



# Task 24 ExCo Update Phase I

*Closing the Loop: Behaviour Change in DSM – From Theory to Practice*

# Task 24 Phase I ExCo Update



Objectives for the  
last 6 months

# Subtask 1 – Helicopter overview

## Objectives from last 6 months

All information from the ‘Monster’ to be put on a wiki ([www.ieadsmtask24wiki.info](http://www.ieadsmtask24wiki.info))

→ Almost completed, but ongoing work in progress

Further case studies to be collected and added to the Wiki

→ Collected 8 further case studies from CA, NZ, BE, JA, AT

Complete missing case studies for Belgium (**done**) and Italy (**not done, due to limited national expert time**)

→ The ‘Monster’ will continue to grow in Phase II

## Subtask 2 – In-depth case studies

### Objectives from last 6 months

Collection of detailed case studies and best practice in four overarching themes

Includes interviews in Italy - **completed**

Analysis of case studies so far collected

→ (Finalised: NL, NZ, SE, NO, CH. Draft: AT. Missing: BE)

→ All case studies were re-iterated based on Task 24 best practice in the completed ST4 reports

→ The case studies will continue to feed into Phase II

## Subtask 3 – Evaluation Tool

### Objectives from the last 6 months

Methodological Review of the literature by Karlin and Ford called *'What do we know about what we know'* (Deliverable 3) → **la edits**

Positioning Paper called *'Did you behave as we designed you to?'* (Deliverable 3A) → **finalised**

Guidelines and Factsheets called *From "I think I know" to "I understand what you did and why you did it"* (Deliverable 3B)  
→ **work will continue in Phase II**

→ **The evaluation tool will continue in Subtasks 8 & 9 in Phase II, including international validation**

# Subtask 4 – Country-specific recommendations

## Objectives from the last 6 months

Country stories

→ Completed

Country-specific reports with recommendations, to do's etc

→ Finalised NO, NZ, NL, CH. Draft: SE, BE. Missing: AT,

Both Belgium (and Italy?) will get truncated versions of this report due to limited input from their national experts

→ The recommendations will be built upon in ST8

## Subtask 5 – Expert Platform

### Objectives from the last 6 months

Expert platform continually growing and getting used

→ 228 experts and counting

New content including presentations, videos and reports uploaded

→ over 135 presentations and videos, all finalised reports are uploaded

Continue publicising and dissemination of Task 24, including at international conferences

→ 2 eceee papers, BECC abstract, Spotlights, Facilitator report translated, 3 guest lectures, DSM University webinar, DUE keynote

The Expert Platform will be upgraded in Phase II

# Expert meetings, seminars and conferences in the last 6 months

Date	Place	# of Experts	Type of meeting	Government	Industry	Academia
4/10/14	London, UK	12	SHM	4	2	6
7/2/15	Wellington, NZ	10	SHM	8	2	

Date	Place	Participants	Type of meeting	Government	Industry	Academia
6/10/14	Sheffield, UK	40+	Seminar		1	40+
1/1/15	Milan, Italy	100+	Conference			
4/1/15	DSM University	300	Webinar			
1/3/15	Cape Town, SA	??	Conference keynote			
1/3/15	Cape Town	??	Conference keynote			
1/3/15	Cape Town	??	Conference			



## Reports and publications produced in last 6 months

2 IEA DSM Spotlight Issues

Filmed presentations and minutes from Graz

Oxford Workshop official UKERC report

Three more ST2 reports (SE, NO, CH)

Three ST3 reports (Deliverables 3, 3A, 3B)

Six ST4 reports (NO, NL, NZ, CH, SE, BE)

Summary presentation of collected findings

2 eceee summer study papers

# Task 24 Phase I ExCo Update



Objectives for the  
next 6 months

## Task 24 – Phase I

### Objectives for the last 6 months

Subtask 1: Finalise the Wiki with remaining case studies, run pa

Subtask 2: Finalise edits on case study from Austria

Subtask 3: Finalise edits on Deliverable 3 (Karlin)

