



# Monitoring, Evaluation and Learning Framework for Net Zero Terrace

PREPARED BY CAG CONSULTANTS FOR ROSSENDALE  
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INFORMING POSITIVE CHANGE

# Rossendale Valley Energy

Monitoring, Evaluation and Learning Framework for Net Zero Terrace

Prepared by CAG Consultants for Rossendale Valley Energy – Draft – February 2024

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## 1 Introduction

This report was prepared by CAG Consultants on behalf of Rossendale Valley Energy (RVE). It presents a draft Monitoring, Evaluation and Learning (MEL) framework for the Net Zero Terrace<sup>1</sup> (NZN) initiative which is being led by RVE in partnership with Buro Happold, the Centre for Energy Equality, Electricity North West and other partners. The development of this MEL framework was funded by Ofgem as part of the Strategic Innovation Fund (SIF) Alpha project.

The MEL framework presented in this report is an overarching framework for the NZN initiative as a whole useable now and into NZN's future. The report makes reference to project monitoring requirements for RVE's current Local Energy Advice Demonstrator (LEAD) project<sup>2</sup>, funded by the Department for Energy Security and Net Zero (DESNZ) in addition to SIF Alpha activities and impacts. But it is not possible to specify detailed arrangements for monitoring, evaluation and learning for future NZN projects until these projects are themselves defined. So the MEL framework provides broad guidance and tools for the development of monitoring, evaluation and learning elements of future projects and activities within the NZN initiative.

The framework presented in this document was developed between December 2023 and February 2024, in close collaboration with staff and directors at RVE including its LEAD team. The steps involved in developing the framework included:

- Review of NZN and LEAD project documentation
- Consultation with key stakeholders within RVE and partner organisations
- A workshop with key stakeholders to discuss potential MEL indicators
- Attendance at a further stakeholder workshop to discuss what NZN success means to different groups
- Discussion of the information collected by the Fairer Warmth (FW) App, developed by the Centre for Energy Equality, which acts as a hub for collecting a database of customers across the LEAD project and wider NZN initiative
- Discussion of DESNZ monitoring requirements for the LEAD project

The draft outputs and recommendations in this report will be tested with the RVE team and key stakeholders, and refined accordingly.

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<sup>1</sup> Under SIF Alpha funding this project is known as Net Zero Terrace. Subsequently the scheme has been branded as Net Zero Terrace Streets to communicate that it will roll out to many streets, not remain focused on a single terrace.

<sup>2</sup> The LEAD project is a critical element of the overall NZN initiative, delivering engagement and testing the Reach, Engage, Retain aspect to generate interest in deeper measures than simple energy advice, through sign up to NZN.

## 2 About Net Zero Terrace

Net Zero Terrace is an initiative by Rossendale Valley Energy (RVE), in partnership with Buro Happold, the Centre for Energy Equality, Electricity North West and other partners, to develop a viable model to decarbonise terrace streets in Bacup and other parts of the UK. The vision for Net Zero Terrace is that:

**Net Zero Terrace provides affordable, low carbon energy, healthy warm homes, at no upfront cost to the householder, so no-one gets left behind.**

Net Zero Terrace aims to:

- develop an approach to decarbonising between 4 and 6 million of the UK's 10 million terrace homes
- help everybody in the community to significantly reduce their energy use and have lower energy bills
- develop a plan to collectively transition terraced communities from fossil fuels to renewable energy for all
- take a planned approach which accelerates deployment through collaborative planning with key stakeholders including local authorities, the DNO, local community energy groups, energy suppliers and financiers.

Figure 1: Net Zero Terrace



Community and customer engagement are central to development of NZT, because the model involves innovative low carbon heat and energy technologies and housing energy efficiency retrofit. Importantly, some of the technology elements need to be developed at street or neighbourhood level, requiring coordination at local level. For example, one

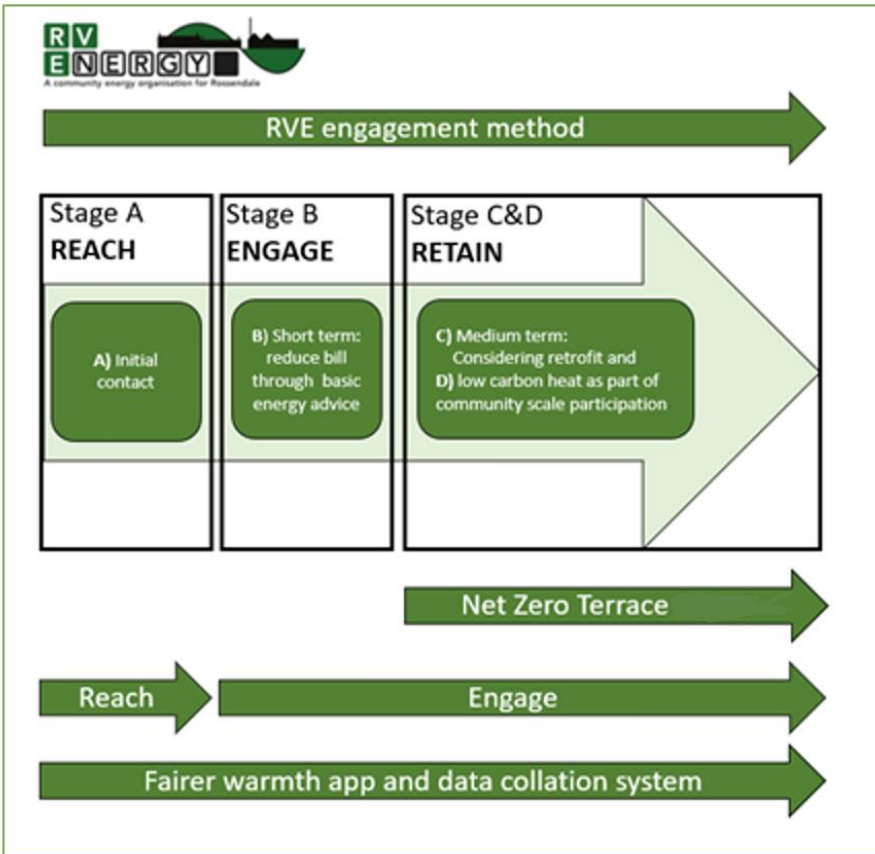
Commented [GP1]: I am a bit concerned by the language in these reports that the project is RVE led. These reports need to talk about the learning gained from the SIF funded elements.

Commented [GP2]: Can we ensure that we call it Net Zero Terrace in any of the SIF reports as that is the name of the registered project.

element of the model involves shared ground loop heat pumps, with boreholes serving a local street or streets, while another involves virtual infrastructure to provide smart management of the locally generated electricity and local electricity grid to make electricity prices affordable. A critical mass of homes are needed to sign up in a street or neighbourhood in order to secure the investment for the scheme to be viable, because there is no upfront cost to householders. As such an investor needs a certain number of customers to merit the investment in the infrastructure.

RVE has developed a model of community engagement for NZT: REACH- ENGAGE- RETAIN. The logic is that local Energy Champions/Advisers REACH out to households in the local area, offering energy advice and home energy assessments. Interested households are invited to ENGAGE with the 'Fairer Warmth App', developed by the Centre for Energy Equality, which provides energy efficiency advice and signposting to relevant Government support, and easy energy savings activities, while also collecting monitoring data. The Fairer Warmth App aims to provide an ongoing energy advice service and community-building activities such as competitions, that will RETAIN some of these households going forward, de-risking the process of identifying potential NZT customers in target streets. The concept is that NZT services will eventually be offered to App users living in streets suitable for NZT, where a critical mass of interested households has been recruited. The REACH-ENGAGE-RETAIN logic model is illustrated in

the diagram below.



**Figure 2: RVE's REACH-ENGAGE-RETAIN model for customer engagement**

Commented [RS3]: NZT

Initial outreach and engagement activities around energy efficiency, linked to the Fairer Warmth App, are being undertaken by RVE in Rossendale under the Local Energy Advice Demonstrator project. This project is funded by the Department for Energy Security and Net Zero, running from autumn 2023 to end 2025. As well as directly helping households in the Rossendale area, this project aims to build up visibility and trust in the RVE energy advice team and to develop a cohort of engaged local households that would be potential customers for eventual NZT services.

This MEL framework therefore considers the specific MEL needs of the current LEAD project, as well as the broad, high-level requirements of the NZT initiative as a whole. It

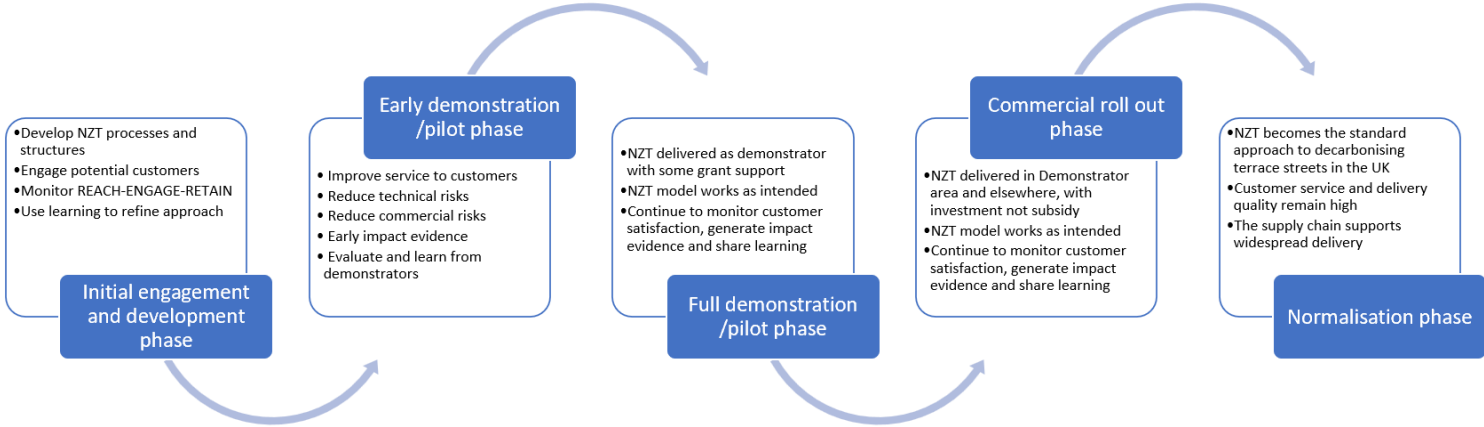
encompasses local delivery issues for LEAD through to wider transformational change for NZT, within Bacup and beyond.

If NZT proceeds as anticipated, the initial energy efficiency advice phase will be followed by grant-funded demonstration and piloting of specific NZT work packages. The intention is that demonstration and pilot activities will help to develop and test the NZT model and reduce operating risks, leading to a full demonstration across 3 streets in Bacup. These activities will be funded by the Pathfinder 2 project and, possibly, a Strategic Innovation Fund Beta project. While demonstration activities are likely to be grant funded, at least in part, RVE's intention is that they will eventually lead on to investor-funded roll-out of the NZT model in Bacup. Similar projects, grant or investor funded, may also be undertaken in other parts of the UK. Eventually, if the model is successful, NZT might become the standard solution for decarbonising terraced housing in the UK. These successive stages are set out in the diagram below.

We recommend that, at some point, a full Theory of Change is developed for the NZT initiative. By setting out in more detail what NZT aims to achieve and how, this will help to inform future development of MEL activities.



**Figure 3: Desired stages in NZT model development**



Commented [RS4]: NZT, Bacup/ target area?

Commented [I05]: can we make this diagram bigger please? quite hard to read the little text.

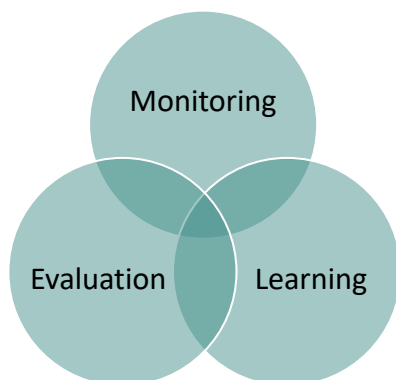
### 3 About the MEL framework

#### 3.1 What is MEL?

Monitoring, Evaluation and Learning are distinct but inter-related activities. They have slightly different purposes, as follows:

- **Monitoring** is real-time, regular collection of readily available evidence about performance, as a project proceeds, which can be used to inform project delivery and to provide basic evidence for evaluation and learning.
- **Evaluation** is periodic investigation of whether the project is achieving what it set out to do, both to share evidence with interested audiences (e.g. funders, replicators, team members) and to generate learning.
- **Learning** is reflection as a project proceeds, and sharing of resulting learning within and beyond the delivery team, to improve delivery and share emerging lessons.

