



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

 5   The follow-up	<b>Q. The Sustainability Strategy</b>	Which type of OSS do you have regarding its engagement level?	<input type="checkbox"/>	
	<b>R. The Business Model</b>	How can your OSS be self-sufficient? Which is its business model?	<input type="checkbox"/>	
	<b>S. The Risk assessment</b>	Which are the potential risks of your OSS implementation? Which are their contingency plans?	<input type="checkbox"/>	
	<b>T. The Performance</b>	<b>KPIs</b>		<input type="checkbox"/>
		<b>Dashboard</b>	Which are the main KPIs to monitor the success of your OSS implementations and the customer satisfaction? How are these KPIs gathered and monitored?	<input type="checkbox"/>
		<b>Value (Satisfaction)</b>		<input type="checkbox"/>

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](#).
- For sub-step **R. The Business Model**, the DIY document is available in [D3.3. Citizen Hub Business model for the two pilots](#).
- 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](#).
- Finally, for sub-step **T. The Performance**, three documents are used:
  - [D4.2 Citizen Hub model agreement Citizen Hub model agreement](#).
  - [D3.8. Monitoring data Plan for the two pilots](#).





## 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	Target	(A)	(C)	(S)	(F)
Public/Private/ Non-profit/ PPP/PCPC	Single housing/ multifamily housing/ public buildings/ residential buildings/ social housing	<b>Technical assistance</b> Yes: ✓	<b>Contractor relations</b> Yes: ✓	<b>Subsidies offers</b> Yes: ✓	<b>Financing solutions</b> Yes: ✓

PPP = Public-Private Partnership  
PCPC = 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*.

**The Business Model Canvas**

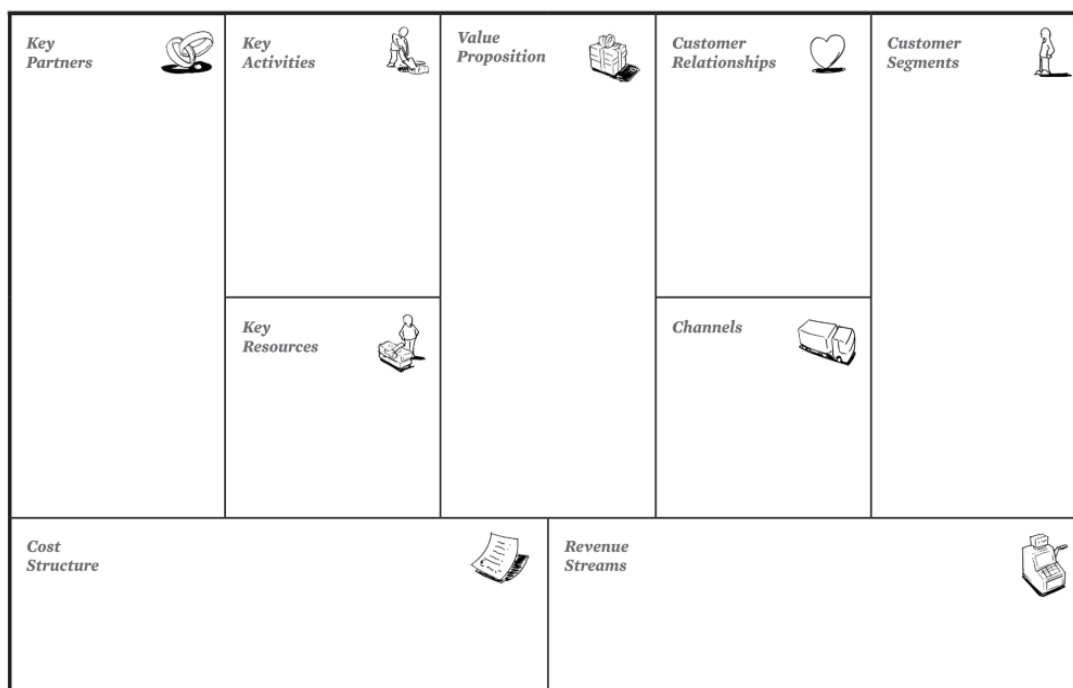


Figure 1. The Business Model Canvas

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.



