



Save the Homes

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WP: 4. Citizen Hub demonstration: Rotterdam and Valencia. Task 4.1. ENGAGEMENT CAMPAIGNS: 'SAVE THE HOMES ON THE MOVE' ELABORATION TO RECRUIT HOMEOWNERS

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1 Executive Summary

WP4 aims at implementing innovative "integrated home renovation services" at local (City of Rotterdam and Valencia) and regional (Region of Valencia) through the implementation of "one-stop-shop" (OSS). Previously developed Citizen Hub models, mapped knowledge and prepared strategies will be here holistically implemented at a single point. The overall monitoring action and quality assurance plans will be laid out and followed throughout all the stops of the Customers Journey stops (see WP3 T3.1 & 3.2).

To create a demand and increase awareness among citizens in the two pilots, Task 4.1 starts far away from the 'dull, formal' municipality offices, meeting the homeowners in their common places (e.g. supermarket, NextDoor app, regional newspaper, etc.).

This task takes care of the communication campaigns strategies defined in T2.2 for the two pilots and its roll-out in connection with the marketing activities and material prepared in WP6. This phase covers Start or Onboarding phase of the customers journey, both physical as also web based dissemination and communication (via social media and websites).

The aim is to encourage homeowners to come to an office for a 'Want to know more' appointment and create interest to use tailored online tools and come to Citizen Hub matchmaking events.

This task finishes with reporting of the recruiting campaigns success rates in the targeted neighbourhoods, then, UIPI and ICLEI in coordination with their ES and NL members will gather information on what the homeowners consider attractive renovation. The Citizen Hub engagement approach will be discussed with the follower cities to integrate their feedback.





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2 Introduction

The overall aim of **Sav€ the Homes** is to contribute to an increase of an annual renovation rate of > 5% by offering attractive OSS services to homeowners, managed and implemented by municipalities as being trustworthy entities for citizens. This is achieved by the implementation of OSS Citizen Hub concept, assisting through the whole renovation process in terms of a customer journey, offering renovation offices, both as physical hubs and web-based virtual hubs at local level based on the concept of medium-sized cities and to maximize replicability, at national and EU level.

The customer journey describes the experiences, behaviour, and decisions of a customer when interacting with a brand, service or company in the process towards purchasing of goods or services. The full process describes the entire journey. From the very first contact until completing the actions and being an ambassador after. The journey consists of several steps that are walked through from the customers perspective, the exact number of steps depend on the customer journey model. For Save the Homes, we adopted 5 as:

- 0) Onboarding
- 1) Design
- 2) Elaboration
- 3) Construction
- 4) In-use

These steps are the base of the customer journey model and follow the decision-making process of the customer. The transition from one step to the next is crucial. The points of interaction between the customer and the company or brand are so-called 'touchpoints'. The touchpoints link directly to the experience of the customer in each step of the journey. Each step has its own drivers and barriers which show the reasons for the potential customer to continue or to quit the process.

But in this task, we are focusing on the first stages:

- The objectives of the onboarding stage, related to needs and expectations, are to establish contact with the citizen with the aim to create an emotional response and then provide more information to increase interest. When citizens take the step of getting involved and do their own research, they go into stop 1.
- The objectives of evaluation stage related to needs and expectations are to provide information & tools to citizens so they can gain more insights and orientate themselves for simplified version of a home assessment, renovation packages tailored to building type and persona needs and drivers, financial online tools (provided by different banks), and advise on suitable and available financial schemes such as loan options, subsidies, and grants, or simple and clear overview available (on the website and/or in a physical brochure). Then to get a personal appointment and personalized advice on renovation package to improve the performance of the home in a confidential manner.

In this context, and this deliverable deals with the deployment of the engagement campaigns, rooted on the outputs of several previous activities that mark the path to effective onboarding. First section recaps these outputs and draws the path. Then the adaptation to each of the pilot ecosystems is presented; and finally, the results of the implemented actions are reported. Along with this, templates for reporting, monitoring and follow-up are annexed, according to the D3.8 Monitoring Plan.

Experiences from this task will be used in WP5 for both follower cities feedback and other cities knowledge.



3 Save the Homes engagement & recruitment

WP4 is about implementation, testing and deployment of WP2 and WP3 evaluation and design activities, assisted with WP6 communication outputs. Process for engagement and recruitment campaign can be summarized as a set of steps, described as follows:

A. Communication strategies

Work done in T2.2, based on T2.1 demand side segmentation and characterization, about needs and expectations, motivations and drivers, defined the communication strategies following an itinerary model adjusted to each studied segment of the demand.

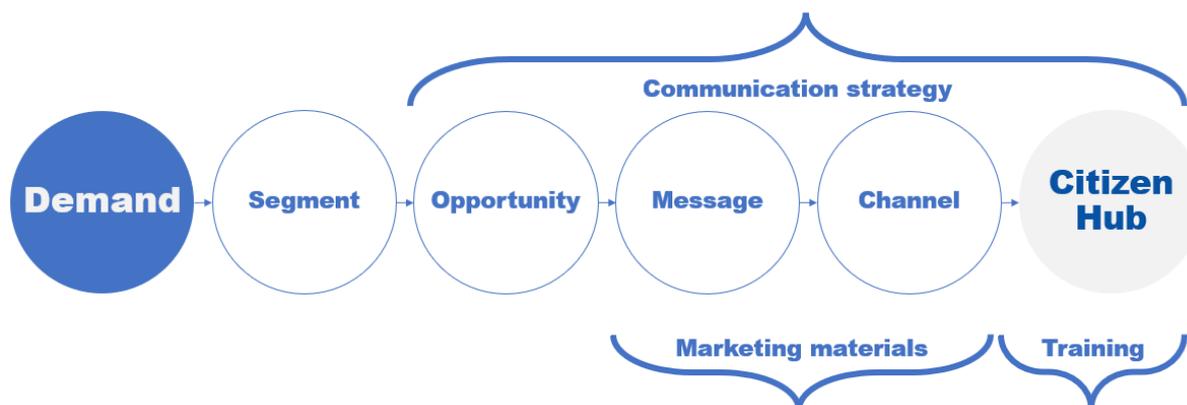


Figure 1.- Itinerary model for the demand side

This itinerary model allows for establishing the most suitable communication strategy based on the different opportunities detected for each segment, whose characteristics define a ‘persona’ fictional character to whom messages and channels are adapted.

	Stop 0 - ON-BOARDING	
	AWARENESS	INTERACTION
demand		
supply		
staff		
	Stop 1 - EVALUATION	
	SELF EVALUATION	ASSISTED EVALUATION
demand		
supply		
staff		
	Stop 2 - DESIGN & FORMALIZATION	

Figure 2.- Customer journey framework first stages

B. Implementation strategy

Work done in T3.2, based on T3.1 customer journey framework, about local context adaptation for the two pilots, with special focus on early stages (on boarding and evaluation), defined the implementation strategy in terms of stops and sub-steps for each user profile. In this task we focus on the demand side profiles.

C. Platform functionalities

Work done in T3.6, based on T3.2 implementation strategy, designed the services menu, customer workflows, services and tools to be offered to customers in order to address each of the stops and sub-steps.

