



HEA (Household Energy Advice) TRAINING GUIDELINES



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1. Overview, structure and aims

1.1 ASSIST overview and introduction

ASSIST is a 36-months European ‘market activation and policy orientation’ project to tackle fuel poverty and support vulnerable consumers. It intends to actively engage consumers in the energy market and positively change behaviour in relation to energy consumption and to influence design of policy at all levels to tackle fuel poverty issues.

Based on the conclusion of the Energy Citizens’ Forum and of the European Vulnerable Consumers Working Group, the project intends to combine activities addressing both energy and social dimensions as fuel poverty is not only an energy issue nor can it be tackled in isolation of the bigger issue of poverty. More specifically, ASSIST strategic objectives are to contribute to:

- tackle energy poverty;
- reduce the main barriers of the energy market faced by vulnerable consumers;
- support vulnerable consumers to be more efficient with their domestic energy consumption (electricity and gas).

To fulfil its goals, the project foresees diversified and correlated research, networking and in-field actions, consistent with the relevant national and European scenarios. Among them, ASSIST intends to create a network of innovative professional figures supporting vulnerable consumers in their domestic energy consumption: the **Household Energy Advisor (HEA)**¹.

1.2 “WP3 - Home Energy Advisor Training”

The third project’ work-package aims at:

- Building the HEA qualification schema, grounded on both national and European desk and in-field analysis and defined according a modular system of correlated: occupations and job roles; activities and sub-activities; knowledge, skills and competences;
- Defining the HEA training program built on learning outcomes and, for each learning outcome, contents and methodologies (including the distance learning options). The

¹ This profile, referred in the project proposal as VCEA (*Vulnerable Consumers Energy Advisor*) has been renamed in “Household Energy Advisor (HEA)”. HEA will be used in public communications while the term VCEA will be used only when requested by the project. Additionally, in each country the HEA – although within a common EU frame – has been differently named – also to take into account the “communication potentials” of the translation - and “defined” (in terms of roles, occupations as well as training programs).

modular approach - consistent with the European training, profession and learning frames and methodologies - enables a customisation and personalisation of the training course according to: country context (job contexts, energy and welfare issues and frames and so on) and entry level of the single trainee (in terms of knowledge, competences, experiences, professional profile and so on).

- ✿ Defining effective HEA training strategies at each national level and engaging at least 75 potential HEA and delivering to them the **HEA training program**

To this extent training strategy guidelines have been realized at each national context on the bases of a common frame, defined and shared by AISFOR to guide operative choices related to overall training action (from educational design and training plan definition to its promotion and target involvement to its evaluation).

1.3 Document overview and structure

The document “**HEA Training guidelines**” has been prepared for each country, in national language targeting national stakeholders interested in undertaking (or organising and replicating themselves) the ASSIST course. The national reports illustrate how the HEA training will be carried out in each country, detailing the strategy of the course delivery, from the selection of the participants to the final assessment of the course. The document contains also all the training promotional strategy and material which needs to be prepared by the partners to inform all possible participants about the course and invite them to register.

The present document:

- ✿ Reports the common guidelines (par. 2) supporting partners in developing the national ASSIST training strategies in line with the common project frame and aims and to the specific national implementation contexts and goals (starting from the HEA national profile, the features of the national HEA network and in-field actions, the expected impacts).
- ✿ Summarises in English (par. 3) the national strategies for each country (as detailed in each national guideline in the relative national language)
- ✿ Collects the national reports describing training strategy and plans that have been realised in national language (Annexes 1-6);
- ✿ Assembles the short presentation - realised in English - of the national training strategies and plan. Presentations also be used also a stand-alone document supporting communication and valorisation activities as well as HEAs engagement (Annex 7).

2. The national report on HEA training: common guidelines on its goals, structure and contents

Aisfor has defined and shared common guidelines intended to support partners through the process of building the national HEA training course, highlighting the various possibilities for the building, delivery and assessment of the course. The guidelines are structured on the basis of the structure of the final document so as to facilitate also the final drafting and delivery of D3.2. More specifically, the guidelines had a twofold aim:

- ✿ Guide partners through all relevant choices to be made at national level regarding the HEA definition, building and delivery of the training course, from its promotion to its assessment;
- ✿ Coordinate the development of the promotional material of the HEA training to address interested stakeholders. To this extent, the communication style and the degree of contents' synthesis of national "Training Strategy Guidelines" should be consistent with a target communication/promotion aim (conceptual and operative background have been explained within D3.1).

AISFOR then collected all national "Training Strategy Guidelines" within the present report. The document is composed of this present document as an overview in English of all the national training strategies in the ASSIST countries and 6 separate national training strategies, in each national language describing the strategy in that country (available also in integrated report with a synthetic reports in English annexed. According to the guidelines, all national reports on training – although the national differences related to the specific national training strategies – have the following common structure:

- ✿ The first chapter contains a factsheet that illustrates a comprehensive but brief view on ASSIST HEA - project, HEA figure and HEA training, to be used also as a stand-alone communication factsheet.
- ✿ The second part briefly recalls the main dimensions of the **country-based HEA profile** (role and working contexts) in the specific country and, so, the country-based frame correlating HEA activities and knowledge, skills and competences
- ✿ On the basis of this frame, partners have described, in the third chapter, the **country-based HEA training** strategies, plan and choices implemented (on the methodological as well as operative dimensions). More specifically, each national training report describes:
 - a. Modules and units composing the training program, also considering the eventual fruition personalization of those modules/units on the bases of participants features (entry competences and/or occupational contexts and so on);
 - b. Contents and methodologies employed per each module/unit;

- c. Training timeframe as well as training fruition and completion rules;
 - d. Training assessment, describing per each evaluation dimension (motivation/expectation; competences/learning; impact) the approach and tools implemented ex ante, in itinere and ex post.
- ✿ The fourth part is dedicated to the description of **training potential participants** (including the eventual “*entry level*” definition) with special reference to participants/targets segmentation criteria and to the value proposition of the training program per each participant typology/segment. The chapter also report the choices made in terms of registration, selection and monitoring procedures;
 - ✿ The last part of the national reports is dedicated to the training promotion strategies, plan and actions (including the reference to the training course promotional materials).

3. The Household Energy Advisor - HEA

As described in the “HEA Qualification Schema (D3.1)” ASSIST defined the HEA professional profile and training program, detailing the overall roles and working contexts, activities and competencies and training of the HEA.

To adapt the project implementation within the different national contexts of the partners and keep into account the existing figures supporting vulnerable / poor consumers (within various sectors, not specifically the energy one but for example also the social one) and the existing framework, the project foresaw the contextualisation of the HEA profile and relative training for each country.

Taking as starting point the overall HEA profile (as described in the HEA Qualification Schema) the following paragraphs summarises the profile in each project country highlighting the differences (if any).

3.1 Italy

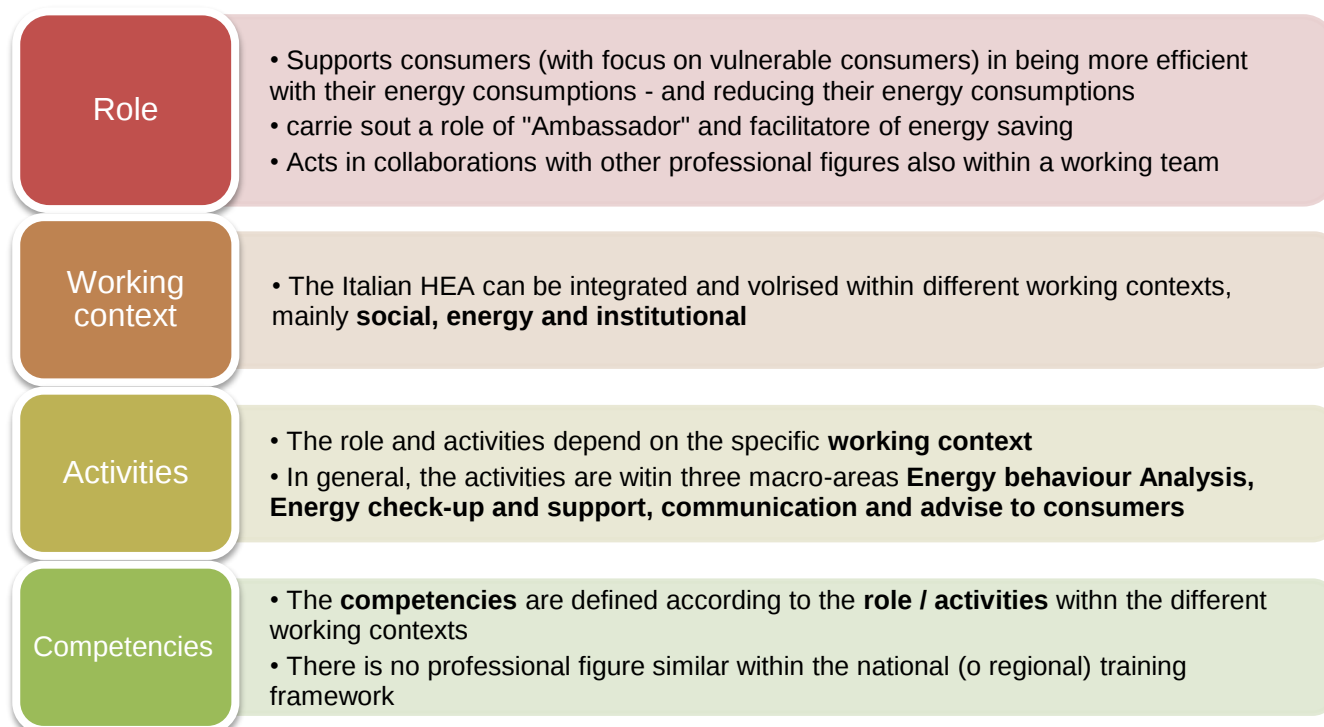
3.1.1 Overview of the Italian Household Energy Advisor

In Italy, to address and engage on the project all working sectors and ensure a thorough holistic approach to tackle energy poverty, it was decided to maintain the full and complete profile of the HEA and to build ASSIST training including all modules.

The Italian HEA (called TED – Tutor per l'Energia Domestica) is an innovative figure working either individually or within working teams from **different sectors – energy, social and institutional**. The HEA **informs, create awareness, guides and assists** consumers, especially those vulnerable or in energy poverty, on their domestic energy consumptions. The HEA provides customised advice to consumers according to their

needs and situation as well as concrete support on contractual issues and access to financial support. The following scheme reports the role, working contexts, activities and competencies of the TED:

Figure 1: Role, working contexts, activities and competencies of the Italian TED



The TED acts in different working context (energy, social, institutional) as unique contact point of vulnerable consumers to first hand answers to all his / her problems related to energy poverty: from access to financial help to consumption habits, to understanding the energy contract and bills and so on. In this way, the TEC acts as and energy "ambassador" and energy facilitator. The TED informs, creates awareness, guides and assists consumers according to specific energy needs and consumption habits. In parallel to informing consumers, the TED provides personalised advice and assistance in the management of the energy within households.

The TED can work in different contexts – public and private – from the energy sector to the social one to the institutional one. The TED can operate either individually or within a team integrating the competencies and the services with his / hers on energy poverty. As example the TED can be an operator within a consumer association, a manger of a social cooperative, operators of public administrations and so on.

One of the innovative aspects of the TED is to carry out its work with respect to domestic energy consumption delivering:

- **already existing services** – the TED can be a new figure within a team already delivering services to consumers / citizens / poor people etc.
- **new services complementary** to those already delivered – launching new specific services addressing energy poverty / vulnerability
- on a **two-way communication** process: **top-down** (a TED may contact directly consumers) as well as **bottom-up** (consumers may contact singularly a TED or the National network of TEDs)

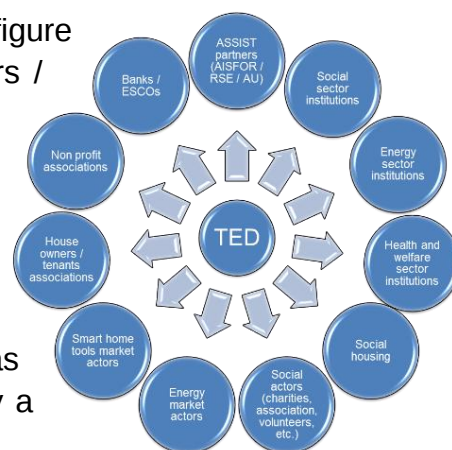
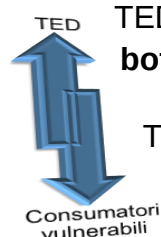


Figure 2 - Working contexts of the Italian TED

The TED main activities, even if very wide and different according to the working contexts, can be grouped into three main categories:

Attività

- Energy behaviour analysis,
- Energy check-up and support,
- Communication and advise to consumers

Each context requires the acquisition and valorisation of knowledge, skills and competencies both vertical (technical-professional) and horizontal (communication and relationships). For this reason, the ASSIST training is built to address operators coming from all sectors empowering them on the knowledge gaps and ensuring that all the 75 trained HEAs have the same minimum knowledge and competencies level dealing with energy poverty.

The training programme will be delivered with a **blended learning** methodology, integrating traditional training with e-learning training through a training platform. The training programme, aimed at empowering competencies on the three sectors (energy, social and communication) is built with 11 modules divided into learning units. The modular structure, together with a modular evaluation and assessment, will enable flexible and customised training pathways. At the end of the course, successfully passed all the intermediate evaluation, the trained TEDs will receive a certificate. The trained TEDs will:

- Constitute the **Italian network of TEDs** which aims to promote the exchange of experiences amongst TEDs coming from different working contexts and backgrounds. The network members will receive regular updates and training and will have access to the tools and resources to implement the ASSIST action and to monitor progress (such as the videos and factsheets, the ex-ante questionnaire, and so on).

- Will deliver the **ASSIST action** and provide customised assistance to vulnerable / energy poor consumer.

The implementation of the national network and the delivery of the action will represent also a way to test and define self-sustainability mechanism for the long-term.

3.1.2 Italian HEA: role(s) and working context(s)

Regarding the **TED working contexts**, the national and comparative analysis has confirmed that the role of the TED:

- Should be defined in terms of “occupation” and not of profile or professional / working qualification (see HEA Qualification Schema)
- Cannot be defined as a unique autonomous professional profile but rather as an “integration” of existing services and roles
- Can be carried out by exiting profiles and roles (such as the operator of consumer associations, contact center and so on).

As outlined in the “HEA Qualification Schema”, the Italian HEA does not represent a unique profile and as such cannot be integrated with the National (or regional) qualification frame (NQF or RQF). Confirmed by the fact that a similar profile does not exist in the NQF nor in the various RQF.

The working contexts of the TED are always energy, social and institutions covering one or more of the roles and activities foreseen in the relative sectors to tackle energy poverty.

