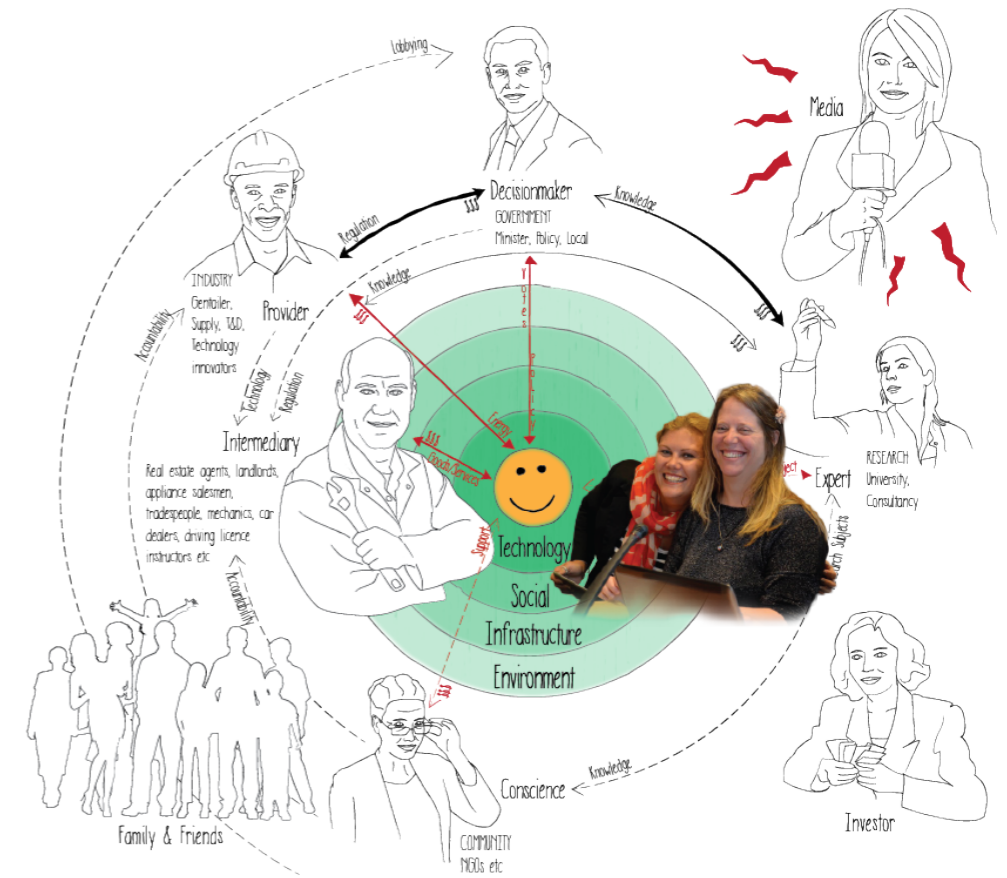


Task 24 ExCo Update Phase I & II



Closing the Loop: Behaviour Change in DSM – From Theory to Practice and Helping the Behaviour Changers

Finalising Phase I

- Subtask 2 report for Austria finalised
- Subtask 4 reports for Austria and Italy finalised
- Over 40 publications on the IEA DSM website

➔ **ExCo: Please officially sign off Phase I as completed**

Task 24 Phase II ExCo Update

Objectives for the
last 6 months

Task 24 – Phase II

Objective in a tweet (or two)

To develop, in collaboration with the Behaviour Changers, a **toolbox of practical interventions** that works for their specific DSM issues, contexts (sectoral and national), mandates and needs. We also aim to extract cohesive, overarching themes to **tell a coherent international story.**