*Figure 4 Monitoring, Evaluation and Learning are inter-related*



#### 3.2 Why do Monitoring, Evaluation and Learning?

The main purposes of monitoring, evaluation and learning are:

- To provide better understanding of how and whether a project is working, and whether it is achieving what it set out to achieve
- To inform adjustments to project delivery processes and/or future project design, keeping things on track and/or responding to emerging learning
- To provide feedback and inspiration to the project team and to potential replicators
- To provide evidence of impact to current and potential funders and investors, including accountability for funding

For MEL to be useful, it's important first to understand what the project or programme is trying to achieve so that MEL can help to assess whether it is 'working'. It is often useful to set this out in a 'Theory of Change'<sup>3</sup>. For an emergent programme such as NZT, this may be relatively high-level at first and then specified in more detail as the details of the required intervention are clarified over time.

MEL evidence needs to be useful to someone. This 'someone' may vary according to the purpose of the MEL: it could be the project delivery team (who may learn lessons about how to improve delivery), current or potential funders and investors (who may see evidence of benefit or 'impact'), or customers (who may benefit from any improvements to services arising from MEL). The audiences for NZT MEL are considered further below.

Designing MEL activities involves compromise. Researching every possible impact and lesson as a project proceeds is unlikely to be cost-effective. And detailed in-depth research may be too burdensome for customers or for the delivery team, with potentially adverse impacts on project delivery, unless you are specifically undertaking a research project. So it's important to find a reasonable balance between the evidence you would ideally like to collect and the level of MEL activity that is feasible and cost-effective for your particular project. Appendix A sets out a guide to developing project-level MEL which explores this point in more detail.

### 3.3 Audiences for MEL in relation to NZT

Given the transformational ambitions of the NZT initiative, there are a number of different audiences for monitoring, evaluation and learning about NZT. Detailed design of MEL activities should take into account the needs and interests of these audiences.

**Table 1: Audiences for MEL and why it is important to understand their perspectives**

Audience	Why MEL should respond to the needs and interests of this audience
Target customers for NZT (i.e. people living in terrace streets in the UK, particularly in Bacup and Rossendale)	To work effectively, NZT needs to be responsive to the needs and preferences of target customers. MEL can help to gather customer insights that will help to improve the design of customer engagement and customer service.
The NZT delivery team, consisting of RVE itself, partner organisations	The RVE team and partners will need to adjust and refine design and delivery of NZT in response to evidence/learning about performance and take-up and future replication
Those providing funding and finance for NZT, now or in future,	Funders and investors will want to see evidence of how NZT impacts customers, the environment and the local economy.

<sup>3</sup> A 'Theory of Change' explains how activities are understood to produce a series of results that contribute to achieving the final intended impacts. (see <https://www.betterevaluation.org/tools-resources/theory-change-0>)

including both grant funders and investors	MEL activities should take account of funder and investor priorities, to ensure that relevant evidence is collected.
Suppliers involved in NZT delivery, and the training organisations supporting these suppliers	To be deliverable at scale, and to generate benefits for the local economy, NZT needs to take into account the needs and capacity of the local supply chain. MEL can help training organisations to identify training and support needs in the supply chain.
Other organisations across the UK who might be interested in replicating the NZT model	Potential replicators will want to see evidence of what NZT can achieve and will want to access/share learning on what works well and less well in NZT delivery.
Policy makers and thought-leaders who want to see decarbonisation of terrace streets, and whose policies/regulations may affect the feasibility of NZT	An understanding of policy-maker and regulator concerns and perspectives will help RVE and project partners to identify the types of MEL evidence and wider commentators/think tanks with influence, that will be persuasive for these groups.

Each of these audiences is considered further in the MEL framework that is presented below.

### 3.4 Distinction between overarching and project-level MEL

As noted in the introductory section, this is a high-level, overarching framework for NZT that will evolve over time. Beneath this overarching framework, RVE and its partners will need to develop project-level MEL proposals for specific grant-funded and investment projects. While the overarching framework puts forward high-level indicators for NZT, more detailed Key Performance Indicators are likely to be needed for specific projects within the NZT initiative.

This MEL framework provides an overarching structure and allows RVE to set its own MEL priorities, rather than always being funder-driven. This is important because there may be types of evidence important to RVE that are not captured by current funder requirements. The overarching framework will enable RVE and its partners to monitor strategic priorities, including information that may be important to future funders, investors, partners and policy-makers.

For the LEAD project, which is already operating on the ground, the MEL framework presents a range of specific MEL tools. These have been developed in partnership with the LEAD team. The tools, presented in Appendices, include tools for baseline data at sign-up; a monitoring spreadsheet; a monitoring report template; guidance on internal learning processes; a case study/story template; and a draft customer survey. The detailed project indicators developed for LEAD have been mapped on to the higher-level indicators in the overall MEL framework, as explained further below.

Many of the MEL tools developed for LEAD should be adaptable for other specific projects within NZT, and can be further developed and adapted as the project evolves.

## 4 The overarching MEL indicator framework

### 4.1 Overarching MEL indicators

The overarching MEL indicator framework is set out in a [miro diagram](#) and accompanying workbook (see Appendix B).

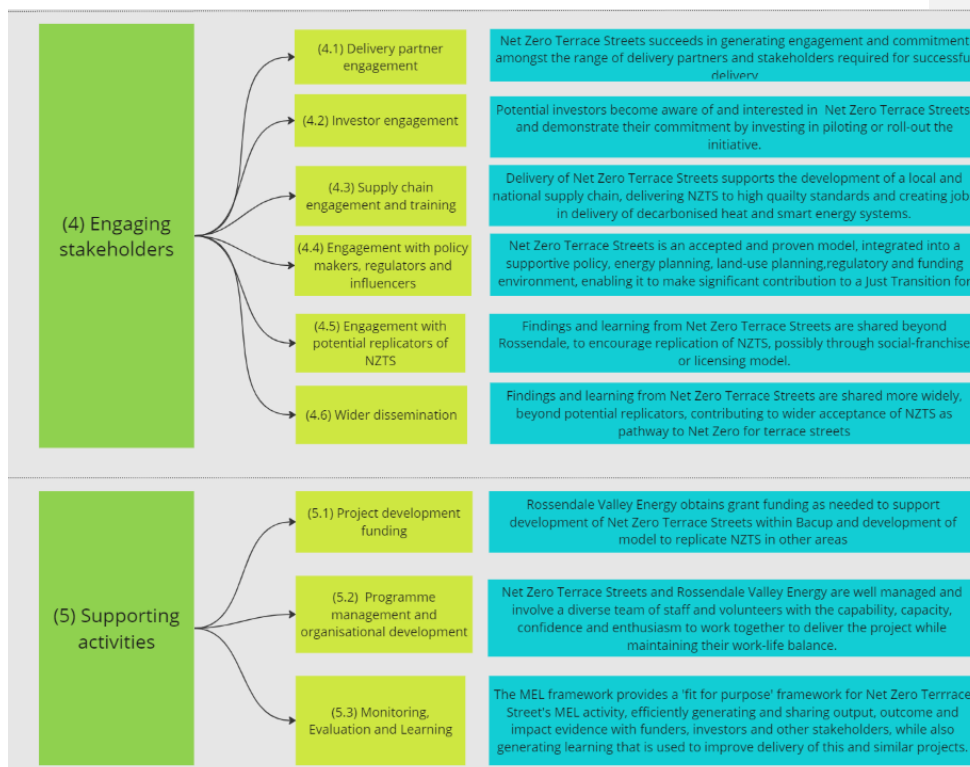
The indicators are structured under a number of themes and sub-themes, as shown in Figures 5a and 5b below. These themes and sub-themes reflect the logical development of the NZT scheme and the range of audiences for MEL outlined above. For each sub-theme, the indicator framework provides a form of logic model, summarising what success looks like and how changes can be measured. A full Theory of Change would include identification of the assumptions on which the desired changes depend.

**Figure 5a: Themes and sub-themes in the MEL indicator framework**

THEMES	SUB-THEMES	WHAT DOES SUCCESS LOOK LIKE?
(1) Customers for NZTS and related projects	(1.1) Customer engagement for NZTS and related projects (including LEAD)	Reach-engage-retain strategy is successful in creating and retaining clusters of interested households across all tenures and across diverse interest groups, maintaining customer satisfaction while enabling delivery of Net Zero Terrace Streets
	(1.2) Customer satisfaction with - and benefits - from NZTS and related projects	Customers are satisfied with the delivery of Net Zero Terrace Streets and related projects, playing a role in recommending the service to others. Customers enjoy benefits as expected, in terms of their comfort, warmth, quality of life and carbon savings.
(2) Proving up the business model and technology for NZTS	(2.1) Business model development	A community-owned business model for Net Zero Terrace Streets is demonstrated to be viable and replicable, involving acceptable levels of risk for the stakeholders involved.
	(2.2) Technology model development	The technologies involved in delivering Net Zero Terrace Streets are demonstrated to be feasible and to fit customers' needs, in terms of delivering services to them reliably and being easy for customers to operate and understand, while being consistent with the NZTS business model.
(3) Delivering NZTS on the ground	(3.1) Grant-funded delivery of energy efficiency advice and measures (via LEAD)	Early energy efficiency advice and signposting activities generate carbon savings and benefits for local households in Rosendale district while helping to build trust in RVE within the local community and prepare/retain potential customers within Bacup for NZTS
	(3.2) Piloting and demonstration of Net Zero Terrace Streets package approach in Bacup, fully or partly grant-funded	Pilot and demonstration activities for Net Zero Terrace Streets are successfully delivered to selected pilot customers, resulting in customer satisfaction, refinement of the business, technical and governance models, and providing supportive evidence for further development of the NZTS concept.
	(3.3) Investor-supported roll-out of Net Zero Terrace Streets approach within Bacup/Rosendale	Net Zero Terrace Streets delivers affordable low carbon heat to a considerable number of households in Bacup, generating evidence of carbon savings, bill savings, improved comfort and perceived health/wellbeing and high levels of customer satisfaction across a range of tenures and household types
	(3.4) Investor-supported replication of Net Zero Terrace Streets approach in other areas across UK	Net Zero Terrace Streets delivers affordable low carbon heat to a considerable number of households across the UK, generating evidence of carbon savings, bill savings, improved comfort and high levels of customer satisfaction across a range of tenures and household types

Commented [RS6]: NTT Bacup

Figure 5b: Themes and sub-themes in the MEL indicator framework (continued)



For each of the themes, the MEL framework presents a suite of indicators, representing the outputs, outcomes and impacts that will provide evidence of success (or lack of success) in relation to that theme.

- **Outputs** are the immediate consequences of project activity. They are usually fairly easily measurable or countable (e.g. workshops run; customers signed up) and are observable in the short-term.
- **Outcomes** are the direct benefits arising from these outputs. While some may be less easily measurable than outputs and may only be observable in the medium-term, they are important indicators of project success (e.g. level of customer satisfaction; customer take-up of measures).
- **Impacts** are indirect benefits arising from the project, some of which may only be observed in the longer term. They are often challenging to measure but involve the types of benefits that the project is really aiming to achieve (e.g. carbon savings, energy bill reductions, improvements in comfort or health).

Table 2 below shows an example of the output, outcome and impact indicators for customer engagement, including specific indicators for the LEAD project as well as wider indicators for the REACH-ENGAGE-RETAIN model and for the overall NZT initiative. Indicator sets by theme are presented in the overarching indicators workbook.