11 - Societal Costs		2 - Value Propositions		10 - Societal Revenue			
8 - Key Partners		7 - Key Activities		4 - Customer Relations		1 - Customer Segments	
6 - Key Resources				3 - Channels			
9 - Cost structure				5 - Revenue Streams			

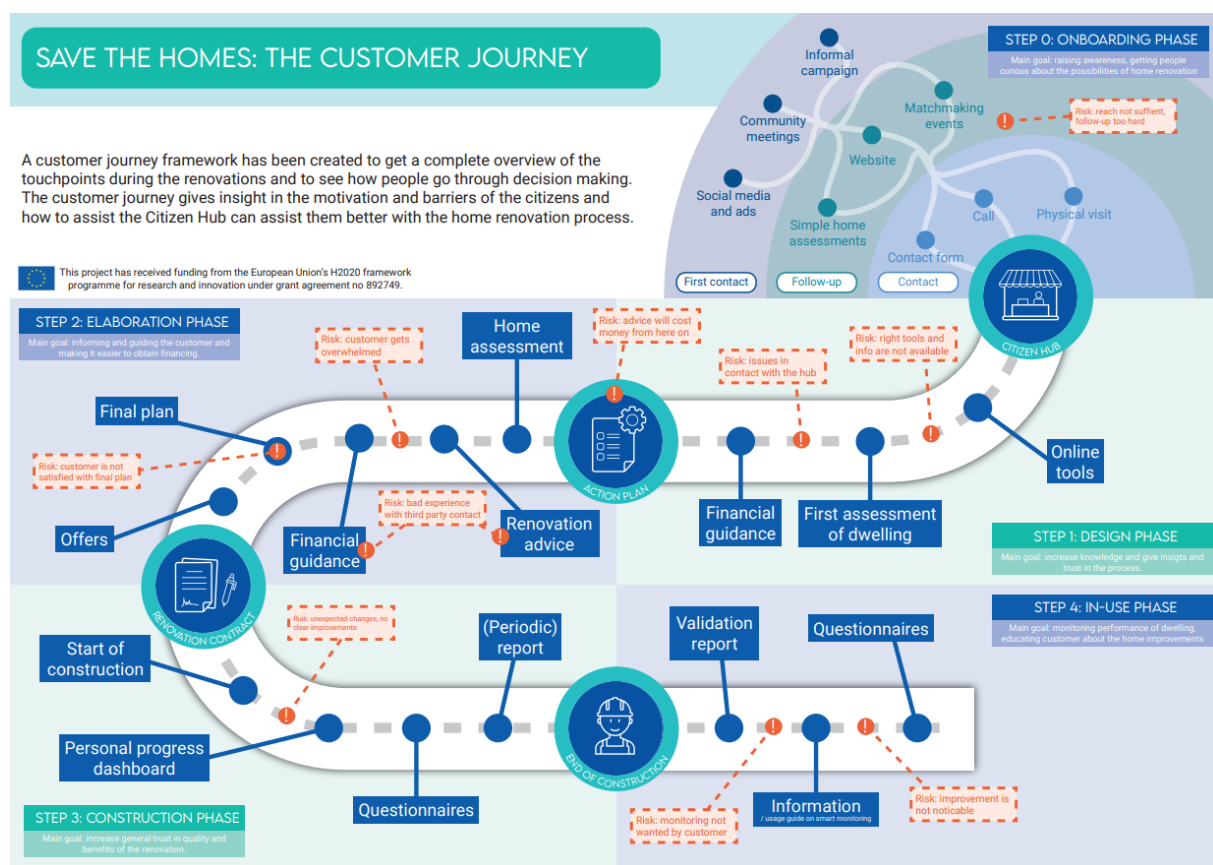


## Risk assessment

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.





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

**STEP 0: ONBOARDING PHASE**

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

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

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





**STEP 1: DESIGN PHASE**

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

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

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





**STEP 2: ELABORATION PHASE**

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

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

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

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

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







### STEP 3: CONSTRUCTION PHASE

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

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

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

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

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

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





**STEP 4: IN-USE PHASE**

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

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

<b>Step</b>	<b>4: In-use</b>
<b>Sub-step</b>	<b>T: Questionnaires</b>
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:

- A. **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)
- B. **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).