Task 24 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.**

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’*

Subtask 5 – Expert Platform Objectives from the last 6 months

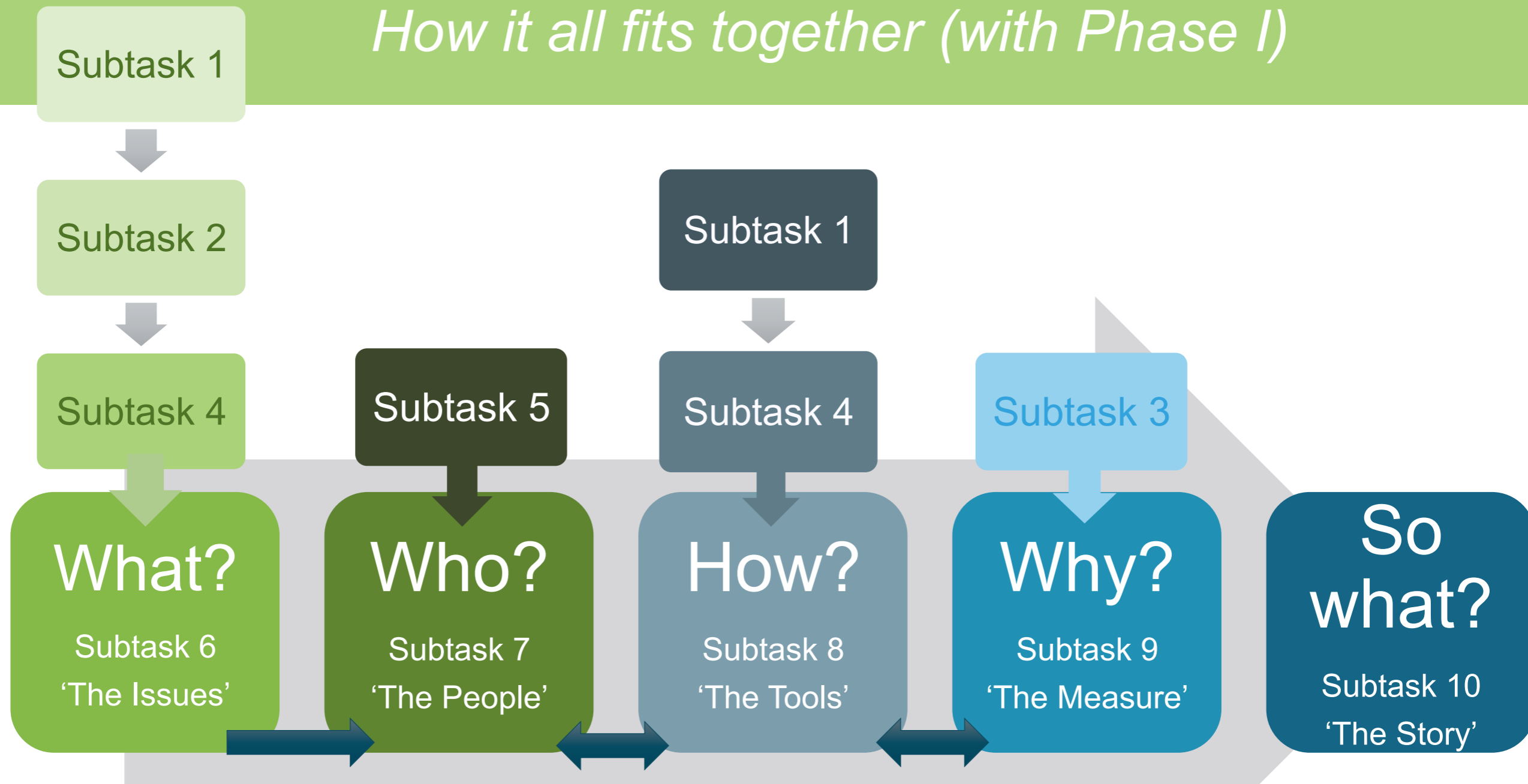
- Expert platform continually growing and getting used
 - ➔ 235 experts and counting
- New content including presentations, videos and reports uploaded
 - ➔ over 145 presentations and videos, all finalised reports are uploaded
- Continue publicising and dissemination of Task 24, including at international conferences
 - ➔ BECC workshop, presentation and experts dinner, Spotlights, EEIP Magazine, 2 guest lectures, DSM University webinar, Bright Conference presentation, IEA Behaviour Workshop, new website content finalised, Phase II flyer, IEPEC report published & presented, Energy Efficiency paper (in press)

➔ The Expert Platform will be upgraded in Phase

For more information, visit www.ieadsm.org

Task 24 – Phase II

How it all fits together (with Phase I)