**Table 2: Indicators for the customer engagement sub-theme**

<b>THEME</b>	<b>(1) Customers for NZT and related projects</b>
<b>SUB-THEME</b>	<b>(1.1) Customer engagement for NZT and related projects (including LEAD)</b>
<b>OUTPUT INDICATORS (MAINLY SHORT TERM)</b>	
	OVERALL: Customer journey, targeting, engagement and communications strategy developed for NZT-related activities (including LEAD)
	REACH: Number and reach of communications activities for NZT (including LEAD)
	REACH: Number/type of consumer engagement activities run for NZT/LEAD
	REACH: Number/type of consumers reached by NZT-related activities (including LEAD)
	REACH/ENGAGE: Characteristics of consumers/ households reached vis a vis vulnerability/'hard to reach' characteristics (possibly using ENW categories)
	ENGAGE: Number/type of households engaged by different means for NZT-related activities (including LEAD)
	OVERALL: System developed for collecting consumer insight indicators (by type of customer)
	ENGAGE: Number/type of customer downloading FW App (either by themselves or supported by Energy Champion)
	ENGAGE: Number of households signed up to FW App in different NZT target zones
	ENGAGE: Number of vulnerable/'hard to reach' customers and 'hard to treat' households signed up to FW App
	ENGAGE: Ease of use of FW App for different types of customer
	RETAIN: Level of ongoing customer use of FW App
	RETAIN: Number/type of incentives for ongoing customer engagement with FW App
	RETAIN: Drop-off rates from FW App (compared to other apps/methods)
	ENGAGE/RETAIN: Level of functionality of Fairer Warmth App (initially supporting LEAD, then supporting NZT)
	REACH/ENGAGE: Number and type of potential NZT customers visiting demo sites
<b>OUTCOME INDICATORS (MAINLY MEDIUM TERM)</b>	
	ENGAGE: Level of trust in Energy Champions and wider project, amongst different customer segments
	ENGAGE: Refined understanding of customer motivations and engagement channels/mechanisms for different customer segments (link to MEL theme)
	ENGAGE: Level of awareness and interest in NZT within NZT target streets in Bacup
	RETAIN: Numbers/types of potential NZT customers continuing to engage with FW App
	RETAIN: Numbers/types of potential NZT customers signing up for NZT package, and retained over time
	RETAIN: Proportion of 'critical mass' reached in different delivery zones for NZT package (via FW App)
	Number of potential customers released from pipeline where NZT delivery not feasible within acceptable timeframe



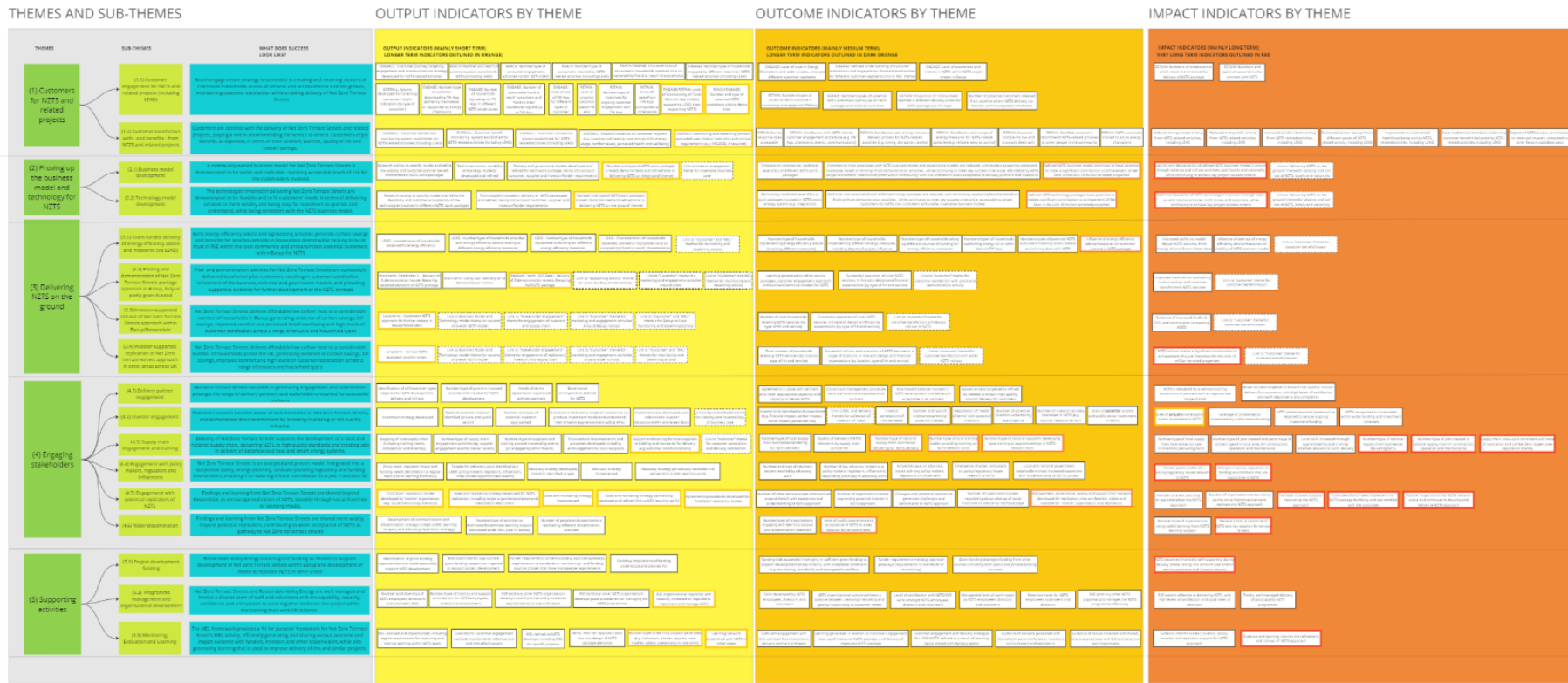
**IMPACT INDICATORS (MAINLY LONG TERM)**

	RETAIN: Numbers of streets/zones which reach the threshold for delivery of NZT package
	RETAIN: Numbers and types of customers who contract with NZT package

A small-scale copy of the overall indicator framework is shown in Figure 6 below, to show the structure of the diagram. The output, outcome and impact indicators for each theme run from left to right across the diagram.

A more legible version can be viewed on the [miro diagram](#). The next section explores how to use the indicator framework.

Figure 6: Small-scale version of overarching indicator framework



## 5 Recommendations for implementing the MEL framework

This section considers generic approaches to implementing the MEL framework, using the overarching indicators within NZT project work. Section 6 focuses on specific recommendations for LEAD project, as this project is already active at the time of writing this report.

### 5.1 Applying the MEL framework

For a long programme such as NZT, we suggest that the project makes use of a 'learning cycle' approach. This will enable monitoring, evaluation and learning to be revised and refined on an iterative basis as NZT develops and as key issues evolve, both for NZT and for the MEL audiences outlined above.

There are many ways in which a learning cycle can be specified, but the basic idea can be summed up in a simple 'Plan-Do-Review' cycle. This cycle should be repeated at least once a year. It may be helpful to link the timing of the cycle to key points in the lifespan of specific NZT projects. For relatively short projects, there might be one learning cycle for the project (e.g. with the 'Plan' stage being undertaken during project development and the early stages of a project, the 'Do' stage being undertaken during project delivery, and the 'Review' stage at the end). For longer projects, there might be multiple learning cycles timed to fit the phasing of the project. But, even if the timing of learning cycles is linked to delivery of a specific project, it will be important for the perspective of the MEL learning cycle to cover NZT as a whole, not just one project.

**Figure 7: Simple learning cycle**



**PLAN:** MEL work should be specified or 'planned' (e.g. as part of a project proposal for funding, or as part of NZT plans for the year ahead). Make sure that you are clear what NZT (or the relevant project) are trying to achieve – this may involve development of a fuller Theory of Change for the project. In planning MEL activities, considerations may include key audiences and priorities for the current wave of MEL, the budget available,

fit with planned project activities, fit with partner appetite for research and with research burden on customers/other stakeholders, likely response rates, the design of surveys/MEL activities, and GDPR/privacy/ethical issues related to research with customers. It is worth noting that, while some adjustment can be made to overarching indicators in the MEL framework (or to project-specific indicators) during each successive MEL planning process, there are strong advantages in maintaining long-term consistency of indicator definitions between cycles so that indicators can be tracked over time – you don't want to change indicators too much or too often.

**DO:** MEL research and related activities should then be implemented or 'done' within the project/year. This is likely to involve collection of basic monitoring data, sharing of this data in monthly or quarterly reports, implementation of tailored evaluation research on topics of particular interest within the current MEL plan, and periodic learning activities to draw out learning within the NZT partner team on priority topics. More guidance on how to 'do' the monitoring, evaluation and learning elements of MEL is provided below.

**REVIEW:** Findings from this MEL work should be 'reviewed' when available, with learning and implications from findings being used to inform and adjust project activities. Outputs from MEL activities (e.g. monitoring reports, evaluation outputs, case studies, stories) should also be disseminated, including sharing with the priority audiences identified during the MEL planning phase. In the long run, it may be less burdensome for NZT to produce an annual impact report<sup>4</sup> for the programme as a whole, rather than separate reports for each funder/investor, if this can be negotiated with relevant funders/investors.

**PLAN:** Experiences with MEL in a given year, or within a given NZT project (e.g. LEAD, or SIF Alpha/Beta), should then be used to inform 'planning' for MEL in the next learning cycle, and the above steps should be repeated.

## 5.2 How to use the overarching MEL indicators

### 5.2.1 Monitoring transformational change

The overarching MEL indicators can be used directly to monitor transformational change. The miro diagram is designed to be used to track transformational change through colour coding of indicators within the diagram. As shown in Figure 6, the indicators boxes are white so that they can be shaded to track progress visually, based

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<sup>4</sup> This is an approach that has been followed successfully by some other Community Energy groups, such as Repowering London. <https://www.repowering.org.uk/understanding-our-impact-repowering-london-2022-impact-report-is-here/>

on a high-level assessment of evidence for each indicator. An assessment could be done as part of the 'review' phase of the MEL learning cycle. A suitable key might be:

- Grey shading – completed as intended
- Green shading – ongoing, as intended for NZT
- Orange shading – ongoing, but not quite as intended for NZT
- Red shading – serious concerns vis a vis what was intended for NZT
- White (no shading) – not yet started or no evidence available

### 5.2.2 Informing project-level MEL activities

The overarching MEL indicators should also be used to inform the design of MEL activities, as follows:

- **Monitoring** – the overarching MEL indicators should be checked when designing monitoring activity within NZT (including the monitoring components of specific projects) to make sure that important aspects of monitoring are not forgotten.
- **Evaluation** – the overarching MEL indicators should be used to inform the specification of MEL elements of specific projects, including framing of research questions for periodic evaluation research (e.g. how well, or otherwise, is a specific element of NZT working? is there evidence that A leads to B? which approach to XYZ works best etc?).
- **Learning** – the overarching MEL indicators will give pointers on the themes, sub-themes and topics that might be explored through learning activities (e.g. customer engagement, investor engagement, supply chain engagement, monitoring of customer benefits).

Further guidance on how to use the MEL framework, including the overarching indicators and additional tools provided in Appendices, are set out below for monitoring, evaluation and learning in turn. A checklist for designing project-level MEL is set out in Appendix A.

## 5.3 General guidance for monitoring

As noted earlier in this report, monitoring is real-time, regular collection of readily available evidence about performance, as a project proceeds, which can be used to inform project delivery and to provide basic evidence for evaluation and learning. Monitoring is usually carried out internally, by the project team and/or delivery partners. Key guidance points for monitoring include:

- When planning specification and collection of monitoring data during the 'PLAN' step of the learning cycle, think not just about the funder or investor's requirements, but also think about any current research questions for this

project (see evaluation below) and whether you want to monitor evidence relating to any of the overarching MEL indicators (as set out in the miro board and overarching indicator workbook).

- Recognise that you will need to develop more detailed project-level indicators for monitoring of specific projects (e.g. Key Performance Indicators) that are more detailed than those in the overarching MEL indicator framework. These can be set out in a project-specific monitoring workbook, with tabs for funder-driven and MEL-driven indicators, along the lines of the workbook developed for LEAD.
- When planning project activities, aim to integrate collection of basic monitoring data into project delivery mechanisms (e.g. collecting information from customers via the FW App, which is effectively creating a Customer Relations Monitoring tool (CRM)).
- Monitoring may be facilitated by Artificial Intelligence (AI) tools in future (e.g. tools such as Firefly.AI or Microsoft co-pilot can be used to summarise key points from meetings, saving time on note-taking).
- When planning monitoring activities, think about:
  - Collecting baseline data – this needs to be collected at or close to the start of an intervention, so that you can measure change over time.
  - Streamlining data collection - for example, it's likely to work better to have one annual customer survey or research process that rather than burdening respondents with multiple surveys for different project activities.
  - Incorporating data collection and feedback into project delivery processes (e.g. undertaking physical monitoring of energy use and internal temperatures in demonstration houses; accessing Smart Meter data on household energy use; collating statistics on the number of people who attend different events; using a simple form to collect feedback on how the event was run and how useful it was).
  - Making the collection of feedback interactive and 'fun' (e.g. use a simple flipchart, post-its or physical feedback in a workshop; incorporate a feedback button or 'smiley face' rating system in online tools).

