps and commit to taking them.</p>
<b>Agree how you will keep in contact</b>	<p>Ask each individual what method of contact they prefer, e.g. Facebook, email, text, phone and how often they want you to be in touch.</p>
<b>Build in extra preparation time</b>	<p>While some volunteers may be happy to go out and take action immediately after the training, most are likely to want a few days to digest the information before taking part in engagement. Ensure that this is planned into your timeline.</p>
<b>Allow volunteers to plan their own workload</b>	<p>If you are asking volunteers to deliver packs or materials, it can be effective to allow volunteers to request the amount of materials that they feel comfortable delivering. Provide a suggestion of an appropriate and achievable number of people to engage with (perhaps 5 per person depending on the size of the activity you would like them to do).</p> <p>By allowing the volunteer to decide how much they commit to they are more likely to complete their actions. Where volunteers select their own engagement numbers you can also reduce the likelihood of wasting materials that are distributed to the volunteers but are then not used. Do make sure that the volunteers know how to get more materials if they are happy to continue once they have met their initial target and have developed more confidence.</p>

Factors which volunteers in the SAEP reported increased the follow-through rates include:

- Being able to use the knowledge and the skills to save energy in their own home.
- Having resources or materials which they can confidently pass on to other people.
- Practical action planning, allowing delivery of the opportunity to be factored into 'everyday life'.
- No requirement to be an expert beyond the knowledge they acquired during the programme.
- A relatively small ask, which can be delivered at a time which suits the volunteer.
- A short delivery timescale, not requiring long term commitment.

"I thought, well, I can give a pack to my daughter and another to my son and his family."

Volunteer

## 2.3 FOLLOW-UP TRAINING

Follow up training can be helpful depending on the specifics of your project. Some volunteers may not need this session, but it can be a good opportunity to discuss issues and barriers to delivery. See the table below for some example topics that you may wish to consider for follow up training and tips on how you could approach this session.

Follow up training can also add strength to the volunteer network, giving attendees the opportunity to connect with others in their volunteer group, stay engaged and feel valued.

### TOPICS THAT FOLLOW UP TRAINING CAN ADDRESS

<b>Dealing with set-backs and negative responses</b>	Obtain feedback from volunteers on the negative experiences that they have come up against, and then train in strategies to manage common incidents or topics.
<b>Unanswerable questions</b>	Depending on what the residents in your housing association are asking, this session provides further information to volunteers, expanding their knowledge, such as providing further technical training i.e. understanding insulation, heating controls or tariff switching.
<b>Deeper behavioural change information</b>	This may empower engaged volunteers to consider targeting different audience groups by applying the information they have learned to harder to reach communities.
<b>Behavioural insights on values and habits</b>	Work with volunteers to come up with extended community engagement programmes to make their delivery more effective.

## 2.4 KEEPING IN TOUCH

Coordinators should provide their phone numbers or email addresses to volunteers, and contact each volunteer at the very least, after the training. The support needed will vary considerably according to the volunteer's previous experience of volunteering and energy and the ease of the volunteer 'ask'.

Additional support may be necessary in order to:

- cover issues of confidence (in getting started) or resilience (in dealing with negative feedback)
- explain exactly what to do with different elements of the materials
- provide reassurance where volunteers have not been able to engage as many people as they had hoped or planned.
- coach volunteers through difficult engagements.

Many volunteers are content to work on their own during the project. However, in cases where volunteers have either low confidence or a small personal network, a buddying or group approach can help to boost confidence and increase the sense of momentum and being in something together.

Occasionally volunteers will attend training as a pre-existing group, and it will be natural for this group to remain together to offer mutual support.

"It was nice to know that [co-ordinator] was there, but I felt I had all the information I needed following the training and with the hand-out notes and the packs."

Volunteer

"Some volunteers needed follow up support. 50% were good to go, the ones who were experienced. The others needed a bit more time, i.e. the turnaround between training and start was a bit much."

Housing Association Co-ordinator

### TOP TIPS – Supporting volunteers

#### TOP TIPS

- Use an experienced trainer to deliver your training and help volunteers work through strategies to deal with common problems.
- End with an action planning session, so that everyone is clear on the next steps.
- Consider using drop-in sessions, coffee mornings or further training to get volunteers together and increase their skills.
- Agree at the training how often you will keep in contact, and how.