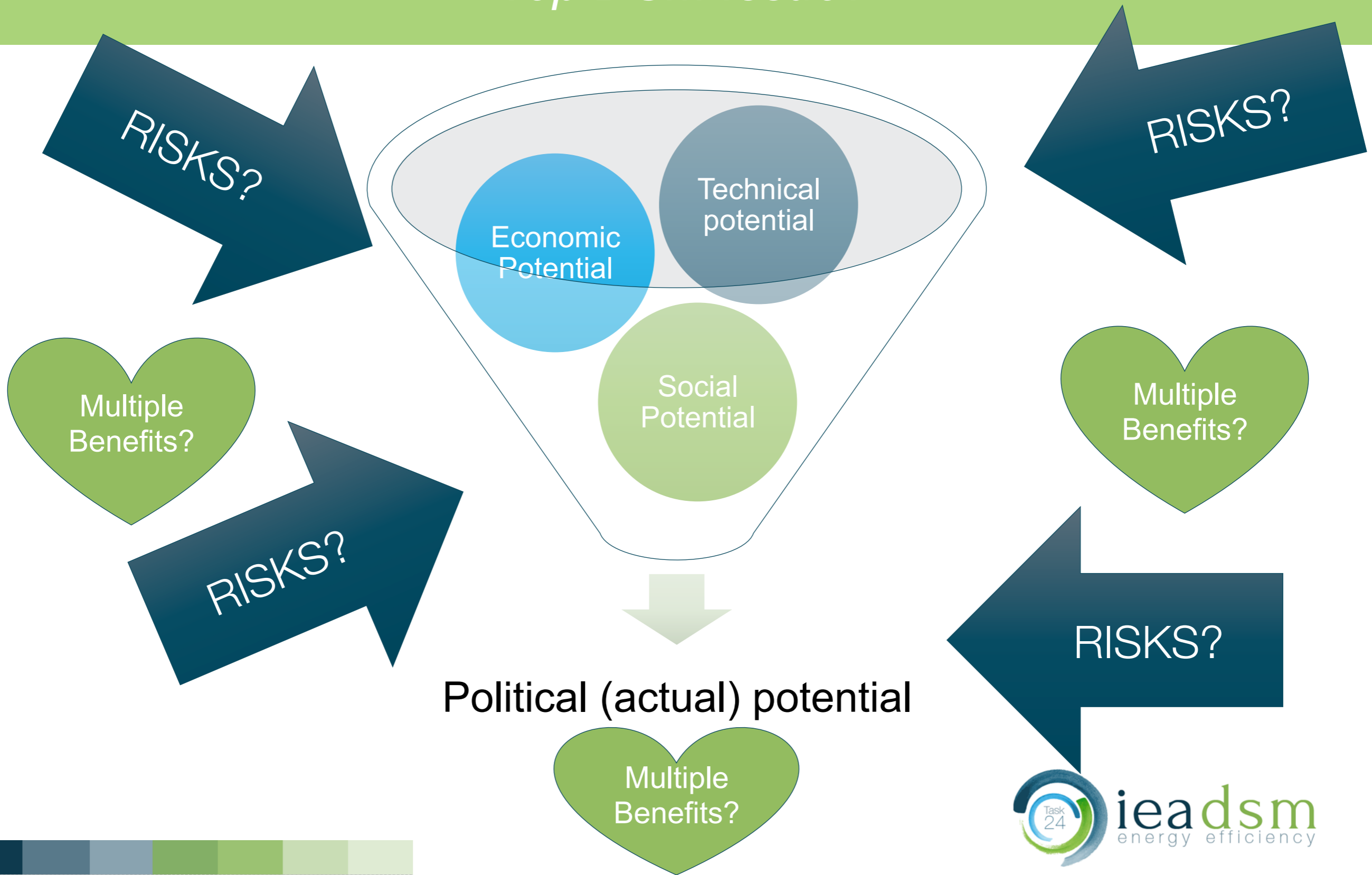


Subtask 6 – The Issues

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**
 - 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)
- **The ‘Monster’ will continue to grow in Phase II**

What are the potentials, risks and (multiple) benefits for the Top DSM Issue?



Who is the End User whose behaviour we are trying to change?

Tenants? In single homes or apartment buildings?

Home owners? (single or apartment) ?

Office workers in a large commercial building?

Retail workers in smaller retail buildings?

Landlords? Private or large-scale? Social housing? Commercial?

Building Management Operators? Office or eg hospitals?

Smart meter/feedback/EE technology installers or developers?

Drivers? Truck or private vehicle? Behaviour or Mode Switching?

Freight companies? Behaviour or technology switching?