Also the activities and competencies of the TED in Italy match the overall ones described in the “HEA Qualification Schema”.

3.2 Spain

The HEA is a professional in direct contact with vulnerable consumers who provides support in energy efficiency to vulnerable consumers and more specifically to people suffering energy poverty. HEA’s goal is to give them information, support and advice in an easy, comprehensive and practical way to improve their habits in energy consumption and to make easier the access to energy incentives.

3.2.1 Overview of the Home Energy Advisor (HEA)

The HEA in Spain is defined as a professional in the social or energy sector who has done a specific training course in energy, communication and social issues to obtain knowledge, abilities and specific skills in order to help vulnerable consumers to have more efficient energy use habits and thus achieve a reduction in their energy consumption which will also be reflected in the reduction in the price of their energy bills. On the other hand, the HEA

will also advise on possible improvements in energy efficiency at home, as well as improvements on insulation to reduce energy demand.

In Spain, there are two different HEA profiles depending on their working context and the methodology they will follow to develop their actions, but also depending on their specific initial knowledge.

The first profile, of a more social nature, consists of home care professionals from Home Care Services and professionals from the Tele-care service, from now on a social profile. These are professionals, mostly women, from the social field and who work as part of a multidisciplinary team. Their work, framed in the local social services, focuses on looking after vulnerable homes in which dependent people live, providing the necessary care and attention and carrying out basic domestic tasks. Between 30%-40% of these professionals have suffered a situation of energy vulnerability in their lives. In the case of tele-assistance professionals, the role of the professional and the type of person using the service are the same, but the work is mainly based on telephone accompaniment to these vulnerable people.

People with a social profile have knowledge and social and communication skills with people in situations of vulnerability since their work is already carried out in this sector. Their contact with vulnerable consumers will facilitate the trust they will place in professionals when they propose saving measures or give them advice on improving their habits in energy use.

The second profile includes workers in energy companies who have direct contact with end users. We will call this profile professionals SAEC Social Attention to Energy Customers. This group generally works in the customer service department of energy supply companies. Their work focuses on contractual and administrative issues and from their position they already provide technical advice during the contracting process to help the final customer to contract the energy services that fit their consumption needs.

Workers with a SAEC profile are trained in energy issues, but not in social and relational areas. The training they receive through the ASSIST project to become HEA will be of great help to identify, from among the clients served, those in a situation of vulnerability who need more specific and personalized advice. The ASSIST training will provide this group with the appropriate social and communication knowledge and skills to assist people in situations of energy poverty or at risk of vulnerability and provide them with appropriate advice, not only on technical issues, but also in terms of consumption habits, efficiency and social assistance.

To become a HEA, it is necessary to pass the ASSIST training course taught by **Ecoserveis** and **ADEE**. The training course is offered in a mixed face-to-face-distance format. It is about 40 hours and focuses on the three main competencies of the HEA: energy, social approach and communication. At the end of the course, and when the

evaluation tests have been successfully passed, they will be awarded with the HEA certificate issued by the Spanish project partners.

Once the training course is successfully completed, the professional will become a qualified HEA and a member of the national HEA network within the framework of the ASSIST project.

The HEA will also take part in the action of the ASSIST project to support vulnerable consumers, particularly to carry out the following actions:

1. Advising vulnerable people on energy bills
2. Support in the procedures and management of their energy contracts
3. Make a simple energy audit on the energy use at home
4. Working on habit improvement in the intervened homes

3.2.2 HEA: role(s) and working contexts

The analysis of the different profiles has confirmed the role of the HEA as a potential mediator and/or facilitator working within a multidisciplinary team. **The professional profile of the HEA is not "unique" and therefore cannot be directly integrated into the regional/national qualification framework.**

The HEA can perform different functions within different work contexts. The three main professional contexts identified by the project are the energy sector, the social sector and energy institutions.

The professional contexts the HEAs will carry out in Spain according to the profiles described above are detailed below:

In the case of the social profile, the professionals carry out domiciliary services or telephone attention in the social sphere and, specifically, framed in the municipal social services. These people already carry out their daily work in the homes of vulnerable consumers or have established a continuous telephone relationship over time and, therefore, have a consolidated relationship with them, which will facilitate peer-to-peer communication.

The HEA will play a role at homes in which they already work and that will be to improve the energy consumption habits of vulnerable consumers living in those households. The activities mainly developed are:

- To identify a user's possible situation of energy vulnerability.
- To adapt the information and language to that of the people being assessed.
- To analyze the energy profile of the household.
- To analyze habits and special needs.

- ✿ To identify efficient/optimal energy uses.
- ✿ Analyzing energy bills and advising on energy contracts.
- ✿ To advise on energy in general and resolve specific issues.
- ✿ Advising on the proper use of energy systems.
- ✿ To communicate advice on energy saving habits.

On the other hand, the case of the SAEC profile is significantly different. The main function of the professionals included in this profile is customer service in the offices and front offices of energy companies. These professionals already have technical knowledge related to energy contracts and their functions include advising end users on the type of contract and supply that best suits their needs, analysing their energy bills and advising them, above all, on the type of fare and power they are most interested in contracting.

The roles of these professionals as HEA will focus, above all, on correctly identifying users who may be at risk of vulnerability or energy poverty. Once they have been identified, they will be able to offer them more personalised advice focused on improving their situation in terms of the energy vulnerability they suffer from. The activities of these professionals, once trained, can be defined as:

- ✿ Correctly identify users in situation of energy vulnerability among the clients served.
- ✿ Adapting its message to that of vulnerable users, leaving aside, when necessary, the most technical concepts and offering users clear, simple information with an appropriate language.
- ✿ Analyzing the energy profile of the household and its consumption habits.
- ✿ Identifying efficient/optimal energy uses and advise vulnerable users on more efficient consumption behaviours.
- ✿ Advising on energy in general and solving specific issues.
- ✿ Advising on the proper use of energy systems.
- ✿ Providing simple information and advice on energy-saving habits
- ✿ Advising vulnerable users about protocols or social aids to which they may be eligible.
- ✿ Offering them payment facilities tailored to their needs.
- ✿ Including vulnerable users in specific programmes to assist in vulnerability and protect their companies from disconnection, where possible.

3.2.3 HEA activities and their knowledge, skills and competencies

Below there is a table with the knowledge, skills and competencies expected from the HEA with a social profile once the training course has been completed.

Table 1 - Knowledge, skills and competencies of the Spanish social-HEA

	Activities	Knowledge, skills and competencies
Analysis of energy behaviour	✿ Identify potential vulnerability and its main behaviours and dimensions at the households in which they work. ✿ Adapt the information to the level of the people assisted. ● Analyze the household and its electrical appliances and identify the points of maximum energy consumption. ● Analyze habits and special needs.	Technical knowledge of the energy sector with special reference to: ✿ Energy market and types of energy. ✿ Retail market. ✿ Energy uses at the households. ✿ Energy bills and fare structures. Technical knowledge of the social system with special reference to: ✿ Structure and services of the social system. ✿ Dimensions and characteristics of vulnerability. ✿ Energy poverty (causes/effects and policies/actions). ✿ Ability to analyse the context in which it operates. ✿ Ability to observe, measure, analyse and synthesise. ✿ Ability to adapt to situations. ✿ Communication and relational skills and competencies.
Control and support in energy use	✿ Identify efficient/optimal energy uses. ✿ Analyze energy bills and advising on energy contracts. ✿ Support energy saving habits such as: "tips of using to reduce energy consumption".	✿ Ability to classify and highlight major energy uses. ✿ Skills for energy consumption analysis. ✿ Abilities to carry out energy control in a simplified way. ✿ Competencies related to the formulation of opportunities to improve energy efficiency. ✿ Knowledge and skills to identify and access better financing opportunities (incentives, bonuses...).

Communication and consumer advice	- Advise on energy in general and resolve specific issues. - Advise on the proper use of energy systems. - Communicate advice on energy saving habits.	- Competences and communicative skills (speaking, listening and writing). - Communication with technical and non-technical personnel. - Social Intelligence. - Communication skills and competences (also written, by telephone, mediating with ICTs). - Relational skills (empathy, good communication...). - Competences related to proposals for opportunities for improving energy efficiency.
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The competences, knowledge and skills expected for the SAEC profile after the HEA training are very similar to those of the social profile of the HEA.

Table 2 - Knowledge, skills and competencies of the Spanish SAEC-HEA

	Activities	Knowledge, skills and competences
Analysis of energy behaviour	- Identify the users in possible situations of vulnerability, their main behaviors and dimensions, among the clients served. - Adapt the information to the level of the people served.	Technical knowledge of the energy sector with special reference to: - Energy market and types of energy. - Retail market. - Energy uses at households. - Energy bills, tariff structures and contract types and power requirements.
	- Analyze in detail users' energy consumption and identify periods and behaviours of maximum consumption. - Analyze habits and special needs.	Technical knowledge of the social system with special reference to: - Structure and services of the social system. - Dimensions and characteristics of vulnerability. - Energy poverty (causes/effects and policies/actions).
		Ability to analyse the context in which it

		operates. - Ability to observe, measure, analyse and synthesise. - Ability to adapt to situations. - Communication and relational skills and competencies. - Ability to adapt and translate technical language based on user knowledge.
Control and support in the use of energy	- To measure energy use and energy efficiency of the home. - Offer simple tips on energy optimisation methods or kits. - Identify efficient/optimal energy uses. - Analyze energy bills and advise on energy contracts - Support energy saving habits such as: "tips of using to reduce energy consumption".	- Ability to classify and highlight major energy uses - Skills for energy consumption analysis - Skills to carry out energy control in a simplified way - Skill to calculate energy savings and efficiency improvements. - Abilities related to the formulation of opportunities to improve energy efficiency. - Knowledge and skills to identify and access better financing opportunities (incentives, bonuses...)
Communication and consumer advice	- Advise on energy in general and resolve specific issues - Advising on the proper use of energy systems - Communicate advice on energy saving habits - Advise on the methods and facilities of fractional payment.	- Competences and communicative skills (speaking, listening and writing). - Communication with technical and non-technical personnel. - Social Intelligence. - Communication skills and competences (also written, by telephone, mediating with ICTs). - Relational skills (empathy, good communication...). - Competences related to proposals for opportunities for improving energy efficiency.

3.3 UK

The HEA is an advisor that has direct contact with the target group (vulnerable consumers) to provide energy efficiency support to vulnerable consumers and more specifically to energy poor consumers. The HEA delivers information, support and advice to them in an easy, comprehensive and practical manner to improve their energy consumption behaviours and also facilitate access for them to supporting financial measures/incentives.

Although there will be differences in each working context, there are three main roles and activities of the HEA:

- energy consumption behaviour analysis;
- energy behaviour support and check-up;
- advice and communication to consumers.

3.3.1 Overview of the English Household Energy Advisor

Although in the UK there are already jobs and vocations that cover the role of Energy Advisor, it is clear that the issue of energy poverty in the UK is not diminishing. The most recent statistics (as highlighted in report D 2.5) show that the percentage of households in the UK that suffer from energy poverty has not reduced over the past eight years or so and remains at c.12%. The ASSIST programme HEAs will increase the number of vulnerable consumers that it is possible to reach, and, uniquely to ASSIST, will have training provided at no cost to the HEA; a library of traditional (factsheets) and multimedia resources that adds value to the work being carried out; and a support network of peer ASSIST HEAs that will allow the ASSIST HEAs to easily share best practise.

The ASSIST HEA is defined as an expert who has undertaken a specific training course on energy – social – communication issues to gain the knowledge, skills and competencies to support vulnerable consumers to have more efficient energy consumption behaviours which will consequently save the consumer money as well as reduce energy consumption in the UK. The ASSIST HEA adds value to the existing offer because:

- the training is provided at no cost
- there is a support network of peers, and
- access is provided to a range of traditional and innovative informative materials

The ASSIST HEA will have the following role “Delivering information, support and advice to vulnerable consumers (energy poor consumers) in an easy, comprehensive and practical manner to improve their energy consumption behaviours and also facilitate access for them to supporting financial measures/incentives” and will work in the following contexts: support and advice provided in person at drop-in centres, or through home visits.

To become an ASSIST HEA, it is necessary to undertake the ASSIST HEA training course carried out by Severn Wye Energy Agency and Caring for Communities and People (CCP). The ASSIST HEA training course will be delivered through a blended methodology of presentations, one-to-one shadowing of professionals and workshops. It will last 40 hours and will focus on the three main competences of the ASSIST HEA – energy, social, communication. At the successful completion of the course the participants will be presented with the “ASSIST HEA certificate”.

Having successfully completed the training course, he/she will become a qualified ASSIST HEA and become a member of the National network of ASSIST HEA that will be able to share ideas and best practise through an online portal.

3.3.2 English HEA: role(s) and working context(s)

The situation in the UK is slightly different from the other partner countries. There is a requirement to engage only 6 ASSIST HEAs as there already exist certain frameworks and organisations (such as SWEA) providing similar roles and services. However, it is important to note that the ASSIST HEAs have an added value because, as shown in the table below, unlike existing advisors, the ASSIST HEAs will work directly within organisations dealing with vulnerable consumers and so will have more direct and trusted access to the consumers.

Table 3 - Role and working contexts of the UK HEA

Context	Role
Social organisations and charities	HEA can work in team with social agents giving advice to vulnerable consumers
Local / regional social services	HEA can work in team with social workers giving support on energy issues of their users

As a result of the unique situation in the UK, SWEA will be working with other local third sector organisations to reach out to volunteers who will be able to offer advice and support to vulnerable consumers on a range of issues. SWEA will provide training to the ASSIST HEAs specifically on energy poverty and energy efficiency issues, and the ASSIST HEAs will then be able to include this advice within the overall, arching package of support.

There are already professional roles in the UK that provide energy advice and support to vulnerable consumers. In the case of SWEA, these advisors take part in a three day training course and then take two exams in order to gain the qualification which is recognised as a formal qualification of City & Guilds Level 3. HEAs working within the ASSIST project will not gain a formal qualification following their training as that is not within the remit of the program, however, the training, which is provided free-of-charge to

ASSIST HEAs, will provide an invaluable resource of information and knowledge which they can pass on to vulnerable consumers. ASSIST HEAs benefit from the unique 'shadowing of professionals' element of the ASSIST training which is not offered as part of the existing City & Guilds Level 3 training. In addition, the ASSIST HEAs will also be able to disseminate and distribute the ASSIST information materials to vulnerable consumers, something that is not automatically provided through the existing training pathways.