#### 5.4 Guidance points for evaluation

As noted above, evaluation is periodic investigation of whether the project is achieving what it set out to do, both to share evidence with interested audiences (e.g. funders, replicators, team members) and to generate learning. Evaluation research may be undertaken internally or externally, depending on the capacity and capability of the project team and the degree of independence which is needed. Key guidance points for evaluation include:

- When undertaking the 'PLAN' step in the MEL learning cycle, work with the NZT team and partners try to identify a few research questions that are a real priority for NZT at the time.
  - Research questions may relate to NZT 'processes' (e.g. Are potential investor perspectives on impact evidence sufficiently well understood? Is the REACH-ENGAGE-RETAIN model working? How could the REACH-ENGAGE-RETAIN be made to work better? Why do people drop out of the process? How can engagement and retention of target households for NZT be improved?).
  - Research questions may also relate to NZT 'impacts' (e.g. What impact is LEAD having on energy bills and comfort for vulnerable customers? What is the impact of the REACH-ENGAGE-RETAIN on the development of cohorts of customers suitable for NZT delivery in target streets? And, eventually, what impact does NZT delivery have on household energy bills, comfort and carbon emissions?)
- Having defined your research questions for this learning cycle, think about the methods that would be needed to research these questions. It may be possible to collect much of the evidence that you need through monitoring processes that are integrated with project delivery (see previous step). And some further evidence may be available from external sources (e.g. other studies, published reports). But, where there are gaps in existing evidence, you may need to collect additional evidence (e.g. qualitative evidence from interviews or focus groups; quantitative evidence from surveys and so on). Remember that you may want to include some objective evidence from monitoring observed behaviour, as well as subjective evidence involving people's stated views.
- Remember that impact evaluation needs to consider not just whether change happened, but whether it's attributable to the work of the project. If resources permit, it may be possible to design an 'experimental' approach to project delivery, from the outset. This might involve some element of comparison work (e.g. research with 'control' or 'comparison' households unaffected by the project, in parallel with research with similar households involved in the project). In practice, owing to the resource-related and ethical challenges involved in developing and monitoring 'control' groups, attribution is often explored by looking at changes 'before' and 'after' the project intervention, rather than by comparing households 'with' and 'without' the intervention. In either case, research involving subjective, reported views will be important in exploring why changes happen. For example, in-depth interviews with participants can ask about the different influences on their behaviour/outcomes, exploring the influence of other factors (e.g. energy prices, changes in public awareness of climate issues) as well as the influence of the project.

- In assessing the REACH-ENGAGE-RETAIN model, it will be essential to do some research with potential customers who aren't reached, don't engage or who drop out, as well as those who stay the course. This will aid understanding of the scope for improving reach, engagement and retention processes, particularly in streets that are priority for NZT delivery.
- Depending on the nature of the research questions under consideration, evaluation research may include research not just with customers and delivery partners but with a range of stakeholders in the MEL indicator framework (e.g. supply chain, training providers, investors, replicators).

## 5.5 Learning

As noted earlier, learning involves reflection as a project proceeds, and sharing of resulting learning within and beyond the delivery team, to improve delivery and share emerging lessons. Learning is generally an internal process, although you may choose to bring in external resources to support larger learning events or processes that can't be resourced from within the NZT delivery team. Key guidance points for learning include:

- Learning is about developing a reflective attitude to delivery (or 'reflective practice').
- A key concept here is that the people 'doing' the delivery work are a very valuable resource for the project – they are dealing with challenges from day to day and will have important insights about what works, what doesn't and why.
- It's important to recognise that certain insights that are obvious to some parts of the team may not be obvious to other delivery partners. For example, the customer-facing team may have important insights that are new to those developing the techno-economic models for NZT.
- Learning should be informal, fun and part of delivery processes. For example, time can be made to reflect on learning at:
  - Regular customer team meetings
  - Monthly or quarterly partner meetings
  - Annual reflection session for all RVE partners
  - Periodic reflection sessions with other NZT-type projects, elsewhere in the UK
- Possible prompts for discussions about learning are set out in Appendix F.



- Insights emerging from learning sessions need to be captured (e.g. in case studies, notes etc) and shared within or beyond the delivery team.
- NZT needs to develop mechanisms for periodically feeding learning back to improve project delivery. 'What does this learning mean for what we're doing?'

#### 5.5.1 Checklist for project-level MEL

Appendix A sets out a checklist for the development of project-level MEL activities, along the lines described above. This is presented in standalone form so that it can be refined and developed over time.

Appendix B presents the spreadsheet of overarching MEL indicators, including a column which suggests suitable sources of evidence for each indicator (e.g. project records, customer survey and so on).

#### 5.5.2 MEL capacity and capability

As well as allowing enough budget and staff time for MEL activities (see Appendix A), the NZT project will need to consider whether members of the project team have appropriate skills and capabilities to fulfil their role in MEL. If internal team members and partners are expected to work 'reflectively', generating learning and insights, and from time to time to create and share stories and case studies, then they may need some training in this approach. Training will help to build the confidence of NZT team members, particularly frontline staff, and ensure they understand the importance of their role within MEL.

## 6 Recommendations for implementing MEL for LEAD project

In line with the guidance above, an important step in defining MEL activities for the LEAD project is to define research questions for NZT in relation to LEAD. For RVE, LEAD is a stepping stone in the wider NZT process, so these questions go beyond the energy efficiency-advice related research questions that the funder, DESNZ, would ask.

The research questions below are a first suggestion, for review and discussion with the LEAD and NZT team. Most of these are focused on the LEAD process, because of its relevance to the wider NZT process.

**Table 3: Suggested MEL research questions for NZT in relation to LEAD**

MEL research questions (RQs)
1. How far are LEAD activities helping to establish awareness of, and trust in, and systems for RVE delivery of energy services within NZT target communities in Bacup?
2. What can be learned from LEAD activities about how best to implement and improve NZT's REACH-ENGAGE-RETAIN model? For example: <ol style="list-style-type: none"> <li>What is the relative effectiveness of different methods in reaching, engaging and retaining different types of customers?</li> <li>How are different types of customers engaging (or failing to engage) with the FW App and - based on this - how can the App best be used within the REACH-ENGAGE-RETAIN model?<sup>5</sup></li> <li>Why do different types of customers remain engaged or drop out from LEAD, and - based on this - what is the best way of building cohorts of potentially interested customers for NZT?</li> </ol>
3. How successful have LEAD activities been in encouraging different types of customers to implement energy efficiency advice and how have LEAD activities impacted on customer welfare and energy use? Based on this, what can be learned from this for the design of future NZT energy services?

With these research questions in mind, we have developed a number of specific tools to help implement MEL for the LEAD project. Many of these can be adapted and refined for MEL activities on future NZT projects. The tools are listed in the table below and presented in the appendices.

<sup>5</sup> For example, if many vulnerable customers do not engage directly with the FW App, is the App's role for these customers primarily that it provides a useful CRM and monitoring tool for Energy Champions? To what extent will NZT be targeted at non-vulnerable customers, and are they more likely to engage with the FW App directly?

**Table 4: Draft MEL tools for LEAD/NZT**

Tool	Purpose and guidance on how to use these tools
<p><b>Appendix C: Spreadsheet of indicators for LEAD and the current NZT project</b></p>	<p>Appendix C is a detailed spreadsheet of indicators for the LEAD project level work, comprising:</p> <ul style="list-style-type: none"> <li>• indicators required by the funder (DESNZ), which are all collected via the FW App.</li> <li>• additional (MEL) customer insight indicators that will help to answer the research questions above</li> <li>• analysis sheets that present charts based on quantitative indicators, for inclusion in LEAD monitoring and evaluation reports (see Appendix H).</li> </ul> <p>The indicator sheets and analysis sheets can be used to compile and present findings from these indicators for successive months. The spreadsheet also suggests the source of evidence for different indicators, including:</p> <ul style="list-style-type: none"> <li>• Project records – e.g. engagement events flagged in the project diary, together with attendance numbers.</li> <li>• Customer data entered into the FW App, either directly by the customer or by an Energy Champion – as part of the sign-up process or initial energy advice session (see Appendix D).</li> <li>• A periodic (e.g. annual) survey of customers (see Appendix E).</li> </ul>
<p><b>Appendix D: Suggested questions for FW App sign-up or initial energy advice sessions</b></p>	<p>We recommend that a few additional questions are asked of customers during the FW-App sign-up process or during initial energy advice sessions led by Energy Champions, to help answer the research questions. The advantage of asking questions at this stage are (a) that they would be collected across all customers signing up to the FW App and (b) they would be collected early in a customer’s interaction with NZT. The disadvantage is that they might make the sign-up and initial advice process overly long and cumbersome. We suggest that the project should experiment with including additional questions and then adopt those questions where the added benefit of gathering information outweighs the hassle of extending the sign-up process/</p> <p>Appendix E lists additional indicators, and associated questions, that could be integrated into FW App sign-up and/or initial advice session processes. These additional questions will help to answer Research Question 2 on the effectiveness of different engagement routes for different types of customers (e.g. vulnerable, elderly, low income vs able to pay etc). They will also help to establish a baseline for Research Question 3, by establishing the customer’s perceptions of energy bills and thermal comfort ahead of advice being given and services delivered. Appropriate permissions will need to be sought for the collection and use of this data, from a privacy and GDPR perspective.</p>

Tool	Purpose and guidance on how to use these tools
<p><b>Appendix E: Draft annual customer survey</b></p>	<p>We recommend that a periodic customer survey is undertaken for LEAD to gather evidence on monitoring of customer satisfaction, customer actions taken and customer impacts. These topics are important to monitor the overarching 'customer' indicators in the overarching MEL framework and to answer Research Questions 1-3 above. This survey could eventually be broadened and repeated at intervals during the development of NZT. We suggest that the frequency of the survey could be annual, to allow effective tracking of customer experiences without overburdening them with research requirements.</p> <p>There are a number of options for administering the survey. Firstly, it could be emailed to all customers signed up to the FW App (or, when the system permits, could be administered directly via customers' mobile phones). Or, secondly, paper copies could be passed to customers by the relevant Energy Champion(s). Or, thirdly, it could be completed over the telephone by a team member (possibly an Energy Champion or another team member).</p> <p>We are concerned that the response rate from an email survey would currently be very low because LEAD is primarily reaching vulnerable customers who do not engage directly with the FW App. So the project may need to consider alternative routes for completing the survey (e.g. distribution of paper copies by Energy Champions and/or assisted completion of the online survey with telephone or face to face assistance from a member of the NZT team). Completion of the survey over the telephone by a team member not directly working with the respondent would allow the customer to be more comfortable giving honest feedback on the Energy Champion (whether this was positive or negative). However, careful communications would be needed to ensure that vulnerable people were aware of the purposes of the survey and felt sufficient trust in the process to respond to a telephone call. Again, appropriate GDPR/privacy permissions would need to be sought.</p> <p>Depending on response rates, and potential biases in the types of customers responding to the survey, the survey will potentially generate quantitative statistics</p>
<p><b>Appendix F: Prompts to stimulate 'learning' discussions</b></p>	<p>We have provided some examples of prompts that could be used to stimulate discussion and capture informal insights/learning at regular internal meetings and at periodic workshops and cross-partnership meetings. With appropriate permissions, stories and insights should be shared with other members of the partnership team, to ensure that the technical, modelling and FW App teams are made aware of customer insights as they emerge. We recommend that the prompts are used as part of internal LEAD team meetings, either on a weekly or monthly basis, learning being shared periodically with the wider partnership.</p>

Tool	Purpose and guidance on how to use these tools
<b>Appendix G: Case study and story templates</b>	We have created a simple template that the LEAD team could use to capture qualitative case studies and stories about NZT processes or impacts. While qualitative case studies and stories will not be statistically representative of what is happening across the board, they can be powerful communication tools. For example, stories can powerfully illustrate impacts to funders and investors, and can also provide persuasive evidence to potential customers. Video versions of case studies can be particularly powerful. <sup>6</sup> Depending on permissions, the case studies/stories can be shared on an anonymous or identifiable basis, and can be shared via newsletters, websites, social media, the FW App, email and so on.
<b>Appendix H: LEAD reporting template</b>	Finally, we have created a template for a periodic evaluation report presenting both quantitative and qualitative data for the LEAD project, focusing on the Research Questions identified above. Depending on the requirements of the project and of funders, this could be prepared on a quarterly, half-yearly or annual basis.