Subtask 4: Finalise edits for SE & BE and complete AT report

Subtask 5: Upgrade expert platform, BECC abstract, more web

Phase II will kick off in April 2015

# Expert meetings, seminars and conferences in the next 6 months

Date	Place	Type of meeting
March	Cape Town, SA	XM
April	Wellington, NZ	XM
May	Toronto, CA	XM & SHM
June	eceee, FR	XM
July	Sheffield, UK	XM
August	San Diego, USA	SHM
September	Eindhoven, NL	XM
October	Stockholm, SE	XM

Date	Place	Type of meeting
June 1-6	eceee, FR	Summer study

## What can Task 24 help Behaviour Changers with?

**Reframing the issues**, including looking at the more ‘human’ aspect of the energy system

**Improved knowledge** and understanding amongst stakeholders especially what different models of behaviour are out there

**Improved engagement**, development of new aspirations and collaborations, shared learning

**Improved political buy-in** and policy development, including Secretariat and H2020 research

**Addressing funding** and/or policy disconnects

**Improving business/industry** approaches and collaborations

Good examples of how to use **storytelling in policy and practice**

Help with specific initiatives, development of **field research projects**

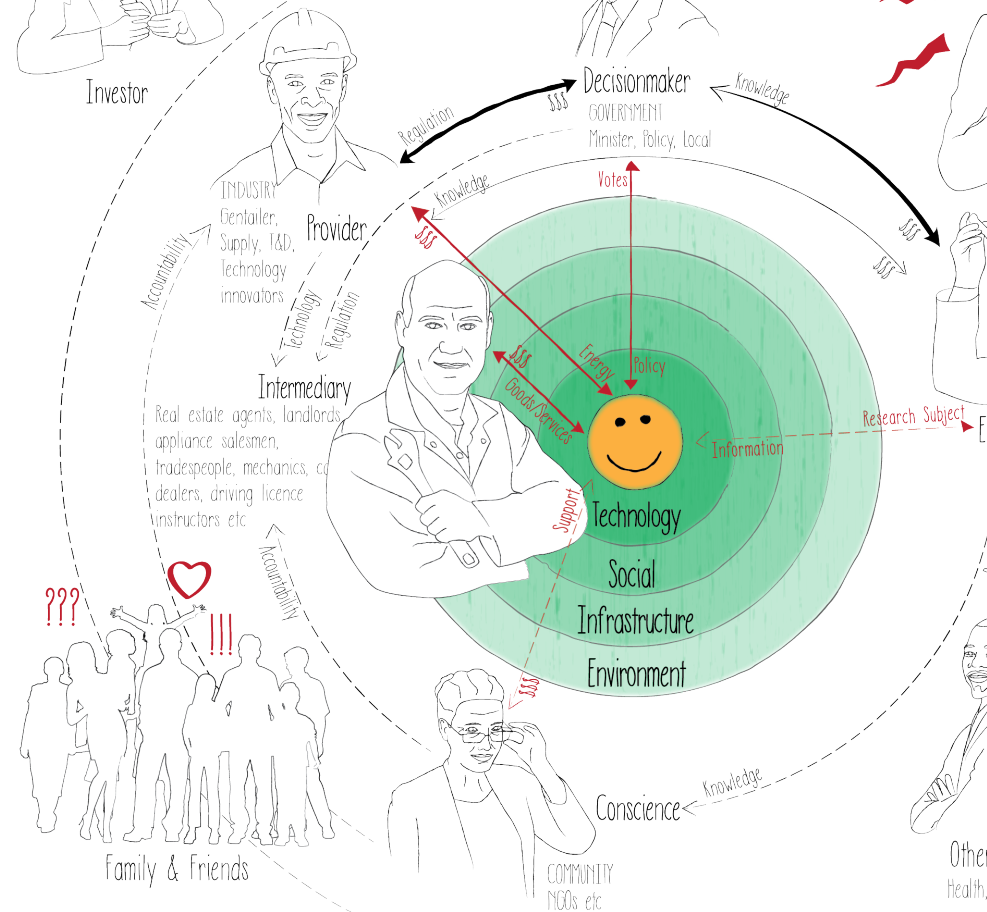
# Task 24 – Phase I

## Budget

Income	Cost
<p>Country participation None outstanding (except SA):</p> <p><b>320,000</b></p>	<p><b>Person months (officially, <i>pro bono</i> excluded)</b>            Sea Rotmann 38 pm            Ruth Mourik 19 pm</p> <p><b>€256,500</b></p>
<p><b>In-kind contribution (approx):</b></p> <p>KERC Meeting Place Workshop Oxford 40,000</p> <p>WZ Workshop (x2) NZD 9,000</p> <p>Energy Savers Dubai workshop €1,000</p> <p><b>In-kind expert time:</b>            over 20 weeks' worth of expert time (Especially Spain, UK, Portugal, US, Canada)</p> <p>Marlin, Ford et al (2015) report: USD10,000</p>	<p><b>Other costs:</b></p> <p>Travel, filming, expert site, incidentals:</p> <p><b>€63,500</b></p> <p><b>TOTAL SPENDING \$320,000</b></p>