Table 4 - Role, working contexts, activities and competencies of the UK HEA

	HEA occupation	Working Context	The Role of the HEA in relation to other occupations	The potential integration within the national and regional qualification framework
Definition	To provide energy efficiency support to vulnerable consumers and more specifically to energy poor consumers	The HEA will work in collaboration with professionals from the health, social and charity sectors	Social workers, health professionals (such as Occupational Therapists) and charity support officers will work in tandem with the HEA.	The HEA will be qualified (once training is complete) to offer energy advice to consumers.
Description	Volunteers will be trained to provide advice and support on a range of issues. The ASSIST training will allow the volunteers to add energy advice to the range of topics covered in their overall training.	The HEA will be able to make home visits to vulnerable consumers – always accompanied by another professional – as well as provide advice at drop-in sessions at community hubs.	The HEA will hopefully add extra value to the work of other professionals by having a holistic approach to helping the vulnerable consumers. Energy advice will form an important part of the support that can be offered.	There are formal training packages in the field of energy advice in the UK – but these are quite expensive and can not always be accessed by voluntary or charity organisations. The ASSIST training qualification will be 'informal' but hopefully provide useful tools to improve the advice that can be given by the HEA.

The value of the ASSIST in the UK is in the holistic approach to the training and support of the HEAs. There is no other platform or programme in the UK that offers both training and 'in the job' support (through the peer-to-peer network and the provision of materials). The ASSIST HEAs are also uniquely placed to gain more direct access to vulnerable consumers, as they are embedded within organisations that are already working with, and

crucially, are already trusted by, the vulnerable consumers themselves. This targeted approach of ASSIST HEAs will provide a more efficient outcome and success rate in terms of reaching vulnerable consumers compared to the existing offer. The widening of the support available with regards to energy advice, and the raising of awareness around energy poverty in general will also of course be of benefit, as the percentage of households in the UK that suffer from energy poverty has not reduced over the past eight years or so and remains at c.12%.

As described in document 3.1, the HEA can play different and “integrating” potential occupations within diverse working contexts. The three main contexts identified by the project (energy, social, institutional) have been confirmed by actors involved who have further detailed them as follows:

1. Energy Sector: with reference to representative organizations, authorities, energy agencies, energy services companies, energy consultancies and energy utilities. A “sub-sector” in fact can be represented by the same market actors - utilities, DSOs and energy companies in general, which could be interested on a “Corporate Social Responsibility” perspective and/or to improve their services to consumers by employing an HEA and/or training their employees employed within the network of customer care. Although some operators have pointed out that any energy retailer has to provide information to his customers (through website and contact centre), at the same time, the opportunity of enlarging the existing “help desks” or consumers services has been explored also in terms of effective ways to reach and engage vulnerable consumers. More specifically, HEA specific occupations within the “energy sector” have been indicated as:

- contact centres;
- energy agencies;
- individual professionals (engineers/other energy-related technical professions).

2. Social sector: with reference to very diversified contexts and organisations such as: third sector, social departments and services, consumer associations, social organisations and charities (red cross, caritas, etc.), housing associations. The most relevant HEA specific occupations within the “social sector” have been indicated as:

- social services;
- consumers associations;
- third sector;
- social housing and users (where HEA is peer acting with peers).

3. Institutions: with reference to local/regional social services, health services, environmental education, as well as energy authority and energy institutional agency. Two main HEA “institutional” contexts have emerged as more relevant:

- Public energy agencies, contact centres, services related to energy policies/incentives;
- Municipalities' Technical Offices.

3.4 Poland

3.4.1 Overview of the Polish Household Energy Advisor

Household Energy Advisor (**Domowy Doradca Energetyczny**) is a person who, using his knowledge and skills, prevents the appearance of energy poverty. HEA is not a separate professional profile, but rather an individual person working and specializing in a particular area, who is either a person cooperating with different consumers or a person who is a consumer himself and has gained additional skills during special training.

HEA has knowledge and skills in the field of household energy management, consumer law in the area of the energy market, social assistance and communication skills with vulnerable consumers. Thanks to these skills he can effectively provide support and spread knowledge in the field of energy poverty.

To become a HEA, you need to complete a training course handled by the Polish Consumer Federation and the Polish National Energy Conservation Agency. The training is directed to varied, in terms of already existing competences, groups: professional energy advisors, employees of Social Welfare Centers (OPS), consumer advisors, consumer ombudsmen and vulnerable consumers. The topics of the classes will vary depending on the competences of the participants and the skills they already have. The courses will be divided into modules addressed to the main groups: energy advisers, social workers, advisers and consumer ombudsmen. Vulnerable consumers will be able to participate in the selected modules of trainings depending on their skills and knowledge. In this way, HEA groups will be created with similar basic skills, but slightly different competences and scope of activities profiled by professional activity. Participation in the training will prepare HEA to prevent the appearance of energy poverty in Poland by expanding knowledge and skills in the field of energy, consumer rights, social assistance and communication.

All HEA, regardless of the professional group they belong to, will create a HEA network supported by networking tools. Each member of the HEA network will pass on the knowledge and skills acquired during trainings and working with vulnerable consumers to others who then are able to train subsequent advisors. This way the group of people who can provide support in the field of energy poverty and the effectiveness of training will expand. All members of the HEA network will have access to the networking platform, which they are going to use to exchange their experiences. It is particularly beneficial and relevant due to the diversity of professional groups involved in helping various types of

consumers. The HEA network will help them achieve their goals and carry out the activities included in the ASSIST project

3.4.2 Polish HEA: role(s) and working context(s)

While planning the network operation and dedicated trainings, we assumed that each participant has a specific skill and initial knowledge. For this reason the training is modular, as described below.

3.4.2.1 Modular training depending on the initial competences

Network members who have knowledge in the field of energy consulting.

The training modules will support the HEA network created as part of the "Polish nationwide advisory support system for the public, housing and enterprises sector in the field of energy efficiency and renewable energy". Advisors will receive additional knowledge about good practices for cooperating with consumers tackled by energy poverty. Training will expand their competences and allow to exchange the knowledge and experience in this field. Thanks to this, they will be qualified to work as HEAs. In addition, it will be possible to constantly expand the number of people with knowledge in the field of energy poverty. It is a part of the activities of Advisors operating under the project implemented by the National Fund for Environmental Protection and Water Management (NFOŚiGW). This will bring further benefits and develop the HEA network, even after the end of the project. The trainings of this group will take into account the professional nature of advisers and will broaden their knowledge in the field of energy poverty, consumer rights and the specificity of vulnerable consumers, as well as ways of communication with them.

Network members who have knowledge in the field of social assistance

The second branch of HEA trainings will support employees of social institutions working in the City of Warsaw region who have direct contact with a group of vulnerable customers, including those who are most tackled by energy poverty. These trainings will help social workers analyse consumer behaviour in the field of energy consumption and provide basic advice in this area. Training this group will be particularly important before the upcoming next heating season, so that social workers can best help a group of vulnerable consumers in this particularly demanding period. During the training of this group, basic effective methods of supporting vulnerable consumers will be specifically emphasised, not only in terms of efficient energy consumption. Moreover, additional support that will help them protect consumers from falling into energy poverty will be provided, e.g. by avoiding unfair practices of energy sellers.

Network members who have knowledge of consumer law

We plan to include consumer advisors working in the field branches of the Polish Consumer Federation and municipal or second-level administration consumer ombudsmen.

Both groups have direct and daily contact with consumers, including those tackled by energy poverty. This is a group with specific knowledge of consumer rights. They provide advice in the entire area of consumer regulations, including matters related to the energy market. As a part of the HEA network, they will be able to use training modules on energy use.

3.5 Belgium

3.5.1 Overview of the Belgium Household Energy Advisor

The HEA is a role that will be taken up by volunteers and is not seen as a professional role. He/she informs, advises and supports vulnerable customers with tips of reducing energy consumption in order to tackle the phenomenon of energy poverty. The HEA will be recruited from interested parties from mainly the energy and the social sector.

To enable the HEA to carry out its assignment, he/she will receive thorough training supported by Fluvius. The training will be modular so that it can be personalized according to the skills, knowledge and skills of the candidates. The training will cover three major areas: energy knowledge, social issues and communication skills.

Depending on the module, it will be offered either through classroom training or through e-learning or in mix form.

After following the training, a test will be conducted to ensure that the HEA's possess these knowledge. If the HEA passes the test, he/she will receive a certificate, and this is also the signal to be included in the HEA network and to actively perform their task.

The HEA can make use of this network during the process, in order to exchange knowledge and information, both to colleague HEAs and to the project.

If necessary, it will be provided that he/she can rely on an already experienced HEA at the first home visit.

After the training, the HEA will be asked to closely monitor an average of 10 household customers in energy poverty, in order to achieve the objectives of the ASSIST project.

The actions consist of:

- 🌟 A basic scan of the household home and the energy behaviour of the residents
- 🌟 Determining the measures that can be taken to reduce the energy bill
- 🌟 Draw up an action plan for the actions for which a commitment is found

- Follow up the consumption together with the user, and further stimulate them through reminders, tips, experiences ...
- Actively use the HEA network
- Check the effect of the measures and adjust where necessary

3.5.2 Belgian HEA: role(s) and working context(s)

The HEA will have a background mainly from the energy or social sector.

As candidates for HEA, we are thinking of Fluvius employees, energy houses, Social Housing Companies ... or existing volunteer networks from the social sector, or within the social sector (eg neighborhood work, ...) who want to commit to this. .

The HEA will therefore not have an autonomous professional profile.

It is intended that he/she works closely with local or regional social organisations to be introduced to vulnerable customers. A well-established safety net for protected customers already exists in Belgium, but this does not currently include the entire target group of people in energy poverty. With the HEAs, we want to focus primarily on the group that currently receives little or no support and is potentially at risk of ending up in energy poverty. (example 1 parents with a limited income, young people from disadvantaged groups who are going to live independently ...)

The HEA will be able to rely on the energy knowledge that is available within Fluvius, in order to be able to perform her/his task efficiently.

At the start-up, he/she will have the opportunity to appeal to an experienced HEA colleague or an energy scanner.

Table 5 - Role, working contexts and activities of the HEA in Belgium

ROLE	Informs, advises, supports the vulnerable customer, after making an energy scan of the house and the energy habits. He approaches the vulnerable customer respecting his everyday environment, to determine together the best actions to reduce energy consumption. He guides the customer in the energy world in order to determine the cheapest energy partner and thus reduce the costs of invoicing. He follows up the impact of the past actions, and directs if necessary.
WORKING CONTEXT/S	• Energy sector: Fluvius, energy houses, Eco-houses • Social sector: 'samenlevingsopbouw', OCMWs, CAWs and other local social neighbourhood organisations • Charity sector
MAIN ACTIVITIES	The main activities for the HEA:

- energy consumption dwelling and behaviour analysis
- energy behaviour support and follow-up
- guide consumers in the energy market and regulations
- help consumers in the communication to energy partners

3.6 Finland

3.6.1 Overview of the Finnish Household Energy Advisor

Household Energy Advisor (HEA) is a person who offers vulnerable consumers support to improve the energy efficiency in their homes. In Finland the HEAs shall be called Energy Tutors (“**energiatuutori**”), in order to avoid confusion with the Finnish national “Energy advisors (“**energianeuvoja**”). HEAs provides vulnerable consumers with information, support and advice in an easy, comprehensive and practical manner, helping them to improve their consumption habits and, where appropriate, to share advice on how vulnerable consumers could get financial support.

To become a HEA, it is necessary to undertake the ASSIST HEA training course offered by VaasaETT. The course covers three important topics: 1) energy efficiency, 2) social dimension and 3) communication and networking. The training is organized in twelve learning modules. However, each trainee or a group of trainees is tailored an individual training content and scope, basing on their existing knowledge and skills. In essence, HEA training is considered as complementary education, suitable for many existing professional profiles. In particular, the course is offered to individuals whose job description already includes counseling, such as energy counseling or household repair counseling. Social workers or volunteers who are already in close connection with vulnerable consumers are another important target group.

Vulnerable consumers themselves can also take part in the training course. Training of vulnerable consumers targets to provide them with necessary knowledge and skills to be giving peer support for other vulnerable consumers.

The training will be delivered through a blended methodology of contact lessons, independent learning using printed and electronic material and distance learning in an online environment. The content of the contact day depends on the group being trained and their basic knowledge, but some modules are common to all. At the successful completion of the course the participants will receive an “HEA certificate”.

Having successfully completed the training course, he/she will become a qualified member of the National network of HEA that will be able to share ideas and best practise through an online portal.

3.6.2 Finnish HEA: role(s) and working context(s)

ASSIST HEA training could be compared to professional in-service training offered for people dealing with vulnerable consumers. ASSIST HEA training provides relevant and interesting content and insights that may bring confidence for many people working in public sector, private sector or in non-governmental organisations. The flexibility in the training structure and scope offers the possibility to involve people with various backgrounds. For this reason, an ASSIST Energy Tutor is not a professional profile that could be evaluated in the Finnish national qualification framework for degrees or education programmes.

Several target groups and professional or volunteering profiles have been identified in the ASSIST project who could benefit from the offered HEA training. Different profiles are presented in Table 6 which also shows the key motivations identified for the potential HEA groups.

First category are energy professionals who have a solid background on energy efficiency and energy economics. They would benefit especially on energy poverty, vulnerability and other societal content of the HEA training programme, as well as from the networking and communication parts of the training. Their key motivation is professional and often also ethical. Students of energy and engineering may share a similar motivation.

ASSIST HEA training could be relevant also for various actors in the social sector where many are directly dealing with VCs in their daily work. Household renovation advisors, for example, are typically civil engineers who visit elderly and retired people's homes if they have questions on necessary repair needs at their home. ASSIST training could offer relevant technical knowledge on home energy questions so the renovation advisors could serve their customers even better.

Table 6 - Identified professional profiles who could benefit from the HEA training

Category	Identified target group	Key motivation
Energy professionals	Energy advisors (in public organisations or energy counselling companies)	Professional
	Customer support personnel of energy companies	Professional
Social sector and housing (both governmental and non-)	Housing advisors (e.g. in housing companies for vulnerable	Professional

governmental bodies)	consumers)	
	Household renovation advisors	Professional
	Social workers	Professional
	Debt and financial advisors	Professional
	Volunteers (in various organisations serving vulnerable consumers)	Ethical
Interest groups and organisation, political, ethical or religious organisations (various fields including housing, technology, environment)	Personnel of consumer associations or vulnerable consumers organisations	Political, ethical
	Personnel of technology associations (e.g. heating associations)	Political, ethical
	Personnel of nature protection organisations	Political, ethical
Education institutes	University students of energy, social work or other relevant fields	Professional, ethical
	Researchers of concerned fields	Professional, ethical
	Pupils at secondary schools and high schools	Personal

The ASSIST Energy tutor training is also open to vulnerable consumers, who could provide peer support to other vulnerable consumers. Peer support is based on equality between people who have had similar experiences in life, being heard and understood, and meet and support each other. Personal experience helps to understand the other person's situation and thus better tailor the counselling of the subject.