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<sup>6</sup> See this example 'impact' video from Kent Community Energy, who provided a grant to Emmaus Dover. <https://www.youtube.com/watch?v=JRTf-fiG118>



## Appendix A: Checklist for project-level MEL

### Planning

- When you're applying for project-specific funding, build in a MEL component from the outset, so that your MEL activity is funded. As a rule of thumb, 5-10% of a project budget might be spent on MEL, including internal time and costs as well as any external inputs.
- Allow time for MEL in project budgets, not just for research and events, but for team members to participate in reflection sessions, workshops, research interviews and so on.
- You may want to consider budgeting for some external MEL support. This can be helpful where the independence of MEL research is important, and where the project team does not have capacity or capability for certain research tasks.
- Think about the audience for MEL evidence for this specific project – who will need/want to see the evidence, and what are they most interested in? The audiences might include the project funder(s), potential investors and other funders, local partner organisations, potential replicators and so on.
- Depending on the length of your project, and the needs of NZT stakeholders and/or funders and investors, think about whether it's OK to have a single MEL 'learning cycle' starting at the beginning of the project and reporting at the end. If findings are needed before the end of the project, or if the project spans several years, you may find it useful to have more than one MEL 'learning cycle' for this project. Each learning cycle would follow the 'PLAN-DO-REVIEW' steps (as set out in the main report) and would culminate in its own reporting and review process (e.g. mid-point review, final review). This checklist can be used for each successive learning cycle.
- If a project funder has specified a list of KPIs, or asks you to propose a set of KPIs, then this will clearly need to form part of your project-level MEL. Aim for a set of KPIs that really help to demonstrate how/whether your project is 'working'. You will normally want to consider 'process' as well as 'impact' KPIs. Where impacts are difficult to measure, you may need to consider proxy measures.

### Work out what 'success' looks like for your project, and how to test for success

- Check the overarching indicator framework (see Appendix B) for indicators relevant to your project. This may stimulate your thinking about what success looks like and how to test for it.

- Consider defining a Theory of Change for the project (or for NZT as a whole), setting out the outputs, outcomes and impacts you aim/expect to create and the causal links between them. The 'Better Evaluation' website provides guidance on TOCs and how to develop them.<sup>7</sup> Participatory development of a TOC for the project can be a very useful process to ensure that all partners and stakeholders are 'on the same page' and understand what the project is aiming to achieve.
- Using the TOC (if you have one) or the overarching indicator framework (if you don't), define the key assumptions/hypotheses that would have to hold if your project is to work as intended.
- Bearing in mind the overarching indicator framework, your funder's/investor's requirements, the parts of the TOC relevant to your project and related assumptions/hypotheses, define a small set of high-level research questions for the first learning cycle in your project-level MEL. Example research questions for the LEAD project are presented in section 6 of the main report. Try to define a small number of high-level research questions that are really important to your project and to NZT.
- If appropriate, you may want to develop a further level of more detailed questions that sit below the high-level research questions (e.g. linking in project-level KPIs).
- If the project involves multiple learning cycles, you may want to review and adjust the research questions for each new cycle.

### **Design your proposals for evidence gathering for this learning cycle**

- The next step is to design regular project-level monitoring and periodic evaluation research for this learning cycle that respond to funder/investor requirements and that answer your research questions as far as reasonably practical. This is likely to include collection of qualitative and quantitative evidence on outputs, outcomes, impacts, project processes and related KPIs.
- Don't forget to include collection of baseline data at an early stage, where this is practical, to help you demonstrate change.
- It may be appropriate to plan research with non-participants as well as project participants. For example, if relevant to your research questions, you might plan research with non-participants to explore issues about NZT

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<sup>7</sup> A 'Theory of Change' explains how activities are understood to produce a series of results that contribute to achieving the final intended impacts. (see <https://www.betterevaluation.org/tools-resources/theory-change-0>)



engagement/retention issues, or to compare outcomes/impacts for participants and non-participants. In relation to the latter, it might be possible to compare energy use by FW App users who have received a particular intervention with similar FW App users who have NOT received this intervention. If this could be done for FW App users with and without access to the NZT package, this could provide powerful evidence of NZT impacts on carbon, energy use, energy bills, comfort and so on. But careful consideration would need to be given to the ethical issues<sup>8</sup> and permissions required to use people's data in this way.

- Remember to include learning processes, as well as monitoring and evaluation, in your MEL plans. For example, you could look at ways of capturing insights from direct work with customers, periodic review sessions for partners, or for the project as a whole.
- Where you can, make evidence collection fun (e.g. integrate participative feedback activities into workshops that you run; design an engaging way of customers providing ratings via the FW App).
- Build on the practices and templates already developed for other projects (e.g. see Appendices C – H for example tools for the LEAD project).
- Think carefully about whether your MEL proposals are manageable and reasonable for respondents, achievable in terms of project team time and resources, and whether they will generate useable, reliable evidence.
- Don't aim for perfection – just make sure that your MEL proposals are 'CORE' (Consistent, On message, Realistic and 'Enough')<sup>9</sup>. 'Enough' means that they cover priorities that really matter for the project (e.g. they are essential requirements for your funders/partners or they will really help you to help customers). For example, remember that there is a trade-off between the length of a survey and the response rate you're likely to get – less may be more.
- Be realistic about customer survey response rates. Use incentives, a long response period and multiple reminders to encourage customers to respond. Even with these features, a response rate of 20-30% would be a good result.
- If you're asking customers to give up time to attend a focus group, build in allowances or incentives for attendance.

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<sup>8</sup> For example would it be fair to use FW App data for those who are interested in NZT but cannot (or cannot yet) access the full NZT package?

<sup>9</sup> The CORE principles were developed by MB Associates ([www.mbassociates.org](http://www.mbassociates.org)).

- Again, you may want to adjust evidence collection methods for each successive learning cycle, building on learning from the previous cycle but maintaining sufficient consistency so that important indicators can be tracked and compared over time.

### **Gather the evidence for this learning cycle**

Evidence collection methods you could consider include:

- Integration of collection of regular monitoring data into the project delivery process (e.g. FW App; inclusion of Smart Meters within technical packages; post-delivery feedback mechanisms; project complaints procedures and so on)
- A periodic (e.g. annual) customer feedback survey - ideally jointly coordinated across all current RVE/NZT projects to avoid respondent fatigue – with a prize draw or similar incentive to encourage completion. This would need to be delivered in a form convenient to participants – email or apps may be easiest for you, but you may need some paper copies too and/or telephone or face to face completion by a team member or researcher. Remember that you may need to consider translation for specific ethnic groups. (See Appendix E for draft survey tailored to the LEAD project.)
- Mechanisms to share informal learning from delivery processes within the team and with partner organisations (e.g. weekly reviews, partners meetings, periodic (e.g. annual) review workshop, cross-regional NZT conferences, if relevant) (See Appendix F for learning prompts tailored to the LEAD project.)
- Regular development of written case studies or ‘stories’ that capture specific examples or important insights/learning as you go along, so that you can integrate them into evaluation reports, communications materials and/or share with stakeholders. These may be identifiable (subject to GDPR permissions) or anonymised. (See Appendix G for draft template tailored to the LEAD project.)
- Potential commissioning of videos to present case studies, stories or ‘the project’ in an immediate way. While examples highlighted in this way are exemplars, and do not provide statistically robust evidence of impact, they can provide powerful evidence in themselves.
- Periodic waves of deeper evaluation research, where justified by the research questions for this learning cycle and your audience’s requirements. This could include focus groups/workshops with target customer groups and/or in-depth interviews with selected stakeholders relevant to your research questions. Depending on your research questions, relevant stakeholders might include

selected customers, people who have dropped out of the process or are not engaged, delivery partners, current/potential suppliers, training bodies, current/potential investors, potential replicators and so on.

### **Analysis, review and reporting**

- Monitoring reports - agree a reasonable frequency for sharing of monitoring data in a brief (preferably automated) report or dashboard. (See Appendix H for a template report for the LEAD project).
- Learning outputs – pull together case studies, stories, videos, insights from review sessions in formats that can be used shared both internally and externally.
- Evaluation reports and outputs – taking into account your funders/investors' evaluation requirements, and your thinking about 'learning cycles', pull together evaluation findings against the research questions at key points during the project. The evaluation research will usually draw on monitoring and learning outputs as well as research undertaken specifically for evaluation during this learning cycle. Depending on your funders/investors' requirements, the frequency of evaluation outputs could be annually or bi-annually for a long project, or – for shorter projects – at the mid-point and project end.
- Don't hide negative findings – you may learn a lot from these and you ignore them at your peril.

### **Use your MEL evidence!**

- Use your learning/reflection sessions (see above) to reflect on monitoring and evaluation findings and work out how to improve delivery, and what NTZS needs to do next.
- Include feedback mechanisms and delivery review points in each learning cycle, to allow delivery to be adjusted in response to evidence gathered and lessons learnt.
- Think about how findings should be presented to meet the needs of your audience for MEL work. You may want to prepare short, visually appealing versions of evaluation outputs, which can be more easily communicated to project funders, investors or other stakeholders.
- Share your outputs both internally and externally (e.g. monitoring dashboards, learning outputs – e.g. case studies, videos), subject to appropriate permissions.

- Be aware that MEL and communications outputs may be slightly different. For MEL purposes it's important to be transparent and draw out what didn't/doesn't work (and lessons learnt from that) as well as what does work well. But for communications purposes you may want a more 'curated' but still realistic picture of the project. Hold onto the learning aspects of MEL outputs, even if the versions you share publicly are a bit different. And remember that replicators will be interested in the lessons learnt, warts and all, not just the curated version.

### **Revisit for the next learning cycle**

Review your approach to MEL for each successive learning cycle in the project, being aware of the benefits of maintaining consistency in questions and indicators over time but adjusting where needed.

## Appendix B: Overarching NZT indicators

The overarching NZT indicators are presented in a miro board [here](#). They are also presented by sub-theme in a spreadsheet (attached). The output, outcome and impact indicators for each sub-theme in the spreadsheet are presented below.

**Table 5: NZT indicators for subtheme 1.1 (customer engagement)**

THEME	(1) Customers for NZTS and related projects	
SUB-THEME	(1.1) Customer engagement for NZTS and related projects (including LEAD)	
WHAT SUCCESS LOOKS LIKE	Reach-engage-retain strategy is successful in creating and retaining clusters of interested households across all tenures and across diverse interest groups, maintaining customer satisfaction while enabling delivery of Net Zero Terrace Streets	
OUTPUT INDICATORS (MAINLY SHORT TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	OVERALL: Customer journey, targeting, engagement and communications strategy developed for NZTS-related activities (including LEAD)	Project records
	REACH: Number and reach of communications activities for NZTS (including LEAD)	Project records
	REACH: Number/type of consumer engagement activities run for NZTS/LEAD	Project records
	REACH: Number/type of consumers reached by NZTS-related activities (including LEAD)	Project records
	REACH/ENGAGE: Characteristics of consumers/ households reached via a vis vulnerability/'hard to reach' characteristics (possibly using ENW categories)	FW App
	ENGAGE: Number/type of households engaged by different means for NZTS-related activities (including LEAD)	FW App
	OVERALL: System developed for collecting consumer insight indicators (by type of customer)	Project records
	ENGAGE: Number/type of customer downloading FW App (either by themselves or supported by Energy Champion)	FW App
	ENGAGE: Number of households signed up to FW App in different NZTS target zones	FW App
	ENGAGE: Number of vulnerable/'hard to reach' customers and 'hard to treat' households signed up to FW App	FW App
	ENGAGE: Ease of use of FW App for different types of customer	Customer survey
	RETAIN: Level of ongoing customer use of FW App	FW App
	RETAIN: Number/type of incentives for ongoing customer engagement with FW App	FW App
	RETAIN: Drop-off rates from FW App (compared to other apps/methods)	FW App
	ENGAGE/RETAIN: Level of functionality of Fairer Warmth App (initially supporting LEAD, then supporting NZTS)	FW App
	REACH/ENGAGE: Number and type of potential NZTS customers visiting demo sites	Project records
OUTCOME INDICATORS (MAINLY MEDIUM TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	ENGAGE: Level of trust in Energy Champions and wider project, amongst different customer segments	Customer survey
	ENGAGE: Refined understanding of customer motivations and engagement channels/mechanisms for different customer segments (link to MEL theme)	FW App/Customer survey/MEL activities
	ENGAGE: Level of awareness and interest in NZTS within NZTS target streets in Bacup	Customer survey
	RETAIN: Numbers/types of potential NZTS customers continuing to engage with FW App	FW App
	RETAIN: Numbers/types of potential NZTS customers signing up for NZTS package, and retained over time	FW App/NZTS systems
	RETAIN: Proportion of 'critical mass' reached in different delivery zones for NZTS package (via FW App)	FW App
	Number of potential customers released from pipeline where NZTS delivery not feasible within acceptable timeframe	FW App/NZTS systems
IMPACT INDICATORS (MAINLY LONG TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	RETAIN: Numbers of streets/zones which reach the threshold for delivery of NZTS package	FW App
	RETAIN: Numbers and types of customers who contract with NZTS package	FW App/NZTS systems