## STAGE 3: ENGAGING WITH HOUSEHOLDS

### 3.1 MAKING CONTACT

Volunteers often feel most comfortable delivering their energy information to acquaintances (family and friends). The table below shows the approaches used in the SAEP.

Approach	Approximate % of volunteers using the approach
Close friends and family	100%
Acquaintances - Neighbours known by face only, e.g. in the same street or block	80%
Neighbours not known personally – delivery by door-knocking	20-30%
Members of a community or church or other faith group	10-20%

**Methods used to approach households (most volunteers used more than one approach)**

Providing information in the form of a 'pack' of information is a successful mechanism for exchanging knowledge. In our pilot, volunteers reported that the professional and colourful pack provided gave residents more confidence in the information, particularly as it carried logos which the recipient recognised and trusted. In addition, it gave the volunteer a focus point for their conversation, taking the attention off them and onto the pack.

Wherever possible, any information should be delivered with face to face contact as this particularly helps to break down barriers to engagement around energy use (e.g. distrust of energy companies).

The sections below explore in more detail the ways in which Housing Associations can set their volunteers up for successful engagement and support them to deliver it.

"The majority of people I spoke to I knew. I would probably find it difficult if I didn't know people - I would probably need to be more assertive... particularly going to someone's house saying 'I am going to save you energy'."

Volunteer



### 3.1.1 RAISE AWARENESS OF THE INITIATIVE

Establishing a local and trusted 'brand' for your programme will enable volunteers to engage more successfully with neighbours and people that they do not know. Providing this in a range of forms will improve their chances of success.

Housing Associations in the SAEP reported that, to make it easier for volunteers to explain who they are, the following activities should be implemented before volunteers try and engage with their audience:

- Provide volunteers with a letter of authorisation to show that they are supported by the Housing Association
- Put up posters in community spaces to make people aware of the project or campaign
- Place an article in the local tenant newsletter at the start of the delivery period.

### 3.1.2 OPENING UP CONVERSATIONS AROUND ENERGY

Allowing volunteers to start their engagement with existing networks – especially friends and family – allows them space to develop a confident conversation around energy efficiency.

This, combined with training gives volunteers the opportunity to practice this conversation before going to people they are less comfortable talking to.

This also has the potential to mean small scale social norming occurs within the volunteer's social network, further boosting the volunteer's confidence as it is no longer an 'awkward' conversation.

"I find now that in just about every conversation I have with my neighbours, the ones I talked about the packs to, that energy comes up - for the ones who completed the forms and the ones who didn't."

Volunteer

### 3.1.3 FOCUS ON GIVING COLLATERAL

Giving volunteers something to exchange with their audience takes the focus off the volunteer personally. This helps the conversation to remain objective and focussed on the facts. It also provides the volunteer with an aide memoir to ensure they cover all the topics.

In the first instance some volunteers chose to go through the pack with residents over a cup of tea, really familiarising themselves with the content and giving both volunteer and recipient plenty to talk about.

The next page illustrates how an energy saving pack was used as collateral to assist in engagement of households.



"On my way down here [to the focus group] I was talking to a lady about saving energy and saying 'if you'd like to know more, I'm happy to have a chat about it'. 'Would you have said that six months ago?' 'No, I wouldn't, but I've now got the confidence to communicate with people in my neighbourhood'".

Volunteer

Volunteers from the SAEP agreed that having a physical pack to distribute to households was essential as it gave them something to talk about, and a way of initiating the conversation.

Volunteers agreed that the packs functioned well and specifically appreciated:

- Basic information in the packs (a positive point)
- Attractive packs, with plain language wording
- Explanations of amounts of money that could be saved
- Allowing recipients the option to choose their actions
- A fridge magnet, which was both a reminder and a small gift
- Being able to choose who to give the packs to

The 20-30% of volunteers who approached individuals who were less known to them used a slightly more formal approach, borrowing from an outline script that was provided at the training event and which explained who they were and that they were taking part in a project with the local housing association.

Two individuals used their own involvement in the project as an introduction, effectively saying to recipients, "I'm doing this project, could you help me by having a look at this pack with me?" This was a particularly successful approach, as it encouraged the recipients to respond as a friend rather than as someone 'being helped'.



Fridge magnet from engagement pack.

