

Using home energy assessments to engage householders

Why make energy assessments part of your project?

Energy assessments can be a powerful way to encourage occupants to reduce their energy use. A good energy audit reveals the areas where changes can be made and highlights the likely benefits of making those changes. A householder may be aware of the average potential savings of various measures but having a tailored report specific to their home makes the information much more relevant to them. This in turn makes it more likely that they will then act on the findings. If you want to encourage the uptake of specific improvements in your area then carrying out energy assessments first is one very good way to go about it.

An energy assessment can be as simple as a self-completed energy survey of a home (using a tool like CSE's Housing Assessment Tool or the Energy Saving Trust's Home Energy Check), or it could be an in-depth energy audit carried out by a third party, such as a community group or a Green Deal Advisor.

In addition to engaging householders, home energy assessments can help your group in various ways. You will gather real data about the local community to help you assess where the greatest need for a scheme is. This will help to identify areas that may be particularly challenging to retrofit, such as off gas areas, or areas with a high proportion of hard-to-treat housing. It will also help flag up whether there are any 'quick wins' to be had. For example, assessments may reveal that many homes do not have adequate loft insulation. The information you generate will help you to develop tailored schemes for your community, and target those schemes effectively to maximise take-up.

An energy assessment project can also raise the profile of your group locally, increasing the reach of your projects and expanding your mailing lists. Carrying out an assessment is a good first step to build trust in your group. Householders will remember the service and will be more likely to keep up to speed with your activities and engage with future projects.

If your group is new to community energy projects, or if you have new volunteers or members that are not entirely confident giving energy advice, an assessment project can be a very good first project to focus on. The structure of the project can be reassuring. Volunteers will feel that highlighting the service or helping people to fill in an energy survey is a good use of their time and it's an activity that doesn't require an exhaustive knowledge of energy issues.

Running different types of energy assessment projects

The first step of an energy assessment project is to decide exactly what you want to know and why.

Signposting householders

If you are not interested in collecting the results of the assessments, you may decide to signpost to a tool such as the Energy Saving Trust's Home Energy Check.

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Householders can go to this link: www.energysavingtrust.org.uk/homeenergycheck and fill in the details of their home. A report will be generated and sent to them detailing the options for their home and the likely costs and savings. This is a simple approach if your ultimate goal is simply to encourage householders to be more aware of the steps they could take to make their homes more efficient, but it does require the householder to fill in the survey and it might be difficult to find out subsequently how many householders did actually do this and if any acted on the report.

Collecting local data

If you want to collect the results of the energy assessments to help you understand the local housing stock then you will need to use a different tool so that you hold the data and can refer to it when you need to. CSE's Housing Assessment Tool (HAT) is designed to help groups collect data and create energy reports for householders. The benefit of using HAT is that you can store all the data for future reference. This could be invaluable to your group when it comes to designing and targeting energy efficiency schemes.

You may also want to collect other data about the household at the same time, such as the occupant's attitude to energy issues, to help you understand what sort of project they might engage with. It may be that your area has some very specific issues, such as a reliance on oil or LPG fuel, or a lot of heritage buildings, and as such a generic survey may not be the most practical way to collect data. You may wish to design your own survey and consider ways to collate and store the data (e.g. a database or an online survey tool). If so, think about if and how you will feed back the results to the households that take part. Households tend to respond best when they receive a tailored report stating the likely benefits of energy efficiency measures.

Green Deal assessments and EPCs

If you want to carry out official assessments for the purposes of accessing the Green Deal this needs to be done by an accredited Green Deal Advisor, so you would need to think about who you would work with and how it would be paid for. Would you want to offer this as a free service (in which case you would need to find funding); or would householders be expected to pay for the survey? Green Deal Advisors can be found on the official accreditation website: www.greendealorb.co.uk

Energy Performance Certificates (EPCs) contain information about a property's energy use and typical energy costs, recommendations about how to reduce energy use, and an energy efficiency rating from A (most efficient) to G (least efficient). This information all forms part of the Green Deal Advice Report but an EPC is generally cheaper, so if you are commissioning assessments (and depending on what you want to achieve), this could be an alternative to consider.