**Table 6: NZT indicators for subtheme 1.2 (customer satisfaction and benefit)**

THEME	(1) Customers for NZTS and related projects	
SUB-THEME	(1.2) Customer satisfaction with - and benefits - from NZTS and related projects	
WHAT SUCCESS LOOKS LIKE	Customers are satisfied with the delivery of Net Zero Terrace Streets and related projects, playing a role in recommending the service to others. Customers enjoy benefits as expected, in terms of their comfort, warmth, quality of life and carbon savings.	
OUTPUT INDICATORS (MAINLY SHORT TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	OVERALL: Customer satisfaction monitoring system established, for NZTS-related activities (including LEAD)	Project records
	OVERALL: Customer benefit monitoring system established for NZTS-related activities (including LEAD)	Project records
	OVERALL: Customer complaints system established, for NZTS-related activities (including LEAD)	Project records
	OVERALL: Establish baseline for customer impacts (e.g. housing and heating type, energy bills, energy usage, comfort levels, perceived health and wellbeing)	FW App/initial advice visits and/or customer survey
	OVERALL: monitoring and baselining process upgraded over time to meet pilot and roll-out requirements (e.g. PAS2030, if required)	Project records
OUTCOME INDICATORS (MAINLY MEDIUM TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	RETAIN: Survey response rates acceptable	Customer survey records
	RETAIN: Satisfaction with NZTS-related customer engagement and advice (e.g. FW App, champions, events, communications)	Customer survey
	RETAIN: Satisfaction with energy measure delivery process for NZTS-related activities (e.g. timing, disruption, works)	Customer survey
	RETAIN: Satisfaction with usage of energy measures for NZTS-related activities (e.g. reliable, easy to control)	Customer survey
	RETAIN: Customer complaints low and promptly dealt with	Complaint system records
	RETAIN: Satisfied customers recommend NZTS-related activities to other people in the community	Customer survey
	RETAIN: NZTS customers trained to act as energy champions	Project records
IMPACT INDICATORS (MAINLY LONG TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Reduced energy usage arising from NZTS-related activities, including LEAD	Reported (via customer surveys/FW App) or measured (via Smart Meter data and/or detailed energy monitoring)
	Reduced energy bills arising from NZTS-related activities, including LEAD	Reported (via customer surveys/FW App) or measured (via Smart Meter data and/or detailed energy monitoring)
	Improved comfort levels arising from NZTS-related activities, including LEAD	Reported (via customer surveys/FW App) or measured (via detailed property monitoring)
	Estimated carbon savings from different waves of NZTS-related activity, including LEAD	Calculated from energy usage data
	Improvements in perceived health/wellbeing arising NTZS-related activities, including LEAD.	Reported (via customer surveys/FW App) or measured (via detailed health service data)
	Case studies/stories/videos evidencing customer benefits delivered by NZTS-related activities, including LEAD	MEL activity
	Degree of NZTS/project contribution to observed impacts, compared to other factors outside project	Customer surveys/MEL research

**Table 7: NZT indicators for subtheme 2.1 (business model development)**

<b>THEME</b>	<b>(2) Proving up the business model and technology for NZTS</b>	
<b>SUB-THEME</b>	<b>(2.1) Business model development</b>	
<b>WHAT SUCCESS LOOKS LIKE</b>	A community-owned business model for Net Zero Terrace Streets is demonstrated to be viable and replicable, involving acceptable levels of risk for the stakeholders involved.	
<b>OUTPUT INDICATORS (MAINLY SHORT TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Research activity to specify, model and refine the viability and customer/partner benefit from different NZTS work packages	Project reports
	Techno-economic model(s) and energy model(s) developed and refined	Models and associated reports
	Delivery and governance models developed and refined for each work package, taking into account customer, supplier and investor/funder requirements	Project reports
	Number and type of NZTS work packages trialled, demonstrated and refined (link to 'delivering NZTS on the ground' theme)	Project/MEL reports on work package trials and demonstrations
	See "Investor engagement" theme for investable business case	
<b>OUTCOME INDICATORS (MAINLY MEDIUM TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Progress on commercial readiness level (CRL) of different NZTS work packages	Project reports
	Commercial risks associated with NZTS business model and governance models are reduced, with models appearing viable and investable, based on findings from demonstration activities, while continuing to meet key success criteria (i.e. affordable by NZTS target consumers; retention of profit within community; with risk and return levels acceptable to delivery partners and investors)	Project reports
	Refined NZTS business model continues to have potential to make a significant contribution to achievement of Net Zero in the UK's 10 million terraced properties	Project reports
<b>IMPACT INDICATORS (MAINLY LONG TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Viability and deliverability of refined NZTS business model is proven through scale-up and roll-out activities, both locally and nationally, while continuing to achieve key project success criteria	Project/MEL reports
	See "delivering NZTS on the ground" theme for piloting and roll-out of NZTS, locally and nationally	

**Table 8: NZT indicators for subtheme 2.2 (technology model development)**

<b>THEME</b>	<b>(2) Proving up the business model and technology for NZTS</b>	
<b>SUB-THEME</b>	<b>(2.2) Technology model development</b>	
<b>WHAT SUCCESS LOOKS LIKE</b>	The technologies involved in delivering Net Zero Terrace Streets are demonstrated to be feasible and to fit customers' needs, in terms of delivering services to them reliably and being easy for customers to operate and understand, while being consistent with the NZTS business model.	
<b>OUTPUT INDICATORS (MAINLY SHORT TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Research activity to specify, model and refine the feasibility and customer acceptability of the technologies involved in different NZTS work packages	Project reports
	Technologies involved in delivery of NZTS developed and refined, taking into account customer, supplier and investor/funder requirements	Project reports on technology testing and delivery
	Number and type of NZTS work packages trialled, demonstrated and refined (link to 'delivering NZTS on the ground' theme)	Project/MEL reports on work package trials and demonstrations
<b>OUTCOME INDICATORS (MAINLY MEDIUM TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Technology readiness level (TRL) of work packages involved in NZTS smart energy system (e.g. integration)	Project reports
	Technical risks associated with NZTS technology packages are reduced, with technology appearing feasible based on findings from demonstration activities, while continuing to meet key success criteria (i.e. acceptable to target customers for NZTS, cost consistent with viable, investable business model)	Project reports
	Refined NZTS technology packages have potential to make a significant contribution to achievement of Net Zero in the UK's 10 million terraced properties	Project reports
<b>IMPACT INDICATORS (MAINLY LONG TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Technical feasibility of NZTS technologies is proven through scale-up and roll-out activities, both locally and nationally, while continuing to achieve key project success criteria	Project/MEL reports
	See "delivering NZTS on the ground" theme for piloting and roll-out of NZTS, locally and nationally	



**Table 9: Delivering NZT on the ground – (3.1) grant-funded delivery of energy efficiency advice and measures (via LEAD)**

THEME	(3) Delivering NZTS on the ground	
SUB-THEME	(3.1) Grant-funded delivery of energy efficiency advice and measures (via LEAD)	
WHAT SUCCESS LOOKS LIKE	Early energy efficiency advice and signposting activities generate carbon savings and benefits for local households in Rosendale district while helping to build trust in RVE within the local community and prepare/retain potential customers within Bacup for NZTS	
OUTPUT INDICATORS (MAINLY SHORT TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	LEAD - number/type of households assessed for energy efficiency	FW App
	LEAD - number/type of households provided with energy efficiency advice relating to different energy efficiency measures	FW App
	LEAD - number/type of households signposted to funding for different energy efficiency measures	FW App
	LEAD - Characteristics of households assessed, advised or signposted vis a vis vulnerability/'hard to reach' characteristics (possibly using ENW categories)	FW App
	See "Customer" and "MEL" themes for monitoring and baselining activity	
OUTCOME INDICATORS (MAINLY MEDIUM TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Number/type of households implementing energy efficiency advice (involving different measures)	FW App/customer survey
	Number/type of households implementing different energy measures, including degree of project influence	FW App/customer survey
	Number/type of households taking up different sources of funding for energy efficiency measures	FW App/customer survey
	Numbers/types of households submitting energy bill or kWhr data vis FW App	FW App
	Numbers/types of potential NZTS customers installing Smart Meters and sharing data with NZTS	FW App
	Influence of energy efficiency advice/measures on customer interest in NZTS package	Customer survey/MEL activities
	See "customer" theme for customer satisfaction with pilots and demonstration activity	
IMPACT INDICATORS (MAINLY LONG TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Improved ability to model/ deliver NZTS services, from energy bill and Smart Meter data	Project reports
	Influence of take-up of energy efficiency advice/measures on viability of NZTS business model	Project reports
	See "customer" theme for customer benefit/impact	

**Table 10: Delivering NZT on the ground - (3.2) Piloting and demonstration of Net Zero Terrace Street package approach in Bacup, fully or partly grant-funded**

THEME	(3) Delivering NZTS on the ground	
SUB-THEME	(3.2) Piloting and demonstration of Net Zero Terrace Streets package approach in Bacup, fully or partly grant-funded	
WHAT SUCCESS LOOKS LIKE	Pilot and demonstration activities for Net Zero Terrace Streets are successfully delivered to selected pilot customers, resulting in customer satisfaction, refinement of the business, technical and governance models, and providing supportive evidence for further development of the NZTS concept	
OUTPUT INDICATORS (MAINLY SHORT TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Short term- Pathfinder 2 - delivery of 3 demonstration houses featuring selected elements of NZTS package	Physical demonstration/project reports
	Short term- Living Lab - delivery of 10 demonstration homes	Physical demonstration/project reports
	Medium - term - (SIF Beta) - delivery of 3 demonstration streets, featuring full NZTS package	Physical demonstration/project reports
	See "Supporting activity" theme for grant funding of pilot activity	
	See "Customer" theme for marketing and engagement activities around pilots	
	See "Customer" and "MEL" themes for monitoring and baselining activity	
OUTCOME INDICATORS (MAINLY MEDIUM TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Learning generated to refine service packages, customer engagement approach and business/technical models for NZTS	Project reports and MEL outputs from pilots and demos
	Successful operation of pilot NZTS services, in line with design and financial expectations (by type of hh and service)	Project reports and MEL outputs from pilots and demos
	Link to "customer" theme for customer satisfaction with pilots and demonstration activity	
IMPACT INDICATORS (MAINLY LONG TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Improved methods for estimating carbon savings and customer benefits from NZTS services	Project reports; MEL outputs
	See "customer" theme for customer benefit/impact	

**Table 11: Delivering NZT on the ground – (3.3) Investor-supported roll-out of Net Zero Terrace Street approach within Bacup/Rossendale**

<b>THEME</b>	<b>(3) Delivering NZTS on the ground</b>	
<b>SUB-THEME</b>	<b>(3.3) Investor-supported roll-out of Net Zero Terrace Streets approach within Bacup/Rossendale</b>	
<b>WHAT SUCCESS LOOKS LIKE</b>	Net Zero Terrace Streets delivers affordable low carbon heat to a considerable number of households in Bacup, generating evidence of carbon savings, bill savings, improved comfort and perceived health/wellbeing and high levels of customer satisfaction across a range of tenures and household types	
<b>OUTPUT INDICATORS (MAINLY SHORT TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Implement NZTS approach for further streets in Bacup/Rossendale	Monitoring/project reports from roll-out
	See "Stakeholder engagement" theme for engagement of investors and supply chain	
	See "Customer" theme for marketing and engagement activities around roll-out	
	See "Customer" and "MEL" themes for monitoring and baselining activity	
<b>OUTCOME INDICATORS (MAINLY MEDIUM TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Number of local households receiving NZTS services (by type of hh and service)	Monitoring/project reports from roll-out
	Successful operation of local NZTS services, in line with design and financial expectations (by type of hh and service)	MEL outputs from roll-out
	Link to "customer" theme for customer satisfaction with Bacup roll-out of NZTS	
<b>IMPACT INDICATORS (MAINLY LONG TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Evidence of improved landlord EPCs and contribution to meeting MEES	MEL outputs from roll-out
	Link to "customer" theme for customer benefit/impact	

