|  |
| --- |
| TEMPLATES STEP 5. THE FOLLOW-UP | MONITORING |

Interfaz de usuario gráfica, Texto, Aplicación

Descripción generada automáticamente con confianza media

Table 1. Test materials for step 5

This step (and its sub-steps) aims to define the way of ensuring the continuation on the mid-long term, measuring success and implementing improvements where needed.

* For sub-step **Q. The Sustainability strategy** the DIY document is available in [**D3.3. Citizen Hub Business model for the two pilots**](https://savethehomes.net/wp-content/uploads/2023/06/StH_D3.3.pdf)**.**
* For sub-step **R. The Business Model,** the DIY document is available in [**D3.3. Citizen Hub Business model for the two pilots**](https://savethehomes.net/wp-content/uploads/2023/06/StH_D3.3.pdf)**.**
* For sub-step **S. The Risk assessment**, the DIY document is available in [**D4.5. Action plan, risk assessment and quality assurance of the renovation activities**](https://savethehomes.net/wp-content/uploads/2024/01/StH_D4.5.pdf)**.**
* Finally, for sub-step **T. The Performance,** three documents are used:
  + [**D4.2 Citizen Hub model agreement Citizen Hub model agreement**](https://savethehomes.net/wp-content/uploads/2024/02/D4.2-Citizen-Hub-model-agreement-VF.pdf)**.**
  + [**D3.8. Monitoring data Plan for the two pilots**](https://savethehomes.net/wp-content/uploads/2023/06/StH_D3.8.pdf)**.**

## Definition of OSS type

Please, fill the following table to define your OSS type regarding the engagement level. Indicate if the OSS includes the presence of technical assistance, contractor training and relations, subsidy offers or links and links to or offers of financing solutions. Based on this data, the OSS can be rated as low, medium, or high touch to pinpoint their engagement level. More information about the definition of the OSS type is available in **D3.3. Citizen Hub Business model for the two pilots**.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Type**  Public/Private/ Non-profit/ PPP/PPCP | **Target**  Single housing/ multifamily housing/ public buildings/ residential buildings/ social housing | **(A)**  **Technical assistance**  Yes: 🗸 | **(C)**  **Contractor relations**  Yes: 🗸 | **(S)**  **Subsidies offers**  Yes: 🗸 | **(F)**  **Financing solutions**  Yes: 🗸 |
|  |  |  |  |  |  |

PPP = Public-Private Partnership  
PPCP = Public-Private-Citizen Partnership

🡪 Now, please indicate the combination of letters for your OSS: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

And now, indicate the corresponding letter combination in the table below to know your type of OSS regarding its engagement level.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **1. Low-touch** | | **2. Medium-touch** | | | **3. High-touch** |
| F | A+S | A+C+S | A + C | A+F | A+C+F+(S) |
|  |  |  |  |  |  |

* **Rating of 1. Low-touch** - A program only provides financing, or if it only offers technical advice in combination with subsidy info (and no contracting or financing).​ These only offer a single or a couple of services to homeowners, which may help to initiate the renovation process but does not facilitate it entirely.
* **Rating of 2. Medium-touch** - Advice, contracting, and subsidies are provided (with no mention of financing); if advice and contracting are offered (no subsidies or financing); or if the OSS provides advice and financing (no contractor relations and/or subsidies)​. This type of OSS is a medium touch or medium intensity program as it provides homeowners with several resources that may be needed when renovating but lacks some elements to fully support renovation works.
* **Rating of 3. High-touch** - Advice, contracting, and financing is provided (which may or may not include subsidies). This type of OSS is an all-encompassing integrated home renovation platform that offers all of the services potentially needed by homeowners when renovating their properties.

## Business model canvas

In order to determine how the One-Stop-Shop (OSS) can be self-sufficient, a specific business model is necessary. One way to build up a business model in an efficient way is by using the Business Model Canvas (BMC) framework. In concrete, the BMC framework address the following points:

* Value creation which describes how value is created and the sources for this.
* Value delivery which describes how this created value is delivered to the customers.
* Capture of value which describes how the organization generates revenue and profit.