To see more of the training materials used by Global Action Plan in the SAEP trials, please visit [www.globalactionplan.org.uk/energisingcommunities](http://www.globalactionplan.org.uk/energisingcommunities)

## 3.2 DEALING WITH DIFFICULT SITUATIONS

At some point during the engagement it is likely that volunteers will come up against difficult situations and questions from householders. Prepare your volunteers during the training so that when these difficult situations arise they can manage them calmly and consistently or that they understand your role in supporting them through these issues.

Below are the three main topics that the SAEP volunteers felt difficult to address:

### 3.2.1 QUALITY OF HOUSING

Residents who felt that the quality of their Housing Association property was not as high as it could be were sometimes less motivated to take their own energy saving actions.

Volunteers should be provided with contact information to direct those conversations to the teams who can best respond to them, whilst clarifying that this is something that they are not personally involved in.

Train volunteers to take control of the conversation to bring the topic back to the impact that energy saving measures can have even in a poorly performing building, for example:

"Why should I do all this stuff to save energy, when the windows that [Housing Association] put in are draughty. I'd save far more money if they put them in properly."

Volunteer

*Q: Why should I save money when my house is draughty?*

*A: I'm really sorry you are having that problem. You should contact [relevant HA contact] to report any problems, but did you know that you can still make some savings which will give you money in your pocket at the end of the month...*

### 3.2.2 THE WIDER CONTEXT OF ENERGY

Energy is not a neutral subject to many recipients, often being a 'political' subject linked to rising energy bills, "fat cat" salaries and energy mis-selling. This can be a particular issue for volunteers who use a more formal approach, such as door-knocking.

"When we were out one day our son answered the door and it was someone from an energy company. He was given some information and asked to sign a form saying he'd received it. The next thing we knew we had a letter from that company saying we were now their customer."

Volunteer

Address the issue in training and encourage the volunteer to try and keep the conversation focussed on what the resident can do for themselves. Providing the volunteer with responses that keep them neutral i.e. 'I don't know anything about that; but if you want to raise that you could talk to the Citizen's Advice Bureau/local advocacy group etc.' will help them take control of this conversation.

### 3.2.3 COMPLEXITY OF THE ENERGY MARKET

Energy tariffs and billing are also frequently identified as extremely complicated, which results in both volunteers and recipients feeling disempowered and raises question that volunteers can feel unable to answer.

Volunteers may not be experts in energy, and are likely to be unable to answer all of the questions they may be asked during the course of the programme. This can leave volunteers feeling uncertain of what to say, and can tempt them to give advice which may not be correct. To avoid this, ensure that volunteers are pre-warned that this can occur, and give suggestions of what to do, such as providing a phone number or email address to the householder, and provide a factsheet for common questions that they may encounter.



Typical questions raised, and potential solutions are listed on the next page.

Question	Comments	Possible solution
<b>Am I on the best tariff I could be on?</b>	Existing suppliers provide this information already at the end of the year, for their own tariffs. However, it is difficult for some people to make comparisons with other suppliers as they have to consider both unit rates and standing charges.	Price comparison websites do allow this to take place, once residents understand the way in which their bill is calculated, and the amount of energy they use.
<b>Should I be on an Economy 7 tariff?</b>	This is difficult to answer without considering what heating system the home uses, occupancy levels during the day and the current pattern of electricity use.	An energy professional with access to household bills and information about occupancy and heating type would be able to make that judgement, but volunteers may not.
<b>If I have photovoltaic panels should I top up my storage heaters during the day?</b>	This is an increasing issue for some social landlords. In theory, residents should be able to use 'free' electricity during the day to top up storage heaters so they use less 'cheap' night-time electricity to do that.	This it is a difficult judgement to make as it depends on the daily output from the panels, the total wattage of the heating system and the cost of energy. An energy professional would be best place to respond.
<b>How do I find out how much energy I'm using on my key meter?</b>	Although those with key (or other pre-payment) meters are generally more aware of the energy that they use, this is in the form of the cost of energy rather than the kilowatt hours used. (Thus a householder can save energy but still pay more, because the price per unit has increased.)	Key meters display total kWh used, but only when a button is used to scroll through the display. Volunteers can be trained to explain this, although a wide variety of meters are in use.
<b>Should I move from pre-pay to quarterly or direct debit payment?</b>	Quarterly and direct-debit customers generally pay less per unit for their energy, but many people use pre-pay meters to budget and control their energy use. Some customers feel they would save money by moving to direct debit / quarterly billing, but fear losing control and going into debt.	Residents should be pointed to a trained advisor, who can advise on tariffs as well as their rights as an energy customer.