SMEs? Which sector? CEOs or energy managers/CFOs?

Who else could it be?



What behaviour are we actually trying to change?



Home owners: Install PV, learn your home's energy eco-system, share it with your neighbourhood's energy eco-system (NZ)

Commercial building tenants and landlords: co-develop green leases that work (SE)

Restaurant owners/SMEs: close doors, turn off burners, lights etc (Fort Collins)

Building Management Operators in Hospitals: Engage with energy managers and hospital users on energy savings (CA)

Energy companies: Go all the way with energy efficiency regulations, not just the easy route (AT)

SMEs: Overcome inertia, engage with new business models (NL)

Subtask 7 – The People

Objectives from last 6 months

- Identify the most appropriate Behaviour Changers focusing on one of the top 3 DSM issues chosen by each participating country
 - Develop national Behaviour Changer dialogues in each participating country by holding (bi) annual workshops
 - Backbone support to set a common agenda, measurement systems, mutually reinforcing activities and ongoing communication between the Behaviour Changers
 - Evaluate Behaviour Changers' impressions on the effectiveness of the Collective Impact Approach and use of narratives as a common language to overcome barriers
 - Collect examples of successful matchmaking stories.
- Behaviour Changers have been identified in Canada, Sweden and New Zealand and first workshops were held there. 3 UK experts visited NZ. Lots of matchmaking at BECC conference.

A model for collaboration

Collective impact = the commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem.

The Five Conditions of Collective Impact

Common Agenda	All participants have a shared vision for change including a common understanding of the problem and a joint approach to solving it through agreed upon actions.
Shared Measurement	Collecting data and measuring results consistently across all participants ensures efforts remain aligned and participants hold each other accountable.
Mutually Reinforcing Activities	Participant activities must be differentiated while still being coordinated through a mutually reinforcing plan of action.
Continuous Communication	Consistent and open communication is needed across the many players to build trust, assure mutual objectives, and create common motivation.
Backbone Support	Creating and managing collective impact requires a separate organization(s) with staff and a specific set of skills to serve as the backbone for the entire initiative and coordinate participating organizations and agencies.

Who are the RIGHT Behaviour Changers to collaborate on our issue/behaviour?

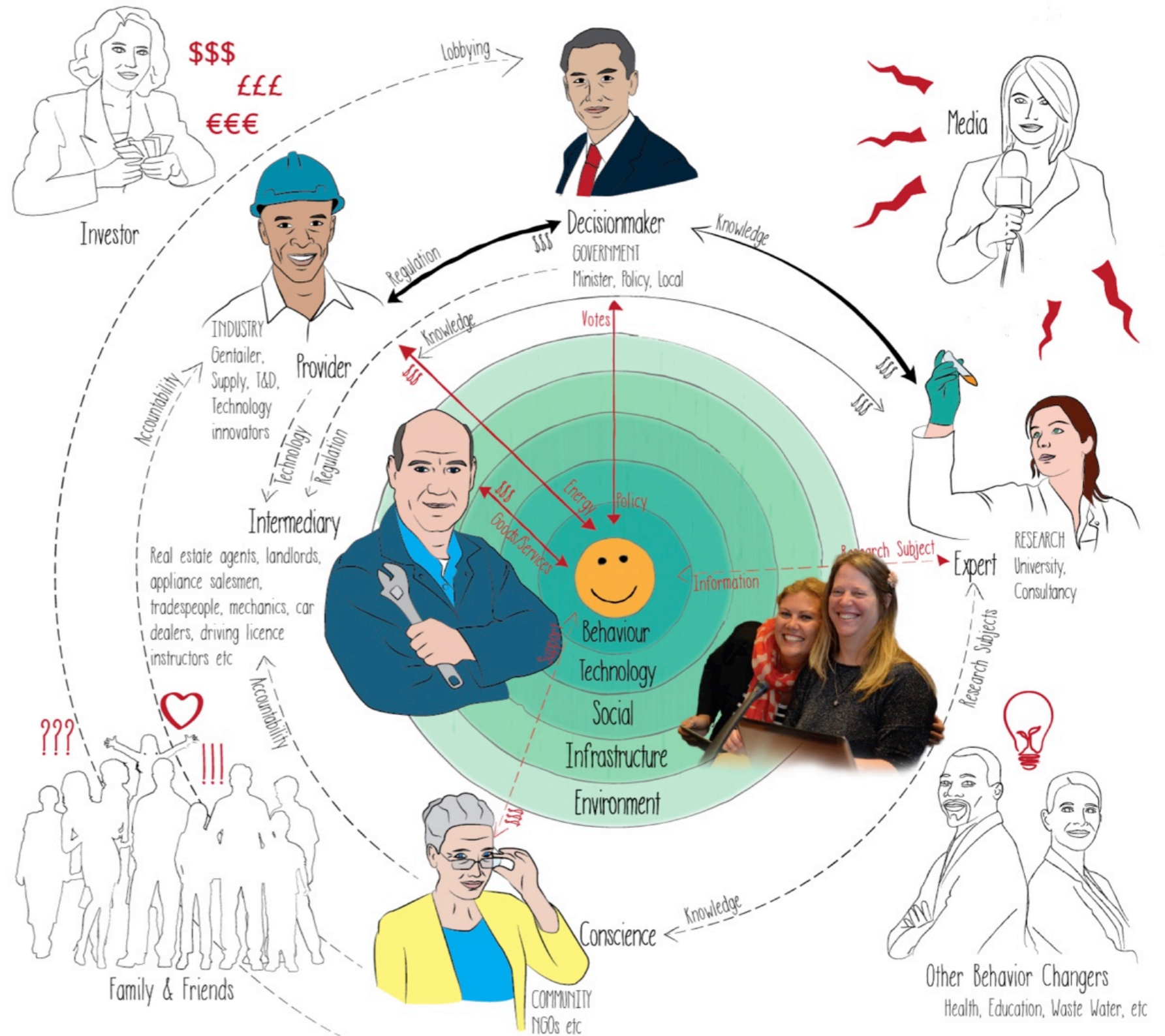
Government – which level, agency, person/s?