These three categories of value are analysed and designed by organizations using the BMC, shown in Figure below. Moreover, these three categories are acknowledged in academic literature to stress the central role of value in doing business (Richardson, 2008). This is also stressed as the central building block of the BMC, which is the *Value Proposition*.

A picture containing diagram

Description automatically generated

Figure 1. The Business Model Canvas

Please, fill the following business model canvas (BMC). You can find the explanation of each one of the BMC blocks in **Section 3. Methodology** from **D3.3. Citizen Hub Business model for the two pilots.** The next table shows the example of Valencia city pilot BMC.



## Risk assessment

The aim of this document is to review step-by-step the possible risks that could occur, and how to solve them or how to avoid them. Follower cities can choose to put steps together if local circumstances influence the outcome.

So, for each stop and sub-stop, it is needed to define:

* The main activity deployed, or service offered.
* The roles and actors implementing them.
* The delivered quality sought.
* The risks related.
* The potential solutions/ correction measures.

Escala de tiempo

Descripción generada automáticamente

Please, fill the following tables with this information for each sub-step (from A to T).

**STEP 0: ONBOARDING PHASE**

|  |  |
| --- | --- |
| **Step** | **0: Onboarding** |
| **Sub-step** | **A: First contact** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **0: Onboarding** |
| **Sub-step** | **B: Follow-up** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **0: Onboarding** |
| **Sub-step** | **C: Contact** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

**STEP 1: DESIGN PHASE**

|  |  |
| --- | --- |
| **Step** | **1: Design** |
| **Sub-step** | **D: First assessment of the dwelling** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **1: Design** |
| **Sub-step** | **E: Financial Guidance** |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **1: Desing** |
| **Sub-step** | **F: Action plan** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

**STEP 2: ELABORATION PHASE**

|  |  |
| --- | --- |
| **Step** | **2: Elaboration** |
| **Sub-step** | **G: Home assessment** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **2: Elaboration** |
| **Sub-step** | **H: Renovation advice** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **2: Elaboration** |
| **Sub-step** | **I: Financial guidance** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **2: Elaboration** |
| **Sub-step** | **J: Final plan** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **2: Elaboration** |
| **Sub-step** | **K: Offers** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

**STEP 3: CONSTRUCTION PHASE**

|  |  |
| --- | --- |
| **Step** | **3: Construction** |
| **Sub-step** | **L: Renovation contract** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **3: Construction** |
| **Sub-step** | **M: Start of construction** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **3: Construction** |
| **Sub-step** | **N: Personal progress dashboard** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **3: Construction** |
| **Sub-step** | **O: Questionnaires** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **3: Construction** |
| **Sub-step** | **P: Periodic report** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **3: Construction** |
| **Sub-step** | **Q: End of construction** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

**STEP 4: IN-USE PHASE**

|  |  |
| --- | --- |
| **Step** | **4: In-use** |
| **Sub-step** | **R: Validation** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **4: In-use** |
| **Sub-step** | **S: Information/Usage guide on smart monitoring** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

|  |  |
| --- | --- |
| **Step** | **4: In-use** |
| **Sub-step** | **T: Questionnaires** |
| Main activity/service |  |
| Roles and actors |  |
| Delivered quality |  |
| Risks related |  |
| Chance/Solution |  |

