



# Task 24 Phase II ExCo Update

## What is Task 24 Phase II?

*Why are we doing this? What could you get out of it?*  
*Task 24's view of the Energy System*

We pose that the *Energy System begins and ends with the human need for the services* derived from energy (warmth, comfort, entertainment, mobility, hygiene, safety etc) and that **behavioural interventions** using technology, market and business models and changes to supply and delivery of energy are the *all-important means to that end.*

➔ Move from a technocratic lens to a 'human' lens and show how whole-system and multi-disciplinary thinking can be applied in practice.

For more information, visit [www.ieadsm.org](http://www.ieadsm.org)

*If there is ONE THING to take home from this:*

**IT'S ALL ABOUT THE  
PEOPLE!**

*Who are we doing this Task for/with?  
Our audience: Behaviour Changers*

Government



Industry



Researchers

The Third Sector



Intermediaries





## *What are we doing? Our objective (in short)*

The overarching impact of this Task is to provide a **helicopter overview of best practice** approaches to behaviour change interventions and **practical, tailored guidelines and tools** of how to best design, implement, evaluate and disseminate them in real life.

➔ **Multi-stakeholder collaboration and shared learning is our top objective**



# The Subtasks of Phase II

## 5 – Expert Platform (upgraded)

6 –  
Understanding  
Behaviour  
Changer  
Practices in  
Top DSM  
Areas

*‘The Issues’*

7 –  
Identifying  
Behaviour  
Changers in  
these areas

*‘The People’*

8 –  
Developing a  
toolbox of  
interventions  
to help  
Behaviour  
Changers

*‘The Tools’*

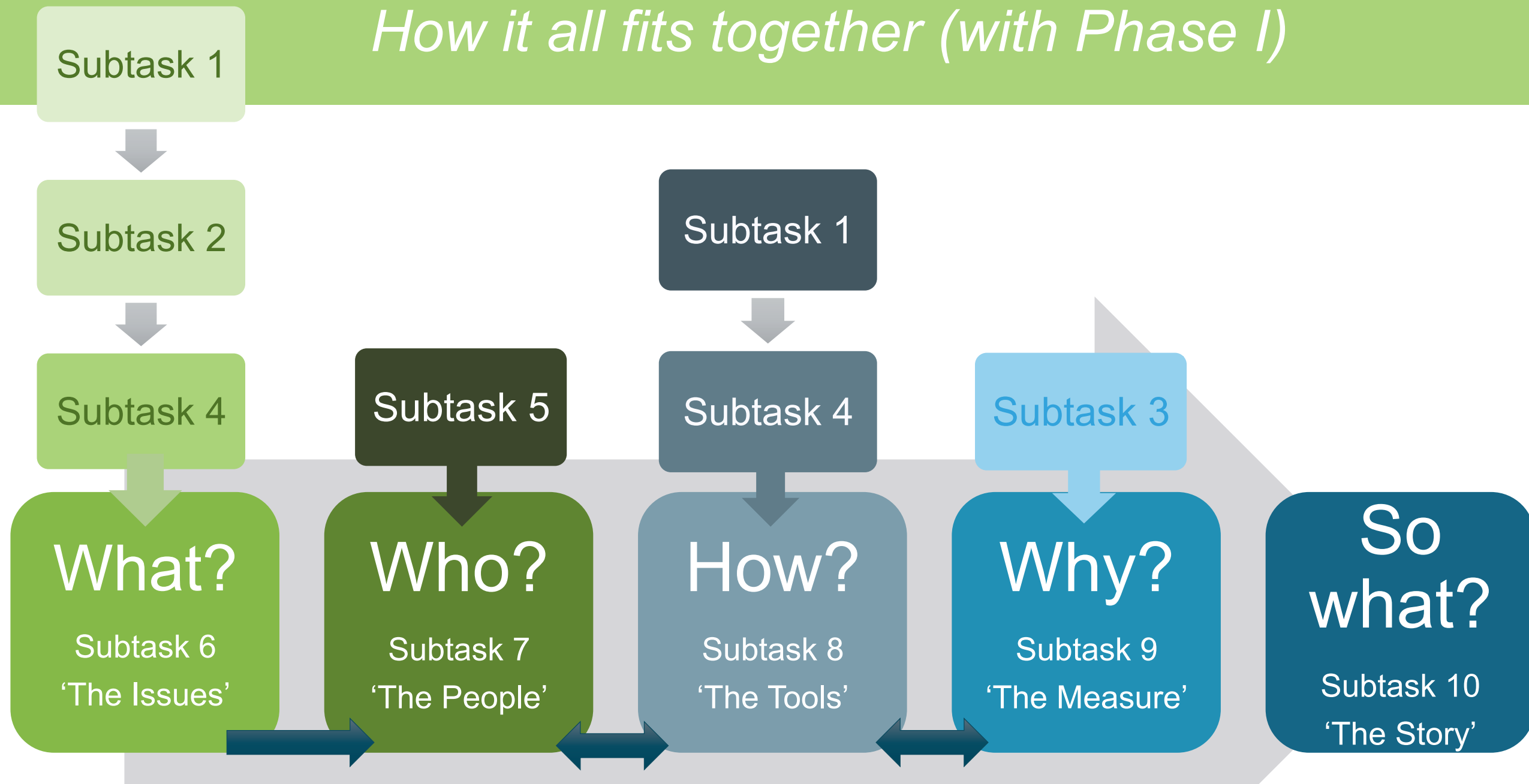
9 –  
Standardising  
Evaluation  
beyond kWh