Vulnerable consumers will be offered their own training which includes all modules. Those trained in the ASSIST project will probably not be offered a job, but they will work on a voluntary basis. Vulnerable consumers are encouraged to organise ASSIST actions such Energy Cafés during the project.

4. “Country” HEA training

4.1 Italy

The training program will be delivered according to blended learning methods, which integrate traditional and distance learning activities. The distance learning will be delivered within a dedicated platform accessible at the link: <http://assist2020.eu/>

The TED training program is:

- developed according to a modular structure, which enables to customise the training according to the participant's entry skills (training modules may be either optional  or compulsory  – for the optional modules if the HEA proves through an entry test to have the foreseen competencies then he may skip the module). However within the ASSIST training course, has been set with all training modules as compulsory in order to ensure that all the trained ASSIST TEDs had undergone the entire course.
- provided mainly online (). For some modules, due to the contents and / or training purposes, collaborative training methods are also envisaged - such as, for example, webinars and / or activities in presence ();
- divided into 10 training modules, of which two transversal (M1 - introductory to the system and ASSIST resources; M4 - Data processing and privacy) and eight pertaining to the three macro-areas of action (and competences) of the TED;

The TED training program:

- provides for each module (and learning units) specific in-depth resources and the opportunity to meet with experts, professors and other participants (forums);
- issues a “participation certificate” at the end of the full training course (if the participant has successfully passed all the tests delivered at the end of each module and has filled in the final assessment questionnaire).

4.1.1 Timing and duration

The online training will be open and accessible for the entire duration of the project, starting from 10 June 2018 and until the end of the project. The training will remain accessible in parallel with the ASSIST network and action in order to facilitate peer to peer learning mechanisms between participants in training and already in action.

The duration of the ASSIST-TED training course is estimated as 40 hours in total, taking into account the 1:2 ratio between the duration of only the spoken lessons and the actual training time and considering that the duration of the spoken lesson is 27 hours. The following table shows the structure of the ASSIST-TED training:

Table 7 - Italian ASSIST-TED training structure²

Area	Modules	Fruition
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² The titles of the modules and learning units have not been translated – for the general structure of the ASSIST training course refer to the HEA Qualification Schema document

			methodology	
M1 - Modulo introduttivo		ASSIST-TED: L'iniziativa ASSIST ed il profilo / rete / azione dei TED		
<i>Analisi del Comportamento di consumo energetico</i>	M2	L'energia è		
	M3	Il sistema sociale è ... cos'è povertà energetica e vulnerabilità		
M4		Privacy e trattamento dei dati		
<i>Check up e "supporto energetico"</i>	M5	Check-up del consumo energetico		
	M6	Supporto al comportamento di consumo		
	M7	Azione Assist	 / 	
<i>Comunicazione e consulenza ai consumatori</i>	M8	Comunicare l'energia		
	M9	Saper comunicare l'energia	 	
	M10	Pianificazione e organizzazione della comunicazione		

4.1.2 Training methodology and resources

The ASSIST-TED training course will be carried out mainly through distance learning methods in order to take into account the educational objectives, the qualitative and quantitative composition of the participants - and their geographical distribution - and the project timelines. Furthermore, the distance learning methodology will enable the enhancement:

-  - of the experimental aspects related to the use of innovative training approaches:
-  - the synergic integration between the “training, network and action” areas that compose the overall ASSIST-TED model. End users, potential TEDs and trained TEDs will benefit - according to different accesses, areas, functions and differentiated policies - of an integrated space, initially the training (TED Course) and then the working area with the resources for the national TED network and realization of the ASSIST Action.

In this context of distance didactic methodologies will be adopted, in particular:

-  **Asynchronous mode** for:

- the fruition of the learning resources, created with the “Articulate 360” software which allows to integrate the developed educational contents with the audio support (thesis, links to external resources, videos, etc.);
- the use of support resources (also external resources linked through hyperlinks);
- contact / interaction with other participants as well as the project team and the system administrator.

 **Synchronous mode**, mostly implemented in presence or through webinars, defined on the basis of specific needs and / or opportunities such as

- learning processes with educational objectives with a greater “experiential dimension” such as, Module 7 relating to the ASSIST Action. The webinars, organized as part of one or more modules for the identified learning units, will be periodically scheduled so as to allow the participants to participate according to the individual paths (and times) of use;
- peer to peer learning mechanisms, with reference to webinars that can be organized with the aim of putting “in parallel” activities and people in training with the TEDs already involved in the ASSIST Action.
- support processes for the creation, animation and consolidation of the ASSIST network.

Finally, the synchronous methods enables the access and use of forums and / or other social tools, facilitating the internal communication processes, collaborative learning and the initial construction of the TED network. The participants will, in fact, be involved in activities / social areas, progressively activated (and constantly guided and animated) in support to individual and collaborative learning processes and enhancement of the network mechanisms underlying the subsequent networking action. The participants will be able to create discussions and send messages and request the activation of discussions, send posts to open discussions and interact with messages with the project team and system administration.

4.1.3 Set up and participants profiles

The ASSIST training platform has been structured in order to foresee 3 different profiles:

-  ASSIST-TED training course participants who will have access only to the training course contents (progressively with the progress of the training)
-  Trained TEDs (i.e. those who have successfully passed the training course) who will maintain access to the ASSIST-TED training course and will be provided access also the ASSIST-TED working area with tools and resources (information, support, communication, etc.) linked to the ASSIST-TED network and to the realization of the ASSIST Action in the field;

- ✿ Project team staff, to support their training activities (including training monitoring) and network animation.

The training course participants will be able to register to the training course and therefore to have an account through a registration process starting with the filling in of a form (as also described on the Italian ASSIST web site ([https://www.assist2gether.eu/news-61-corso di formazione assist](https://www.assist2gether.eu/news-61-corso-di-formazione-assist))). The registration form also allows and "ex ante" profiling of the various participants and the "recording" of their expectations.

Once the registration form has been filled in, AISFOR provides to create a learner account and the training platform automatically sends an email with all the access data. The learner account provides permissions to access and undertake:

- ✿ the training course and, therefore, to the training and learning resources related to the individual modules and units;
- ✿ the overall schedule of the training plan and the activities indicated in it (meetings, webinars, events, action, etc.);
- ✿ satisfaction questionnaires (by module and by course)
- ✿ access tests (for any personalization of the course) and verification of learning (for each module and final);
- ✿ individual progress reports and results;
- ✿ social tools / areas.

4.1.4 Training rules and pathway

Once the participant receives the automatic email from the training platform, he/she can access the platform and start the ASSIST training. In order to ensure that the participants undertake the full training course and that the training is most effective, the following sequential rules have been set within the platform:

- ✿ Crossing rules: the modules and units are all subsequentially numbered (Mx.y where x represents the progressive number from 1 to 10 of the module and y the progressive number of the unit). The participant is allowed to move progressively from module to module and within the module from unit to unit;
- ✿ Completion rules: all units must be completed - the unit is considered completed when all the slides have been viewed (it is not possible to skip slides) and the final test has been successfully passed. All modules must be completed – a module is considered complete when all the units are complete

4.1.5 Evaluation system

The ASSIST training course evaluation system is divided into two key dimensions:

• horizontal timeline: ex ante, in itinere and ex post

• evaluation "objects": satisfaction vs. learning.

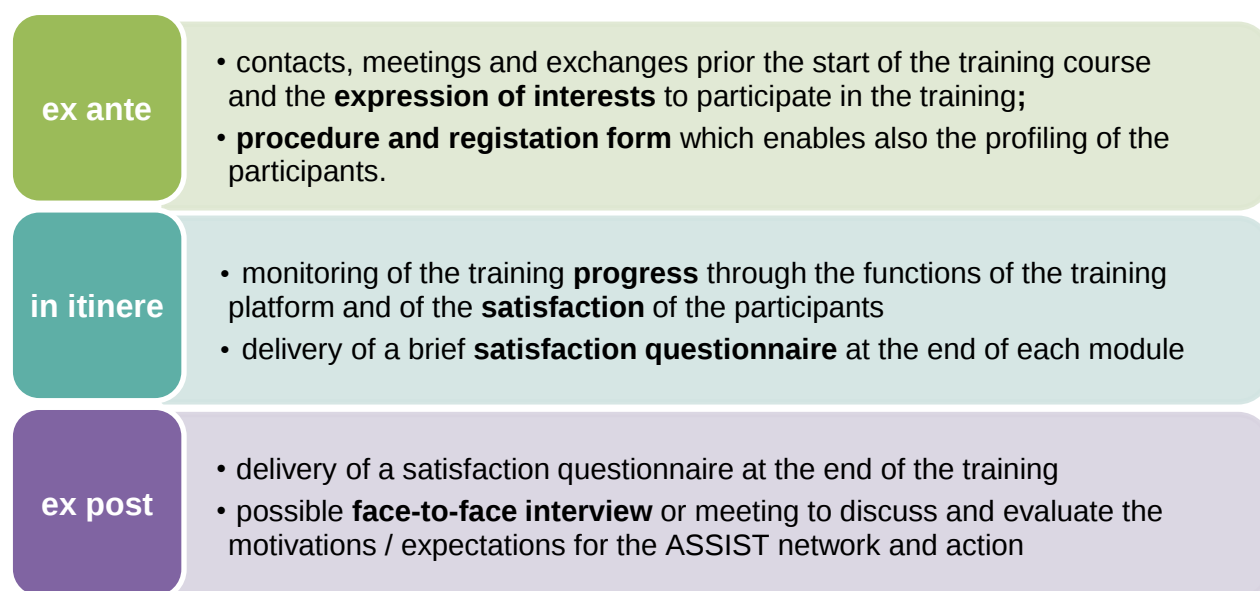
The definition of the evaluation system was also intended to satisfy the assessment requirement of the third project milestone, i.e.:

VCEA training material and methodology validation	Comments and marks on the training evaluation forms (> 75%), % of people finishing the course respect the number of registered people	Defined and collected evaluation forms
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4.1.6 Participants motivation / expectations evaluation

The evaluation of motivation is realized through:

Figure 3 - Assessment of the Italian training course



The definition of the specific tools for evaluating the motivation / expectations - together with the evidence related to the evaluation of learning – will enable a richer elaboration and evaluation of the evidences with respect to some key dimensions related to: fruition behaviors; educational success; action and impact of the action; participation in the network; etc.

To this end, an online form was created for the expression of the expression of interest; an online registration (and profiling) form; satisfaction questionnaires (end of module and final).

4.1.7 Learning assessment

Also the assessment of learning will take place over the entire training horizontal timeframe, as follows:

Entry test

At the start of each module / training unit, an entry test may be delivered to evaluate the competencies and knowledge of each participant on the specific topic and in case the test is successfully passed the participant is allowed to skip the learning unit. However this possibility was not foreseen within the ASSIST training course in order to oblige all participants to undertake the full training course and therefore to collect feedback on the full ASSIST model.

Learning unit final test

At the end of each learning unit, the participant will undertake a final test – multiple choice questions according to the number of lessons in the learning unit (an average of 3 questions per lessons have been considered adequate).

The test is passed if the result is above the **minimum threshold of 70%**. The test can be repeated twice and if the participants fails it also the second time then he/she must re-undertake the lessons.

Final Test

At the end of the entire training course, the participant will undertake the final test on the contents of the full ASSIST-TED training course. As for the test *in itinere*, the test is considered passed if the result is above the **minimum threshold of 70%**.

After the "successful" completion of the training course, a certificate of participation is issued attesting the acquisition of the knowledge and skills necessary to act as a Household Energy Advisor (Tutor per l'Energia Domestica). The positive evaluation of the learning and the achievement of this certificate represents the "formal" transition of the trained TED to member of the National TED network with consequent access to the ASSIST-TED working area and to the implementation of the ASSIST-ACTION on the field, supported and guided by the project team.

4.1.8 Follow-up and impact evaluation

The evaluation of the impact of the training course on the behavior and performance of the TED will not represent a moment of evaluation "by itself"; consistently with the objectives of the training course and the project's very purposes, this evaluation will proceed according to two main dimensions:

- Degree of participation in the TED network;
- Degree of participation in the ASSIST action and assessment of the effectiveness of the action itself through the tools and KPIs defined for the project.

4.2 Spain

The HEA training programme encompasses three main areas of knowledge: energy, social and relational. This programme will be developed through 4 basic modules and a final course project that will be carried out during the whole training period and which will have a part in each training module. In addition, and given the transversality of the training, an active participation of the participants in the moodle forum with comments or specific questions will be required.

4.2.1 Training programme - modules and units

Below there is a table with the contents of the HEA training, detailing the modules and units that will be carried out as well as the hours that will be invested in each of them.

Table 8 - HEA training course programme in Spain

Module	Units/Contents	Hours	Methodology
Introduction	Presentation of the programme and the Moodle platform Dynamics of social care and context of social services - Presentation of the tasks of the HEA	4	On-site
Module 1	Poverty and energy poverty: poverty and social exclusion; definition, causes and consequences of energy poverty; effects of energy poverty on people's health	2	Online
Module 2	Basic concepts of energy: what is energy, how is it transformed and in what shapes does it exist; renewable vs. non-renewable resources; power, energy and units of measure; introduction to the use of energy at home	5	Online
Module 3	Energy advice 3.1. Introduction to energy markets: functioning of energy markets 3.2. Electricity billing: concepts of electricity billing; free and regulated markets; methods of saving.	13	On-site/Online

	3.3. Gas billing: gas billing concepts; free and regulated market, butane gas 3.4. Energy meters: types, functions, how to download the data. 3.5. Current legislation on energy poverty: state framework, autonomous framework, existing bonuses, vulnerable consumer protection.		
Module 4	Comfort and energy use at home 4.1. Improving comfort: what is comfort, on what does it depend, how can we improve it through consumption habits and through insulation 4.2. Optimisation of energy use at home: uses, improvement of air-conditioning and hot water systems, improvement of domestic appliances and lighting, other consumption at home	9.5	Online
Closing	Protocols of action in households Presentation of the final results of the students' coursework	6.5	Onsite

4.2.2 Modular **course**

Depending on the initial level of the participants and taking into account their previous training, each HEA profile will develop one or other training modules on a mandatory basis. However, no module will be restricted for any of the participants. In other words, there will be mandatory modules depending on the profile but there will be no restriction if one of the participants decides to carry out more modules than they are entitled to.

Specifically for the profiles identified in Spain, the modules to be carried out will be the following:

- HEA profile (social service workers with home or tele-care services): In this case the participants must carry out all the modules of the training programme and the activities derived from them in order to successfully pass the course.
- SAEC profile (employees of the customer service departments of the energy supply companies): In this case, the course participants do not need to complete the entire module 3, as they already have technical training, especially in contractual issues and

invoice comprehension. The training will therefore be tailored to the specific profiles of the trainees, e.g. the professionals in the customer service department of the electricity companies will not need to complete modules 3.1, 3.2 or 3.4 but will need to complete modules 3.3 and 3.5.