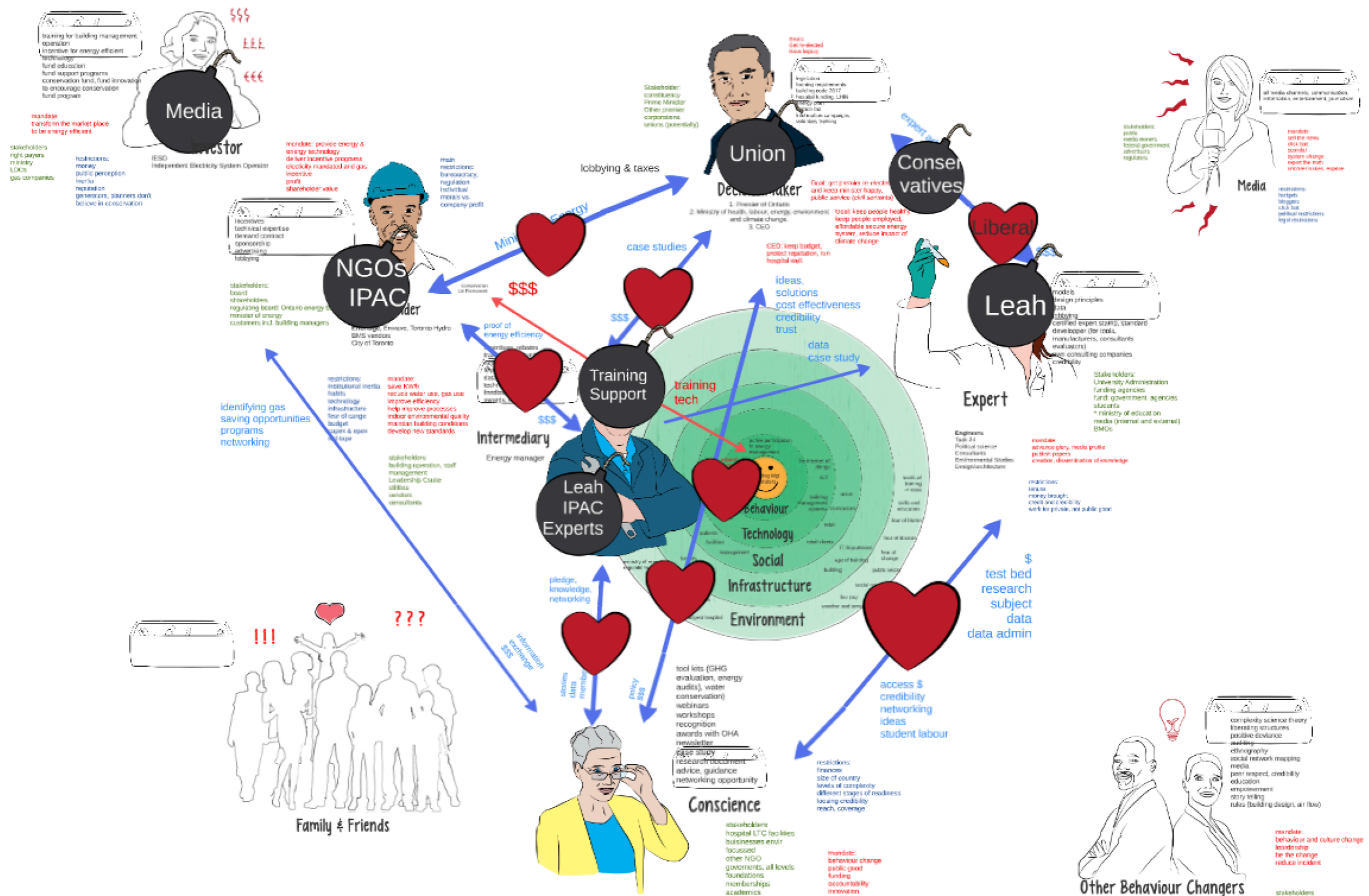
Industry – which sector, organisation, person/s?