D. Marketing strategy

Work done in T6.3, the different cities design their own strategy, needs for materials and communication channels/activities, relaying in a common preliminary work based on the StH mapping methodology (T2.1, 2.2 & 2.3) & StH customer journey framework (T3.1, 3.2 & 3.6):

- Demand side mapping allows to better known targets, their needs & expectations, motivations & drivers
- The market analysis in terms of existing resources and initiatives, matched with those, pointed out the opportunities to onboard homeowners
- Customer journey first steps, focused on engagement activities are designed accordingly, so to offer the best fitted services and functionalities
- And the dissemination strategy is deployed sequentially from proof of concept for close collaborators to mass campaigns for general public, where marketing material comes into play.

E. Marketing materials

Once the content strategy foundation is laid and enriched with relevant elaborated information, this serves as input for the marketing material for the engagement campaigns, defined in T6.3. With this content, material for several steps of the case specific elaborated customer journeys is prepared, depending on the needs of the one stop shop, according to T6.4. Possibilities are for example:

- Posters/ banners (corporate image for eventual actions)
- Infographics (explaining renovation measures, checklists etc.)
- Stickers/ badges/ cards (summarizing renovation (fun)facts, e.g., turning the assumptions about renovations around into “did you know...” stickers)
- Renovation magazine/ brochure/ flyer (with all information bundled, to have a good read and understand the whole process better)
- Articles or videos (showing the user stories)

F. Channels & Activities

Finally, this is all put in place in T4.1, where local and well-known existing places and channels are to be identified to distribute these marketing materials. Several possibilities to be used are:

- Websites; Like the One Stop Shop websites, dedicated landing pages
- Social media channels; (Like LinkedIn, Twitter, Instagram etc)
- Events, trainings and workshops, in OSS premises and homeowners' places (markets, fairs...)
- Having conversations and offer information at the one stop shop itself
- Personalized letters/ appointments offering solutions adapted to building situation

G. Reporting

Touchpoints and monitoring actions to be implemented in onboarding stage, according to D3.8 are summarized in Table 1.

Indicator	Variables involved	Method/ Protocol/ Tool	Objective
Dissemination success rate	Visits to auto evaluation tools; target of dissemination action; number of dissemination actions	(Origin of auto evaluation tools access/ (dissemination actions* target))* 100	Effectiveness of action
Events success rate	Visits to auto evaluation tools; participants to event; event capacity; number of events	(Origin of auto evaluation tools access/ (events* event capacity))*100 AND (Origin of auto evaluation tools access/ (events* event participants))*100	Effectiveness of action AND Success of action
Website success rate	Visits to auto evaluation tools; visits to website;	(Origin of auto evaluation tools access/ (websites visits))* 100	Effectiveness of action
Mailing success rate	Visits to auto evaluation tools; visits to website; contact form; phone calls; mails sent	(Origin of auto evaluation tools access/ (mails sent))* 100	Effectiveness of action
On-boarding step factor	All previous ones	(Visits to auto evaluation tools/ (summatory of actions))* 100	Effectiveness of step

Table 1.- customer journey Monitoring Plan for onboarding stage 0



For evaluation stage, also according to D3.8, monitoring options are summarized in Table 2.

Indicator	Variables involved	Method/ Protocol/ Tool	Objective
auto evaluation tools success rate	Visits to auto evaluation tools; pre-reports downloaded	(pre-reports downloaded/ visits to auto evaluation tools)* 100	Effectiveness of tool
Pre-reports' success rate	Visits scheduling system; pre-reports downloaded; letters sent	(Visits to scheduling system/ (pre-reports downloaded AND/OR letters sent))* 100	Effectiveness of actions
Reminders' success rate	Visits scheduling system; reminders sent	(Visits to scheduling system/ reminders sent)* 100	Effectiveness of action
Scheduling system success rate	Visits scheduling system; appointments set	(Appointments set/ visits to scheduling system)* 100	Effectiveness of system
Users' reliability (demand side)	Appointments set/ appointments served	(Appointments served/ appointments set)* 100	Respectability of citizen hub
Evaluation step factor	All previous ones	(Appointments served/ (summatory of actions))* 100	Effectiveness of step

Table 2.- customer journey Monitoring Plan for evaluation stage 1

In these stages, monitoring methods are limited to counts and registers, and calculating rates between them, and no other protocol than **keeping the same counting criteria** is used.

Data collection will use a common **evaluation template** (see D3.8 Annex 1) to be connected with a data **dashboard** for monitoring and reporting KPIs and impacts, similar to the one in Figure 3.

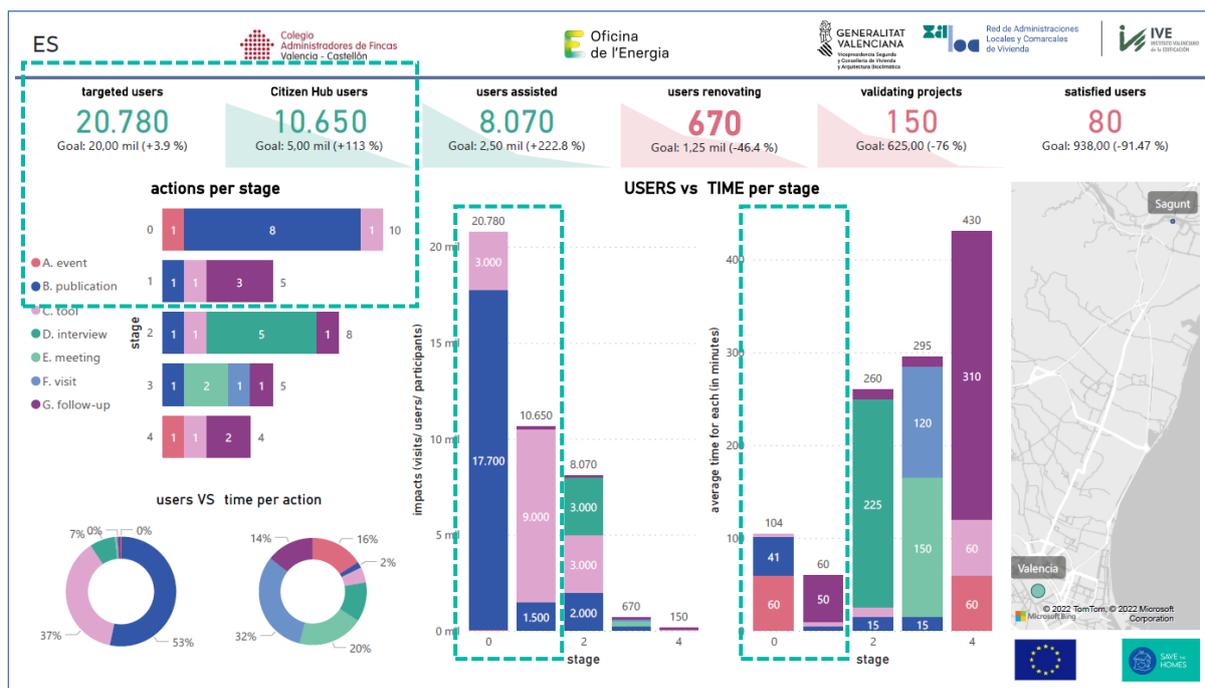


Figure 3.- (Synthetic data) Spanish customer journey evaluation dashboard



4 The pilot cities ecosystems

According to Objective 1 (to make home renovation easier, faster and more affordable for homeowners by designing an economically sustainable citizen-oriented OSS model, 'Citizen Hub', to be deployed by municipalities), the 'Citizen Hub' is an OSS model endorsed by a municipality, a trustworthy entity ensuring that the process is independent, transparent and of high quality for their citizens. It is specifically focused on enhancing the homeowners' experience throughout the home renovation journey.