4.2.3 Time frame of the course

The HEA training course will take place over a month and a half with a total implication of 40 hours distributed between face-to-face classes, online sessions and hours of autonomous work.

It has been considered to carry out 40 hours in a period of a month and a half to facilitate the assimilation of concepts in a gradual way. Likewise, it must be taken into account that the students already have a job so the temporary availability is asynchronous. Therefore, we believe that the online format is optimal to improve performance and assimilation of concepts as each professional will choose the optimal time to work.

4.2.4 Training methodologies

The training methodology is combined as it consists of on-site classes, online sessions and autonomous work. The start and end dates of the course and the on-site sessions are fixed in a calendar but the rest of the training will be distance learning, with an asynchronous time distribution where the student decides which is the best time to assimilate the corresponding module. Even so, a study recommendation will be made to the students to give them support in the organization of the study time and to avoid the accumulation of work in the last weeks of training.

On the other hand, the online forum will always be available where the teacher will solve all the doubts generated with the students in a quick and easy way.

4.2.5 Follow-up and completion requirements

The modules of the training course must be carried out in a linear manner, i.e. a module cannot be taken if the next one has not been passed before. The only exception are the modules that some of the profiles should not take because they already have the skills acquired previously. In this case, the module will be skipped and the next one will follow.

Each module has a part of autonomous work to be done. Attendance, either in person or online, is not enough to overcome it satisfactorily. Depending on the module or unit, there is a task to be done:

- 🌟 Practical exercise/s.
- 🌟 Online questionnaire.
- 🌟 Request for comments on Moodle's online forum.

Even so, not all the activities will be mandatory, some of them will be complementary and will be voluntarily done by those students who feel they need to reinforce a specific unit or module.

As for the practical exercises, a final Business case is proposed to validate the contents acquired in the different modules. This exercise will be conducted individually, although it is recommended that students share their results among themselves in order to be able to compare them. On the last day of the training, in person, each participant will present the exercise for each of the students and communication skills will be evaluated.

4.2.4 Evaluation

As already stated, the individual evaluation of each participant will be carried out through six mechanisms:

- ✿ Attendance to on-site sessions and viewing of all training materials.
- ✿ Accomplishment and completion of the questionnaires proposed in each module.
- ✿ Participation in discussion forums.
- ✿ Execution of the proposed practical exercises.
- ✿ Defense of the Business case in the final on-site session.
- ✿ Motivation assessment and expectation management.

At a global level, and fulfilling the objectives of the European project, it is expected that at least 75% of the participants of the different professional profiles will pass the training phase.

4.2.5 Evaluation of participants' motivation and expectations

Throughout the program, motivation, expectations and level of participation of participating professionals will be assessed in the following ways:

- ✿ Ex ante: At the beginning of the training the level of motivation will be evaluated and the expectations will be identified both at the face-to-face level during the first training session and through an initial questionnaire to the participants.
- ✿ In itinere: The participation in the on-site sessions will be registered and the follow-up of the online sessions will be controlled through the follow-up statistics offered by Moodle.
- ✿ Ex post: At the end of the training there will be a participant satisfaction questionnaire and the motivation to start with the interventions.

4.2.6 Participant conceptual evaluation

The students will be evaluated through theoretical questionnaires after the modules and at the end of the training, in a classroom where they must present the results of the project (business case) conducted throughout the course and based on a real energy intervention in their own homes.

Even so, there will be complimentary exercises and questionnaires by modules that will be corrected by the teacher so that the students can identify their errors and correct them although they will not condition the final evaluation.

4.2.7 Evaluation of the impact on participants

The training has multiple goals but basically these professionals are trained to provide energy advice to the vulnerable users they serve.

In order to evaluate the impact, two levels are identified:

- ✿ Own impact: given that the training foresees an energy intervention in the participants' own homes, many of them in vulnerable situations, the impact of their own actions in their homes will be evaluated and made visible in the last on-site session of the course.
- ✿ Impact on users: each participant will have a tutor assigned and will carry out the energy interventions that will be monitored following the evaluation methodology foreseen in the ASSIST project. Thus, data will be obtained on improvements in comfort levels, reduction of energy use in the household or economic savings in utility bills.

4.3 UK

The activities, knowledge, skills and competences to be undertaken or gained by the HEAs in the UK are fully described in the “HEA Qualification Schema”,

4.3.1 Training program - modules and units

4.3.1.1 Modular training

As described previously in the document, the general training undertaken in module 2 will be undertaken by SWEA's project partner CCP. They as an organisation work continuously with volunteers with a new intake every three weeks or so. Modules 1,3,4 and 5, the specific energy advice training, will be provided by SWEA, including presentations and the opportunity to shadow our members of staff as they carry out home visits to vulnerable consumers as part of our professional role as an energy agency.

The training program will include the following:

- ✿ Background of the participant: application forms, assessment day, interviews. All of these activities will be carried out by our partners CCP
- ✿ Working context of the participant – the HEA will operate as a volunteer within CCP's range of support services

The HEAs can also have been vulnerable consumers themselves in the past. In this case the general training will be revised accordingly by CCP but the energy advice training will be exactly the same from SWEA.

4.3.1.2 Training timeframe

It is envisaged that the energy advice training can be added into the general volunteer training provided by CCP and could be undertaken during a period of one to three weeks. As energy advice in the UK typically becomes more prescient in the public's minds when the cold weather approaches, it was felt that the training should take place in August and September so that the HEAs would be prepared and ready to provide advice from September/October onwards. SWEA's professional energy advisors are available presently and so are helping vulnerable consumers from April 2018 onwards.

4.3.1.3 Training methodologies

Describe the delivery methodology for the training – in the table above report for each module / unit the methodology specifically:

- ✿ In presence – the HEAs will be operating locally and so it is felt that this is the best and most personal approach where answers can be provided to questions immediately
- ✿ Collaborative learning tools – the online platform will be made available to all HEAs to encourage sharing of information and best practice
- ✿ Social media – this will be used to increase awareness and also encourage sharing of information and best practice

4.3.1.4 Training fruition and completion rules

- ✿ Meet competences laid out in application form
- ✿ Pass interview for general volunteering
- ✿ Attendance of all modules
- ✿ Signed off by lead trainer in each module

4.3.1.5 Training assessment

4.3.1.5.1 Participants' motivation / expectation assessment

The participants' motivation and expectation will be assessed through the application form and interview process. This will be carried out by SWEA's project partner CCP.

4.3.1.5.2 Participants' learning assessment

The participants' learning will be assessed through the trainer's continued assessment during the modules. This will be carried out by both SWEA and SWEA's project partner CCP.

An informal learning certificate can be provided at the successful completion of the training.

4.3.2 HEA training participants

4.3.2.1 HEA training participants "entry level"

There will not be any academic qualifications required to become a HEA. The underpinning idea is that the HEA courses should be open to all (from the unskilled consumer to the energy auditor or social operator) and that according to the background of the participants they will undertake only the modules that complement their knowledge, competencies and skills (therefore social operators need not undertake the module on social issues).

In the UK there is a requirement to train 6 HEAs. If the opportunity arises it will be interesting to see if participants can be identified who have been vulnerable consumers themselves. The added value of this 'peer-to-peer' support and advice will be monitored during the project.

4.3.2.2 HEA training potential participants

We anticipate that there will be a wide range of reasons behind why people would want to become HEAs. may be interested in the ASSIST HEA training course and justify the choice in terms of added value of the course (as example below), the more detailed this section is the more defined the course promotional strategy will be. Indicate also for each type of participants the expected number of people to be trained

Table 9 - Participants training in UK

Participants		Added-value	Expected number of HEA trained
Volunteers helping	social	Empower their competencies and skills to include the energy sector and be able to provide wider	6

operators assisting people in need	support to the assisted people in need. Assist allows support (both via digital lines of communication, and face-to-face meetings) to be provided to the HEAs, while they work for their host organisations such as CCP and Citizens' Advice, on any complex energy issues.	
Vulnerable consumers who then become volunteers as above	Gain knowledge, skills and competencies to support vulnerable consumers through a "peer to peer" methodology. Assist allows support (both via digital lines of communication, and face-to-face meetings) to be provided to the HEAs, while they work for their host organisations such as CCP and Citizens' Advice, on any complex energy issues.	6

Vulnerable consumers will be addressed as possible participants of the HEA ASSIST training course and invited to undertake the course. The underpinning idea is that vulnerable consumers may become HEAs and activate a "peer to peer" support action.

SWEA's partner organisation CCP will be able to identify vulnerable consumers to take part in the training and volunteering and the energy advice will be provided by SWEA.

4.3.2.3 HEA course participants registration procedure

Course registrations will be managed by SWEA's partner organisation through regular volunteer registration and induction processes.

4.3.2.4 HEA training participants selection procedure

As there is a requirement to train only 6 HEAs in the UK, the training will be offered to participants who have already registered an interest in becoming a volunteer with our partner organisation CCP. Due to the small number, the selection procedure will be managed by SWEA ensuring that:

- The applicant meets the entry requirements of our partner organisation CCP
- The applicant passes the interview process
- The applicant shows the motivation and desire to be able to offer advice and support for vulnerable consumers with regards to energy poverty and energy efficiency advice

4.3.2.5 4.5 HEA training participants monitoring

Independently from the specific training methodological choices (in presence or distance learning) all the people who register / complete the training course will have an account on

moodle in order to dispose of the training resources and tools for the action implementation. Moodle will enable SWEA to monitor the activities of the users.

4.4 Poland

After the training program, which is based on thematic modules, a HEA network will be created with the maximum use of the knowledge and skills of advisory groups who have a contact with consumers tackled by energy poverty, but are currently operating in various areas that only partially complement each other.

Individual groups of advisers will remain experts in their field (e.g. in helping consumers with redress of companies from the energy market). In other areas they will function as a first aid institution. They will diagnose the problem and provide the specific information for the consumer, e.g. where to get professional support and help. This will allow to use the competences of individual groups effectively in their specific area. The consumer will be able to get help from a professional, who has the appropriate support tools (e.g. is able to represent the consumer in a dispute with the entrepreneur or prepare necessary documentation to obtain a targeted benefit).

It should be emphasized that all the groups, which the training is addressed to, should be focused on supporting consumers. Therefore, activities in the field of energy poverty will be part of their daily responsibilities. Part of the HEA knowledge, skills and competences coincides with those already obtained by training participants. That is why, the courses will expand their competences, including less-recognized areas (e.g. energy poverty).

4.4.1 Training program

4.4.1.1 Modules and their scope

The training program has been divided into main modules according to the subject. Each of the modules will be adapted to the group of participants in the best way of expanding their knowledge and to avoid duplication of the provided information. Depending on the competences of individual groups, the modules from those described below will be assigned to each group. Within the scope of each module, we specified the main issues to be discussed during the training. Below you can see general description of each course, which includes main issues raised during the training.



Module 1: Introduction

This module contains the presentation of the goals, structure and communication systems of HEA activities and presents everything included in the ASSIST project's program: online training platform with necessary materialism(information brochures; vulnerable consumer

support measures - WP6; tools available for HEA, including tools for making a simple energy use analysis - WP5), training program and activities.

Module 2: Energy behaviour analysis

In this module participants gain basic knowledge about the structure of the energy sector with particular emphasis on the energy sales sector and entities operating in this area, as well as institutions supervising and providing support. There is also a wide presentation of all energy-using systems (lighting, heating, food preparation etc.) and basic equipment included.

Module 3: Basic knowledge about the social care sector and vulnerable consumers

Here the participants learn about social welfare system and its programs, policies and activities. This module also includes discussion of general conditions for vulnerable consumers at national and EU level, together with general statistics describing these appearance, objectives related to this appearance, volumes describing them and health and social aspects.

Module 4: “ASSIST ACTION”

This module contains advice on communication with consumers. Also, the participants learn how to create a HEA network.

Module 5: Energy consumption Test

This module contains a presentation of information on energy consumption, popular habits, in relation to previous modules and a study of household energy consumption analysis.

Module 6 : Energy behaviour support

Here the participants are provided with useful tips on how to perform the study and lists of areas needed to study. They analyse energy bills and get an overview of supplier switching procedure.

Module 7: Communication skills

This module includes a presentation of the communication process, especially verbal communication and the ability to listen and communicate in writing. The participants also learn about the communication supported by IT tools; communication with various groups (technical employees, people without specialist knowledge).

Module 8: Relations

There is basic information about relationships (from self-awareness and management, to problem solving and non-verbal communication) presented.

Module 9: Planning and organization of communication activities

The group discusses issues such as: promotion of events and workshops, the development of communication materials and systems and tools for online communication.

Module 10: Security and protection

The participants learn about data protection, health and safety. There is also a presentation of information on the protection of personal data included in this module.

Module 11: Consumer law and rules

This module consists of learning about consumer rights - liability of the seller and distributor, sales contracts and distribution services contracts and tariffs. It also mentions the right to choose the seller and a tutorial on how to form a complaint. This module also contains necessary information about billing, invoices and payments. Matching training modules to recipient groups

During group trainings, trainers will prepare a specific training plan taking into account the selection of modules and time range. In the case of online training - the person taking the course - will select tasks with the help of a virtual assistant.

For example:

Execution and scope of training modules for the group of NFOŚiGW Advisors will be developed in cooperation with program supervisors to precisely match the skills and knowledge to the full HEA profile destined for this group. As part of the project implemented by NFOŚiGW, Advisors are trained to provide support to various groups, including:

-  individuals,
-  companies,
-  the public sector, including municipalities,
-  the housing sector, including housing associations and cooperatives.

Additionally, Advisors from this group are prepared to perform tasks in the following areas:

-  support in planning and implementing environmentally friendly investments in your region,
-  indication of investment financing sources available on the market,
-  leading trainings and information and educational activities,
-  support in the preparation, verification and implementation of low-carbon economy plans,
-  trainings for municipal energy engineers.

Due to the specific nature of the trained group, the content of the modules will be transformed so to avoid duplication of the knowledge already acquired by Advisors. We

will focus on using the capabilities of the tools prepared in the ASSIST project, on identifying consumers in the field of energy poverty and those tackled by it, and on supporting those people by limiting such issues as e.g. knowledge about the energy market in Poland.

The scope of training modules carried out for OPS employees will be tailored to their knowledge of the social assistance system and communication skills with vulnerable consumer. Also, modules presenting knowledge of the energy market, energy use, and research on energy behaviour will be modified to present the main issues in a more practical way, by limiting the presentation of specialized knowledge. This way, excessive complexity of training inappropriate for this group of participants will be avoided.