## Monitoring: KPIs definition

The following table shows the KPIs proposed to quantify the level of achievement of distinct goals. The table shows the operational KPI divided in 6 different sections, the monitoring rate, and the gathering method. Please, fill de column “Availability” to reflect if your OSS can provide these KPIs. An extra row is proposed in each section in case you need to add new KPIs. Add more rows if needed. The explanation of the KPIs methodology definition is available in **D4.2 - Citizen Hub model agreement including quality control system for the business model elements and monitoring protocols for evaluation of partners’ activities.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Operational KPI** | **Monitoring rate** | **Data gathering method** | **Availability** |
| Citizen hub sustainability | Costs | Monthly | Budget |  |
| Revenue to OPEX ratio | Monthly | Budget |  |
| Number of public loans or subsidies mobilised | Monthly | Budget |  |
| Other: |  |  |  |
| Pipeline, support and execution of project | Number of first approaches by calls from potential contacts | Monthly | CRM |  |
| Number of first approaches by walk-ins of potential contacts | Monthly | CRM |  |
| Number of first approaches by emails from potential contacts | Monthly | CRM |  |
| Number of web visits by single-users | Monthly | CRM |  |
| Total number of first approaches of potential contacts | Monthly | CRM |  |
| Number of new contacts by calls | Monthly | CRM |  |
| Monthly conversion rate by calls | Monthly | CRM |  |
| Number of new contacts by walk ins | Monthly | CRM |  |
| Monthly conversion rate by walks ins | Monthly | CRM |  |
| Number of new contacts by emails | Monthly | CRM |  |
| Monthly conversion rate by emails | Monthly | CRM |  |
| Number of new contacts by web visits | Monthly | CRM |  |
| Monthly conversion rate by web visits | Monthly | CRM |  |
| Total number of new contacts of single-family dwellings | Monthly | CRM |  |
| Total number of new contacts of multi-family buildings | Monthly | CRM |  |
| Total number of new contacts | Monthly | CRM |  |
| Monthly conversion rate by total contacts | Monthly | CRM |  |
| Number of dwellings included in the new single-family contacts | Monthly | CRM |  |
| Number of dwellings included in the new multi-family building contacts | Monthly | CRM |  |
| Number of multi-family buildings included in the new multi-family building contacts | Monthly | CRM |  |
| Total number of dwellings included in the total number of new contacts | Monthly | CRM |  |
| Number of workshops/sessions | Monthly | CRM |  |
| Monthly workshops/sessions conversion rate | Monthly | CRM |  |
| Number of dwellings included in the workshops/sessions (for single-family) | Monthly | CRM |  |
| Number of dwellings included in the workshops/sessions (for multi-family buildings) | Monthly | CRM |  |
| Number of multi-family buildings included in the workshops/sessions | Monthly | CRM |  |
| Total number of dwellings included in the workshops/sessions | Monthly | CRM |  |
| Number of technical advice meetings | Monthly | CRM |  |
| Monthly technical advice conversion rate | Monthly | CRM |  |
| Number of dwellings included in the technical advice meetings (for single-family) | Monthly | CRM |  |
| Number of dwellings included in the technical advice meetings (for multi-family buildings) | Monthly | CRM |  |
| Number of multi-family buildings included in the technical advice meetings | Monthly | CRM |  |
| Total number of dwellings included in the technical advice meetings | Monthly | CRM |  |
| Number of financial advice meetings | Monthly | CRM |  |
| Monthly financial advice conversion rate | Monthly | CRM |  |
| Number of dwellings included in the financial advice meetings (for single-family) | Monthly | CRM |  |
| Number of dwellings included in the financial advice meetings (for multi-family buildings) | Monthly | CRM |  |
| Number of multi-family buildings included in the financial advice meetings | Monthly | CRM |  |
| Total number of dwellings included in the financial advice meetings | Monthly | CRM |  |
| Number of dwellings included in rehabilitation works | Monthly | CRM |  |
| Monthly rehabilitation works conversion rate | Monthly | CRM |  |
| Number of dwellings included in the rehabilitation works (for single-family) | Monthly | CRM |  |
| Number of dwellings included in the rehabilitation works (for multi-family buildings) | Monthly | CRM |  |
| Number of multi-family buildings included in the rehabilitation works | Monthly | CRM |  |
| Average time/user by phase of the customer journey | Monthly | CRM |  |
| Type of interventions hired in the the construction phase | Monthly | Exit survey |  |
| Positive reviews score | Monthly | Exit survey |  |
| Other: |  |  |  |
| Economic Impact | Investment triggered | Monthly | Proposal and Exit survey |  |
| Jobs created | Monthly | Proposal and Exit survey |  |
| Amount of public loans or subsidies mobilised | Monthly | Proposal and Exit survey |  |
| Other: |  |  |  |
| Environmental Impact | Monthly gwh/y saved | Monthly | Proposal and Exit survey |  |
| Monthly tCO2eq/y saved | Monthly | Proposal and Exit survey |  |
| Other: |  |  |  |
| Social Impact | Health and air quality benefits reviews | Monthly | Exit survey |  |
| Satisfaction survey at the end of each phase | Monthly | Exit survey |  |
| Other: |  |  |  |
| Partnerships | Number of new partnerships | Monthly | CRM |  |
| Number of works done by recommended partner | Monthly | Survey + CRM |  |
| Value of works done by recommended partner | Monthly | Survey + CRM |  |
| Review score for each partner | Monthly | Survey + CRM |  |
| Contractor availability | Monthly | Survey + CRM |  |
| Other: |  |  |  |

