



STEP

Solutions to
Tackle Energy Poverty

TRAINING PROGRAMME FRAMEWORK

ABOUT THE PROJECT

Solutions to Tackle Energy Poverty (STEP) is a project to develop a simple, innovative and replicable model of measures to address energy poverty.

The project covers some of the [countries](#) with the [highest rates of energy poverty in Europe](#). These are Bulgaria, Cyprus, Czech Republic, Latvia, Lithuania, Poland, Portugal, Slovakia and the United Kingdom.



There are three specific objectives:

- To get consumer groups and frontline organisations, who advise people on a range of issues such as financial or health-related ones, to partner and deliver [advice](#) to energy poor consumers.
- To help energy poor consumers across the 9 countries save energy and improve their living standard. We will [advise consumers on more efficient energy consumption](#) and how this can help them save money and improve their health and well-being. We will carry out information campaigns, provide tips on [how to save energy](#), demonstrate cost savings and help put in place low-cost energy efficiency measures.
- To disseminate [best practices and policy choices](#) that can alleviate energy poverty and promote their replication in other EU countries.

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Introduction

According to the project description, the objective of Work Package 3 (WP3) is to provide training to national energy advisors and frontline workers in each partner country. The capacity-building program will provide the diverse groups of advisors with the necessary knowledge and tools to:

- Meet the different needs of specific target groups
- Advise energy poor consumers on energy efficiency measures
- Make the training programme adaptable and easily replicable.

This report is a first deliverable from WP3, therefore it summarises the work done so far, but also refers to the next deliverables, namely:

- D3.2. - Training modules (Public deliverable: Initial modules available on 30/11/2019 and Refined modules available on 31/05/2020)
- D3.3. - IT tool for learning modules online (Public deliverable: Available on 31/07/2020)
- D3.4. - Summary of reports on activities to strengthen energy advice in partners (Confidential deliverable: Available on 30/09/2020)

The activities performed in first three months of the project under WP3 covered the general planning of the work duties shared among the Partners, WP Leaders and Project coordinator, and connections with other WPs. For WP3 it was very important to include outputs from WP2 (especially Task 2.2. Definition of target groups), but also to consider needs and aims of next WP's, (especially WP4 - Establishing networks and WP5 - Cascade delivery).

1. Recipients of trainings

The aim of the training programme is to provide training tools and a common methodology suitable for various organizations, public bodies etc. regardless of:

- their previous knowledge, experience and skills
- their member state and local conditions

For the delivery of the training programme to be most efficient we identified the following **3 main groups of training recipients** / beneficiaries:

- Energy advisors – responsible for providing training to frontline workers/consumers
- Frontline workers – responsible for providing advice to consumers
- Individual consumers

These three groups have significantly different levels of knowledge before the training, but also their needs are not the same which implies the training scope and effect will not be the same either.

Energy advisors in this project are qualified specialists, having a wide range of knowledge and competences, as well as the skills to train and provide advice to both other groups.



Frontline workers are qualified and skilled, but not necessarily as much as the energy advisors. They may origin from various organisations, entities or even companies, and energy can be only a part of their work and duties. These can be for example social welfare assistants who are visiting vulnerable consumers' houses and facing several dimensions of vulnerability or helpdesk advisors from consumer organisation who are skilled mostly in consumer redress but also prepared to give a first energy consultation and can guide the consumer to a more specialised energy advisor.

Finally - individual **consumers** are the group that should benefit most from the trainings and further advice provided in the STEP project.

The main guidelines for the training framework are:

- Customisation of the trainings is needed in order to reach such a variety of target groups and training needs
- In-depth training for energy advisors should cover all areas, but cater as well for the individual needs of each participant
- The training courses for energy advisors should include the materials which these can further use for the Cascade delivery to target groups (WP5)
- For frontline workers, trainings can be less specialised, but should cover all important energy and project topics
- For frontline workers, the training course materials should be used as a script for their contacts with consumers
- For consumers - training could have two levels: basic and advanced depending on their interest and needs.

In developing the program, attention will be paid to ensuring gender balance and that the training is accessible both for a female and male audience.