Sav€ the Homes acts within already established frameworks for OSS networks at the City of Rotterdam, the Netherlands, and Municipality of Valencia, Spain. The project builds upon the existing climate targets set by the two cities (according to the initiative of Covenant of Mayors (CoM) for Climate & Energy, 15% of the mitigation actions and 9% of the adaptation actions proposed by cities in their Sustainable Energy and Climate Action Plans address residential buildings¹).

In this context, engagement into the renovation process is capital to achieve both the StH project objectives and the cities' existing commitments, and recruiting campaigns are deployed in both pilots, according to the previously defined communication strategies (T2.2), implementation strategy and platform functionalities (T3.2 & 3.6), and marketing strategy and materials (T6.3 & 6.4).

¹ Covenant of Mayors figures: <https://www.covenantofmayors.eu/about/covenant-initiative/covenant-in-figures.html>



4.1 Valencia (ES)

The geographical scope for this pilot experience will be local at first instance, and then regional, as a replication phase). Therefore, cities involved are the City of Valencia (815,440 inhabitants) as front-runner and partner of the project, and the follower cities in the region: City of Elche (230,000 inhabitants), City of Gandía (74,000), Municipality of Onda (12,000 inhabitants) and City of Alcoi (59,000 inhabitants), supported by the Regional Government (all of them signed project Letters of Support)

4.1.1 Communication strategies

As a summary of the community mapping and itineraries analysis, figure below shows the needed actors and resources to successfully deploy the Valencian communication strategy. The Citizen Hub orbit is populated by:

- Tools: appointment & follow-up, training, diagnosis...
- Services: technical assistance, contracting assistance, funding assistance...
- Allies: local & regional government, business & professional associations, financial entities...
- Resources: DBs, grant schemes...

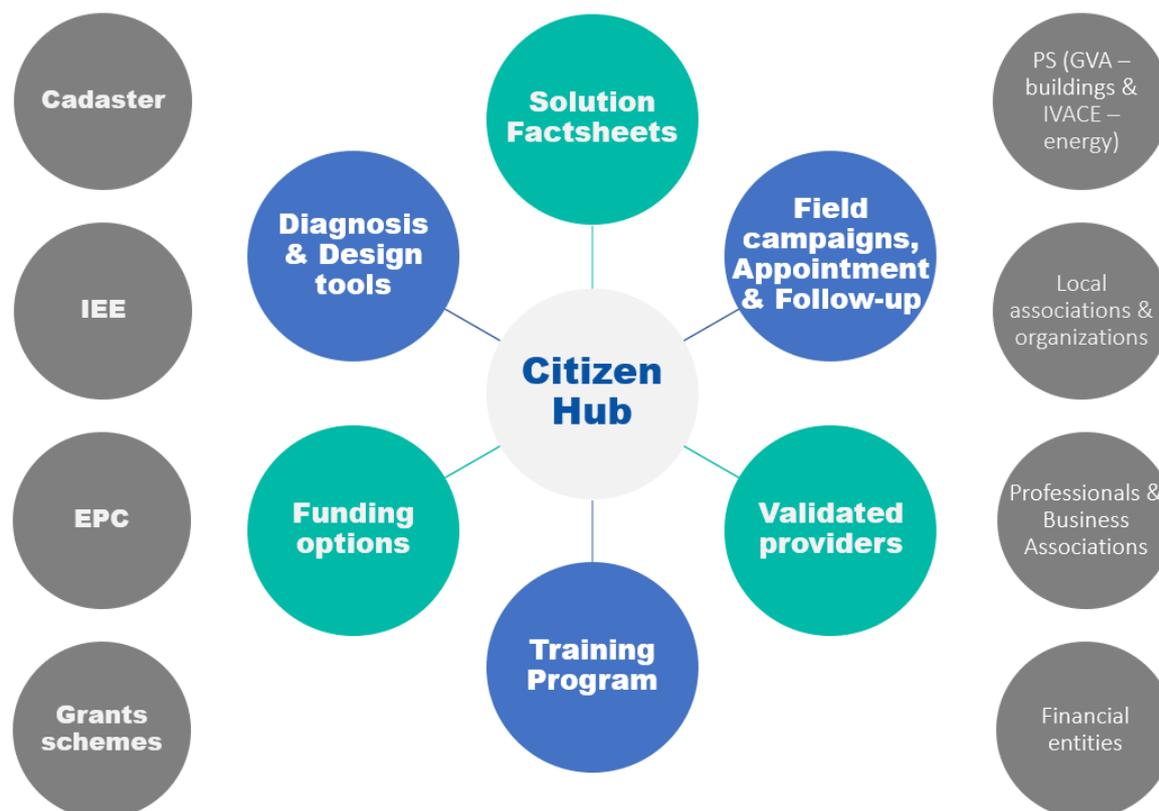


Figure 4.- Valencia communication strategy building blocks

Therefore, each of these assets are to be exploited for the deployment of the recruitment campaigns.

A. Valencia Communication strategy

The itineraries from each opportunity, message and channel to the Citizen Hub returns a set of lines of action, needing the development of materials and activities based on the solutions to be promoted:

- 1) **When things wear out or wrong:** personal appointment letters for users ‘forced’ to an intervention (according to IEE results) to drive them into the energy renovation path with a pre-designed solution showcasing clearly the benefits and addressing them to their Citizen Hub for more information.
- 2) **When (non-EE) renovating:** Professionals’ training programmes addressed to designers, to involve them into the selected solutions application at design stage by enhancing the co-benefits of the proposed solutions; and to auditors, to involve them into the proposal of clear improvements on their buildings’ evaluation and energy certification.
- 3) **When grants are available:** on-line self-operated tools enabling a pre-diagnosis on the building status and the benefits under the different renovation options, including previous motivations, but enhancing the access to subsidies programs, with Citizen Hub contact, FAQ and booking system.

4.1.2 Implementation strategy

Potential touchpoints for onboarding stage are managed through functionalities, services or tools such as campaigning at popular places/events in the city, community meetings or newsletters, social media, newspapers or radio or word of mouth (local heroes, videos or open house). Next sub steps are managed through Information sessions, Website with information & interactive tools or sign up for playful/ simple home assessments, while stepping into next stage can be done through Contact form, Phone call or Physical hub walk-in visit.

Potential touchpoints for evaluation stage are managed through functionalities, services or tools such as tools & information (on website and/or brochures), automated advice by the tools, contact form/information, appointment and finally advice fee (first real commitment).

Providing the right information and support at the right moment is crucial. This includes clear, and meaningful information about the renovation process, financial options, energy performance, IEQ and well-being impacts. What kind of *touchpoints*, information, and guidance is needed depends on the emotions, needs and wants of the customer at that point in their journey.