*‘The  
Measures’*

10 – Telling an Overarching Story *‘The Story’*

# Task 24 – Phase II

How it all fits together (with Phase I)





# Task 24 Phase II ExCo Update



Objectives for the  
last 6 months

## *Subtask 5 – Expert Platform and dissemination Objectives from the last 6 months*

- Expert platform continually growing and getting used
  - ➔ 245 experts and counting
- New content including presentations, videos and reports uploaded
  - ➔ over 145 presentations and videos, all finalised reports and publications (close to 60!) are uploaded
- Continue publicising and dissemination of Task 24, including at international conferences
  - ➔ IEA EBC Annex 66, Australian University lecture, IEPEC paper and SCE report ST9, ACEEE and BEHAVE papers, Energy Efficiency paper, ERSS Special Edition on storytelling (editor) including paper/s, 2 international workshops as part of int'l conferences

## Subtask 6 – The Issues

### Objectives from last 6 months

- Building on work from Subtasks 2 and 4, develop lists of common **top 3 DSM issues** and their potentials in each country → **In progress in NZ, SE, CA, NL, IE**
- Research and review **current approaches** and practices on these top issues → **In progress**
- Feed these cases, and the ones analysed in Subtask 1 and 2 into a **Toolbox of Interventions (ST 8)** → **In progress**

*What behaviours are we actually trying to change?*



**Home owners:** Share PV with your neighbourhood's energy ecosystem (NZ)

**Commercial building tenants and landlords:** co-develop green leasing that works (SE)

**Building Management Operators in Hospitals:** Engage with building management operators and hospital users on energy savings (CA and USA)

**Universities:** How to use ICT to better save energy (NL)

**Residential:** Habitual behaviours (IE)

➔ It can be any behaviour, on any DSM issue in any sector. It's about the process and the people, not the issue or tools

## Subtask 7 – The People

### Objectives from last 6 months

- Identify the most appropriate Behaviour Changers in each participating country
- Develop national Behaviour Changer dialogues
- Backbone support to help ongoing communication between the Behaviour Changers
- Evaluate Behaviour Changer Framework's impact
- Collect examples of successful matchmaking stories.

➔ Behaviour Changers have been identified in Sweden, the Netherlands, Ireland, New Zealand, Toronto and South Carolina and first workshops were held there. Interview, case study and report templates have been finalised and NL, SE and NZ reports drafted









## *Subtask 8 – The Tools*

### *Objectives from the last 6 months*

- Use the **Collective Impact Approach** via the BCF
- Collect information for a **Decision-making Tree???**
- Develop the common language of **Storytelling** further
- Identify all the tools in each Behaviour Changer's **Toolbox** of Interventions
- Continued testing and development of the **Evaluation Tools (ST 3)**

➔ Several objectives are underway, e.g. evaluation guidelines, fact sheets and toolboxes, Special Edition in ERSS on Storytelling

## *Subtask 9 – The Measure Objectives from the last 6 months*

- 4 publications on the website (1 in Phase I ST3 and 3 in ST9) → New paper on the toolbox published in IEPEC conference 2016 and psychometric testing paid by SCE finalised, Beyond kWh website up
  - Co-funding by SCE and PG&E ~USD100,000
  - Presented tool at BEHAVE Task 24 workshop
- The evaluation tool was going to be internationally validated but with only 3 countries participating in ST9, this isn't possible (needed 4 minimum). We are looking at finding other ways to do this.