2. Training channels/methods (online/offline)

The methods of training are the second important factor influencing the training framework. The needs, capacities, national circumstances and background (like country area, internal/external model of advisory activities, local/regional/national size of the organisation etc.) were all discussed among the Partners regarding how trainings can be best implemented.

In effect we believe that:

- All partners could implement both training channels: online and offline.

Online training:

- is much more accessible for wider groups of recipients
- is cheaper to provide (replicable when ready at no/very limited cost)
- is easier in terms of organisation (no need to gather several people in one place, same time)
- is independent from trainers when published (however updates are still needed).



Offline (face to face training) has significant advantages comparing to e-learning:

- allows interactions between the specialised trainer and the trainees
- allows to explain even the most complicated problems and issues
- builds personal relations and strengthens the referral processes of the project (i.e. consumer advisors and frontline workers knowing each other through training are more likely to cooperate in the future and contribute to the projects' monitoring of impacts).

Comparing these two channels, our ambition is to use elements from both. Therefore, we propose to all Partners a model solution on how to share the training efforts between online and face-to-face training:

- **For energy advisors:**
 - initial e-learning training/calibration test - to find the areas where the advisors are already skilled in and those where they still need further training
 - offline regular training - this is customised accordingly to the professionals' profiles, scope of advising and calibration test (above)
 - online modules – will be accessible for knowledge refresh or to be used in their activities as presentation materials
- **For frontline workers:**
 - complex online training
 - offline courses for more advanced topics
- **For consumers:**
 - we expect e-learning channels to be only an optional tool
 - partners will develop offline trainings and advice sessions for consumers. This will also enable partners (a) to conduct pilot trainings and perform evaluation and (b) to reach consumers who are not digitally prone

The above scheme is a base all partners can use when preparing their national training plans. Each partner should, however, have the possibility to customise this scheme according to the national/local background, target groups accessibility, participants' prior knowledge and any other relevant factors.

3. Content

The aim of the training framework is also to select the relevant topics for trainings. The background for this selection was described first in the project application according to the following categories:

- common content for all project participants (European dimension),
- common content for all (or some) participants after adaptation to local conditions,
- content very typical for certain partners (local) but also (at least partly) interesting for others after completing and entering local data,
- very specific content, only local.

The scope of the trainings will be to provide:

- basic knowledge about the energy sector
- basic knowledge about the social system and poverty
- basic knowledge on consumer behaviour for energy use
- how to identify consumers in energy poverty
- how to check energy behaviours / supporting energy behaviours
- how to refer to STEP energy advisors
- how to measure and collect data for STEP evaluation (for WP1 and WP8)
- information on the mechanisms / support possibilities outside STEP
- communication and advocacy for consumers
- how energy contracts affect consumers in energy poverty (tariffs, supplier switch, transparent bills)
- information on consumers' rights

Bearing in mind the above scope and criteria, a draft list of topics was created by FK and then evaluated by the Partners. As a result, we selected 36 topics grouped in 5 categories and which provide the common list of subjects for the training modules:

	GENERAL TOPICS (common for all Partners)
1.	Basic knowledge about the energy sector
1.1.	European and national energy market
1.2.	Electricity/gas/coal/biomass/RES on the energy market
1.3.	Market participants (including distributor, energy supplier, last resort supplier) - who is who?
1.4.	Types of energy contracts (complex, separate, pre-paid etc.)
1.5.	Consumers and groups on the energy market (individual/clusters/cooperatives/communities etc.)
1.6.	Tariffs: evaluation, switching, special tariffs (incl. for vulnerable consumers)
1.7.	Collective switching
1.8.	Energy market (free vs. regulated, the scope of regulation, who and how sets the energy prices)
1.9.	Representing consumers in the energy matters
1.10.	Energy efficiency and health conditions
2.	Energy at home
2.1.	Energy behaviours - every day energy saving habits
2.2.	Energy labelling
2.3.	Energy performance of buildings certificates
2.4.	Windows - insulation, expenditure for heating - how to choose, how to assess?
2.5.	House insulation (walls, doors, roofs, etc.)
2.6.	Heating furnaces: fuel, types, costs, profitability, health issues. Cooling.
2.7.	Light sources: types, energy savings, how to choose.
2.8.	Large domestic appliances (fridges, washing machines etc.) - size, power consumption, energy labels
2.9.	Renewable sources (PV, heat pumps, solar etc.)
2.10.	Where to get energy advice?