Barrier questions

### 3.3 CONTEXT OF THE CONVERSATION

The most successful conversations are frequently those that are 'friend-to-friend' (whether the recipient is a friend, neighbour or family). This is less to do with who the recipient is and more to do with how the conversation is initiated. In our trial these conversations rarely run up against issues of Housing Association rents, or Energy Company tariffs. The friend-to-friend approach essentially brings an element of trust into the conversation.

Explaining the project over a cup of tea with friends is an effective way to get used to having an energy saving conversation. While this can feel a bit awkward to begin with, it is a safe way for volunteers to get comfortable with the topic.

#### TOP TIPS – Dealing with difficult situations

#### TOP TIPS

- Pre-communicate the initiative to households – either through letters, leaflets or an article in the community newsletter to increase the likelihood of uptake.
- Be prepared for questions from tenants and help volunteers have the confidence to respond. Give volunteers clear signposting information for when they are 'out of their depth'.
- Encourage volunteers to use friendship networks and other 'warm' opportunities that will reduce the barriers to participation.

The next section covers the monitoring and evaluation which is essential to make sure that you learn from your project and can quantify what impacts you have had.

## STAGE 4: MONITORING AND EVALUATION

Evaluating your project is critical to ensure you are benefiting your tenants and the community and build a business case for further investment in this area. It goes without saying that monitoring and evaluation needs to be planned at the start, so that mechanisms for capturing data are built into delivery.

### KEY POINTS TO PLAN EVALUATION INTO A PROGRAMME

<b>Determine the questions you are trying to answer</b>	Are you trying to increase household awareness, ask the households to take an energy saving action, reduce their energy consumption, switch providers or identify problems? The desired outcome will have a huge influence on what your evaluation methodology should be.
<b>Clearly define your measurable outcomes (success criteria)</b>	<p>What would success (and failure) look like? If you are asking households to carry out a one-off action (reviewing a tariff, identifying where their energy meter is) then the success of the project may be identified through reported behaviours from the householders.</p> <p>If you are asking for repeated actions (taking regular meter readings, switching equipment off rather than leaving on standby) then ongoing monitoring may be needed to identify whether the households have maintained the actions after the end of the engagement.</p>
<b>Think about how to collect the necessary data and how to deal with challenges</b>	<p>This can include baseline surveys, energy meter readings, interviews, website hits, reported switching numbers or other measurement tools.</p> <p>Consider what you need to do in advance to ensure there is baseline data against which to show that a change has resulted from your programme.</p>
<b>Evaluate the results using an unbiased appropriate method</b>	<p>It is good practice to include ways of checking the validity of any results you see, e.g.</p> <ul style="list-style-type: none"> <li>• Using a control group, who have not been part of the project.</li> <li>• Interviewing a small sample of participants in more depth, to ask them about the main reasons for changes.</li> <li>• Collecting the data in a way that will allow a statistical comparison of significance, rather than just comparison of averages.</li> </ul>

## 4.1 DETERMINE THE QUESTIONS

Project questions are generally around the time, cost, quality, and quantity of delivery.

- Did the project deliver what it was supposed to do?
- At what costs? Was the outcome worth the investment?
- Who were you able to help, and how?
- How much energy was saved?
- Which approach was most effective?
- What would you do differently next time?

Once the key questions are defined you can begin to work out which outcomes are important, as some are much easier to measure than others.

## 4.2 DEFINE YOUR OUTCOMES

The table below gives an indication of possible project outcomes, together with possible measurement.

Outcome	Measured as	Measurement options
<b>Quantitative aims</b>	Reduction in energy use, measured as a reduction of fuel use (electricity, gas, LPG, oil or solid fuels)	Direct reading of utility meters
	Reduction of utility costs	Comparison of utility bills or pre-payment rates
	Warmer homes	Measured by temperature loggers
<b>Qualitative aims</b>	Improved perceptions of comfort or other measures of well-being	Before and after surveys
	Improvements in health	Very difficult to quantify
<b>Actions</b>	Adoption of energy saving behaviours	Pledges / self-reported behaviour
	Take-up of energy efficiency offers (e.g. for insulation)	Sign-up numbers
<b>Supporting outcomes</b>	Changes in awareness, attitudes or knowledge about energy efficiency	Before and after surveys

### Measurement options for outcomes

Whilst reduced energy use or bills may be the ultimate aim of the project this data can be difficult to obtain without access to utility meter or billing data, which is covered in a later [section](#).