*Subtask 10 – The Story*  
*Objectives from the last 6 months*

- Collate, analyse and distil all information collected in Subtasks 6-9. Develop **an international, interactive handbook** with guidelines and recommendations including

→ **This will not commence until mid 2017**

## *(Voluntary) Subtask 11 – The Pilots Objectives from the last 6 months*

- Attract **co-funders** in countries from industry, government, research or the third sector to pay €15,000 to test Behaviour Changer Framework and toolbox on different, specific DSM issues
- ➔ Interest from Government in NZ (contracted) and Carolina Health System in Charlotte (contracted), Toronto University Health Network (work in progress), Sinai Cedar Hospital LA, Energy Efficiency Vermont and PG&E...



# Expert meetings, seminars, conferences in last 6m

Date	Place	# of Experts	Type of meeting	Government	Industry	Academic
Apr 2016	Dublin, IE	12	SHM	6	3	3
Jun 2016	Wellington, NZ	8	IEA	4	2	2
Jul 2016	Wellington, NZ	35	SHM, EX	10	10	15
Sep 2016	Coimbra, PO	70+	EX			
Oct 2016	Stockholm, SE	10	SHM	4	4	2

Date	Place	Participants	Type of meeting	Government	Industry	Academic
Apr 2016	Vienna, AT	>150	Workshop			
Jul 2016	Wellington, NZ	>250	Conference			
Aug 2016	Monterey, US	>1500	Conference			
Sep 2016	Australia	20+	Lecture			20+
Sep 2016	Coimbra, PO	30	Lecture			



## *Dissemination in last 6 months*

- BCF Workshop report with learnings from >15 workshops
- Three ST6 & 7 reports (NL, SE & NZ)
- 2 ST9 reports (IEPEC and SCE report)
- Journal of Energy Efficiency ST8 BCF paper
- Workshops and papers BEHAVE, ACEEE & Energy Cultures
- Co-editor and storytelling paper for ERSS Special Edition
- 2 abstracts in ECEEE summer study
- Spotlight and newspaper article NZ

## *Collaboration with others – is imperative to Task 24*

- EBC Annex 66 – Modelling building occupants' behaviour
- IEA Secretariat
- PG&E, SEEchange Institute, Efficiency Vermont (US)
- Queensland Government and University (AUS)
- Sheffield Hallam, Oxford and DeMontford Universities (UK)
- Charlotte and Toronto hospitals (South Carolina, US and CA) and many more...
- Energy Cultures and Green Grid projects (NZ)
- BECC, BEHAVE conferences (international)

# Task 24 Phase II ExCo Update

Objectives for the  
next 6 months, timeline,  
Budget and ExCo  
matters

## *Task 24 – Phase II*

### *Objectives for the next 6 months*

- **Subtask 5:** Attract more experts including collaboration with Annex 66 expert platform, Special Edition storytelling, EE and ECREEE papers, Beijing workshop 2017?
- **Subtask 6:** Work on issues definition especially with Austria (and Ireland)
- **Subtask 7:** Start in Austria
- **Subtask 8:** Storytelling & double-loop evaluation guidelines, BCF paper
- **Subtask 9:** Outreach
- **Subtask 11:** Collect more real-life contracts and case studies

# Task 24 – Phase II Timeline

Based on 4 participating countries.