3.	Consumer issues – The conscious consumer in the energy market
3.1.	Tariff elements (fixed elements, kWh dependent, flat vs. customised or dynamic, taxes etc.)
3.2.	Contracts (traps, penalties, additional services etc.)
3.3.	How to read and understand an energy bill?
3.4.	Managing consumption - real consumption vs. estimated bills
3.5.	Supplier switching
3.6.	Smart meters (apps, tools, accessibility, consumption monitoring tools etc.)
3.7.	Complaints (consumer rights)
3.8.	ADR scheme for energy
3.9.	Debt collection / disconnection / expiration of debt
4.	Social system
4.1.	Basic knowledge about the social system and poverty
4.2.	Consumers exposed to energy poverty - who are they?
4.3.	Energy poverty - where and when to seek advice and help?
4.4.	Social system actors / institutions
4.5.	Support mechanisms
5	Data privacy and project reporting
5.1.	Consumer questionnaires (Energy and Health) and project reporting
5.2.	Guidelines for the collection and handling of personal data

4. Modular structure

To achieve the goals of WP3, we will use a modular framework: with a universal (common) framework and with additional elements dedicated to specific groups of recipients or countries. This way we will create a common model, that can be easily adapted or customized for specific trainings, depending on the local background and specificities of the groups of trainees.

Objective:

Meet the different needs of specific target groups

MODULES

Energy:

- basic knowledge about the energy sector
- basic knowledge on consumer behavior in the use of energy
- checking energy behaviors / supporting energy behaviors
- Methods of reducing Energy consumptions,

Consumers issue:

- how energy contracts affect consumers in energy poverty (tariffs, supplier switch, transparent bills)
- consumers' rights

Social system:

- basic knowledge about the social system and poverty
- how to identify consumers in energy poverty
- mechanisms / possibilities of support



Background knowledge will not be needed to complete these modules, but nor will every participant follow the exact same course. For example, advisers from a social welfare centre, NGO and/or legal adviser from a consumer organization working with vulnerable consumers, will all have different background knowledge. In this case, the training programme will focus on updating their knowledge and this can be delivered via standalone units. The modular structure will also give the Partners the possibility to customize specific trainings for specific groups of trainees.

5. E-learning expectations

The online learning tool will be placed on FK's servers and linked with the project website and with the websites of the partners. Partners will have the possibility to take-over the tool after the project ends and become the only administrator of it.

Technically, we need:

- A tool which allows replication for the national versions
- A tool in which we can manage the entire menu for and create the structure by ourselves
- Partners should also have the possibility to modify, adapt and create their own menu and structure.

Structurally, the tool would provide:

- The possibility (for administrators, partners) to create separate modules for each topic, like the basic knowledge on the energy sector
- The possibility for users (advisors) to create own way of learning – for example an individual testing. Users (advisors) could graduate all modules or chose only a few (depending on skills, preference and knowledge)

Types of files which we need to include in modules:

- Text guidelines
- Possibly movie guidelines (short videos)
- Possibly slides with simple animations
- Tests with associated mechanisms of evaluation

Taking into consideration the above criteria, the Moodle e-learning tool would be our first preferred choice. This will be discussed and decided in Task 3.3 (Technical development of the training tool).