The **Advisory Board Deliverable** was not undertaken as envisaged but we had so many experts comment on, and participate in the Task. We got frequent, highly valued feedback that steered the Task (especially from our Mentors)

When we received **feedback from ExCo** and funders it was excellent and included, where possible, in the Task. We want to ensure the research from this Task is of value in practice to our funders, so feedback is highly encouraged



# IEA DSM Task 24 - Phase II

*Helping the Behaviour Changers*



## 5 – Expert Platform (upgraded)

6 –

Understanding Behaviour Changer Practices in Top DSM Areas

*‘The Issues’*

7 –

Identifying Behaviour Changers in these areas

*‘The People’*

8 –

Developing a toolbox of interventions to help Behaviour Changers

*‘The Tools’*

9 –

Standardising Evaluation beyond kWh

*‘The Measures’*

10 – Telling an Overarching Story *‘The Story’*

# Task 24 – Phase II

## Objectives

Engage an international expert network → **‘The Experts’**

Develop the top 3 DSM priorities to identify the most (politically, technologically, economically and societally) appropriate DSM themes to focus on → **‘The Issues’**

Identify and engage countries’ networks in the 5 Behaviour Changers sectors to test one of the top 3 DSM themes to develop a collective approach → **‘The Pilot’**

Develop and test a Collective Impact Approach to develop shared methodologies, guidelines and a common ‘language’ based on narratives to aid Behaviour Change decisionmaking of how to choose the best models of understanding behaviour theories of change (a ‘toolbox of interventions’) → **‘The Tools’**

Standardise how to evaluate behaviour change programmes ‘Beyond kWh’

**‘The Measures’**

Collate national learnings into an overarching (international) story to understand, compare and contrast the different behaviour change approaches, risks and opportunities and which recommendations can be universally applied → **‘The Summary’**