Table 2.Business model KPIs for the Valencia city pilot

# STEP 5.1. - MONITORING DATA TEMPLATES

This document will help your Municipality or Region to collect the monitoring data using a common evaluation template. This template will be connected with a data **dashboard** for monitoring and reporting KPIs and impacts. This document is published in **D3.8. Monitoring data Plan for the two pilots**, where more information about the monitoring data procedure can be found, and the corresponding excel spreadsheet is also available.

The document is divided in two parts:

* + - 1. **Customer Journey Evaluation template**: it concerns the realization and reporting of the Sav€ the Homes customers satisfaction within the whole customer journey. This section deals with both Monitored data (quantitative) and User perception data (qualitative)
      2. **The monitoring of the renovation benefits:** The relevant data related to building’s energy performance and IEQ (well-being of occupants) will be stored, analysed and translated into information relevant for homeowners and local governments and municipalities. Therefore, this section deals with both Monitored data (quantitative) and building descriptions data (qualitative).

## Customer Journey Evaluation template

This approach concerns the realization and reporting of the Sav€ the Homes customers satisfaction within the whole customer journey

**Intro** Tab:



**Inputs** Tab



**Measured Actions** Tab:



**Variables** Tab (protected):



**Hoja1** Tab (protected): automatically filled



## Benefits Monitoring templates.

### B.1. Building description:

**Initial Data**

\*Data from cadastral and provided by the occupant during the registration in the monitoring campaign

|  |  |  |
| --- | --- | --- |
| **1. General data** | # Number of monitoring case |  |
|  | Type of monitoring |  |
|  | Typology |  |
| **2. Personal data** | Name |  |
|  | Address |  |
|  | City |  |
|  | Climate zone |  |
|  | Email |  |
|  | Telephone number |  |
| **3. Dwelling data** | Constructed surface (Cadastral) |  |
|  | Year of construction |  |
|  | Current regulation |  |
|  | Cadastral reference |  |
|  | Listed building |  |
|  | Typer of building |  |
|  | Number of floors (building) |  |
|  | Dwelling location in building |  |
| **4. Facilities data** | DHW |  |
|  | Heating |  |
|  | Cooling |  |
|  | Other |  |
| **5. Other data** | Layouts |  |
|  | Energy performance certificate |  |
|  | Registered data |  |
|  | Gas bills |  |
| **6. Renovation measures after 2020?** | Windows |  |
| Insulation (façade or roof) |  |
| DHW |  |
| Heating/Cooling |  |
| PV |  |
| Other |  |
| Date of measures |  |
| **7. Upcoming renovation measures?** | Windows |  |
| Insulation (façade or roof) |  |
| DHW |  |
| Heating/Cooling |  |
| PV |  |
| Other |  |
| Expected date of measures |  |