6. National versions

The training topics selected above will be:

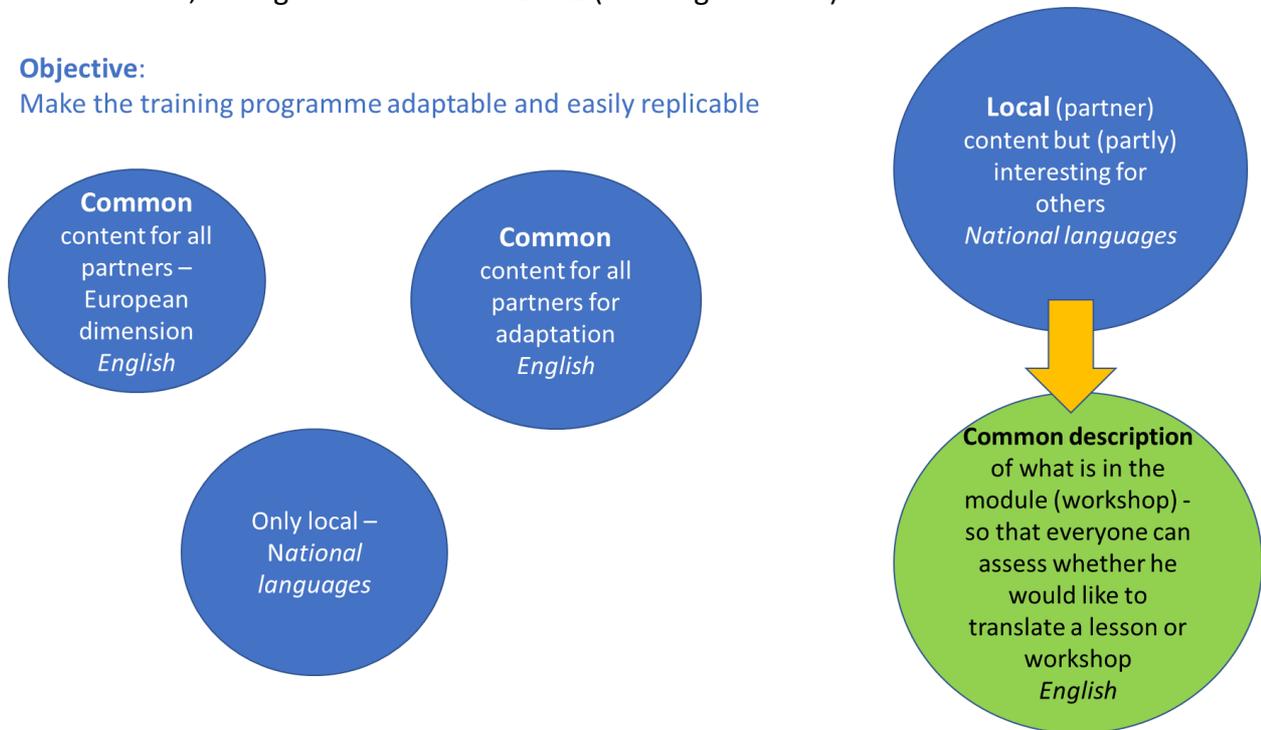
- just translated, or
- adapted to national versions, or
- deleted from the national version if it is not relevant for the country.



Apart from the common topics, each Partner will decide on adding country specific topics. Some Partners already defined their needs in this scope, including issues like Electronic complaints book, Smog or CO2 measurement. The full list of national / local topics will be dynamically created in next 3 months, during the execution of D.3.2 (Training modules).

Objective:

Make the training programme adaptable and easily replicable



The scope of the work undergone in Task 3.2. (Preparation and writing of individual modules) is further presented in the scheme below:

Federacja Konsumentów		Partners
List of topics for each module	➔	Complete the common list
List of training units		List any specific topics of interest
Common training units	➔	Adaptation, translation
Common training units which are based on a specific content in Partner countries (i.e. bills)	➔	Adaptation, translation, development of specific content
Assist in the development of national versions	➔	Create country specific training units
Create the training course tool	➔	Place content into the national versions

7. Durability after the project

The training framework should ensure that trainings can be conducted also after the project, if needed. It concerns all aspects – tools, modules (content), materials and technical means.

To fulfil this obligation, we are going to:

- Transfer the e-learning tool to the Partners (servers and full administration access);
- Keep Partners as the sole owners of the national versions (IPR);
- Create updates during the project, to keep the content actual (especially concerning any changes in law).