# Task 24 – Phase II

## How it all fits together

Subtask 1



Subtask 2



Subtask 4



**What?**  
Subtask 6  
'The Issues'

Subtask 5



**Who?**  
Subtask 7  
'The People'

Subtask 1



Subtask 4



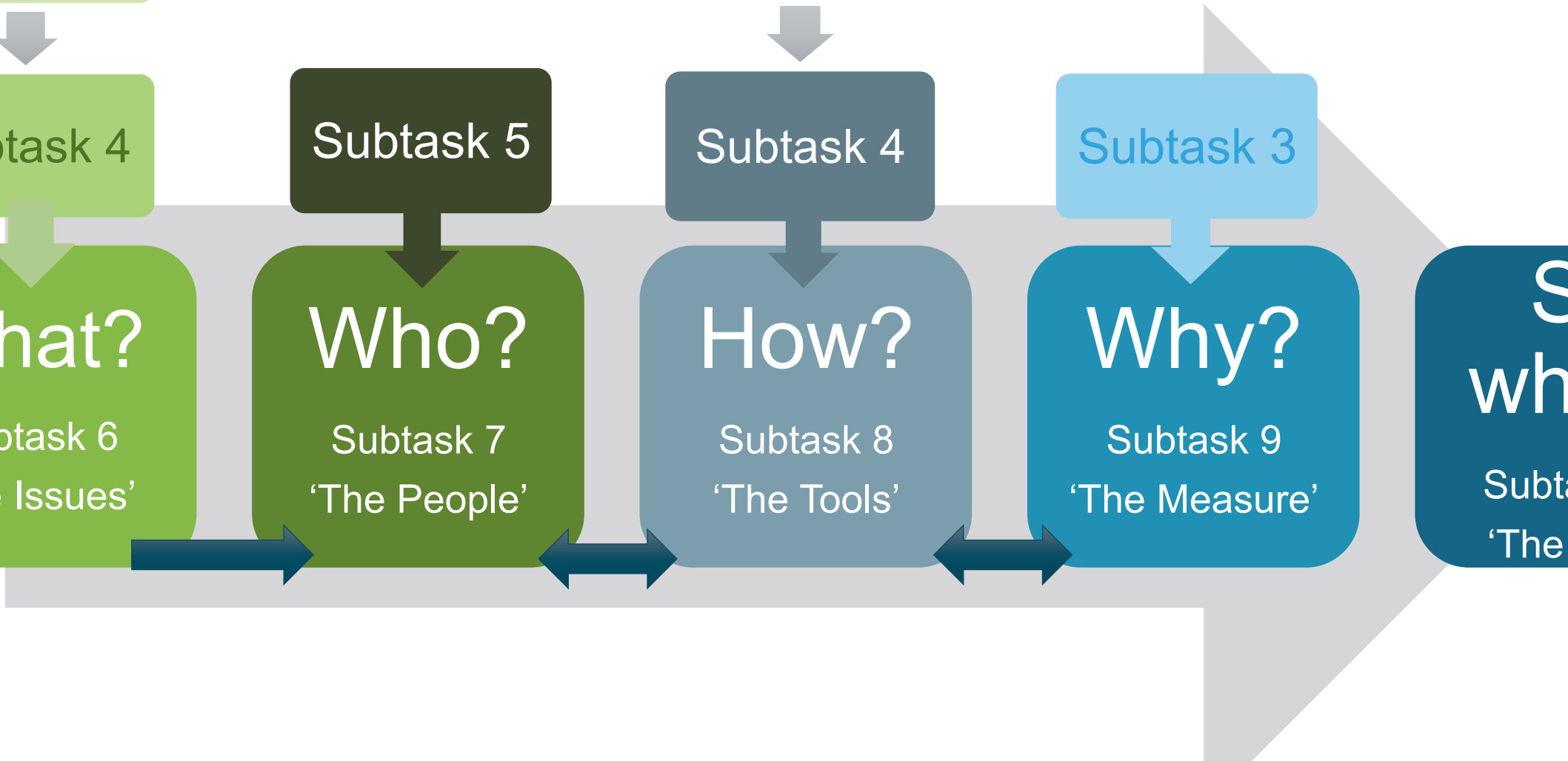
**How?**  
Subtask 8  
'The Tools'