Researchers – which discipline, University, person/s?

The Third Sector – which sector, association, person/s?

Intermediaries – which sector, company, person/s?





Subtask 8 – The Tools

Objectives from the last 6 months

- Use the **Collective Impact Approach** to unite Behaviour Changers. Evaluate this approach continually via stakeholder analyses
- Collect information for a **Decisionmaking Tree** to pick the most appropriate case studies and models of understanding analysed by Task 24 (ST 1, 2 and 6) and test its usability with the Behaviour Changers
- Develop the common language of **Storytelling** further and provide different examples of using storytelling and narratives in practice
- Identify all the tools in each Behaviour Changer's **Toolbox** of Interventions, analyse their pros and cons, risks and opportunities, where they fall short and multiple benefits
- Continued testing and development of the **Evaluation Tools** (ST 3) that can prove if a (toolbox of) intervention/s leads to actual, ongoing behaviour changes in practice.

➔ Several objectives are underway, eg evaluation guidelines, fact sheets and toolboxes, Special Edition on Storytelling

Subtask 9 – The Measure

Objectives from the last 6 months

- Methodological Review of the literature by Karlin and Ford called *'What do we know about what we know'* (Deliverable 3) → New paper on the toolbox published in IEPEC conference 2015
- Co-funding by SCE and PG&E → work is currently underway to do psychometric validations
- The evaluation tool will be validated in the US context first, then taken into international validations with the participating countries (around early 2017)

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:

- Evidence of the usefulness of following a Collective Impact Approach to solve complex whole-system, societal energy problems in practice.
- A decision-making tool from 75+ cases collected in Subtasks 1, 2 & 7
- A practical guide on storytelling with the many examples and stories collected here.
- Overview of countries' and sectors' toolboxes of interventions, common findings and learnings.
- Overview of usefulness of the evaluation tools for each country and sector (as developed in ST 3 and ST 9).

→ **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 issues
- ➔ Interest from Government in NZ (contracted) and several US energy trusts and city councils

Expert meetings, seminars, conferences in last 6m

Date	Place	# of Experts	Type of meeting	Government	Industry	Academic
27/05/15	Toronto, Canada	13	SHM	2	9	2
03/06/15	Eceee summer study	50	Experts	10+	5+	30+
11/06/15	Stockholm, SE	8	SHM	3	4	1
14/06/15	London, UK	12	SHM	3	2	7
23/09/15	Wellington, NZ	12	SHM	3	6	3
19/10/15	Sacramento, US	15	Experts	2	4	9
21/10/15	Sacramento	31	Experts	4	9	18
26/10/15	Toronto, CA	15	Experts	2	11	2
2/11/15	San Francisco	30	SHM	4	24	2