Subtasks	2015	2016	2017	2018
ST 0 Admin	Active			
ST 5 Platform	Active			
ST 6 Issues	Active	Active		
ST 7 People	Active	Active	Active	
ST 8 Toolbox		Active	Active	
ST 9 Measure	Active	Active	Active	
ST 10 Story				Active
ST 11 Pilots		Active	Active	Active

Please note that due to the late completion of Phase I, Phase II did not commence until April 2015, thus pushing this timeline out by 4 months

## Task 24 – Phase II Budget

- First year invoices paid
- Second year invoices paid by SE, NZ, NL
- Issues with AT payment
- 3<sup>rd</sup> year shortfall AT, NL which will mean shortfall in paying ST9 (doesn't have requisite 4 countries)

→ Budget is on track, longer budgetary breakdown report sent to Swedish Energy Agency at their request



## Task 24 – Phase II Matters for the ExCo

- **ST9** now has a psychometrically-tested and validated tool (with Californian utility customers)
- How can we **foster outreach** to test the tool in other countries? Started with BEHAVE Task 24 workshop, will try add it to ST11 contracts
- Ideas?
- **Can we drop the decision-making tool (ST8)** seeing we focus with so much more depth on collective impact, storytelling and double-loop learning?
- **Can we change wording** in work plan on ST11 to go beyond current participating countries
- **Please accept this status report**

*Task 24 – going forward...  
We want more countries! But we have a different idea of  
funding our Task in Phase III which we can trial already*