### A. 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:**

Please follow instructions below:															
<b>Go to Inputs Tab:</b>															
1	Select <b>Country</b>														
2	Type your <b>renovation goal</b>														
3	Type your <b>step factor goals</b>														
Please do not edit <b>grey cells</b>															
<b>Go to MeasuredActions tab:</b>															
For each action you implement, use a new <b>row</b> :															
1	Type the City where the <b>Citizen Hub</b> which implemented the action is located														
2	Select the <b>stage</b> to which the action corresponds <table border="0" style="margin-left: 20px;"> <tr><td>0</td><td><i>onboarding actions</i></td></tr> <tr><td>1</td><td><i>evaluation/diagnosis actions (self-assessment, standard options...)</i></td></tr> <tr><td>2</td><td><i>elaboration actions (customization, contracting, financing...)</i></td></tr> <tr><td>3</td><td><i>quality assurance actions (mediations, site visits...)</i></td></tr> <tr><td>4</td><td><i>validation actions (monitoring, sharing, certifying...)</i></td></tr> <tr><td>5</td><td><i>satisfaction (questionnaire)</i></td></tr> </table>	0	<i>onboarding actions</i>	1	<i>evaluation/diagnosis actions (self-assessment, standard options...)</i>	2	<i>elaboration actions (customization, contracting, financing...)</i>	3	<i>quality assurance actions (mediations, site visits...)</i>	4	<i>validation actions (monitoring, sharing, certifying...)</i>	5	<i>satisfaction (questionnaire)</i>		
0	<i>onboarding actions</i>														
1	<i>evaluation/diagnosis actions (self-assessment, standard options...)</i>														
2	<i>elaboration actions (customization, contracting, financing...)</i>														
3	<i>quality assurance actions (mediations, site visits...)</i>														
4	<i>validation actions (monitoring, sharing, certifying...)</i>														
5	<i>satisfaction (questionnaire)</i>														
3	Select the kind of <b>mechanism</b> the action corresponds to <table border="0" style="margin-left: 20px;"> <tr><td><i>event</i></td><td><i>on CH premises, human driven, dinamic information, to many users (general admission)</i></td></tr> <tr><td><i>publication</i></td><td><i>online, static information, to many users</i></td></tr> <tr><td><i>tool</i></td><td><i>online, dinamic information, to many users</i></td></tr> <tr><td><i>interview</i></td><td><i>on CH premises, human driven, dinamic information, to one user</i></td></tr> <tr><td><i>meeting</i></td><td><i>on CH premises, human driven, dinamic information, to many users (by invitation)</i></td></tr> <tr><td><i>visit</i></td><td><i>on site, human driven, dinamic information, to many users (by invitation)</i></td></tr> <tr><td><i>follow-up</i></td><td><i>online, to one user</i></td></tr> </table>	<i>event</i>	<i>on CH premises, human driven, dinamic information, to many users (general admission)</i>	<i>publication</i>	<i>online, static information, to many users</i>	<i>tool</i>	<i>online, dinamic information, to many users</i>	<i>interview</i>	<i>on CH premises, human driven, dinamic information, to one user</i>	<i>meeting</i>	<i>on CH premises, human driven, dinamic information, to many users (by invitation)</i>	<i>visit</i>	<i>on site, human driven, dinamic information, to many users (by invitation)</i>	<i>follow-up</i>	<i>online, to one user</i>
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<i>visit</i>	<i>on site, human driven, dinamic information, to many users (by invitation)</i>														
<i>follow-up</i>	<i>online, to one user</i>														
4	Type a <b>name</b> to individualize and/or describe the action														
5	Select the <b>owner</b> or responsible for the action														
6	Type the number of <b>participants/ users/ visits</b> to the action														
7	Type the <b>average dedication</b> needed for the staff od user to perform the action (in minutes, per participant if it is the case)														
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<b>Please do not edit Variables or Hoja1 tabs</b> <span style="float: right;">(0000)</span>															
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**Inputs Tab**

Country	stage	renovation goal	people who...	step factor goals	is..
select	0		is targeted		of those who then use a Citizen Hub service
	1		uses services		of those who finally get personal assessment
	2		gets personal assessment		of those who actually renovate
	3		<b>renovates</b>		
	4		monitors/ validates		of those who renovated
			understands results		of those who monitored/ validated
	5		is satisfied		of those who renovated

**Measured Actions Tab:**

Citizen Hu	stage	mechanism	name	owner	visits	average dedication

**Variables Tab (protected):**

Country	stage	mechanism	owner
ES	0	A. event	VCE
NL	1	B. publication	IVE
SI	2	C. tool	GVA
	3	D. interview	VRCP
	4	E. meeting	BHG
	5	F. visit	AE
		G. follow-up	HIA
			SCUG
			CLU

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

Citizen Hub	Country	stage	mechanism	name	owner	visits	average ded	objetivo







## B. Benefits Monitoring templates.

### B.1. Building description:

#### Initial Data

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

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





**Dwelling data**

<b>1. General info</b>	Orientation	
	Number of floors	
	Number of rooms	
	Number of baths	
<b>2. Occupant profile</b>	Tenant/Owner	
	Home occupancy range	
	Number of occupants < 18	
	Number of occupants 18-65	
	Number of occupants > 65	
<b>3. Facilities</b>	<b>Lighting</b>	
	Type	
	Control system and sensors	
	<b>DHW</b>	
	Type	
	Year	
	<b>Heating system</b>	
	Type	
	Year	
	Control system and sensors	
	Setpoint temperature	
	Months of use	
	<b>Cooling system</b>	
	Type	
	Year	
	Control system and sensors	
	Setpoint temperature	
	Months of use	
	<b>Ventilation</b>	
	Type	
	Control system and sensors	
	Year	
	<b>Photovoltaic panels</b>	
	kWp	
	Year	
	<b>Appliances</b>	
	Fridge	
	Washing machine	
	Dryer	
	Dishwasher	
	Oven	
	Type of cooker	
	Control system and sensors	
<b>4. Envelope</b>	<b>Windows</b>	