Date	Place	Participants	Type of meeting	Government	Industry	Academic
26/05/15	Toronto, CA	40+	Seminar	10	25	5
11/06/15	Stockholm, SE	20	Seminar	20		
13/05/15	DSM University	>100	Webinar			
02 to 06/06	Eceee summer study	500	Conference			
19/10/15	BECC	700	Conference			
28/09/15	Australia	20+	Lecture			

Reports and publications produced in last 6 months

- 2 IEA DSM Spotlight Articles
- Filmed presentations and minutes from Toronto
- BCF Workshop report incl CA, ECEEE, SE, NZ, BECC
- One more ST2 reports (AT)
- One ST9 report (IEPEC)
- Two ST4 reports (AT, IT)
- EEIP Magazine article
- Phase II Flyer
- Energy Efficiency IEPPEC paper

Task 24 Phase I ExCo Update



Objectives for the
next 6 months

Task 24 – Phase I

Objectives for the last 6 months

- **Subtask 5:** Update Ning platform look & feel, more experts, Special Edition storytelling proposal, International Conference 2016
- **Subtask 6:** Work on issues definition especially with Austria
- **Subtask 7:** CA, NZ workshop designing interventions, start in Austria
- **Subtask 8:** Storytelling, evaluation guidelines
- **Subtask 9:** Psychometric testing in US

Expert meetings, seminars and conferences in the next 6 months

Date	Place	Type of meeting
October 26	Toronto, CA	XM
November 2	San Francisco	SHM
End Nov	Wellington, NZ	XM & SHM
December	Eindhoven, NL	XM
December	Brisbane, AUS	SHM
March	Stockholm SE	XM
March	Graz, AT	XM
March	Sheffield, UK	XM

Date	Place	Type of meeting
March	Stockholm, SE	Conference

Task 24 – Phase II

What can Task 24 help Behaviour Changers with?

- **Reframing the issues**, including looking at the more ‘human’ aspect of the energy system
- **Improved knowledge** and understanding amongst stakeholders, especially what different models of behaviour are out there
- **Improved engagement**, development of new aspirations and collaborations, shared learning, new & better networks
- **Improved political buy-in** and policy development, including IEA Secretariat and H2020 research
- **Improving business/industry** approaches and collaborations by co-creating new solutions to old problems
- Good examples of how to use **storytelling in policy and practice**
- Help with specific initiatives, development of **field research pilots**
- **Access to cutting-edge tools and resources**
- **Dissemination and publicity** for IEA DSM

Task 24 – Phase II
Help! We need more countries!



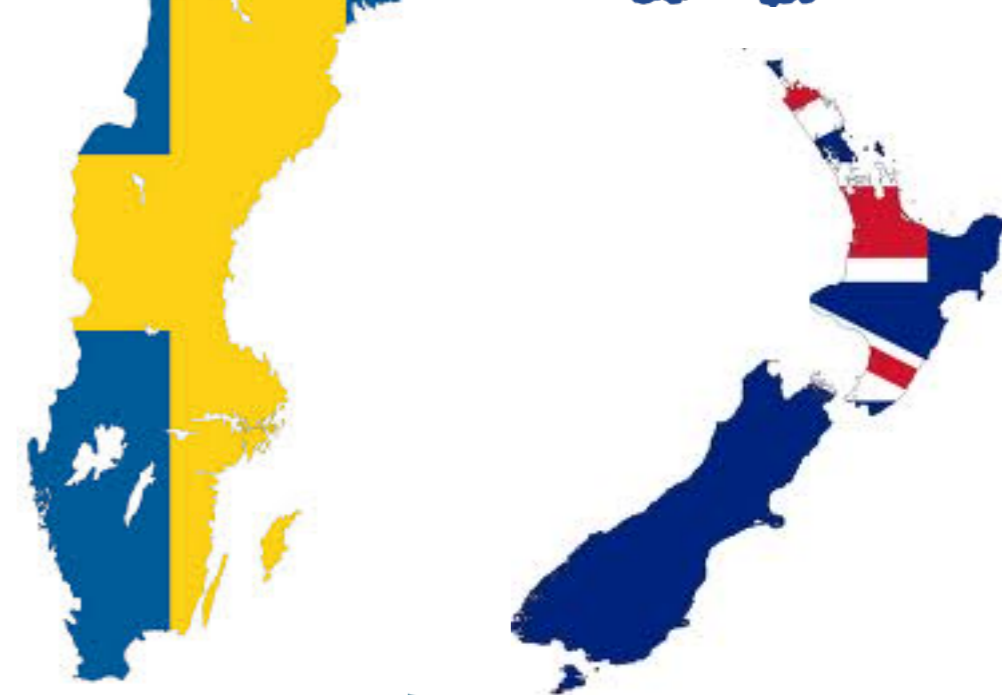
CANADA

AUSTRALIA



IRELAND

GERMANY?