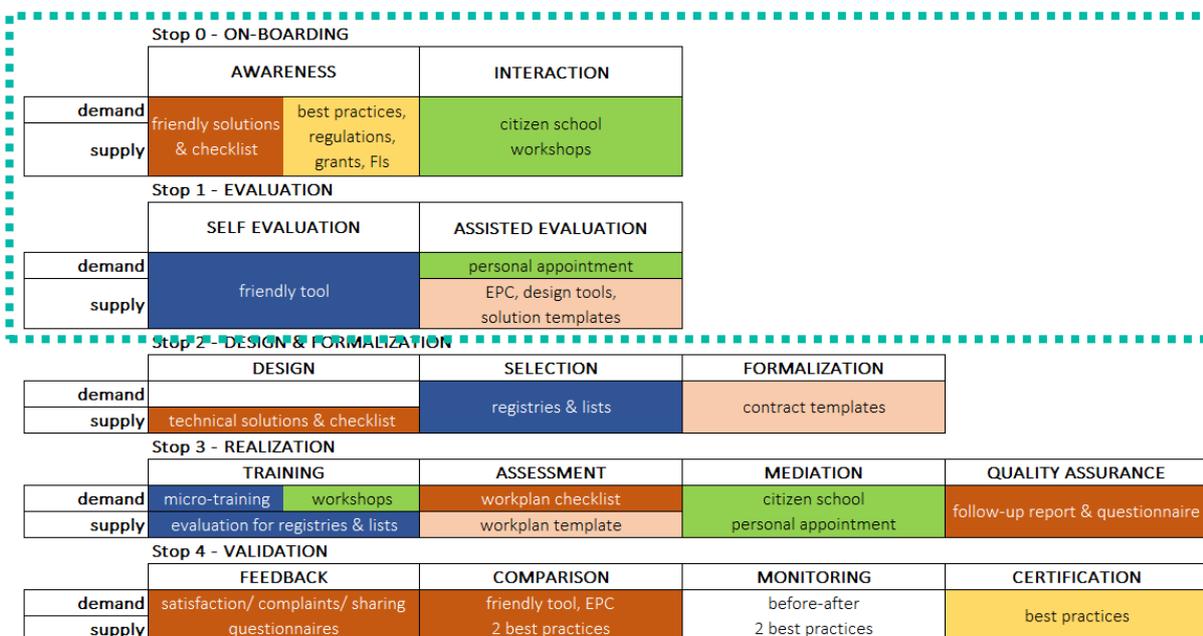


Figure 5.- Valencia customer journey implementation

B. Valencia Customer Journey

Services menu is defined as a set of activities:



- **Awareness** postcards, flyers and factsheets at disposal (or to support explanation) at events, fairs, pop-up offices or to view & download on-line
- **Interactive** workshops at offices, webinars or sessions in sister initiatives/shows
- Friendly **inspiration/evaluation** on-line tools
- **Assistance** in understanding and customization of previous information

4.1.3 Platform functionalities

The services menu for early stages of the Valencia customer journey experience is deployed as four kinds of functionalities (general information, group events, auto-tools and individual appointments) involving (but not exactly corresponding to) the first four sub-steps: the unidirectional dissemination, the interaction, the auto evaluation, and the assisted evaluation.

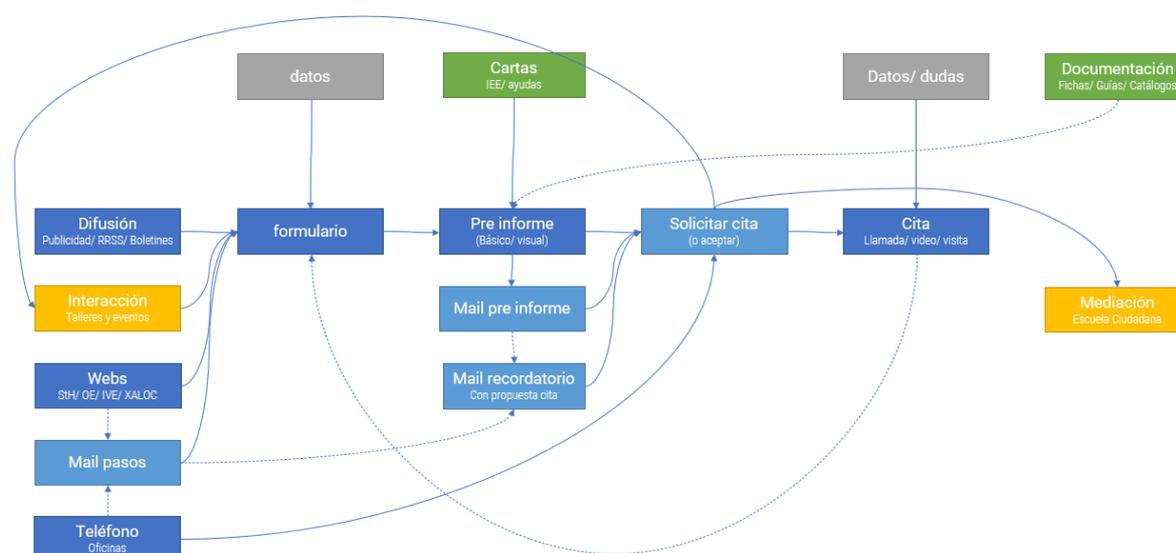


Figure 6.- Valencia onboarding stage functionalities

The defined workflow allows for users to advance in the customer journey, but also for the OSS to detect dropouts and ‘rescue’ lost users.

C. Valencia Platform functionalities

Functionalities implementing the service menu are:

- **General information dissemination channels:** social media and newsletters; partners websites; and physically at the office premises, aiming mainly at awareness objectives
- **Group events:** training, workshops and venues, aiming at both awareness and interaction objectives; and the citizen school meetings, aiming for interaction and assisted understanding or customization of general information
- **Auto-tools:** self-operated on-line available tools for pre diagnosing actual status and potential interventions in order to access a subsidy program (renovEU), aiming at self-evaluation, but also at assisted evaluation purposes
- **Individual information channels:** spontaneous entrances to the office, phone calls, e-mails, and ultimately, personal appointments. The first three act as triage mechanisms, driving users to specific general information section, group event or auto-tool, then setting a personal appointment, aiming in this first step at assisting on understanding or personalizing previous results.

4.1.4 Marketing strategy

Three axes define the marketing strategy set for Valencia pilot:

- From less developed to fully developed functionalities, related to the object to be marketed
- From closest collaborators to general public, related to the testing/evaluating/marketing targets
- From specific events to media, related to the channels to be used

D. Valencia Marketing strategy

This translates, according to the itineraries' outputs (opportunity, message and channel to the Citizen Hub under the co-benefits' approach) into a set of lines of action:

- 1) Professionals' workshops and **training programmes** addressed to designers, to involve them into the selected solutions application at design stage by enhancing the co-benefits of the proposed solutions, including the requirements and procedures for subsidies application; and to auditors, to involve them into the proposal of clear improvements on their buildings' evaluation and energy certification. (Renovation agent/manager course)
- 2) Personal **appointment letters** for users 'forced' to an intervention (according to IEE results) to drive them into the energy renovation path with a pre-designed solution showcasing clearly the benefits and addressing them to their Citizen Hub for more information.
- 3) **On-line & field campaigns** showcasing solutions and best practices, explaining process and enabling a pre-diagnosis on the building status and the benefits under the different renovation options, with Citizen Hub contact, FAQ and booking system.
- 4) **Mass media campaign** with simple messages, driving different profiles to the proper information channel

4.1.5 Marketing materials

Supporting previous marketing lines of action, short, friendly, crispy materials drive different stakeholders to access/contact the Citizen Hub. In this case, they mainly address:

- Peers experiences
- Solution benefits
- Funding options
- Validated providers
- Customer journey progress

E. Valencia Marketing materials

Examples of those used in the different marketing campaigns in the Valencia pilot are:

- Benefits of energy renovation according to neighbours who already went through the process explained at the Energy Day at the Energy Office. Video available.