## 4.3 PLAN YOUR DATA COLLECTION

Your Housing Association may already hold baseline data such as:

- housing stock information
- community demographics
- existing and successful surveying/information gathering mechanisms
- smart meter information, or back-dated energy meter readings.

Other data can come from:

- Utility meter or bill data
- Project sign up data
- Quantitative data on measures delivered, etc.
- Volunteer diaries
- Training sign-in and evaluation sheets
- Surveys with staff, volunteers or recipients
- In-depth interviews or focus groups with staff, volunteers or recipients

Whatever the data source, it is worth considering the following factors.

### DATA GATHERING CONSIDERATIONS

<b>Intensive monitoring can be a barrier to volunteers or households</b>	Consider this in the design of your evaluation so that you can try to strike the right balance and draw on different sources so that if one should not prove so successful, you have data from other sources from which to drive your business case.
<b>Protect participant information</b>	It may be necessary to anonymise data – the UK Data Archive has a useful section on <a href="#">Data Management – consent and ethics</a> .
<b>Consider the practical issues</b>	The UK Data Archive has a checklist to help you consider your requirements - <a href="#">Data Management Plan</a> .
<b>Consider how many households you need to include</b>	If your number of participants is small, it may be necessary to ensure that all those who engaged with the project take part in data monitoring, or surveys, whereas with larger groups it may only be necessary to survey a sample of the participating group.
<b>How do you know it is your intervention which has caused any change?</b>	To be sure that it is your intervention that has caused the changes, rather than other factors, you may need to use a 'control' group, by collecting data from residents who have not been part of the project, to see if their attitudes and behaviours, etc. have changed over the same time period.

Advice on meter reading and surveys are covered in the next two sub-sections.



## 4.3.1 METER READINGS

Meter reading can provide valuable information on the effect of a programme and in demonstrating a reduction in energy use. This in turn can help build the business case to senior management and others.

As part of energy projects, it is often tempting to ask participating households to provide meter readings for gas and/or electricity. The effectiveness of this information is, however, limited if you have not fully considered what you are measuring.



For meter readings to be valuable, a solid, long term data management plan should be developed to obtain robust data. This could include:

### METER READING MANAGEMENT PLAN

<b>Identify similar target and control groups</b>	There is no value comparing a block containing predominantly young families against a control group from a retirement complex. Factors to consider include housing type, refurbishment state, occupancy levels and demographics.
<b>Consider a period of 'meter reading only' data collection</b>	Data collection for potentially 6+ months prior to the start of the pilot will set benchmark trends for the audience you are targeting.
<b>Consider how many data points are needed</b>	<p>Taking meter reading before, during and after interventions in the control group and active group allows both a 'before' and 'after' use to be calculated, providing there are no other significant changes during the period.</p> <p>Taking meter readings at the beginning and end of the project will only tell you what the household consumed for that period. It does not give enough information to tell you whether their performance has improved or not.</p> <p>However, if the sample is large enough, it may be possible to compare use between a control and target group using only two meter readings (start and end), provided that all other variables remain constant between the groups. For this to work the intervention would need to be large enough to trigger a significant change in energy use, for example through changes to the fabric of the homes or a behaviour campaign on heating controls.</p>

### Consider what else may influence energy use

Ideally you will want sufficient data to demonstrate a causal relationship between the project and changes in energy use. It is therefore necessary to understand the impact that external variables can have, including:

- Weather – e.g. changes in temperature or daylight hours
- Household occupants – e.g. family members leaving the home
- Changes to building fabric – e.g. additional work carried out at the property in addition to the programme?
- Occupation patterns – e.g. a member of the household becoming ill, leading to changes in the way the home is used?

These factors can be included through interviews or surveys and by logging weather conditions or building works through the duration of the project.

### Understand the assumptions you are making

It is impossible to take all factors into consideration so in collecting this data you should be prepared to state 'assumptions' and caveats.