It has been a requirement for several years now for EPC reports to be carried out whenever a property is built, sold or rented, and the data is in the public domain. This means that if you want to get a quick idea of the sorts of properties in your area and their level of energy efficiency you could access reports online. However, if your aims are to engage with householders whilst carrying out an energy audit, people who have had a recent EPC report on their property might be less interested in taking part. To look up EPC assessors and to search for EPCs for properties in your area, use this website: www.bit.ly/VMLBG2

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Home energy audits

You may also be thinking about going into homes to carry out formal energy audits on site. If this is the case then you will need to make sure you are happy that volunteers going into homes will be safe and that they will behave in a way that does not bring your group into disrepute. The Suzy Lamplugh Trust has some useful information about working safely in other people's homes: www.suzylamplugh.org

Data protection

If you are intending to collect personal data you do need to ensure that this is stored safely, in line with the Data Protection Act. You must inform householders that their details will be stored and you must never pass on this information without the knowledge and consent of the householder. The fundamental principles of the Data Protection Act state that you should:

- only collect information that you need for a specific purpose;
- keep it secure;
- ensure it is relevant and up to date;
- only hold as much as you need, and only for as long as you need it;
- allow the subject of the information to see it on request.

For more information about your obligations to safeguard personal data visit the ICO website: www.bit.ly/bnpNxa

If you intend to use the data you collect for future projects, do make sure you have a robust data protection statement and that householders are aware of this. Examples of the sort of thing you might want to use survey data for include designing and targeting energy schemes, direct marketing of your group and activities, creating an evidence base for a Neighbourhood Plan, or referring a household to a partner agency, such as Age UK.

Gathering data

Once you have decided what information you want to collect and how you will store it, the next step is gathering the data. Most successful campaigns use a variety of different methods to distribute surveys to increase the rate of return, because every household is different and methods that work for one household won't necessarily work for another. An online survey, such as Survey Monkey (www.surveymonkey.com), is a quick and easy way to gather data if you have a good mailing list built up as you can just set up the survey and send the link to your contacts. However, you also need to think about how to reach new people and how to reach those without access to the internet.

You could also create paper survey forms for households to fill in, which you could leave with a collection box at local community hubs (libraries, community centres, schools, etc.). If you have lots of active volunteers you may also want to consider a door-knocking campaign and/or attending local events where people may spend a few minutes going through the survey with you. Coffee mornings, support groups, farmers markets and other similar events are usually a good bet. If you are planning on door-knocking in the area, ensure that local Police Community Support Officers are aware. You can find your local neighbourhood policing team here: www.police.uk

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Some groups have secured funding for this activity in the past and have found that offering a payment to volunteers for completed surveys has helped boost the return rate. Offering a prize draw to householders can also increase the response, but be wary of offering very “green” prizes if you want a wide range of responses, else you may alienate those that do not normally engage with an energy project.

To get a decent data set out of an energy assessment project you will need to get as many responses as possible from each of the representative property types in your area. This is where local knowledge of the housing and occupant types will really help, so if you haven't already done so it is well worth doing a walk around to visually assess the different property types in your community. This will help you to design your targeting strategy.

See also the PlanLoCaL resources: ‘Understand your local area walk around’ | ‘Writing a marketing plan’

Follow up and action planning

Once you have collected a reasonable number of responses you will want to analyse the results to see what sort of follow-up would be most useful. It may be that the results highlight the need for loft insulation, or show a lot of solid-walled properties with high bills. Use the results to pinpoint any particular issues or concerns that are cropping up frequently. You can use this information to inform your plans for community engagement. HAT will help you to collect your results and assess the impact of energy saving measures across the community.

Think about how you might display the results of the project. You may have decided to send all the survey respondents a personalised report, using a tool like HAT. Even if this is the case it is still useful to think of other ways to inform the wider community of your findings. This ensures that households that did not directly take part can still find out about the project and which possible measures they could install in their properties, and that local agencies are aware of the issues that have been raised during your project. You could produce a summary of the findings (for example a set of posters or case studies) to display at events and at community hubs. You could also think about producing some guidance notes for overcoming the particular issues you have found to be common in your community, do a series of talks for local groups, or hold public meetings to inform householders of your findings and help them plan ways to reduce their energy use. Many of the resources in PlanLoCaL are designed to help you do this.

See also the PlanLoCaL resources: ‘Top Energy Savers game’ | ‘Comparing costs and benefits’

Sharing results

If you are thinking of sharing the results of your project, make sure you are allowed to do this according to the data protection statement you have used. Also, be very aware of the potential commercial value of your data and make sure you do not give away something which would bring value to your group or could be misused. Your local knowledge and the data set you have collected may mean you are in a good position to work with local installers or local schemes where your data would be of use to target the right households. If you decide to work with a local scheme make sure you negotiate a fair deal for your group. For example, you may want to negotiate a referral fee for every household you sign up to a local scheme, or ask for a management fee.

See also the PlanLoCaL resources: ‘Finding the right installer’ | ‘Local installer networks’