**Dwelling data**

|  |  |  |
| --- | --- | --- |
| **1. General info** | Orientation |  |
| Number of floors |  |
| Number of rooms |  |
| Number of baths |  |
| **2. Occupant profile** | Tenant/Owner |  |
| Home occupancy range |  |
| Number of occupants < 18 |  |
| Number of occupants 18-65 |  |
| Number of occupants > 65 |  |
| **3. Facilities** | **Lighting** |  |
| Type |  |
| Control system and sensors |  |
| **DHW** |  |
| Type |  |
| Year |  |
| **Heating system** |  |
| Type |  |
| Year |  |
| Control system and sensors |  |
| Setpoint temperature |  |
| Months of use |  |
| **Cooling system** |  |
| Type |  |
| Year |  |
| Control system and sensors |  |
| Setpoint temperature |  |
| Months of use |  |
| **Ventilation** |  |
| Type |  |
| Control system and sensors |  |
| Year |  |
| **Photovoltaic panels** |  |
| kWp |  |
| Year |  |
| **Appliances** |  |
| Fridge |  |
| Washing machine |  |
| Dryer |  |
| Dishwasher |  |
| Oven |  |
| Type of cooker |  |
| Control system and sensors |  |
| **4. Envelope** | **Windows** |  |
| Type of glass |  |
| Type of frame |  |
| Type of opening |  |
| Air tightness |  |
| Blinds |  |
| Curtains |  |
| Solar protection |  |
| **Façade** |  |
| Width |  |
| Type |  |
| **Roof** |  |
| Sloping/flat |  |
| Type |  |
| **Floor** |  |
| Type |  |

**Subjective wellbeing data**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1. Indoor parameters** | **How often do you experience discomfort due to…?** | **Never** | **Hardly ever** | **Sometimes** | **Frequently** | **Quite often** |  |  |
| Dry air |  |  |  |  |  |  |  |
| Humid air |  |  |  |  |  |  |  |
| Stuffy "bad" air |  |  |  |  |  |  |  |
| Unpleasant odour |  |  |  |  |  |  |  |
| Dust and dirty |  |  |  |  |  |  |  |
| Noise |  |  |  |  |  |  |  |
| Draught |  |  |  |  |  |  |  |
| Indoor temperature too high |  |  |  |  |  |  |  |
| Indoor temperature too low |  |  |  |  |  |  |  |
| Light that is dim |  |  |  |  |  |  |  |
| Light that causes glare and/or reflections |  |  |  |  |  |  |  |
| **2. Symptoms** | **How often do you experience the following complaints…?** | **Never** | **Hardly ever** | **Sometimes** | **Frequently** | **Quite often** |  |  |
| Fatigue |  |  |  |  |  |  |  |
| Feeling heavy-headed |  |  |  |  |  |  |  |
| Headache |  |  |  |  |  |  |  |
| Dizziness |  |  |  |  |  |  |  |
| Difficulties concentrating |  |  |  |  |  |  |  |
| Itching, burning or irritation of the eyes |  |  |  |  |  |  |  |
| Visual disturbances |  |  |  |  |  |  |  |
| Irritated, stuffy or runny nose |  |  |  |  |  |  |  |
| Hoarse, dry throat |  |  |  |  |  |  |  |
| Respiratory problems |  |  |  |  |  |  |  |
| Sneezing, stuffy nose |  |  |  |  |  |  |  |
| Other…. |  |  |  |  |  |  |  |
| **3. Cold / hot wall** | **Do you feel the floor or wall cold/hot?** | **Never** | **Hardly ever** | **Sometimes** | **Frequently** | **Quite often** |  |  |
| cold wall/window in winter |  |  |  |  |  |  |  |
| hot wall/window in summer |  |  |  |  |  |  |  |
| **4. Thermal feeling** | **Indoor thermal feeling** | **Hot** | **Warm** | **Slightly warm** | **Neutral** | **Slightly cool** | **Cool** | **Cold** |
| In winter, in your house it usually does… |  |  |  |  |  |  |  |
| In summer, in your house you usually do… |  |  |  |  |  |  |  |
| **5. Clothing** | **Clothing** | **Nothing** | **Light clothing** | **2 layers** | **Coat or more than 2 layers** |  |  |  |
| In winter, you usually wear... |  |  |  |  |  |  |  |
| In summer, you usually wear... |  |  |  |  |  |  |  |