If you need to rely on this data robustly, it may be advisable to seek the advice of a data specialist, although a longer history of meter reading data and a larger number of households can go some way to mitigate this as you can compare before and after results from the same household and potentially through similar weather events, for example.

### Plan data collection carefully

Energy meter data can take a long time to collect, frequently involving repeat visits if energy meters are inside the home. In order to quantify the time and resource you will need to assess:

- The number of readings that you are going to take and at which points during your project or campaign.
- Location of the properties involved.
- How you are going to request a meter reading visit (e.g. sending a letter, asking volunteers on house calls to seek permission).
- Who has the expertise to read the range of meters in your organisation.
- What will happen if meter readings cannot be taken.

### Obtain consent

It is important to obtain consent from householders (unless you already have this consent as part of tenancy agreements) and that your project plan includes the additional effort required to capture this information.

### Consider barriers to meter reading

One barrier that you may come up against is suspicion around requests to take utility meter readings. It is worth building into your plan ways to deal with this issue so that it does not tie up resource and negatively impact your timeline. These suspicions can stem from:

- Fear about who the information would be passed on to
- Fear that the information or visits were being used by the Housing Association for other purposes
- Mistrust of energy company or housing association

### Make sure you collect all of the data

Use a data template (on paper or a portable electronic device) to ensure that all relevant details are collected, e.g. meter type (electricity or gas), units, Economy 7 readings, etc. Decide if you will collect data from after the decimal point. Spreadsheets can be used to check automatically if the second meter reading is lower than the first, suggesting that an error has been made.

Note whether the property has photovoltaic solar panels, as these have been known to cause electricity meters to run backwards.

In the SAEP, only one Housing Association was able to collect a full data set – demonstrating the complexity involved in this aspect of data collection. Their success can be attributed to strong communications and transparency about the project aims.

Here are some additional preparatory and support steps to increase take-up:

- A strong communication plan telling residents about the project ahead of the 'ask' for information.
- Personal, formal letters to the target residents telling them about the programme, outlining the full level of commitment and what their data will and won't be used for.
- Signed permission to take meter readings. Staff collecting meter readings can take the letter to the household on subsequent visit to remind residents that they agreed to the readings.
- Clear opportunity for residents to say 'no' at the outset – you don't want to waste time repeatedly visiting a property where the resident felt pressured into saying yes.
- Dedicated staff assigned to meter reading collection (the successful Housing Association had 8 staff members)
- Repeat visits to households
- Make the data collection easy, by giving options for visits in the evening and on the weekend.

"We mostly underestimated the time needed for meter readings, that took a long time and it was hard. We needed to have more information at the start to better estimate this."

Housing Association Co-ordinator

### 4.3.2 SURVEYS

Surveying households can give a robust overview of how your programme has 'landed' with your target audience. Follow up surveying after an extended period can then demonstrate whether new behaviours are being maintained.

For more information on designing effective surveys, see [Survey Fundamentals](#). It provides hints and tips for writing good questions and getting the best answers for analysis from your audience as well as taking you through the full survey design process:

- Design survey process
- Develop questions
- Test and train
- Collect data
- Analyse data

## 4.4 EVALUATE THE RESULTS

Once all of the data has been collected it can be analysed to test the effectiveness of delivery. To plan this, and for more information on how to measure impact the NSMC Social Marketing Toolkit [Designing Evaluation Approach](#) is a helpful resource.

### TOP TIPS – Monitoring and evaluation

### TOP TIPS

- Think through your monitoring and evaluation plan before you start your project.
- Consider the questions you want to answer to determine what information is important.
- Map how you will collect, store and analyse the data, including how long after the programme you will continue to collect follow up information.
- Ensure that you have considered how to evaluate the data so you can make robust conclusions.

Once you have your results, make sure to celebrate, and to thank those who have been involved in achieving the outcomes.

## CELEBRATE

People like to know that their actions are making a difference, and it is very valuable to acknowledge their impact individually and collectively.

At the end of the programme (or at regular intervals) invite all the volunteers back for a celebration event, to recognise their achievements and learn from their experiences through an informal focus group. Reward volunteers who engaged people with certificates or prizes.

Holding celebration events at an inspirational venue helps to complete the 'encourage' lever, inspiring volunteers to continue with actions after the programme has finished.