Subtask 3



**Why?**  
Subtask 9  
'The Measure'

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# Task 24 – Phase II

## Country Budgets

countries	6 - 7 countries	8 - 9 countries	10+ countries
<p><b>€75,000 per country (€25,000 per annum)</b>            (2 OAs, 1 PI, travel, platform maintenance, filming, workshops, toolbox, reports overheads)</p> <p><b>Total budget €1,000,000-€375,000</b></p>	<p><b>€75,000 per country (€25,000 per annum)</b>            (2 OAs, 1 PI, travel, platform maintenance, filming, workshops, toolbox, reports overheads)</p> <p><b>Total budget €450,000-€525,000</b></p>	<p><b>€75,000 per country (€23,000 per annum)</b>            (2 OAs, 1 PI, travel, platform maintenance, filming, workshops, toolbox, reports overheads)</p> <p><b>Total budget €600,000-€675,000</b></p>	<p><b>€75,000 per country (€21,500 per annum)</b>            (2 OAs, 1 PI, travel, platform maintenance, filming, workshops, toolbox, reports overheads)</p> <p><b>Total budget €750,000-€825,000</b></p>
<p>Level of detail in deliverables:            · Social expert platform            · Top DSM issues of 4-5 countries            · Behaviour Changers            · Toolbox of interventions            · Standard evaluation tool            · International handbook</p>	<p>Level of detail in deliverables:            · Social expert platform            · Top DSM issues of 6-7 countries            · Behaviour Changers            · Toolbox of interventions            · Standard evaluation tool            · International handbook</p>	<p>Level of detail in deliverables:            · Social expert platform            · Top DSM issues of 8-9 countries            · Behaviour Changers            · Toolbox of interventions            · Standard evaluation tool            · International handbook</p>	<p>Level of detail in deliverables:            · Social expert platform            · Social expert platform            · Top DSM issues of 10+ countries            · Behaviour Changers            · Toolbox of interventions            · Standard evaluation tool            · International handbook</p>
<p><b>36 months duration</b></p>	<p><b>36 months duration</b></p>	<p><b>39 months duration</b></p>	<p><b>42 months duration</b></p>

# Task 24 – Phase II

## Detailed Budget

### Detailed budget based on 4 participating countries.

Description personmonths/ costs	Cost (Euro)	personmonths Sea Rotmann per subtask	personmonths Ruth Mourik per subtask	total costs Rotmann	Sea total costs Ruth Mourik	total sum
Subtask 0	4750	3.5	0.5	16625	4750	21375
Subtask 5	4750	6	1.5	28500	2375	30875
Subtask 6	4750	3	1.5	23750	11875	35625
Subtask 7	4750	7	2.5	28500	14250	42750
Subtask 8	4750	9	4	38000	14250	52250
Subtask 9 (Beth Karlin PI)	4750	3.5	see below	16625		16625
Subtask 10	4750	4	2	19000	9500	28500
<b>Total personmonths/costs</b>		<b>36</b>	<b>12</b>	<b>€171,000</b>	<b>€57000</b>	<b>€228,000</b>

Description costs	Costs
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OAs travel costs	27500	costs travel Sea Rotmann and Ruth Mourik including extended stay in Europe of Sea Rotmann and frequent face to face meetings RM and SR (up to 6 times travel SR to Europe from New Zealand) including workshops
Beth Karlin (PI)	38000	ST9 subcontract
stakeholder analyses	5000	separate meetings and costs associated with stakeholder analyses/workshops
website and data management	1500	including website, webinars, VC, social media, blogs/vlogs, database etcetera

incidentals and overheads €72000

Total

**€300,000**

# Task 24 – Phase II Timeline

Subtasks	2015	2016	2017
Task 0 - Admin	Active	Active	Active
Task 5 - Expert Platform	Active	Active	Active
Task 6 - Top DSM Issues	Active	Active	Completed
Task 7 - Behaviour Changers	Completed	Active	Active
Task 8 - Toolbox of interventions	Completed	Active	Active
Task 9 - Beyond kWh	Active	Active	Completed
Task 10 - Overarching Story	Completed	Completed	Active
Task 11 - Interventions	Completed	Active	Active

Please note that due to the late completion of Phase I, Phase II will not commence until April 2015, pushing this timeline out by 4 months

Thank you very much for your attention!

*Any comments or questions?*