**Dwellings with energy measures**

|  |  |  |
| --- | --- | --- |
| **1. Measures after 2020** | **Implemented measures** |  |
| Windows |  |
| Insulation (façade and/or roof) |  |
| DHW |  |
| Heating/Cooling |  |
| PV |  |
| Other |  |
| **Date of the renovation measures** |  |
| **Reasons for the renovation** |  |
| Too cold in winter |  |
| Too hot in summer |  |
| Too noisy |  |
| High humidity and/or mold |  |
| High energy consumption/cost |  |
| Other problems |  |
| It didn't have problems |  |
| **Pictures previous state** |  |
| **2. Feedback** | Global appreciation of the works |  |
| Global appreciation of the measures |  |
| What has been the most difficult part of the process? |  |
| Have pre-existing problems improved? |  |
| Have you reduced your energy bills? |  |
| **3. Cost** | Cost of the measures |  |
| Have you applied for Next Generation grants? |  |
| Has it been easy for you to process the grants? |  |
| **4. Tools** | Have you used the renovEU tool? |  |
| Has the renovEU tool been useful to you? |  |
| Have you gone to the Energy Office/Xaloc? |  |
| Has the OE/Xaloc been useful to you? |  |
| **5. Upcoming measures** | **Are you going to implement more measures?** |  |
| Windows |  |
| Insulation (façade and/or roof) |  |
| DHW |  |
| Heating/Cooling |  |
| PV |  |
| Other |  |
| **Reasons for further improvements** |  |
| **Are you going to apply for Next Generation grants?** |  |

**Dwellings without energy measures**

|  |  |  |
| --- | --- | --- |
| **1. Upcoming measures** | **Are you going to implement renovation measures?** |  |
| Windows |  |
| Insulation (façade and/or roof) |  |
| DHW |  |
| Heating/Cooling |  |
| PV |  |
| Other |  |
| **Planned date** |  |
| **2. Reasons for renovation** | **Razones para llevar a cabo mejoras** |  |
| Too cold in winter |  |
| Too hot in summer |  |
| Too noisy |  |
| High humidity and/or mold |  |
| High energy consumption/cost |  |
| Other problems |  |
| It didn't have problems |  |
| **3. Budget** | **Estimated budget** |  |
| **4. Grants** | **Are you going to apply for Next Generation grants?** |  |
| [Are you going to use renovEU tool?](http://renoveu.five.es/#/home) |  |
| **Are you going to visit the energy office/Xaloc?** |  |
| **5. Problems** | **Biggest obstacles in the process so far** |  |

### B.2. Monitoring data description

**Hoja1** Tab (themes and variables):



**Measurements** Tab (description):



**Values** Tab (data collection):



**Variables** Tab:



## Monitoring: Value (satisfaction)

The objective of this document is the realization and reporting (satisfaction evaluation) of the Sav€ the Homes customers satisfaction after work is done (Stop 4 - In-Use phase). The following table shows the KPIs proposed to quantify the customer’s satisfaction after using the customer journey. This KPIS are now included in the Pipeline KPIs and are explained in **D4.2 - Citizen Hub model agreement including quality control system for the business model elements and monitoring protocols for evaluation of partners’ activities.** Once the satisfaction evaluation questionnaire is fully completed, it will be available in **D4.8. Evaluation of the Citizen Hub holistic renovation services and the customer journeys.**

Please, fill the column “Follower” if your OSS can gather this satisfaction feedback from the customers:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **KPI ID** | **KPI name** | **Answer by** | **Answer each...** | **Answer format** | **Follower** |
| P22 | satisfaction professional | office staff | customer | select |  |
| P33 | satisfaction professional | office staff | customer + 6M | select |  |
| P40 | satisfaction | office staff | customer + 9M | 1/0 |  |
| P43 | satisfaction result | office staff | customer + 9M | select |  |
| I50 | satisfaction process | office staff | customer + 9M | select |  |
| R10 | satisfaction | AUTO | 6M | double |  |

* P22 addresses the satisfaction level with the contracted professional.
* P33 addresses the satisfaction level with the contacted contractor.
* P40 addresses the finishing of renovation works through the offer to answer an exit survey and marks the start of stage.
* P43 addresses the satisfaction level with the result of renovation works.
* I50 addresses the satisfaction level with the Citizen Hub service.
* R10 addresses the level of satisfaction with the professionals and contractors contacted from the registry and is related to P22 and P33