Keep the celebration events short to make it easy for people to attend in the face of other commitments.



**Housing Association residents at a local sustainable nature reserve as part of their end of project celebration event**

### TOP TIPS – Celebrating success

### TOP TIPS

- Celebrate by taking volunteers somewhere special such as a local attraction.
- Consider ways that you can reward volunteers, such as vouchers, or a Community Award.
- Recognise volunteers in your community newsletter or the local paper!
- Celebrate and provide recognition not just at the end, but along the way.

The final postscript provides a few ideas for continuing the use of volunteers in your work.

## POSTSCRIPT: POTENTIAL OF WORKING WITH VOLUNTEERS FOR THE FUTURE

We know that all Housing Associations are different, facing different immediate challenges and are at different places in their development. Wherever you are, volunteers can form a vital part of your business strategy and can help to deliver on social and community aspirations.

As you develop your volunteer support model that includes some or all of the aspects outlined in this e-book, you can also think about your future development of your volunteer network. Questions such as:

- Now I have a volunteer network, how do I keep them engaged?
- How else can we use the volunteer network to improve our service and business model?
- How do I continue to show the value of my network?

The topics below provide some tips on continuing to make the most of your volunteer network.

### KEEPING VOLUNTEERS ENGAGED

Keeping volunteers in the 'loop' is a critical part of ensuring that they feel part of your group or community, therefore your 'communications' strategy is critical in ensuring volunteers are regularly informed and feel like they are continuing to get benefit from their involvement. You can continue to involve volunteers through:

- Volunteer newsletter or noticeboard in common areas
- Setting up a team Facebook Page or website for interactive chat and event notification
- Running quarterly social events or skills sessions where volunteers get to learn something new
- Volunteer Awards to recognise people who have gone above and beyond.
- Providing volunteer internal opportunities to help individuals develop skills within an organisation which may give them employability skills they are otherwise lacking.

### BUILDING BETTER RELATIONSHIPS

The volunteer network has great scope to improve the relationships between tenants and landlords because of its unique ability to potentially position volunteers as equals rather than tenants or employees.

Some suggestions around achieving this are:

- Forming a transparent relationship with volunteers – bringing them into a trusted network and providing an insight into the work of the Housing Association
- Ensuring that the benefits to residents are emphasised in volunteer programmes to build a sense of mutual accomplishment and respect.
- Providing volunteers with a 'brand' that they can associate with to build a sense of belonging and loyalty that is separate to the Housing Association themselves.
- Use volunteers in focus groups or give them representation in other Housing Association matters.

If you are successful in building a trusted bond with your volunteers, they are likely to talk positively about your Housing Association, improving your standing within certain groups of residents. It will also help you to take a better and more genuine pulse from your residents, allowing you to be more proactive in dealing with any issues as they arise.

## PROVING THE VALUE OF ON-GOING SUPPORT

If building better tenant-landlord relationships doesn't provide you with the evidence you need to show how valuable volunteers can be, then showing an improvement in volunteer (and therefore tenant) skills, awareness and employability may do so.

### VOLUNTEER OUTCOMES

<b>Improved awareness of energy use</b>	Tenants using less energy means saving money on their bills which could help tenants make payments to their landlord on time. This may improve their sense of security at living within that Housing Association.
<b>Improved skills</b>	A better understanding of 'what makes things tick' may empower some residents to troubleshoot problems independently before calling on the help of Housing Association staff.
<b>Improved employability</b>	Volunteers in particular, will gain new skills from volunteering programmes such as people engagement, improved language skills or an ability to prove reliability and trustworthiness. This in turn, may lead to increased employability or open up employment opportunities that tenants had not considered.

Volunteers can form a vital part of your strategy in equipping and empowering residents to take control of their own energy consumption, and therefore bills. A good programme can also greatly improve community relations, but the effort involved in setting up and supporting volunteers should not be underestimated.

This e-book has focussed on energy saving projects, but many of the principles, templates and links can be applied to any volunteer project. A strong volunteer network will provide your organisation with a great resource pool from which you can deliver trusted messages to the heart of your community.

On the remaining pages you will find a glossary of some of the terms used in this e-book and an introduction to behaviour change techniques.