Depending on the needs, preferences and capabilities (including time) of our recipients, we allow the following training models:

- A. Training meetings implemented in the form of lectures in conjunction with practical classes. In addition, useful materials will be disseminated through the training platform that can be used to further transfer of knowledge. After the training, participants will be able to consult with trainers to supplement the acquired knowledge.
- B. Regular trainings in the form of lectures with elements of practical tasks, so as not to significantly interfere with the standard work model of employees, e.g. OPS. In addition, some hours will be allocated to the possibility of consultations (e.g. using the ASSIST communication platform) so as to supplement knowledge if doubts or questions arise regarding the areas presented during training.
- C. Online training - the choice of modules will take place with the participation of a virtual advisor if approved by the administrator. The training schedule will be adapted to each of its participants.

Training materials prepared for participants will also be available to download on the training platform to facilitate access to course participants.

4.4.1.2 Training results and graduation rules

In the case of stationary training, each of the training modules will be fully implemented during one training meeting. In addition, each module will be presented in a separate way, so absence on any of the meetings (in the case of several recurring meetings) will not affect the possibility of participating in the rest of the trainings. Participants will also have the opportunity to catch up on material missed during absence by direct consultations and the use of materials posted on the training platform.

The condition of completing the training is registering on the training platform, passing the final test and participating in classes. Due to the possibility of consultations, the work mode of OPS employees and random events, full-time presence will not be obligatory. The minimum required participation will be at the level of 50% of the course hours and

registration on the training platform. Each participant will have to complete the final test which will evaluate the knowledge and skills acquired during the training.

After successful completion of training, participants will receive a certificate confirming acquired skills.

4.4.1.3 Training program evaluation

Assessment of participants' motivation and expectations

Before the trainings, participants will be asked to complete a short test of motivation and initial competences. It will check if expectations of training participants have been met and how their knowledge and skills have improved throughout training. After completing the entire training, participants will be asked to evaluate the usefulness of training and participants' satisfaction. The result of the surveys will be analyzed.

Assessment of participants' competences

The overall competence assessment will take place at the end of the training and will be carried out in the form of a test. The test will assess the knowledge and skills acquired in individual training modules. Successful completion of the test and attendance at training will be a condition for receiving a certificate confirming the competences of training participants.

Assessment of training effects

After the training, participants will have to pass a final test, assessing the acquired knowledge. The test results will be compared with the initial test to assess the difference in knowledge and skills. After the training, participants will be able to use the networking and training platform, which will be used to collect and exchange HEA experiences. The platform will also be used to assess the impact of training and its usefulness during HEA work. Evaluation surveys will be made available through the platform, which will be used to gather HEA experiences and their opinions on the usefulness of acquired knowledge while helping vulnerable consumers. Surveys will be collected a few months after the training, to give HEA the opportunity to fully utilize the acquired knowledge and reliably assess its usefulness. In addition, the number of subsequent people indicated by the number of new participants in the networking platform after completing all training will be the basis for assessing the possibility of knowledge transfer and development of the HEA network. The direct impact on vulnerable consumers associated with HEA activities will be estimated based on activity on the ASSIST project platforms and based on conversations with HEA who have completed the training.

4.5 Belgium

You find here an overview of the training modules that will be offered.

A general description of the training modules, the estimated duration in hours and the methodologies provided are presented in the following table.

Table 10 - Training course structure in Belgium

Gebied	Module		Time	Methodology
Introduction	M1	Introduction to the ASSIST project	2 hours	
	M4	Assist in action, role of the HEA	1/2 hour	
Energy & behaviour analysis	M2	Basic knowledge of the Social System and Vulnerability	4-6 hours	
	M3	Basic knowledge of the Energy Sector	4-6 hours	
Energy scan & support	M5	Tracking Energy Behaviour	2-4 hours	 
	M6	Track energy consumption	2-4 hours	
	M7	Assist measures and actions	2-4 hours	
Communication and relational skills	M8	Communicate about Energy	2-4 hours	 
	M9	Relational competencies	2-4 hours	 
	M10	Planning and implementation of communication initiatives	1-2 hours	
	M11	Safety and protection	1-2 hours	

4.5.1 Modular training

In Belgium, we choose to build the course modularly, because the candidates can have a very diverse background.

At the start of that training, the entry level of the participant will be determined on basis of a survey. Depending on the "entry level", the participant will be allocated his further modules via e-learning. The follow-up will be managed via the e-learning platform.

At the end of each module, the participant must go through a survey (on the basis of a quiz), during which the participant can test his / her acquired knowledge. If he/she pass this, he/she can start the next module. He/she will also receive feedback about the mistakes.

At the end of the course, the participant will take a final exam in which his/her knowledge about all modules will be questioned. If he/she succeeds, he/she is included in the HEA network and receives a certificate as proof.

4.5.2 Training period

As soon as we have enough participants in a region, a training session will be organized in a Fluvius location. The purpose is to ensure that the courses continue as centrally as possible, depending on the target group. We want to start the session from June 2018 and every time we have a target group of 10 to 20 people. Once the training has started, we plan to end it in a period of one month.

4.5.3 Training methods

The methodology of training will contain two pillars, depending on the content of the module, one of the two or mix form of the methods below will be chosen.

On the basis of class lessons

- ✿ Syllabus
- ✿ Presentations
- ✿ Exercises

On the basis of e-learning with:

- ✿ Syllabus
- ✿ Presentations
- ✿ Movies
- ✿ Exercises

4.5.4 Training rules and pass rules

- ✿ At the start of the process, the prior knowledge of each individual HEA will be assessed.
- ✿ Depending on that knowledge, a personal pathway will be mapped out.

- After completing a module, a quiz will be provided to test the gained knowledge.
- At the end of the complete process, a test will be conducted to determine whether the knowledge is sufficient to be able to take on the task as a HEA.
- In case of failure, a resit is provided, by allowing the HEA candidate to go through the e-learning process again, in particular the modules for which the knowledge was insufficient.

4.5.5 Training assessment

4.5.5.1 Participants motivation / assessment expectations

At the start of the training, the expectations and initial competencies of the candidates are questioned. In this way, the expectations of the participant group can be taken into account during the training, and special attention can be paid to those points during the training.

4.5.6 Participants training evaluation

We provide three phases for assessing the participants during the training:

- At the start of the training : a survey to test the participant's basic knowledge
- During the education : by a survey after each module
- Upon completion of training : exam about acquired knowledge

4.6 Finland

As mentioned above, the Energy tutor training program covers three important areas: 1) energy efficiency, 2) social dimension and 3) communication and networking. There is an online learning environment freely available for everybody. However, in practise, the training course is customized for each participant, based on his or her existing knowledge and skills.

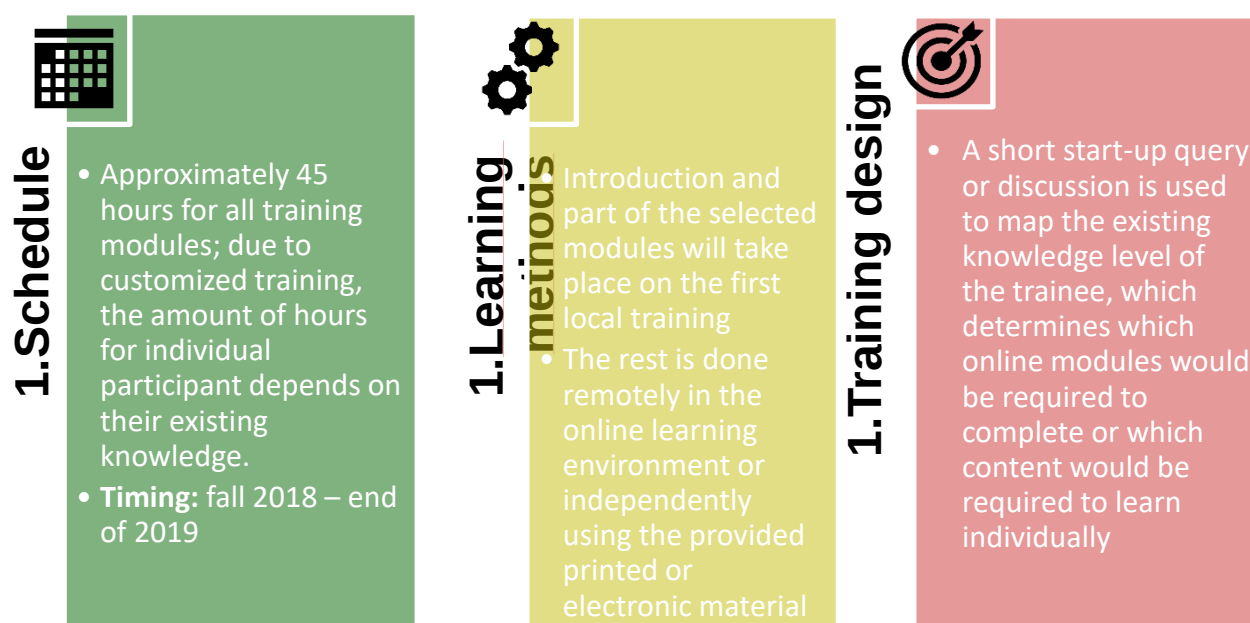
4.6.1 Methods

The training will be delivered through a blended methodology of contact lessons () , independent learning using printed and electronic material and distance learning in an online environment ().

During the first contact session basic information on energy poverty and the background and goals of ASSIST Energy tutor training are provided. Then all trainees are guided to the online learning environment which is offered for all interested HEA trainees.

The trainees background, existing knowledge and expectations for the training are evaluated before the actual training starts. Suitable online learning modules are selected for each participant and customized new learning content or material is created for trainees, whenever necessary and required.

Table 11 - Summary of HEA training timing, methods and implementation



4.6.2 Online training course modules and contents

Table 1 presents the online training course modules and their contents. The modules are divided in four categories 1) Introduction, 2) Energy efficiency, 3) Social dimension, 4) Communication and networking. The online environment can be found on <http://ASSIST2020.eu/>.

Table 12 - HEA online training course and the existing training modules in Finland

Module		Section	Method
M1	Introduction to energy poverty and ASSIST project	M1O1 Introduction to energy poverty and ASSIST project Basic knowledge of energy poverty and aims and background of ASSIST project. Instructions for completing Energy tutor training. Distance	

			learning and online environment	
Energy efficiency	M2	Energy sector principles	M2O1 Energy sector Basic knowledge of energy sector, consumer markets, major players including public authorities	
			M2O2 Legislation National legislation relevant to energy consumer, introduction to the EU legislation and energy policy	
			M2O3 Energy Costs Energy invoices and tariffs, tendering. Updating electricity contract	
	M3	Home energy efficiency	M3O1 Energy consumption at home Basic knowledge of consumption measuring, energy labels, invoice reading. Home energy consumption spots (heating, lighting, home appliances, etc.)	
			M3O2 Home energy survey Instructions for home energy survey and practising the survey at home	
			M3O3 Energy efficiency improvement Practical energy efficiency improvement at home	
	M4	Energy efficient behaviour	M4O1 Energy efficient behaviour Everyday choices and inspection of one's own energy consumption habits	
Social dimension	M5	Social system principles	M5O1 Social system principles System's structure and players. Basic information on available support	
			M5O2 Third sector Non-governmental organisations and offered support for vulnerable consumers.	

	M6	Energy poverty and vulnerability	M6O2 Energy poverty and vulnerability Vulnerability and its characteristics at both EU and Finnish levels, the key statistics of the phenomenon, dimensions of vulnerability, health effects of vulnerability	
Communication and networking	M7	Energy communication	M7O1 Energy communication Communication tools and resources, event organization, communication creation	
	M8	Meeting the vulnerable	M8O1 Meeting the vulnerable Social skills and empathy, behaviour and safety at home visits	
	M10	Energy tutor network and experience sharing	M10 Energy Tutor Network Networking, knowledge and experience sharing, enabling continuous learning	
	M9	ASSIST Actions	M9O1 ASSIST Actions in practice What will tutors do, what kind of pilots can be arranged	
			M9O2 ASSIST Actions dissemination Available communication tools and resources	
	M12	Privacy policy	M2O1 Privacy policy Respect for privacy, privacy protection legislation. New GDPR regulation	

Those who would like to do complete the HEA training mainly on the online environment, are required to pass all assignments and the final examination. In the beginning of each online training module there is an initial questionnaire. If the participant answers the questions correctly, he or she can proceed to the next module. In other words, these initial questionnaires act as an alternative to complete the module; they contain same questions as the module's final test.

4.6.3 Schedule and duration of the training course

The training material in the Moodle platform was finished in fall 2018 and it has been available ever since.

The duration of the training will be determined by the completion of the modules. Should the trainee go through all modules in the online environment, altogether it will take approximately 45 hours.

Participants may take their time to complete the training. The completion date is individually planned to ensure flexible completion of the possibly challenging modules.

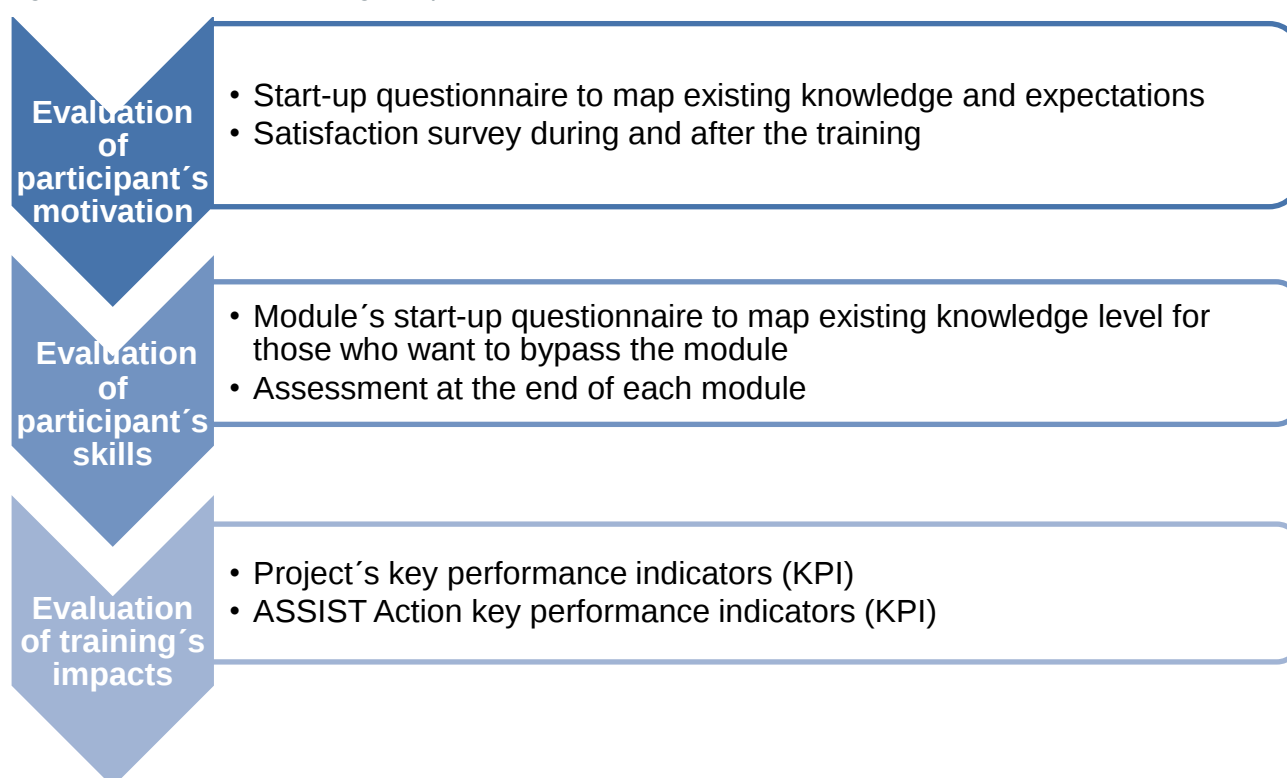
4.6.4 Feedback from the participants

The training participants are encouraged to provide feedback during the training via questionnaire in an online environment and during the contact learning sessions. Feedback is collected also at the end of the training.