Figure 7.- Testimonies from real case of energy renovation

- Solutions explained. Available for download and on renovEU tool.



Figure 8.- Insulation explained in Energy Office brochure and renovEU tool

- Funding options brochures, for both public and private opportunities. Available for download.



Figure 9.- Private financial options for Valencia Region

- Regional government funding options corporate image and factsheets. Available for download.



Figure 10.- Regional Government marketing material for XALOC network subsidies dissemination

- Validated providers. presentations available for download and videos available for view. Links on the partners websites



Figure 11.- Presentation of validated providers

- Validated renovation agents and managers, process steps and frequent doubts. Promotional website



Figure 12.- energy renovation subsidies application steps

- Mass media materials: urban furniture and spot



Figure 13.- Some renovation grants publicity on the city of Valencia

All of them connect to different instances of the Valencia Region Citizen Hub network (Valencia Energy Office and/or XALOC network)

4.1.6 Channels & activities

Activities to be deployed should correspond to all previous settings, starting with the defined onboarding and evaluation functionalities to which we want to attract our target population. For this, we use the marketing materials designed for this purpose in the different lines of action designed in the marketing strategy.

F. Valencia activities

Based on all the above mentioned and according to Valencia (and Region) context, onboarding and evaluation activities and channels are:



- 1) Waiting in the Office: schedules, telephone lines, WhatsApp and e-mails visible in all marketing material
- 2) Conferences & events: energy Day (once a year), thematic workshops (once a month), XALOC related news launch (when needed)
- 3) Training for professionals: professionals and contractors acting as renovation managers are made mandatory agents for the subsidies' applications. Validation is needed.
- 4) Partners websites, newsletters and social media activity highlighting StH news periodically
- 5) renovEU diagnosis tool promotion: presented and accessible from all official channels related to energy renovation subsidies (Regional Government, IVE, XALOC, promotional websites)
- 6) Grant schemes publicity (urban furniture & buses): redirecting to Citizen Hub channels
- 7) EO goes to market: fast interactions with market customers to get to know the citizen hub services
- 8) Past years grant appliers: customized report based on past years applications (not granted)
- 9) Energy Transition Office OTEA: brief information flyer available on itinerant energy Transition Offices (depending on other Regional Government Department focused on energy communities), to lead customers to energy Renovation specific services, complementary to those being promoted there (next year)
- 10) Itinerant wooden houses: in collaboration with Maderamen University Chair, and according to Regional Government energy renovation subsidies corporate image (next year)

4.1.7 Reporting

Impact for each stage and step factors reported for the city of Valencia (and Region) are chosen to be:

- 1) Waiting in the Office: appointments (spontaneous, from e-mail & phone) per office
- 2) Conferences & events: direct participants & viewers on each
- 3) Renovation agent/manager training or validation test: registered users
- 4) Partners websites, newsletters and social media: clicks
- 5) renovEU: visits, users, downloaded reports, cadastral references, contact, link to OE or XALOC, link to more info
- 6) Grant schemes publicity (urban furniture & buses?): prints, population
- 7) EO goes to market: event, persons assisted
- 8) Grant appliers: past years appliers appointment letters, with CR
- 9) Energy Transition Office OTEA: flyers distributed
- 10) Itinerant wooden houses: persons assisted; flyers distributed

Valencia strategy is all about the grant schemes, even if Citizen Hub will assist on any other energy renovation process, but main reporting strategy revolves around the grant scheme information and the grant scheme applications. Therefore, **for the impact monitoring, it is crucial to keep cadastral reference of all the dwellings and buildings assessed during the onboarding and evaluation campaigns, so to compare them with the 2022 grant applicants at the end of the year (deadline is 1/12/2022)**

G. Valencia Results

Using the corresponding template, Valencia results so far are compiled in Table 3:



Citizen Hu	stage	mechanism	name	owner	visits	average dedication
Valencia	0	B. publication	VCE website: energy efficiency visits 2022	VCE	916	3
Valencia	0	A. event	energy renovation workshop II 04/2022	VCE	6	20
Valencia	1	D. interview	spontaneous visits/ appointment 06/2022	VCE	30	30
Valencia	1	D. interview	phone calls attended 06/2022	IVE	10	10
Valencia	1	D. interview	forum conversations 06/2022	IVE	146	7
Valencia	1	A. event	Un nuevo pacto verde: los fondos europeos para la rehabilitación 11/2021	IVE	190	2
Valencia	1	D. interview	e-mails received and answered (renovEU) 06/2022	IVE	40	8
Valencia	0	A. event	energy day 2021 10/2021	VCE	not reported yet	
Valencia	0	A. event	energy renovation workshop 01/2022	VCE	8	15
Valencia	0	A. event	energy renovation workshop 02/2022	VCE	8	15
Valencia	0	A. event	energy renovation workshop 03/2022	VCE	8	15
Valencia	0	A. event	energy renovation workshop I 04/2022	VCE	8	15
Valencia	0	A. event	energy renovation workshop 05/2022	VCE	8	15
Valencia	0	A. event	energy renovation workshop 06/2022	VCE	8	15
Valencia	0	A. event	subsidies: process & tools dissemination event 02/2022	IVE	1.763	1
Valencia	0	B. publication	newsletter	VCE	800	5
Valencia	0	B. publication	newsletter 04/2021 (questionnaire)	IVE	7.834	5
Valencia	0	A. event	energy renovation with TripleA-reno board game	VRCP	not reported yet	
Valencia	0	A. event	energy renovation in multifamily buildings	VRCP	not reported yet	
Valencia	0	A. event	renovation agent/manager training or validation test at 06/2022	IVE	1.821	1
Valencia	0	B. publication	VCE website: energy efficiency visits 2021	VCE	270	3
Valencia	0	B. publication	IVE website: StH project visits	IVE	not reported yet	
Valencia	0	B. publication	IVE website: NextGen subsidies visits	IVE	not reported yet	
Valencia	0	B. publication	XALOC network website visits	IVE	not reported yet	
Valencia	0	B. publication	renoveu website visits	IVE	not reported yet	
Valencia	1	C. tool	renovEU tool visits	IVE	8.700	6
Valencia	0	B. publication	grant schemes publicity on urban furniture population coverage	IVE	not reported yet	
Valencia	0	A. event	EO goes to market 1	VCE	not reported yet	
Valencia	0	A. event	EO goes to market 2	VCE	not reported yet	
Valencia	0	A. event	EO goes to market 3	VCE	not reported yet	
Valencia	0	G. follow-up	Personal letters to past years grant applicants (not granted)	IVE	not reported yet	
Valencia	0	B. publication	newsletter 02/2022 (renovEU)	IVE	10.000	5
Valencia	0	A. event	re-MODULEES re-LAB 11/2021	IVE	19	5
Valencia	0	A. event	re-MODULEES re-LAB 05/2022	IVE	21	5
Sagunt	1	D. interview	spontaneous visits/ appointment 06/2022	IVE	50	30
Valencia	0	A. event	energy renovation workshop 11/2021	VCE	6	20
Valencia	0	A. event	energy renovation workshop 12/2021	VCE	6	20

Table 3.- Valencia results so far

Accordingly, engagement campaigns achievements are represented on Figure 14 dashboard (not reported activities are not considered), where we see that objectives are already achieved, even when some of the figures are still not collected.