**Table 12: Delivering NZT on the ground – (3.4) Investor-supported replication of Net Zero Terrace Street approach in other areas across UK**

THEME	(3) Delivering NZTS on the ground	
SUB-THEME	(3.4) Investor-supported replication of Net Zero Terrace Streets approach in other areas across UK	
WHAT SUCCESS LOOKS LIKE	Net Zero Terrace Streets delivers affordable low carbon heat to a considerable number of households across the UK, generating evidence of carbon savings, bill savings, improved comfort and perceived health/wellbeing and high levels of customer satisfaction across a range of tenures and household types	
OUTPUT INDICATORS (MAINLY SHORT TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Roll out NZTS approach to other areas	Monitoring/project reports from roll-out in other areas
	See "Stakeholder engagement" theme for engagement of replicators, investors and supply chain	
	See "Customer" theme for marketing and engagement activities around wider roll-out	
	See "Customer" and "MEL" themes for monitoring and baselining activity	
OUTCOME INDICATORS (MAINLY MEDIUM TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Total number of households receiving NZTS services (by location, type of hh and service)	Monitoring/project reports from roll-out in other areas
	Successful roll-out and operation of NZTS services in a range of locations, in line with design and final	MEL outputs from roll-out in other areas
	Link to "customer" theme for customer satisfaction with wider NZTS roll-out	
IMPACT INDICATORS (MAINLY LONG TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	NZTS roll-out makes a significant contribution to achievement of a Just Transition for the UK's 10 million terraced properties	Outputs from MEL across roll-out areas
	Link to "customer" theme for customer benefit/impact	

**Table 13: Engaging stakeholders - subtheme 4.1 (delivery partner engagement)**

THEME	(4) Engaging stakeholders	
SUB-THEME	(4.1) Delivery partner engagement	
WHAT SUCCESS LOOKS LIKE	Net Zero Terrace Streets succeeds in generating engagement and commitment amongst the range of delivery partners and stakeholders required for successful delivery	
OUTPUT INDICATORS (MAINLY SHORT TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Identification of skills/partner types required for NZTS development, delivery and roll-out	Project management processes
	Number/type of partners involved provide skills needed for NZTS development	Needs assessment, within project management processes
	Heads of terms agreements negotiated with key partners	Project documentation
	Governance arrangements defined for NZTS	Project documentation
OUTCOME INDICATORS (MAINLY MEDIUM TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Agreements in place with partners who have appropriate capability and capacity to deliver NZTS	Project documentation
	Consortium management processes work well and are acceptable to all partners	MEL activity with partners
	Risk/reward balance involved in NZTS development and delivery is acceptable to all partners	MEL activity with partners
	Governance arrangements refined as needed to ensure high quality, smooth delivery for customers	Periodic feedback from partners (via MEL activities) and customer satisfaction/complaints (see "customer" theme)
IMPACT INDICATORS (MAINLY LONG TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	NZTS is delivered by a well-functioning consortium of partners with an appropriate range of skills	Periodic feedback from partners (via MEL activities) and customer satisfaction/complaints (see "customer" theme)
	Governance arrangements ensure high quality, smooth delivery for customers, with high levels of satisfaction and swift response to any complaints	Customer survey and customer complaints (see "customer" theme)

Commented [l07]: Louise Note to self - check these are in one of the excel sheets

**Table 14: Engaging stakeholders - subtheme 4.2 (investor engagement)**

<b>THEME</b>	(4) Engaging stakeholders	
<b>SUB-THEME</b>	(4.2) Investor engagement	
<b>WHAT SUCCESS LOOKS LIKE</b>	Potential investors become aware of and interested in Net Zero Terrace Streets, and demonstrate their commitment by investing in piloting or roll-out the initiative.	
<b>OUTPUT INDICATORS (MAINLY SHORT TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Investment strategy developed	Project documentation
	Types of potential investors identified (private and public sector)	Project documentation
	Number and type of potential investors approached	Project records
	Discussions held with a range of investors to co-produce investment model and understand their drivers/requirements (including KPIs)	Project records
	Investment case developed, with reference to investor discussions/KPIs and Green Book	Project documentation (see "business model" theme)
<b>OUTCOME INDICATORS (MAINLY MEDIUM TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Investor KPIs identified and understood (e.g. financial impact, carbon impact, social impact, perceived risk)	Project documentation
	See "MEL" and "delivery" themes for collection of investor KPI data	
	Investor perceptions of risk decrease	MEL activity with investors
	Number and type of investors expressing potential interest	Project records
	Negotiation of 'heads of terms' with potential investors	Project records
	Number of potential investors undertaking due diligence	Project records
	Number of investors actively interested in NZTS (e.g. signing 'heads of terms')	Project records
	Scale of potential private and public sector investment in NZTS	Project records
<b>IMPACT INDICATORS (MAINLY LONG TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Scale of actual private/public sector investment in NZTS	Project records
	Leverage of private sector investment by public sector funding	Project records
	NZTS passes approval 'gateways' as required to secure ongoing investment/funding	Project records
	NZTS recognised as 'investable' within wider funding and investment schemes	MEL activity with investors

**Table 15: Engaging stakeholders - subtheme 4.3 (supply chain engagement and training)**

<b>THEME</b>	<b>(4) Engaging stakeholders</b>	
<b>SUB-THEME</b>	<b>(4.3) Supply chain engagement and training</b>	
<b>WHAT SUCCESS LOOKS LIKE</b>	Delivery of Net Zero Terrace Streets supports the development of a local and national supply chain, delivering NZTS to high quality standards and creating jobs in delivery of decarbonised heat and smart energy systems.	
<b>OUTPUT INDICATORS (MAINLY SHORT TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Mapping of local supply chain (including training needs, competition and diversity)	Project research reports
	Number/type of supply chain engagement activities (eg. supplier engagement events; trainer liaison)	Project records
	Number/type of suppliers and training providers attending events (or engaged by other means)	Project records/monitoring
	Procurement documentation and processes developed, including encouragement for local suppliers	Project documentation
	Support and training for local suppliers re bidding and standards for delivery (e.g. customer communications)	Project records/monitoring
	See "customer" theme for customer complaints and delivery satisfaction	
<b>OUTCOME INDICATORS (MAINLY MEDIUM TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Number/type of local supply chain businesses tendering for NZTS delivery	Project records
	Quality of delivery of NZTS elements by supply chain companies	Contractor monitoring processes
	Number/type of national supply chain businesses tendering for NZTS delivery	Project records
	Number/type of local training bodies providing training on NZTS-relevant skills	Project research reports/MEL activities with training bodies
	Number/type of national suppliers developing local training or apprenticeships in NZTS-relevant skills	Project research reports/MEL activities with national suppliers
<b>IMPACT INDICATORS (MAINLY LONG TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Number/type of local supply chain businesses (or sub-contractors) delivering NZTS	Project records
	Number/type of jobs created and percentage of project spend in local area, for construction, operation and maintenance	Contractor monitoring processes/MEL research on economic impact
	Local skills increased through apprenticeship and training schemes relevant to NZTS delivery	MEL research on economic impact
	Number/type of national supply chain businesses delivering NZTS	Contractor monitoring processes/MEL research on economic impact
	Number/type of jobs created in national supply chain in construction, operation and maintenance	MEL research on economic impact
	Supply chain scale-up is consistent with scale of replication and UK Net Zero targets (see Replication theme)	Project research reports on potential scale up

**Table 16: Engaging stakeholders - subtheme 4.4 (engagement with policy makers, regulators and influencers)**

THEME	(4) Engaging stakeholders	
SUB-THEME	(4.4) Engagement with policy makers, regulators and influencers	
WHAT SUCCESS LOOKS LIKE	Net Zero Terrace Streets is an accepted and proven model, integrated into a supportive policy, energy planning, land-use planning, regulatory and funding environment, enabling it to make significant contribution to a Just Transition for the UK's 10 million terraced properties	
OUTPUT INDICATORS (MAINLY SHORT TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Policy 'asks', regulator issues and funding needs identified on a regular basis (link to learning from MEL)	MEL activities (e.g. outputs from periodic learning workshops)
	Targets for advocacy work identified (e.g. LAEP; policy-makers, regulators, influencers, time-limited opportunities/ events)	Project or MEL research
	Advocacy strategy developed, linked to identified targets	Project documentation
	Advocacy strategy implemented	Project records
	Advocacy strategy periodically reviewed and refined (link to MEL learning work)	Project or MEL research
OUTCOME INDICATORS (MAINLY MEDIUM TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Number and type of advocacy targets reached by advocacy work	Project records
	Number of key advocacy targets (e.g. policy-makers, regulators, influencers) responding positively to advocacy work	Project records or MEL activities
	Active dialogue on advocacy issues with key policy-makers, regulators or influencers	Project records or MEL activities
	Emergence of wider campaigns on policy/regulatory issues relevant to NZTS	Project or MEL research
	Local and national government stakeholders show increased awareness and understanding of NZTS concept	Project or MEL research
IMPACT INDICATORS (MAINLY LONG TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Raised public profile of policy/regulatory issues relevant to NZTS	Project or MEL research
	Changes in policy, regulation or funding environment that are supportive to NZTS	Project or MEL research



**Table 17: Engaging stakeholders - subtheme 4.5 (engagement with potential replicators of NZT)**

THEME	(4) Engaging stakeholders	
SUB-THEME	(4.5) Engagement with potential replicators of NZTS	
WHAT SUCCESS LOOKS LIKE	Findings and learning from Net Zero Terrace Streets are shared beyond Rossendale, to encourage replication of NZTS, possibly through social-franchise or licensing model.	
OUTPUT INDICATORS (MAINLY SHORT TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	'Cold Start' replication model developed by 'mother' organisation (e.g. social franchising, licensing)	Project documentation
	Sales and marketing strategy developed for NZTS replication, including target organisations/areas and methods to reach them	Project documentation
	Sales and marketing strategy implemented	Project records/web analytics
	Sales and marketing strategy periodically reviewed and refined (link to MEL learning work)	Project or MEL research
	Agreements/procedures developed for 'Cold Start' replication model	Project documentation
OUTCOME INDICATORS (MAINLY MEDIUM TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Number of other terrace street communities around the UK with awareness and understanding of NZTS approach	MEL research
	Number of organisations/areas expressing potential interest in NZTS approach	Project records/web analytics
	Dialogue with potential replicators generates challenges and refinements to NZTS approach	Project or MEL research
	Number of organisations/areas negotiating about take-up of social franchise or licence for NZTS package	Project records
	Management, governance, quality and supply chain systems developed for replication, that are feasible, viable and scalable for 'mother' organisation and replicators	Project or MEL research
IMPACT INDICATORS (MAINLY LONG TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Number of areas planning to replicate/adapt the NZTS approach	Project or MEL research
	Number of organisations/areas taking up the social franchise/licence to replicate the NZTS approach	Project records
	Number of areas actually replicating the NZTS approach	Project or MEL research
	Licencees/franchisees implement the NZTS package faithfully and are satisfied with the outcomes	Project records/MEL research
	'Mother' organisation for NZTS remains viable and continues to develop and refine the NZTS approach	Project records

**Table 18: Engaging stakeholders - subtheme 4.6 (wider dissemination)**

THEME	(4) Engaging stakeholders	
SUB-THEME	(4.6) Wider dissemination	
WHAT SUCCESS LOOKS LIKE	Findings and learning from Net Zero Terrace Streets are shared more widely, beyond potential replicators, contributing to wider acceptance of NZTS as pathway to Net Zero for terrace streets	
OUTPUT INDICATORS (MAINLY SHORT TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Development of communications and dissemination strategy (linked to MEL learning outputs, and advocacy/replication strategy)	Project documentation
	Number/type of activities to distribute/disseminate learning outputs developed under MEL (see 11 below)	Project records
	Number of people and organisations reached by different dissemination activities	Web analytics
OUTCOME INDICATORS (MAINLY MEDIUM TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Number/type of organisations engaging with learning outputs and dissemination materials	Web analytics/MEL research
	Level of public awareness and acceptance of NZTS as a key solution for terrace streets	Media analysis/MEL research
IMPACT INDICATORS (MAINLY LONG TERM)	DESCRIPTION OF INDICATOR	EVIDENCE SOURCE
	Number/type of organisations citing useful learning from NZTS learning outputs	Media analysis/MEL research
	General public acceptance of NZTS as a key solution for terrace streets	Media analysis/MEL research