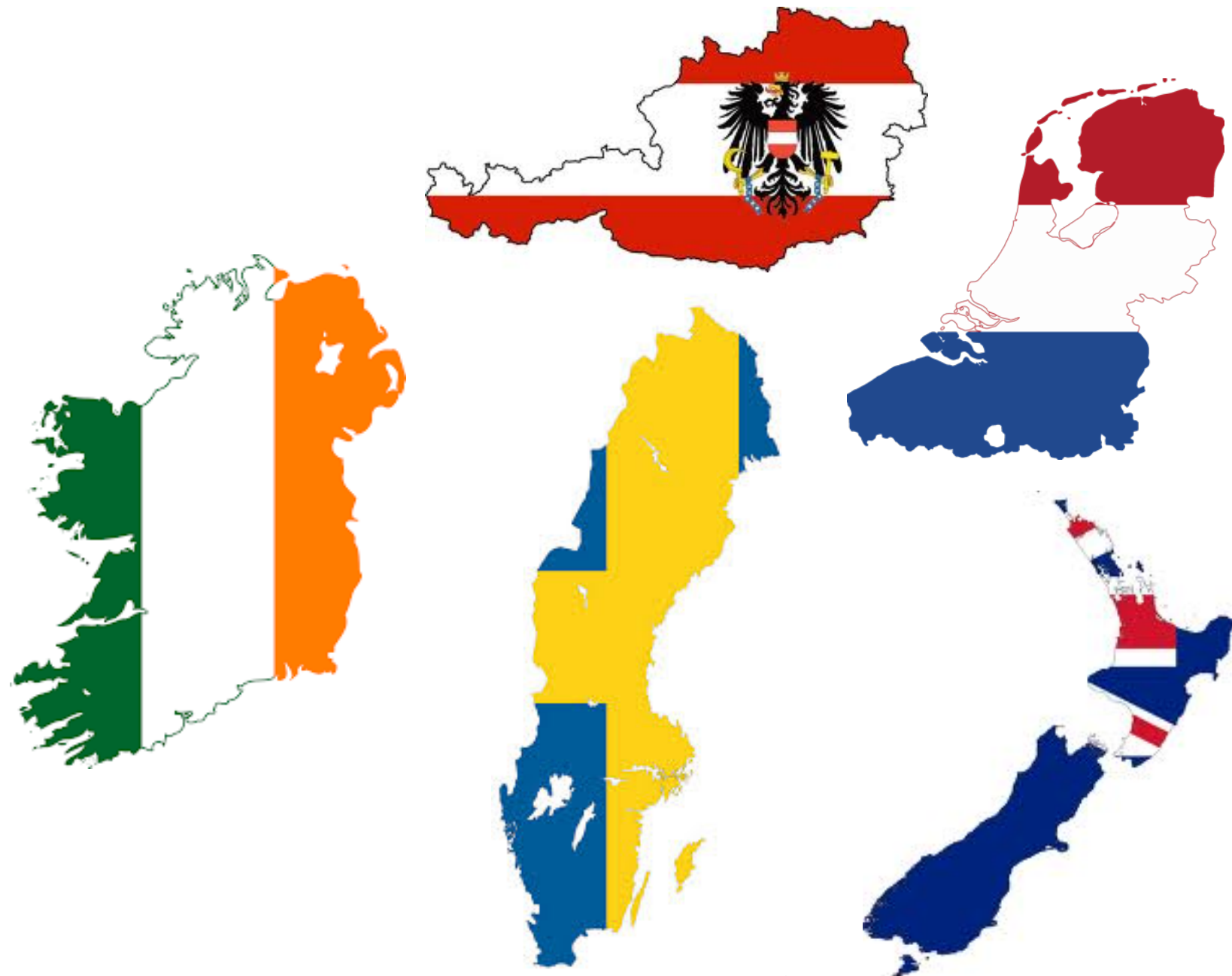
**CANADA**

**AUSTRALIA**

**US**

**UK**

**FRANCE**



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## *A different funding model for Phase III which we are trialling with ST11*

### The “Entrepreneurial OA with seed funding” model

- Crowdfunding? Yes – but we have to understand who ‘our crowd’ is...
- We have 17 members in the DSM, most of whom have not backed any Tasks in quite some time...
- They all pay into the common fund, and we may need to review how some of the money in the common fund could be spent to support more research, or have an extra research funding pot that everyone pays into
- For example, if each member would pay €2,000 pa toward Phase III, that would provide enough baseline support for the OA to run the administrative side of Task work (travel, website and media development, publications, workshops)
- Then Tasks further on the field research/implementation spectrum could reach out to non-state actors (e.g. businesses, large institutions, utilities, the third sector, local government...) to get money for individual case studies which would further our collective knowledge

## *What is good about this idea as a new business model?*

- Less onus on individual countries to find large amounts of money for Tasks
- Every DSM member is participating and gets value out of the Task outputs
- Every DSM member country experts can participate and provide case studies
- We can reach out to non-state actors and collect data from scales that government agencies don't usually look at –e.g. individual businesses (especially SMEs), sectors like hospitals and education, the third sector, municipalities...
- We can reach out to countries not in the DSM/IEA and collect a much more global and realistic set of knowledge from countries that can't afford DSM membership or are non-OECD
- It will revitalise the DSM Programme as it will provide much more engagement among all members, their country experts, other experts and countries and much increased global knowledge on DSM issues
- It would cement the DSM Programme as the global go-to on these energy system transition issues we think we strategically need to focus on

## *What could be concerns about this idea?*

- Each country will either have an additional small contribution to make OR...
- We will need to take a hard look at how we spend the common fund and where we can save money to spend on research support instead
- There is more onus on OAs to find the money and case studies elsewhere. We'd need to have a minimum level of additional knowledge that needs to be brought in by each Task (e.g. 2-3 case studies/non-state actors per year?) to not have Tasks stagnate
- It will take us more into field research and even a form of 'consultancy' (as it will make contracting easier) but if we want to be the go-to place for future thinking on systemic transition issues, we will have to be able to prove how this works in practice, in many different countries, on different issues and with different stakeholders
- Anything else?



## *Can we trial it first?*

- There are already precedents for some of this funding model in the DSM
- E.g. we pay the DSM University and Task 0 out of the common fund
- We have seed funding for Tasks, why not have a level of baseline funding for Tasks that are already running and can't find money for extensions?
- Task 16 and 24 have much global interest and work with non-state or non-DSM TCP actors already, we could use these projects as case studies to increase the amount of publications and output we have on our website, plus of course the wider outreach associated with this work
- It would be a shame to lose the huge engagement, respect and interest we have in some of our Tasks, and the very large expert networks we have created
- Task 24 already has a voluntary Subtask 11 which trials its many tools in real-life practical interventions with different stakeholders and non-state actors e.g. the largest hospital network in the Carolinas (US) or on EV roll-out in NZ
- This new approach reflects what Task 24 has shown is needed to change from a top-down, technocratic thinking to a systemic, collaborative, multi-stakeholder approach.



Thank you very much for your attention!

*Any comments or questions?*