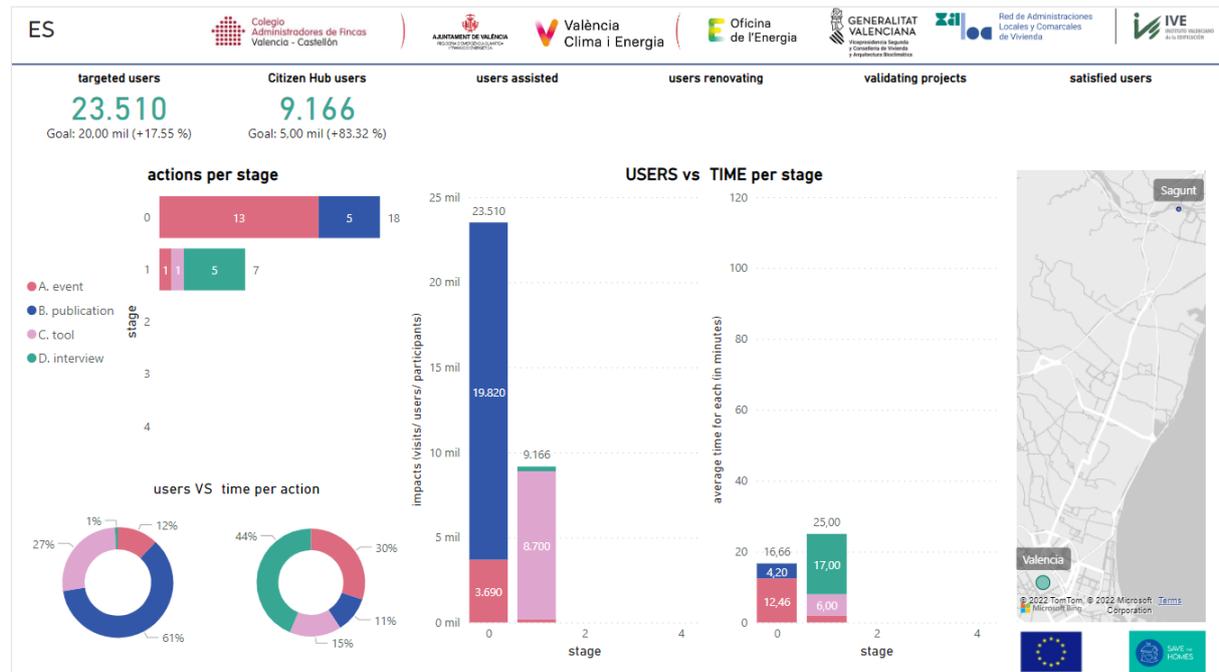


Figure 14.- Valencia dashboard so far





4.2 Rotterdam (NL)

With more than 300.000 homes in the region, Rotterdam has a huge task to fulfil. That means that whatever course they take must be regarded in the light of upscaling. One renovated building does not mean that the rest of the city will follow on its own. The last couple of years Rotterdam already did several experiments on reaching out to people, a pop up store being just one of the ideas. This connects to the ambition of Rotterdam as a 'participating' city. The connection with the citizens now is sought on the level of the neighbourhood. The connection to that entrance was formed by Alex Energy one of five citizen-owned energy cooperatives active in the city.

Alex Energy is active in the area of Prins Alexander, which is one of the eleven city districts of Rotterdam. It is the largest district, with almost 46,000 houses and more than 95,000 inhabitants. The municipality supports participation from the ground up. Alex Energy being a local entity to reach out to people fits in this frame. Therefore the communication with Alex energy is ongoing to discover tasks and responsibilities that they can deliver. This means that part of the customer journey can be filled by Alex Energy.

There are more energy cooperatives active in Rotterdam, they are supported by an umbrella organisation (Energie voor Rotterdam) that can function as a back office. It is the wish of the municipality to cover the entire city with local offices. But that has to grow over time.

The following elaboration is aimed at the uptake of Alex Energy, and does not suggest that the whole city of Rotterdam will work in this way. As a comparison, the district Prins Alexander is as big as the 30th largest city in the Netherlands (both 46.000 homes). So if one community can manage it in a district, the rest of the Netherlands can manage as well.

In the customer journey for Rotterdam, the focus lies with Alex Energy. They are (for the specific area in Rotterdam) the entity that reaches out to citizens. In their approach they have several steps, to get people on board. Alex Energy does all these actions in collaboration and sub-contracted by the municipality accordingly the Save the Homes AF. In their action plan to achieve the agreed targets, Alex Energy proposes the following steps namely:

- a) Formation of a working group
- b) Using 'IkWoon-application'
- c) Energy scan
- d) Energy plan
- e) Measures (menu)
- f) Citizens gathering
- g) Offer

During the planning and execution, Alex Energy works together with the team over homeowners of the Architect street and other parties. They will get support also from the Save the Homes partners.

After these steps the citizens engage in a more project based approach will be followed. For this deliverable the emphasis lies at all the actions that need to be done before citizens agree to an offer.

4.2.1 Communication strategies

Alex Energy is already active in the area since 2018 (www.alexenergie.nl). During this period they are a well-known organisation, and visible in the neighbourhood centre. An energy cooperation is a way of organisation, that occurs more and more in The Netherlands. Most of them start bottom up, with a specific goal (collective purchasing, solar roof or getting a neighbourhood involved), and grow out to an important stakeholder in the city



A. Rotterdam Communication strategy

In this case Alex Energy is actually an association that stimulates energy reduction in their own neighbourhood. On their website they have testimonials of people who already did something in their home as well as a description of activities. In February 2020, just pre-covid, a large event was organised to reach out to citizens in the district of Prins Alexander (<https://alexenergie.nl/nieuws/bewoners-bijeenkomst/>) where the Alderman and people of the municipality were present. After that moment because of Covid, these events were no longer possible and activities were put on hold.

For now Alex Energy aims to engage people with visible actions. That means offering actions like an energy plan or an thermo scan (in colder times). To organize this, they are looking for extra volunteers that want to perform this action together with the board of Alex Energie. This working group is focused at reaching out to people, next to the other existing activities of Alex Energie.