For more information, visit www.ieadsm.org

Task 24 – Phase I Budget

Income	Cost
Country participation: €100,000	Person months Sea Rotmann 6 person months Ruth Mourik 2 person months €38,000
In-kind contribution (approx): £60,000 co-funding (in-kind) promised by Sheffield Hallam and DeMontford Universities Karlin, Ford et al (2015) report: >USD10,000 PG&E and SCE: >USD100,000	Other costs: Travel, filming, expert site, incidentals: €32,000 TOTAL SPENDING \$70,000

Task 24 – Phase II

Country Budgets

4 - 5 countries	6 - 7 countries	8 - 9 countries	10+ countries
<p>€75,000 per country (€25,000 per annum) (2 OAs, 1 PI, travel, platform maintenance, filming, workshops, toolbox, reports overheads)</p> <p>Total budget €300,000-€375,000</p>	<p>€75,000 per country (€25,000 per annum) (2 OAs, 1 PI, travel, platform maintenance, filming, workshops, toolbox, reports overheads)</p> <p>Total budget €450,000-€525,000</p>	<p>€75,000 per country (€23,000 per annum) (2 OAs, 1 PI, travel, platform maintenance, filming, workshops, toolbox, reports overheads)</p> <p>Total budget €600,000-€675,000</p>	<p>€75,000 per country (€21,500 per annum) (2 OAs, 1 PI, travel, platform maintenance, filming, workshops, toolbox, reports overheads)</p> <p>Total budget €750,000</p>
<p>Level of detail in deliverables:</p> <ul style="list-style-type: none"> · Social expert platform · Top DSM issues of 4-5 countries · Behaviour Changers · Toolbox of interventions · Standard evaluation tool · International handbook 	<p>Level of detail in deliverables:</p> <ul style="list-style-type: none"> · Social expert platform · Top DSM issues of 6-7 countries · Behaviour Changers · Toolbox of interventions · Standard evaluation tool · International handbook 	<p>Level of detail in deliverables:</p> <ul style="list-style-type: none"> · Social expert platform · Top DSM issues of 8-9 countries · Behaviour Changers · Toolbox of interventions · Standard evaluation tool · International handbook 	<p>Level of detail in deliverables:</p> <ul style="list-style-type: none"> · Social expert platform · Social expert platform · Top DSM issues of 10+ countries · Behaviour Changers · Toolbox of interventions · Standard evaluation tool · International handbook
36 months duration	36 months duration	39 months duration	42 months duration

Task 24 – Phase II

Detailed Budget

Detailed budget based on 4 participating countries.

Description personmonths/ costs	Cost (Euro)	personmonths Sea Rotmann per subtask	personmonths Ruth Mourik per subtask	total costs Sea Rotmann	total costs Ruth Mourik	total sum
Subtask 0	4750	3.5	0.5	16625	4750	21375
Subtask 5	4750	6	1.5	28500	2375	30875
Subtask 6	4750	3	1.5	23750	11875	35625
Subtask 7	4750	7	2.5	28500	14250	42750
Subtask 8	4750	9	4	38000	14250	52250
Subtask 9 (Beth Karlin PI)	4750	3.5	see below	16625		16625
Subtask 10	4750	4	2	19000	9500	28500
Total personmonths/costs		36	12	€171,000	€57000	€228,000

Description costs	Costs	
OAs travel costs	27500	costs travel Sea Rotmann and Ruth Mourik including extended stay in Europe of Sea Rotmann and frequent face to face meetings RM and SR (up to 6 times travel SR to Europe from New Zealand) including workshops
Beth Karlin (PI)	38000	ST9 subcontract
stakeholder analyses	5000	separate meetings and costs associated with stakeholder analyses/workshops
website and data management	1500	including website, webinars, VC, social media, blogs/vlogs, database etcetera

incidentals and overheads €72000
Total

€300,000

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

Thank you very much for your attention!

Any comments or questions?