4.6.5 Evaluation of training's impacts

The impact of the training as well as the work of HEAs will be monitored within the project in accordance with the key performance indicators of ASSIST project. The training quality and the global impact of the offered training is evaluated before, during and after the training as depicted in the following figure.

Figure 4 - Elements of Training's impacts evaluation in Finland



5. ASSIST-HEA Training participants – identification and engagement

5.1 Italy

Consistent with the occupational and role dimensions expected by the TED in the various and diversified contexts of reference (the Italian HEA, the TED, is in line with the complete and full profile as described in the HEA Qualification Schema), the indication of the target has defined a broad and differentiated set of participants in the ASSIST-TED training program and, therefore, an articulated system of promotional actions and involvement.

5.1.1 Identification and incoming profiles

Participation in the Italian ASSIST-TED training course does not foresee specific entry levels for the participants; the underpinning idea is that the training is open to everyone (from non-specialized consumer to energy consultant to social operator) already active in a working context providing advice to people (in order to ensure the contact with consumers). The variety of TED professional contexts suggest the opportunity to define flexible and customizable training paths based on the different contexts and backgrounds of the participants. However the training strategy in Italy, in order to address all operators coming from different working contexts, was not based on dedicated small and specific training courses (each addressing a specific working context with the modules to fill in the specific training gaps) but rather to develop an overall integrated and modular system, customizable based on the knowledge / skills of the participants (evaluated and verified both with the initial tests for each teaching unit and with the final tests). This choice was based on the fact that the full training course with the possibility of personalised "customization" enables the possibility to undertake in any case all learning units even if the entry tests is positive and the learning unit may be skipped.

5.1.2 The potential participants in the TED course

As already described, the participants of the Italian ASSIST-TED training course are operators working in different sectors with different background, roles and activities. The table below reports as example - and not exhaustive - representation of the value proposal referring to the main types of participants.

PARTICIPANTS	VALUE PROPOSAL
Social Operator	Develops and enhances its knowledge, skills and competences with respect to the issues of energy consumption / savings (domestic) and of the network of the actors of the system so as to enrich its support / assistance action to its target audience
Municipality citizens energy / environment helpdesk operator	Develops and enhances its knowledge, skills and competences with respect to the themes of energy poverty, the network of social actors, support / assistance processes for vulnerable targets (with the relative relational specificities as well as
Consumer association	

helpdesk operator	technical ones)
Contact center operator	
Social housing, cooperative	Develops specific knowledge, skills and competences with respect to domestic energy consumption / savings issues in order to provide effective "peer" support in the "energy choices" of the reference housing aggregates. It also acquires knowledge of the network of actors and services and enters the network with other operators / figures, as well as greater awareness as a consumer / condominium.
Unemployed	Increases its employability through the development of specific, relevant knowledge, skills and competences for many different employment contexts. In the dimension of its vulnerability, it also enhances the peer to peer learning / support dimensions, as well as a greater awareness as a consumer. Employability also increased by participation in the network of actors and services and enters the network with other operators / figure
Vulnerable consumer	Develops specific knowledge, skills and competences with respect to domestic energy consumption / savings issues in order to provide effective "peer" support. It also acquires knowledge of the network of actors and services and enters the network with other operators / figures, as well as greater awareness as a consumer

A further added value of the training course - and potentially transversal and integrative to several target categories - is represented by the validation / certification of the competences acquired according to two major areas:

-  The validation / certification of skills through the issue of a certificate of participation with the indication of the competences acquired (assessed by test / exam per module and final) in order to allow the acquisition of professional qualifications / certifications with additional training
-  The validation / certification of competences for the recognition of professional credits through the issue of a certificate of participation with the indication of the competences acquired, evaluated according to the procedures defined within the reference professional order.

5.1.3 Registration procedures

As anticipated, the ASSIST-TED training course foresees the registration of the participants by filling in a form (online) which allows - in addition to the assignment of

credentials and access profile - to collect data and information useful for profiling the participants. .

5.1.4 Selection procedures

The training strategies defined for the ASSIST-TED training course does not include selection procedures; therefore, access will be given to those who are interested in undertaking the online training course (within the limits of technical feasibility and resources). However the registration form includes questions on the motivations and expectations from the course which will enable the Italian project team to evaluate the reasons to undertake the course.

5.1.5 Monitoring the participants progress

All participants in the training course will have a moodle account so as to allow continuous monitoring of the training activities. In particular, for distance learning activities (synchronous and asynchronous, fruition and social) the system will allow the Italian project team to monitor accesses, activities and participation. On a weekly basis, summary statistics will be prepared so as to detect any discontinuities and intervene (also with recalls and targeted communications) on any problems.

The final analysis will be carried out based on the statistics collected regarding the overall monitoring of the participants course progress and the data related to learning test results (per module and final), data relating to the results of the satisfaction questionnaires (per module and final) and evidence from exchanges between TEDs (or potential TEDs).

5.1.6 Promoting the ASSIST-TED training course

5.1.6.1 The promotion plan: identification of the targets and promotion channels

A promotion plan has been carefully built and implemented in Italy in order to address the large potential target of TEDs, either directly or through intermediaries. The plan has been divided into two distinct but interrelated moments:

-  Identification of the course target, either direct target as final participants of the training course; and indirect target as intermediaries for the identification and involvement of the participants;
-  Definition of the specific actions and tools to address the different targets.

For the identification of the training course targets, starting from the most relevant "employment" areas of the TEDs (social, energy, institutions), the steps have been:

- definition of the main sub-clusters for each of the three area,

- identification, for each sub-cluster, of the channels and targets (direct and indirect) of greatest interest,
- definition, for the various sub-clusters and targets, of the main strategies and promotional actions.

For this activity, as well as for the next one, the Italian project team developed a very analytical (excel-based) tools so as to effectively support the planning and monitoring of the activities carried out, the targets involved, the timing, etc. The following table shows a synthetic representations of the promotion activities in Italy

Cluster e sub-cluster		Strategy Communication Promotion	Promotion target / Type actors	Final target Potential Participant	Other actors
Institutions	Social services	On-line communication and dedicated communication material Meetings Collaboration agreements	Region	PUA operators	Replicability in other regions
	Education	On-line communication and dedicated communication material Meetings Collaboration agreements	High school	Students (Alternanza Scuola – Lavoro)	Materials and agreement to support replicability within school network (and / or national agreement for local health authorities)
		Presentation at the Didactic Area council (CAD) Meetings Collaboration agreements	University	Students (on the job training) Newly graduated	Materials and agreement to support replicability also in other universities (also with

					MASTER courses)
	Energy / institution	Dedicated presentation and direct communication	Public administration and public services	Contact center operators	Contact center operators
	Municipalities	Identification of Municipalities of interest based on: indications of the VCSC; partner network; participation / implementation of complementary initiative Sending dedicated communication materials Meetings in presence or via Skype	Municipality or other public bodies (such as Comunità Montana)	Social operators / educators	Material and agreement to support replicability in other municipalities (mailing list)
employees and / or social service operators and / or "technical offices" operators					
Social	Cooperatives	Identification of actors (VCSC / network partners / other projects) meetings and sending materials	Social cooperatives promotion actors	Young people in civil services	Materials and agreement to support replicability
	Consumers	Identification of actors Communication and meetings Agreements	Associations	Operators	
	Personal services		Third sector bodies and associations		
	Association of old people (AUSER)		Associations		

Energy	Smart Home Companies	Online communication and dedicated material Dedicated meetings Agreements	Companies	Employees	Materials and agreement to support replicability Identification of similar initiatives and collaborations
	Utilities	Identification of actors Communication and meetings Agreements	Utilities and/or other energy companies	Employees	Materials and agreement to support replicability
				Employees / associates	
				Helpdesk / customer care operators	

5.1.6.2 Promotion planning: actions, times, tools and objectives

Due to the large variety of TEDs working contexts, the training course promotional actions include different activities and channels structured according to the characteristics of the final targets of participants: "direct marketing" of the training course towards potential TEDs; promotion to key intermediation actors with respect to the final targets, promotion actions involving the national VCSC Italia ASSIST, aimed at enhancing the network and defining and sharing specific paths / subjects / areas of greatest interest for the project).

Therefore, a mix of levels, approaches and actors was used to promote the ASSIST training course. In the following table a summary representation of some activities / targets of the promotion plan.

Activity	How	Who	When	Objectives
Direct marketing	Published news and factsheet on the project website and on the partners website	AISFOR RSE AU	From February 2018 (with regular reporting for social media)	Learn about the existence and structure of the ASSIST-TED training course
	Published articles on specific journals			Interest and participation of potential TEDs
	Social media			Interest and collaboration of

				intermediaries
Collaboration with intermediaries actors (such as consumer associations and social services)	Dedicated communications (email, telephone calls, etc) Sending informative customised materials Meetings Participation in specific events / fairs	AISFOR RSE AU	Emails and skype from February 2018 Face-to-face meetings from February 2018 Participation in events organised by others from February 2018 Promotional event in Milan on April 11, 2018	Learn about the existence and structure of the ASSIST-TED training course Interest and participation of potential TEDs Interest and collaboration of intermediaries
Collaboration with the Italian VCSC members	Sending informative material on the training course and on the ASSIST model Meetings	AISFOR RSE AU	From February 2018	Identification and activation of communication and promotional channels Interest and participation of potential TEDs Interest and collaboration of intermediaries

5.1.6.3 Materials for promotion and communication of the training action

In order to promote the course, various and target-specific communication materials have been prepared. The most significant are:

- ✿ 3 factsheets on: the project ASSIST, the figure of the TED and the ASSIST-TED training course. The factsheets were used either singularly or combined (<https://www.assist2gether.eu/ita-risultati>);
- ✿ Dedicated communications (e-mail and / or letters) to present and promote the training course,
- ✿ Specific communication on the launch of the ASSIST-TED training course (and its characteristics) on the web sites of the project (Italian section) and on those of the partners as well as in all social channels;
- ✿ Online articles and launch announcements and promotions;

- ✿ Creation of communication materials to support the organization / participation in events of interest, such as: slides, roll-up, brochures, factsheets, video-interviews;
- ✿ Creation of communication materials to support the participation and / or organization of meetings (one-to-one or in small groups) restricted, in presence or realized online (skypes).

5.2 Spain

5.2.1 HEA training participants

5.2.2 Initial level of HEA training participants

The HEA training course is open to anyone regardless of their initial level or specific knowledge. Since the course is modular, depending on the previous training one or the other modules will be developed.

In Spain, as mentioned above, we have two different HEA profiles. On the one hand, the social HEA, as a social services professional with no experience in the field of energy, will develop all the training modules. On the other hand, the HEA worker in the customer service offices of the supplier companies, SAEC, who will not have to carry out the modules corresponding to the introduction to the energy markets, the supply invoices and the energy meters.

5.2.3 Potential participants in HEA training

In the case of Spain, professionals from two fields are contemplated: on the one hand, professionals from the Home Care Service and Tele-care from the Social Services of local/regional public administrations.

Different town councils and supra-municipal bodies have been contacted in order to offer the training course to their home care and telecare workers and, in this way, to have both the students and the users who will form part of the project insured. In order to participate in the course, potential HEAs need to ensure at least 4 interventions in vulnerable households.

In the case of home care professionals in the home care service and tele-care professionals, in many cases these are also vulnerable consumers. In this case, the training has a dual objective, since it allows the activation of peer-to-peer support methodologies, as they themselves are in this situation of energy vulnerability.

For HEA's social profile, it is expected that approximately 90 people will participate in the training course, including coordinators, home care professionals and tele-care professionals.

In the case of energy companies, the course will be offered to the cooperative companies that integrate the Federation of Electricity Cooperatives of the Valencian Community and to the cooperatives that integrate the Renewable Union (the Union of Cooperatives of Consumers and Users of Renewable Energies), which is organised at national level in Spain. These cooperatives will be able to enroll in the course the employees who deal with customer service, collections and contracting, which are generally those who maintain closer contact with the users/members of the cooperatives. It is expected that between 10 and 15 professionals with this profile will have access to HEA training.

Through the training offered by ASSIST to this group of workers, it is expected that these professionals will be able to identify which of the users they serve, suffer or are at risk of suffering vulnerability or energy poverty. Therefore, the vulnerable users served by the SAEC will be among the clients/members of the electrical cooperatives.

5.2.4 Registration procedure for HEA course participants

In the case of professionals with a social profile, the registration of trainees is provided through channelling agents, i.e. town councils or companies that manage this public service.

In the case of customer service professionals from energy supply companies, the registration of participants is arranged through the member cooperatives of the Federation of Electricity Cooperatives of the Valencian Community and the Renewable Union.

5.2.5 Procedure for the selection of students for the HEA training course

In the case of professionals with a social profile, the procedure for selecting students has been carried out through channelling agents, that is, town councils or companies that manage this public service so that some group of their workers can develop the course.

Each city council or private manager of the public service of the Home Care Service, profiles are selected according to the following competencies:

- ✿ Motivation to learn and acquire new knowledge.
- ✿ Ability to innovate and to work in a team.
- ✿ Technical skills. Communication skills and management and resolution of challenges linked to joint social intervention with the people served.
- ✿ Good spoken and written communication.
- ✿ Organizational and planning capabilities, including process design, prioritization and time management.
- ✿ Problem solving skills.

 Observation capacity.

Criteria have also been taken into account, such as the motivation related to the field of energy poverty shown by the different professionals, both for the concerns they have conveyed in their daily interventions and for the motivation shown during the presentation of the project.

On the other hand, for the SAEC profile, the selection of the students who will participate in the course will be simpler and will be based, above all, on the position held by the professionals in their respective electric cooperatives. Generally, it is expected that workers from the customer service, hiring and collections department will be those who enrol for this course.