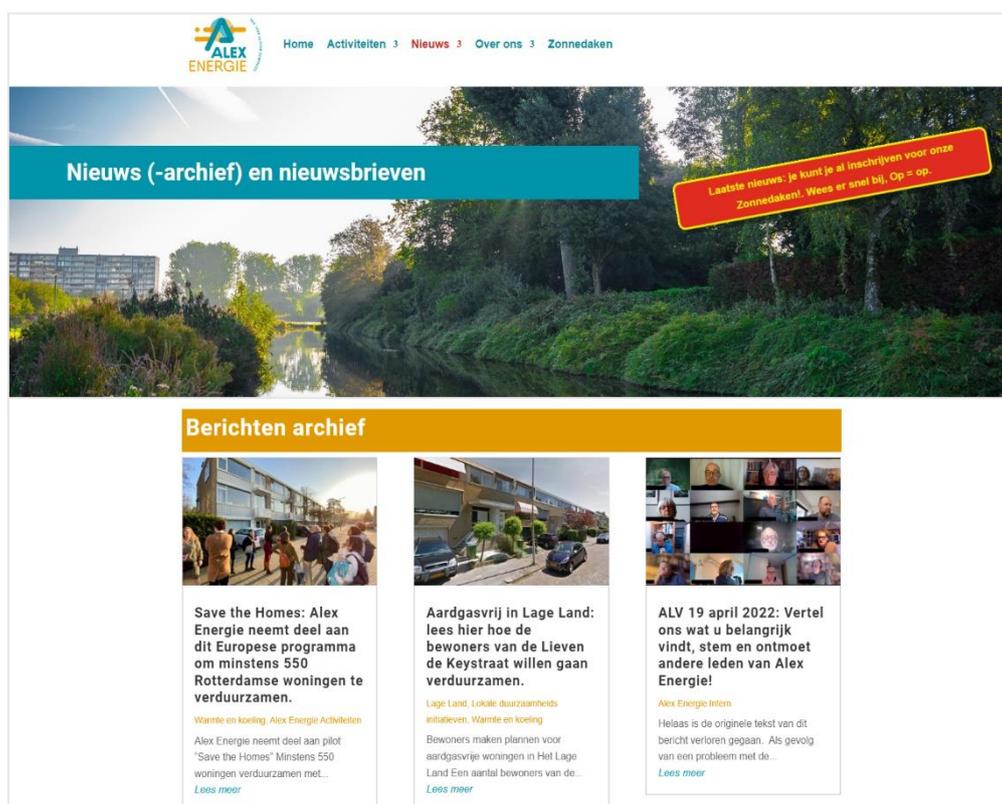


Figure 15.- Website of Alex Energie

Because they know that they cannot speak with all citizens in person the Ikwoon-application² will be used. This application uses questions and examples to select what people think is important when living in their home, and with those wishes in mind, suggests improvements. These are shown with their qualities, like improvement of comfort, the effort to realise it, the necessary costs, and of course the level of energy reduction. By using 'Ikwoon' people are already thinking about their opportunities, and can make some first choices. Then, as a follow up, they can make an appointment with one of the energy coaches to discuss it more in detail. This ensures that more people can be reached, and moreover, that the limited time that is available to talk to people, is put to good use. It allows Alex Energie to make a (communication)plan for a specific group of people. This can be a group of people

² Ikwoon is a digital application (in Dutch) www.ikwoon.io developed by BouwhulpGroep, that allows people to look for proven and sometimes self-designed measures that result in energy reduction and improvement of their homes. The use of Ikwoon is free of charge, as a part of Save the Homes project, and works according to DGPR.

with the same component (for example a flat roof), people that all want the same solution (insulation of their floor) or people living in proximity of each other (a whole street that wants to participate).



Figure 16.- Screenshots of the Ikwoon application

4.2.2 Implementation strategy

The implementation lies with the working group (that has to be formed). But because Alex Energy is already an entity in the neighbourhood, it gives a familiar sound to people, and therefore trustworthy. Normally the support of a municipality is needed to establish trust³ and this takes up a lot of time and effort. But Alex Energie already has a trustworthy position of its own because the organisation is run by people from the same neighbourhood.

B. Rotterdam Customer Journey

So the issue of trust now is addressed from two sides, because Alex Energie has this trust, and the municipality support Alex Energie. This gives the OSS 'Hub Alexander' a strong foundation to build upon.

No further implementation strategy is in place at this moment. But in cooperation with the municipality information from their website [Duurzaam010: website over duurzaamheid van de gemeente Rotterdam](#) can be used and forwarded.

Besides that, Alex Energie is looking at the specific information needed to reach out to the citizens in Prins Alexander and in conjunction with Save the Home partners and the work planned in WP 6 communication materials can be adapted.

4.2.3 Platform functionalities

The overall aim of the municipality is to cover the whole of the city by more local energy collectives, like Alex Energie. Therefore Energie van Rotterdam is appointed as an umbrella organisation, which supports for now 5 existing organisations and will help new ones.

C. Rotterdam Platform functionalities

At this moment their focus lies at implementing sunroofs, on behalf of the local cooperatives. But after that implementation their task is to support the local cooperatives (like Alex Energie) with back office support. There is also the possibility that allows for an exchange of solutions and processes between the five active communities in Rotterdam. So there is a collective platform that can operate on a

³ 'Renewable energy communities as new actor in home energy savings', F.H.J.M. Coenen, T. Hoppe, Urban planning 2022, volume 7 issue 2 p 108-122

strategic level, and at the same time the real action takes place at a local level, through in this case Alex Energy.



Figure 17 Energie voor Rotterdam and its participating organisations

4.2.4 Marketing strategy

Alex Energy uses their existing (communication) channels and marketing formats and campaigns. Because they are already locally visible, the step towards citizens is rather small. With the application Ikwoon the first spark can be easily lit with people to take action, but then this spark needs to be ignited.

D. Rotterdam Marketing strategy

To do so, more energy coaches or ambassadors are needed. Alex Energie wants to train more people (also people from the neighbourhood) that can have the actual talks with people for support. The approach of Alex Energie is based on 'Buurmensen' (neighbourhood people), people living in the neighbourhood themselves, who know what the problems are, but are trained to engage a conversation with people on the topics of sustainability. Then eventually these people would become a member of Alex Energie themselves.

Alex Energie provides easy accessible service for people in the neighbourhood, that want to take the first step(s) on sustainability. By becoming a member of Alex Energie (only €12,- a year) the services of Alex Energie can be used for free, like the thermo scans. It is not about the amount of money that comes into Alex Energie, but because people pay a small amount, but when they actually pay they are connected to the activities and there will be more support in the area.

4.2.5 Marketing materials

For the first part of the customer journey there are not yet that many marketing materials. Within the Save the homes project some materials have been developed. For example, some articles on renovation, as well as the general newsletter. However, these are in English and need to be more suited for the actual local task.

E. Rotterdam Marketing materials

Alex Energy will look into the specific needs. A First example is now visible on their website : <https://www.alexenergie.nl/2022/04/02/save-the-homes-alex-energie-neemt-deel-aan-dit-europese-programma-om-minstens-550-rotterdamse-woningen-te-verduurzamen/>



Figure 18.- Selection of measures based on comparison of qualities

For the first pilot project (Architect street) there was no material ready and all was done project based. When upscaling comes into place ready to use materials must be available.