	Type of glass	
	Type of frame	
	Type of opening	
	Air tightness	
	Blinds	
	Curtains	
	Solar protection	
	<b>Façade</b>	
	Width	
	Type	
	<b>Roof</b>	
	Sloping/flat	
	Type	
	<b>Floor</b>	
	Type	

**Subjective wellbeing data**

	<b>How often do you experience discomfort due to...?</b>	<b>Never</b>	<b>Hardly ever</b>	<b>Sometimes</b>	<b>Frequently</b>	<b>Quite often</b>		
<b>1. Indoor parameters</b>	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							
<b>2. Symptoms</b>	<b>How often do you experience the following complaints...?</b>	<b>Never</b>	<b>Hardly ever</b>	<b>Sometimes</b>	<b>Frequently</b>	<b>Quite often</b>		
	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	<b>Do you feel the floor or wall cold/hot?</b>	<b>Never</b>	<b>Hardly ever</b>	<b>Sometimes</b>	<b>Frequently</b>	<b>Quite often</b>		
	cold wall/window in winter							
	hot wall/window in summer							
4. Thermal feeling	<b>Indoor thermal feeling</b>	<b>Hot</b>	<b>Warm</b>	<b>Slightly warm</b>	<b>Neutral</b>	<b>Slightly cool</b>	<b>Cool</b>	<b>Cold</b>
	In winter, in your house it usually does...							
	In summer, in your house you usually do...							
5. Clothing	<b>Clothing</b>	<b>Nothing</b>	<b>Light clothing</b>	<b>2 layers</b>	<b>Coat or more than 2 layers</b>			
	In winter, you usually wear...							
	In summer, you usually wear...							

### Dwellings with energy measures

1. Measures after 2020	<b>Implemented measures</b>	
	Windows	
	Insulation (façade and/or roof)	
	DHW	
	Heating/Cooling	
	PV	
	Other	
	<b>Date of the renovation measures</b>	
	<b>Reasons for the renovation</b>	
	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	
<b>Pictures previous state</b>		
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?	





<b>4. Tools</b>	<a href="#">Have you used the renovEU tool?</a>	-
	Has the renovEU tool been useful to you?	
	Have you gone to the Energy Office/Xaloc?	
	Has the OE/Xaloc been useful to you?	
<b>5. Upcoming measures</b>	<b>Are you going to implement more measures?</b>	
	Windows	
	Insulation (façade and/or roof)	
	DHW	
	Heating/Cooling	
	PV	
	Other	
	<b>Reasons for further improvements</b>	
	<b>Are you going to apply for Next Generation grants?</b>	

### Dwellings without energy measures

<b>1. Upcoming measures</b>	<b>Are you going to implement renovation measures?</b>	
	Windows	
	Insulation (façade and/or roof)	
	DHW	
	Heating/Cooling	
	PV	
	Other	
	<b>Planned date</b>	
<b>2. Reasons for renovation</b>	<b>Razones para llevar a cabo mejoras</b>	
	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	
<b>3. Budget</b>	<b>Estimated budget</b>	
<b>4. Grants</b>	<b>Are you going to apply for Next Generation grants?</b>	
	<a href="#">Are you going to use renovEU tool?</a>	-
	<b>Are you going to visit the energy office/Xaloc?</b>	
<b>5. Problems</b>	<b>Biggest obstacles in the process so far</b>	





## B.2. Monitoring data description

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

reg	country	building	unit	season	phase	family	variable	timestamp	value
<i>from alldes</i>	<i>from alldes</i>	<i>from alldes</i>	<i>from alldes</i>	Winter	Ante	Energy	Home energy consumption		
				Summer	Post	IndoorEQ	CO2		
						Wellbeing	Air Temperature		
							Relative humidity		
							Illuminance level		
							TVOC		
							Formaldehydes		
							PM2.5		
							PM10		
							Activity		
							Clothing		
							Stressors-		
							Symptoms-		
							Thermal comfort		

**Measurements** Tab (description):

unit	measurement	season	phase	family	variable
<i>from Dwelling</i>	<i>int</i>	<i>select</i>	<i>select</i>	<i>select</i>	<i>select</i>

**Values** Tab (data collection):

measurement	timestamp	value
<i>int</i>	<i>timestamp</i>	<i>double/string</i>

**Variables** Tab:

season	phase	family	variable
Winter	Ante	Energy	Home energy consumption
Summer	Post	IndoorEQ	CO2
		Wellbeing	Air Temperature
			Relative humidity
			Illuminance level
			TVOC
			Formaldehydes
			PM2.5
			PM10
			Activity
			Clothing
			Stressors-
			Symptoms-
			Thermal comfort





## 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