Since the course is designed and prepared online, the option of increasing the number of participants if there is interest from other organizations remains open. However, the course has not been opened to the general public, as the aim of the project is to assess the impact this training has at a practical level and how it solves and manages situations of energy poverty.

5.2.6 Follow-up of HEA training

Regardless of the specific methodological training options (on-site or distance learning), all people who register / complete the training course will have an account in Moodle to have the resources and training tools for the implementation of the action. Moodle will allow users to monitor their activities, however, it also foresees a system for controlling course participation to ensure that training indicators are met. In some cases, follow-up face to face sessions are offered to keep HEAs motivated.

5.2.2 Promotion of the HEA course

5.2.6.1 HEA course promotion plan

In the case of Spain, training has been linked to energy interventions in vulnerable households to ensure the correct evaluation and impact of the training of certain professionals. For this reason, open training is not offered to any interested person, but the complete training and intervention programme is negotiated in order to ensure the evaluation.

Specifically, the programme is offered to public managers of the Home Care Service and Tele-care service and customer service professionals from supplier companies. The first step is an agreement with the channeling agent (City Council or supplier company) in which they agree to promote the training course among their professionals and subsequent involvement in impact assessment.

The next step is the participation of the professionals. In the case of social professionals, the managers (whether subcontracted companies or from the city council itself) have used different channels:

1. Presentation of the project to the coordination teams: The challenge is presented and the pre-identification of possible participants is done and a proposal is made to them to attend an informative session.
2. Dissemination through the office on the information boards: Informative posters about the ASSIST project and the intention to carry out the pilot project have been hung. Volunteers interested in participating in the project could sign up for a list to receive more information.
3. Telephone campaign: From the coordination of the services they have made telephone calls to the professionals to provide them with information about the project, solve any questions and assess their intentions to collaborate.
4. Information sessions: Sessions are held with the professionals who have decided to attend in order to provide more information about the project and to end the list of participants. The objective of these sessions was to contextualize the project, to explain the important and operative aspects that may impact them in their daily life and to share concerns, needs and doubts that may arise before starting the project.

In the case of professionals in the front office of energy companies, the course will be offered to these companies through the communication channels of the Federation of Electricity Cooperatives of the Valencian Community and the Renewable Union (e-mails, meetings and direct information via telephone). For this profile, identification and attention to vulnerable users will be carried out from the company's own offices. Addressing the course to electrical cooperatives and not to all types of energy companies is not accidental, as we understand that the social component of cooperatives will make them have a special interest in this type of training for their employees, which directly benefits their most needed members.

5.2.6.2 HEA training course promotional material

Since the participation of both professionals in the training courses and users in vulnerable situations in the interventions has been ensured through intermediate agents (Departments of Social Services of Town Councils or supramunicipal entities or supplying companies), no specific promotional materials have been developed beyond the triptychs of the project and specific presentations to the agents.

5.3 UK

5.3.1 HEA Training Promotion Plan

Activities	How	With whom	When	Expected goals and results (if possible)
Direct / market action	Publication of course launch and programme on: 1) websites (SWEA, CCP) 2) social media (SWEA, CCP)	SWEA, CCP	One month before the launch of the course	Recruitment of at least 6 volunteer HEAs

As this is a local initiative and volunteers are registered with SWEAs partner organisation CCP on a regular basis, it is not anticipated that there will need to be a national promotional campaign in order to recruit volunteers.

CCP already has circa 200 volunteers who work with them on a regular basis and some of these can be contacted directly to access the ASSIST HEA training on energy advice.

SWEA and CCP will use their websites and social media profiles to champion the work of the HEAs in terms of their achievements; individually, collectively and in terms of the help and support that will have been provided to the vulnerable consumers.

5.3.1.1 HEA training course promotional material

As mentioned above, it is not anticipated that a large promotional campaign is required in order to attract and recruit HEAs in the UK.

The requirement to recruit only 6 volunteer HEAs in the UK means that the situation is very different from that in partner countries.

SWEA's partner organisation CCP already has circa 200 volunteers who work with them on a regular basis and some of these can be contacted directly to access the ASSIST HEA training on energy advice.

5.4 Poland

Training under the ASSIST project is primarily addressed to the groups described in the table below. However, their modular nature will allow the participant to join more groups that have direct contact with the consumer.

Table 13 - ASSIST training benefits for Polish HEAs

Participants	Benefits of participation in training
Regional Advisors	Increasing knowledge and awareness about energy poverty and vulnerable consumers. Possibility of transferring knowledge at various regional levels (e.g. voivodship, commune)
Consumer Advisors	Increasing competences and skills by transferring basic knowledge about the energy sector, enabling the extension of the scope of support provided by employees to the needy.
Municipal consumer ombudsman	Increasing competences and skills by transferring basic knowledge about the energy sector, enabling the extension of the scope of support provided by employees to the needy.
Employees of Social Welfare Centers	Increasing competences and skills by transferring basic knowledge about the energy sector, enabling the extension of the scope of support provided by employees to the needy.
Vulnerable consumers	Ability to assess and improve energy use within a household. Expanding knowledge on support options (e.g. financial, advisory, etc.). Possibility of transferring knowledge to other vulnerable consumers.

Declaration of willingness to participate in trainings will be held via e-mail. Candidates for trainings who do not belong to one of the groups described above will also be able to register their willingness to participate in trainings, but in this case it will be necessary to assess their knowledge and benefits resulting from participation in training. Participants qualified to participate in the training will be informed about this in advance (before the start of the training). In addition, people belonging to one of the target groups will be able to register on the training platform and use the training materials, even if they are not qualified to participate in the training.

5.4.1 HEA selection of participants

The described target groups will have a priority in participation in training to ensure the opportunity to participate for employees from various institutions, who will then be able to share knowledge with subsequent employees of the branches significantly increasing the effect of training. Additional participants (interested vulnerable consumers) will be able to participate in training within the additional places provided. In the case of vulnerable consumers coming in, a preliminary and qualification interview with an expert will be conducted to assess the candidate's skill level and the usefulness of the training. Selected

candidates will also have access to training materials in the case of a positive assessment of the suitability of training for a given candidate resulting from the expert's assessment (even if he will not be able to participate in face-to-face meetings due to the limited space).

5.4.2 Monitoring the activity of training participants

During trainings meetings, attendance will be verified by completing the attendance list. In addition, each participant will have an account on the training platform created as part of the project, which will be used to provide information and training materials and enable monitoring of participants' activity (e.g. by examining the number of logins or downloading training materials).

The platform created as part of the ASSIST project will also enable communication with HEA and interviews that will help assess the impact of HEA on vulnerable consumers after training.

5.4.3 HEA training promotion plan

Due to the precise definition of the target groups of participants, it will not be necessary to lead an intensive campaign promoting training. One of the channels for disseminating knowledge about training will be direct contact with representatives of Social Assistance Centers and a group of Advisors of the project "Polish nationwide advisory support system for the public and housing sectors as well as enterprises in the field of energy efficiency and renewable energy". In addition, to enable participation in training for vulnerable consumers, information about training will be disseminated using communication methods such as, for example, direct information to vulnerable consumers transmitted through OPS employees or using communication channels of the Polish Consumer Federation and the Polish National Energy Conservation Agency.

5.4.4 Materials for trainings participants

As part of the materials promoting the trainings, there will be press releases presenting the training prepared, based on this document. Due to the training orientation, it will not be necessary to create additional promotional materials to disseminate knowledge about the possibility of participating in training.

As part of the training course, there will be special presentations prepared. This presentations will describe the issues presented in the training modules, which will also be available on the training platform. All additional materials will also be distributed using the platform during training sessions and during HEA activities.

5.5 Belgium

5.5.1 HEA Training promotion plan

The Belgian situation requires a specific approach to promote the training, as a conflict can arise with the existing professional energyscanners. Because of this we prefer to promote the training by approaching associations, umbrella structures, energy houses, poverty networks ... that have a connection with the energy or social sector.

For each target group, we prefer to publicize the project on the basis of a presentation, with the option of applying for the course directly via e-mail. The candidate participants are then included in a waiting list.

Due to the specific definition of the target groups of participants, it is not necessary to conduct an intensive campaign to promote training across Flemish territory. Experience with other projects has shown that the targeted approach works best for the Belgian market. The most important channel for disseminating knowledge about training will be direct contact with representatives of the social and energy sectors.

Where possible, the training will be prepared for vulnerable consumers, information about training will be disseminated using the aforementioned communication methods.

Some examples of promotional activities are reported below, decide the best mix for your national context

5.5.2 HEA training course promotional material

As a network of energyscanners is already active in Belgium, we choose to approach specific target groups that are complementary to the existing network. For this we approach associations, umbrella structures, energy houses, poverty networks ... that have a connection with the energy or social sector.

This approach therefore requires a personalized approach, which always looks at possible win-wins between the ASSIST project and the existing networks and initiatives.

Starting from a general presentation, added in the appendix, supplemented with specific needs for the target group, training and recruitment for HEAs are promoted.

In addition, there will be communication via the social media channels, whereby we will also provide for candidates for the HEA training.

5.6 Finland

5.6.1 Potential participants of the Household Energy Tutor Training

Participation in the HEA training course does not require specific prerequisites for the participants. The training is open to everyone, should their background be energy professional or a voluntary worker in the third sector, or any other.

In addition, the training is free-of-charge. There are no tuition fees to participate the training.

Different professional profiles who could benefit from the HEA training are identified in Table in Chapter 3.6.2.

Some exemplary groups of HEAs are:

Existing Energy Advisors

In Finland, citizen's energy advisory services are currently provided by Motiva Oy, a government owned sustainable development company authorised by the Ministry of Economic Affairs and Employment. Motiva coordinates the network of regional energy advisors who are energy counselling companies or municipal energy offices. Energy advising of the Motiva Energy Advisory network is free-of-charge.

ASSIST energy tutor training tailored for the Energy advisors focuses on the social dimension, energy poverty and communication with vulnerable consumers, providing the opportunity to expand the advisors' expertise in the social dimension and improve the quality of counselling for special groups.

Existing housing and renovation consultants

Municipal and non-governmental organizations currently provide housing advice in Finland. Housing counselling responds to a variety of housing problems and e.g. problem with rent.

There is a large number of renovation consultants in Finland. Renovation advice is provided by municipalities and non-governmental organizations around Finland. Renovation counselling helps consumers and property owners in various property maintenance and repair questions. Renovation counselling is also provided for specific groups such as the elderly. Advice to specific groups is provided by, e.g. The Finnish Association of the Welfare of Older People (Vanhustyön keskusliitto, VTKL). ASSIST energy tutor training tailored for existing housing and renovation consultants will focus on the energy market and energy efficient behaviour aspects, providing energy expertise and energy communication to vulnerable people.

Social sector actors

There is a wide range of players in Finland whose purpose is to improve the living conditions or provide help for vulnerable consumer groups. Possible organisations to be trained as ASSIST Energy tutors can be found in the third sector, for example non-governmental organisations who offer personal counselling on various issues.

With ASSIST Energy tutor training, social counsellors have the opportunity to extend their expertise in the energy sector, which provides an opportunity to help vulnerable people even more comprehensively. A tailor-made ASSIST Energy tutor training for social players

will focus on the energy market and energy efficient behaviour aspects, providing energy expertise.

Energy students

Energy students may be professionally attracted to attend energy tutor training as they may see themselves as energy consultants in their future job. Similar to other energy professionals, many energy or civil engineering students may have already a solid background in energy, so their customized training could be focused on the social and communications dimensions.

5.6.2 Enrolment to the course and participant selection

One can register to the course either by email or directly creating credentials in the online learning environment.

There are no requirements to attend the training, but the course is open to everyone. However, the participants' background and knowledge determine which modules and components each participant will need to complete.

5.6.3 Monitoring the course participants and HEA diploma

Attendances are collected and recorded for contact teaching days.

With regard to online learning, the activity of each participants can be monitored, such as number of modules passed and the durations of the login sessions. The collected user data could be used for developing the online learning structure and material.

After having successfully passed the training, all graduates will receive an "Energy tutor diploma".

5.6.4 Communicating the energy tutor training opportunity for different organisations and individuals

The Finnish project partner targets to reach all prospective organisations to attract a maximum number of people to be trained as HEAs who could, then, support energy poor consumers in Finland. A communication plan was made in 2018 to reach the target number of participants. Communication approaches are selected case-by-case according to the audience approached.

The table below is the communication plan created in 2018. The communication strategies have been updated in September 2019.

Table 14 - Finnish HEA training communication strategies

Action	Plan	Target Group	Starting time	Objectives and expected results
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Preliminary information through grapevine and word of mouth advertising	Contact points and preliminary information about the training	Members of the steering committee, advisory networks and other contact points	June 2018 onwards	Provide the training's idea to the players well in time
	Preliminary request to be involved in the training and to provide relevant content and material			Find the most suitable partners and get the most knowledgeable experts involved in organizing the training, sourcing and supporting the development process
	Creating the training unit in collaboration with industry stakeholders to ensure their participation in other modules			Ensure participation in the training and/or dissemination of invitation to won networks
Primary support activities: Publication and promotion of the commence of the training	Contact consumers who have responded to previous surveys and provided their contact information		Advertising begins one month before the start of the training	The response rate is expected to be relatively high, as consumers have already participated in the project and were identified as a suitable target group
	1) ASSIST Finland website 2) VaasaETT website			Sharing knowledge and establishing course timetables
	In social media, both ASSIST and VaasaETT accounts			The highest visibility is expected for ASSIST account, as VaasaETT is poorly known to Finnish consumers due to its B2B profile and international

				customer base.
	Announcements in local papers and publications			Visibility locally
Involvement of indirect players (consumer organizations, municipalities, etc.)	Creating the training unit in collaboration with industry stakeholders to ensure their participation in other modules of the training	Municipalities, consumer organizations	June 2018 onwards	Awareness raising, increase of the training participants volume
	Contact and cooperation with municipalities and cities; disseminating the training invitations through their networks		Advertising begins one month before the start of the training	
Involvement of the steering committee, think tank workshops and participation of other Finnish players	Communications with the players to find the best ways to collaborate and support the goals of both parties	Steering committee members, ministries, umbrella organizations, advisory networks and other high-level contact points	August 2018 onwards	Planning and adapting long-term cooperation within the Energy Advisor Network framework

The training's advertising materials will be diverse, and the goal is using different tools to maximize visibility and attract interest from stakeholders. These includes for example:

- ✿ Infographics
- ✿ Posters and poster-based ads
- ✿ Web banner
- ✿ Leaflets
- ✿ Information packages
- ✿ Press releases and articles
- ✿ Videoclips

VCEA TRAINING GUIDELINES_PU_20191107.docx

-  Short training presentation (PPT, Prezi, etc.)



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