For the later part of the customer journey several materials are already in place. These have the form of a menu or leaflet, and give more detailed information on the measures. The solutions and results of the first homes will be used for an update of the measures. Especially the combination of renovated homes, with people actually living in the area, combined with digital available information should get people from unaware to aware, knowledge and even liking.

4.2.6 Channels & activities

F. Rotterdam activities

The following channels will be used:

- a) Alex Energie Website (local neighbours)
- b) Website municipality Rotterdam (stake- and shareholders)
- c) Local visibility in the neighbourhood on activities (local neighbours)
- d) D) Website from active partners (stake- and shareholders)

In the end of the pilot a marketing plan will be produced based on the results.

Further actions that still need to be decided on for example flyering in the area. But most of the actions are based on local / area specific and personal contact. The pilot project in Architect Street just started and, when it is further on track could be used by Alex Energie to promote the possibilities for (collectively) achieve sustainability.

On another track, the municipality is organising a quotation for a central district heating network in the area (>15.000 homes), so from that side more information will come.



Figure 19 leaflet for one measure (renovating Facade)

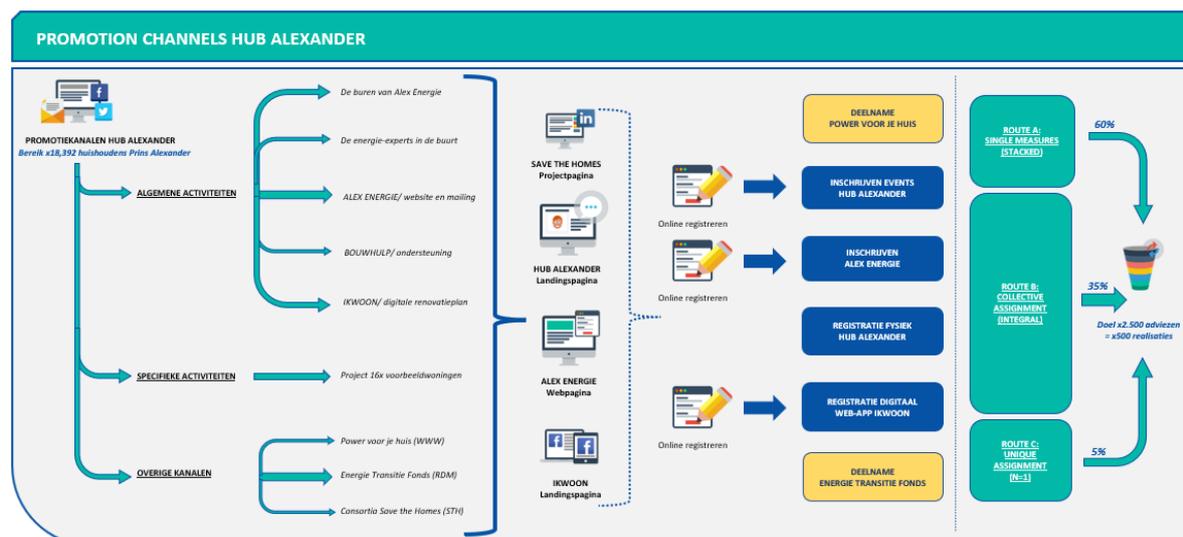


Figure 20 promotion channels

4.2.7 Reporting

At this moment there is no monitoring because Alex Energy is mainly working on the fly. That is going to change.

G. Rotterdam Results

Therefore, the following indicators can be monitored:

- number of people reaching out to Alex Energy
- number of members of the association Alex Energie
- number of views on Ikwoon
- number of logins on Ikwoon
- number of renovation plans made on Ikwoon
- Number of visitors 'spreekuur' Huis van de Wijk
- Number of appointments for energy coaches
- Number of appointments for energy ambassador
- Number of heat scans- unique number of visitors of the website of Alex Energy
- Number of citizens wanting to go ahead towards an offer (trajectory B integral measures and collectively organised)
- Number of citizens, going into trajectory A (single measures collectively or individually organised)



5 Follower cities

According to Objective 4 (To deliver real benefits to citizens and other stakeholders in two cities as a result of the Citizen Hubs operating locally), the objective is not only to provide the integrated renovation services to the specific homeowners groups identified in the two pilot cities (Rotterdam and Valencia) but also to demonstrate the potential of the Citizen Hub concept to all relevant stakeholders in other municipalities, to regain trust and interest in building renovations and to further expand the Citizen Hub business model.

In this context, and in order to roll out the Citizen Hub concept on a wider scale (regional, national and European), the Citizen Hub models developed for Valencia (ES) and Rotterdam (NL) will be one-on-one assessed with the two follower cities, Sant Cugat (ES) and Ljubljana (SI).

After implementing, reporting and evaluation the engagement campaigns within the cities of Valencia and Rotterdam, a meeting to discuss them will be set-up with follower cities Sant Cugat and Ljubljana to find out current initiatives and lessons learned, in the context of T5.1. With this in mind, both cities receive this report and draft methodology for deploying their Recruitment campaigns (assisted by templates that can be found on Annex 1 - StH Document 8: Monitoring data templates; **Error! No se encuentra el origen de la referencia.**) and assess its applicability in their context.

Sant Cugat – ES

The objective is to test the replication in the same country for Spanish pilot in Valencia and follower city Sant Cugat. The aim is to analyse all the benefits of having the structure and services developed in national language and based on national circumstances, legislation, culture and habits.

Sant Cugat Municipality is assessing the methodology and feedback will be reported during WP5 activities for replication and exploitation activities.

Ljubljana – SI

The objective is to test the replication between EU countries where the Citizen Hub mapping methodology and results for the Dutch city of Rotterdam will be replicated for the City of Ljubljana in Slovenia. The aim is to validate the effectiveness of the replication process between the different EU countries.

The city of Ljubljana is assessing the methodology and feedback will be reported during WP5 activities for replication and exploitation activities.





6 Conclusions

This task, belonging to WP4 for implementing those results achieved in both WP2, mapping, and WP3, designing the OSS concept in both pilots, was conceived to deploy on the field the first steps of the customer journey and implementation strategy according mainly to the mapped demand. In this context, the script was clear, and the path straight forward composed of following steps:

- A. Communication strategies
- B. Implementation strategy
- C. Platform functionalities
- D. Marketing strategy
- E. Marketing materials
- F. Channels & activities
- G. Reporting

Nevertheless, the different approaches considered by the two pilots during the whole project, will give very different results, figures and trends, that will demonstrate onboarding performance and real comparability at the end of the project:

- **Valencia (ES) pilot follows a top-down approach**, supported by strong resources from Regional government, so initial phases for awareness are targeted, but massive, making the achievement of the first objectives very easy due to the deployment of mass media campaigns, continuous information and training events and release of a really easy to use diagnosis tool and validated renovation manager registry. The degree of loyalty to the process that these actions can keep will be proofed with time, in the next steps of the process, and the challenge is to assess whether this massive resources will persuade the sufficient number of homeowners to really renovate their homes?
- **Rotterdam (NL) pilot follow a bottom-up approach**, experimenting on a 16 dwellings buildings the designed process, testing, learning, correcting, so to get with the formula for scale up in a massive way. Numbers and onboarding actions by now might not be high, but in this approach, massiveness will come later. The challenge is to get to the explosion in time!