## GLOSSARY

Phrase	Explanation
<b>Behaviour change</b>	An action or habit that can be made, in this case to save energy. This may be a one-off action (such as replacing a light bulb) or an ongoing habit (such as remembering to turn lights off).
<b><u>Social Action</u></b>	Practical action in the service of others, which is carried out by individuals or groups of people working together, not mandated and not for profit, done for the good of others - individuals, communities and/or society and bringing about social change and/or value.
<b>SAEP</b>	Social Action Energy Pilot, funded by the Cabinet Office and run by Global Action Plan with six Housing Associations across England between March and May 2014
<b><u>Social marketing</u></b>	An approach used to develop activities aimed at changing or maintaining people's behaviour for the benefit of individuals and society as a whole.
<b>Behavioural lever</b>	Something that will facilitate, enable or encourage change in behaviours, for example, the issuing of an incentive.
<b>Intervention</b>	An activity designed to change behaviour patterns. This could be a one-off or ongoing activity.
<b>Volunteer</b>	A person connected with the Housing Association, who may either be a tenant, or live in the community served and who gives their time on a voluntary basis.
<b>Recipient</b>	The householder benefitting from the energy saving support or advice from a volunteer.

Glossary



## BEHAVIOUR CHANGE APPROACHES

Behaviour change refers to the process of enabling people to take different actions, in this case actions which result in a reduction in energy use. Behaviours may be one-off, such as signing up for an insulation campaign or ongoing, such as adopting new habits around switching off lights or appliances after use.

It was once thought that human behaviour was rational, and that people would choose the best options for themselves, as long as they had the right information. However, it has been demonstrated over many years that our behaviours are heavily influenced by sub-conscious biases, summarised in books such as Daniel Kahneman's "[Thinking fast and slow](#)". A huge range of behavioural theories and behaviour change approaches have been proposed, with 83 listed in UCL's "[ABC of Behaviour Change Theories](#)".

Despite this complexity, it is possible to make various pragmatic statements, which allow a behavioural approach to have more likelihood of success. At the very least an individual needs to be considered in context of their own self, the social situation in which they live and the environmental context that surrounds them. Whether a person chooses to recycle, for example, will be influenced by:

- Their own attitudes and self-confidence around recycling,
- Whether their friends and neighbours recycle (is it considered normal?), and
- How easy it is for them to recycle given the available local facilities.

The implications are that behaviour change approaches need to consider a range of factors, such as an individual's motivation or ability to complete an action, as well as the trigger which will prompt completion of the action. Much is made of habits, and the need to replace old habits with new ones, covered well in Charles Duhigg's "[The power of habit](#)".

Finally, a variety of levers can be used to encourage behaviours, such as providing evidence of a social norm ("everyone is doing it"), providing incentives for completion of an action and using competition to encourage volunteers and participants. Each of these three levers was used during the SAEP.

To give ideas for further reading, two approaches are introduced below. The first, social marketing, provides a very detailed process to understand why a particular behaviour is chosen, and to increase take up of an alternative behaviour. The second approach, EAST, has been used very effectively in designing processes and materials to increase uptake or participation in various campaigns.

## SOCIAL MARKETING APPROACH

The [Social Marketing checklist](#) provides a framework for thinking through a behaviour, such as behaviours that impact energy use from the audience's perspective and for developing activities which provide alternative behavioural options. More information is available on the National Social Marketing Centre's website ([www.thensmc.com](http://www.thensmc.com)).

### SOCIAL MARKETING CHECKLIST

Do I really understand my audience and see things from their perspective?

Am I clear on what I would like my audience to do?

For my audience, do the benefits of doing what I would like them to do outweigh the costs or barriers to doing it?

Am I using a combination of activities in order to encourage people to achieve the desired action?

## EAST

The Behavioural Insights team have published guidelines on making a behaviour Easy, Attractive, Social and Timely to promote uptake (see [EAST: Four simple ways to apply behavioural insights](#))

### Easy

- Harness the power of defaults.
- Reduce the 'hassle factor' of taking up a service.
- Simplify messages.

### Attractive

- Attract attention.
- Design rewards and sanctions for maximum effect.

### Social

- Show that most people perform the desired behaviour.
- Use the power of networks.
- Encourage people to make a commitment to others.

### Timely

- Prompt people when they are likely to be most receptive.
- Consider immediate cost/benefits.
- Help people plan their response to events.