**Table 19: Supporting activities – subtheme 5.1 (project development funding)**

<b>THEME</b>	<b>(5) Supporting activities</b>	
<b>SUB-THEME</b>	<b>(5.1) Project development funding</b>	
<b>WHAT SUCCESS LOOKS LIKE</b>	Rossendale Valley Energy obtains grant funding as needed to support development of Net Zero Terrace Streets within Bacup and development of model to replicate NZTS in other areas	
<b>OUTPUT INDICATORS (MAINLY SHORT TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Identification of grant funding opportunities that could potentially support NZTS development	Project research
	Funder requirements understood (e.g. approval gateways, requirements re standards or monitoring) - and funding sources chosen that have manageable requirements	Funder documentation
	Bids submitted for appropriate grant funding support, as required to support project development	Project documentation
	Cashflow implications of funding understood and planned for	Project documentation
<b>OUTCOME INDICATORS (MAINLY MEDIUM TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Funding bids successful in bringing in sufficient grant funding to support development phase of NZTS, with acceptable conditions (e.g. monitoring, standards) and manageable cashflow	Project financial records
	Funder requirements met (e.g. approval gateways, requirements re standards or monitoring)	Project financial records
	Grant funding leverages funding from other sources (including both public and private funding sources)	Project financial records
<b>IMPACT INDICATORS (MAINLY LONG TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	NZTS becomes financially self-supporting during delivery phase, taking into account user and/or service payments and investor returns	Projects financial records and projections

**Table 20: Supporting activities – subtheme 5.2 (programme management and organisational development)**

<b>THEME</b>	<b>(5) Supporting activities</b>	
<b>SUB-THEME</b>	<b>(5.2) Programme management and organisational development</b>	
<b>WHAT SUCCESS LOOKS LIKE</b>	Net Zero Terrace Streets and Rosendale Valley Energy are well managed and involve a diverse team of staff and volunteers with the capability, capacity, confidence and enthusiasm to work together to deliver the project while maintaining their work-life balance.	
<b>OUTPUT INDICATORS (MAINLY SHORT TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Number (and diversity) of NZTS employees, directors and volunteers (fte)	Project personnel records
	Number/type of training and support activities run for NZTS employees, directors and volunteers	Project personnel records
	RVE (and any other NZTS organisation) develops sound policies and procedures appropriate to its size and values	Project documentation
	RVE (and any other NZTS organisation) develops good procedures for managing the NZTS programme	Project documentation, compared to good practice for similar organisations
	RVE organisational capability and capacity increased as required to implement and manage NZTS	Project personnel records plus feedback from MEL activities around capability/capacity
<b>OUTCOME INDICATORS (MAINLY MEDIUM TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Skills developed by NZTS employees, directors and volunteers	Project personnel records plus feedback from MEL activities around skills
	NZTS organisational culture achieves a balance between creativity/risk-taking and quality/responsiveness	Feedback from MEL activities with NZTS team
	Level of satisfaction with NZTS/RVE work amongst NZTS employees, directors and volunteers	Feedback from MEL activities with NZTS team
	Manageable level of work inputs by NZTS employees, directors and volunteers	Feedback from MEL activities with NZTS team
	Retention rates for NZTS employees, volunteers and directors	Project personnel records
	RVE (and any other NZTS organisation) manages the NZTS programme effectively	Feedback from MEL activities with NZTS team, plus see "delivery partner" and "customer" themes for feedback on quality of delivery management
<b>IMPACT INDICATORS (MAINLY LONG TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	RVE team is effective at delivering NZTS, with high levels of satisfaction and good rates of retention.	Feedback from MEL activities with NZTS team
	Timely, well-managed delivery of good quality NZTS programme	Feedback from MEL activities with NZTS team, plus see "delivery partner" and "customer" themes for feedback on quality of delivery management

**Table 21: Supporting activities – subtheme 5.2 (MEL activities)**

<b>THEME</b>	<b>(5) Supporting activities</b>	
<b>SUB-THEME</b>	<b>(5.3) Monitoring, Evaluation and Learning</b>	
<b>WHAT SUCCESS LOOKS LIKE</b>	The MEL framework provides a 'fit for purpose' framework for Net Zero Terrace Street's MEL activity, efficiently generating and sharing output, outcome and impact evidence with funders, investors and other stakeholders, while also generating learning that is used to improve delivery of this and similar projects.	
<b>OUTPUT INDICATORS (MAINLY SHORT TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	MEL planned and implemented, including regular mechanisms for capturing and sharing learning within NZTS team	Project records
	LEAD/NZTS: Customer engagement methods monitored for effectiveness and cost-effectiveness	LEAD monitoring reports; subsequent monitoring reports for NZTS project activities
	MEL refined as NZTS develops, including MEL for specific projects	MEL framework; MEL elements of project proposals
	NZTS: 'Fast Fail' approach built into design of NZTS package elements	Project documentation
	Number/type of learning outputs generated (e.g. indicators, articles, reports, case studies, videos, presentations, site visits)	MEL outputs
	Learning network established with NZTS in other areas	Project documentation; records of learning network events
<b>OUTCOME INDICATORS (MAINLY MEDIUM TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Sufficient engagement with MEL activities from customers, delivery partners and team	Participation rates in MEL activities (including survey response rates)
	Learning generated in relation to customer engagement, take-up of measures/NZTS package, and delivery of measures/NZTS package	MEL outputs prepared and used to inform project delivery
	Customer engagement and delivery strategies for LEAD/NZTS refined as a result of learning being shared with delivery teams	Project documentation (and/or MEL research) shows changes to project delivery attributable to MEL
	Evidence of benefits generated and shared with potential funders, investors, policy-makers and replicators	Records of dissemination activities, including web analytics.
	Evidence of failure collected and shared, where appropriate, and fed promptly into learning process	Project documentation and/or MEL research shows changes to project delivery attributable to MEL, including learning from failures
<b>IMPACT INDICATORS (MAINLY LONG TERM)</b>	<b>DESCRIPTION OF INDICATOR</b>	<b>EVIDENCE SOURCE</b>
	Evidence informs funder, investor, policy-maker and replicator support for NZTS approach	Project documentation and/or MEL research shows how MEL evidence has been incorporated into stakeholder engagement process
	Evidence and learning informs the refinement and roll-out of NZTS approach	Project documentation and/or MEL research shows how MEL evidence has been incorporated into ongoing NZTS development

## Appendix C: Detailed project-level LEAD indicators

Please see the separate spreadsheet for project-level LEAD indicators [here](#).

## Appendix D: Recommended additions to FW App sign-up process

### Data already collected via the FW App

We understand that the sign-up process for the Fairer Warmth App (administered online or via an Energy Champion/Adviser) already collects information from people that will help signpost them to sources of Government support and to actions to reduce energy use. From inspection of the FW App itself, the sign-up questions already include:

- Postcode and address
- Name
- Email
- Occupancy type (owner-occupier, private tenant, landlord/other)
- Income band
- Existing insulation type
- Property type (detached, terrace etc)
- Number of occupants
- Current heating system
- Whether the customer is on benefits

We assume that FW App is GDPR compliant, in terms of there being a GDPR basis for processing this personal data, including any elements that constitute sensitive data.

From these variables, the FW App and LEAD team determine whether:

- The consumer falls under definition of 'hard to reach' (e.g. on benefits, low income)
- The consumer's home falls under the definition of 'hard to treat' (e.g. terraced house, solid wall)

The consumer details reported to DESNZ by the LEAD team also include other variables. We understand that these are entered manually by the Energy Champion/Energy Adviser during the delivery of in-person energy advice:

- How in-person advice was delivered (e.g. telephone, community group, home visit, outreach venue)
- Customer initial motivation for seeking advice (e.g. reducing energy bills etc)
- Customer satisfaction with advice provided
- Likelihood of installing a retrofit measure following advice received (rated by the Energy Champion/Energy Adviser, as required by DESNZ)

It is not clear to us how these additional details are collated for consumers who solely use advice presented within the FW App, without requesting support from an Energy Champion/Adviser.

We also understand that the FW App tracks visits to the website from QR codes associated with different community engagement channels. But it is not clear whether the FW App can track the origin QR code through a consumer's sign-up process, particularly if they do not sign-up on their initial visit to the website.

Commented [lo8]: yes, it does not do that.

### Recommended adjustments to the FW App sign-up and data collection process

1. Firstly, we recommend that the Energy Champion/Adviser's current question about the reason for seeking advice should be adjusted to include an option for environmental motivation (e.g. reducing carbon emissions) and for damp issues, and should allow two reasons to be cited (with an indication of priority). This will allow fuller assessment of motivations. Suggested rewording is shown below.

What are your reasons for seeking advice? (select as many as apply) – *(relates to RQ2 - to inform future messaging to different groups, reached via different channels:)*

- a. Reducing energy bills
- b. Reducing damp problems in the home
- c. Improving health
- d. Improving comfort of home
- e. Increasing property value
- f. Reducing carbon emissions
- g. Other

Of these, what is your MAIN reason for seeking advice? (select one) – *(relates to RQ2 - to inform future messaging to different groups, reached via different channels:)*

- a. Reducing energy bills
- b. Reducing damp problems in the home
- c. Improving health
- d. Improving comfort of home
- e. Increasing property value
- f. Reducing carbon emissions
- g. Other

2. Secondly, we recommend that QR code tracking within the FW App should be extended to track consumers from initial 'click' on the code through to eventual sign-up to the FW App, if this is feasible. This should arguably exclude sign-ups outside the project area, that are not relevant to NZT. This will allow fuller analysis of the effectiveness of different community engagement channels.

QR code tracking from each event, poster, mailing, leaflet or social media campaign [reference number] – *(relates to RQ2 - to enable analysis of the effectiveness of different engagement channels in reaching and engaging different customer groups):*

- a. number of clicks on QR code
- b. number of FW App sign-ups linked to this QR code within the project area *(where feasible)*

3. Thirdly, we recommend that a few additional questions should be added to the energy advice sessions run by Energy Champions/Advisers. This would not burden the FW App sign-up process itself. These questions would collect additional consumer insights (to enable better adjustment and targeting of customer engagement work) and would also collect basic data on comfort and energy bills, establishing a baseline from which change could be monitored.
  - How old are you? (under 35; 35-64; over 65) *(relates to RQ2 - to allow analysis of customer insights, motivations and effectiveness of different engagement channels by age group)*
  - How did you first hear about this energy advice service? *(relates to RQ2 - to allow further analysis of effectiveness of different engagement approaches, including any customers who did not respond or sign-up via a QR code)*
  - During the most recent winter, did you feel uncomfortably cold in your living room? (never, sometimes etc) *(relates to RQ3 - to define the baseline for each customer in terms of comfort – question based on BEIS Fuel Poverty research 2017)*
  - During the most recent winter, did you feel uncomfortably cold in your main bedroom? (never, sometimes etc) *(relates to RQ3 - to define the baseline for each customer in terms of comfort – question based on BEIS Fuel Poverty research 2017)*
  - Do you have problems with damp or mould in your home? (yes, no, don't know) *(relates to RQ3 - to define the baseline for each customer in terms of risks to health)*
  - How do you find your energy bills at the moment? (keeping up without any difficulties, struggling to keep up etc) *(relates to RQ3 - to define the baseline for each customer in terms of energy bills – question based on BEIS Fuel Poverty research 2017)*
  - Do you know roughly how much you spend on home energy every month? *(relates to RQ3 - to define the baseline for each customer in terms of energy bills)*



- Are you happy for us to keep in contact with you? If so, what's the best method for you? (*relates to RQ2 - to establish contact preferences: email, post, telephone, no contact*)

These additional questions are specified in more detail in the draft customer survey below. However, it would be advantageous to ask them upfront, when providing in-person energy advice because:

- Customer survey response rates may be low, and certain types of customer may be under-represented, so asking these questions upfront will generate more comprehensive and reliable data.
- Asking these questions upfront will allow establishment of a more accurate 'pre-advice' baseline.
- Asking these questions upfront will allow earlier analysis of this data, generating earlier insights to inform consumer engagement.

While the comfort/energy bill questions would need to be repeated in the customer survey, to track the consumer impacts compared to the baseline, the questions 'how old are you' and 'how did you first hear about this energy advice service' would not need to be repeated.

## Appendix E: Draft periodic customer survey

A periodic customer survey will be important to gather customer insights, monitor customer satisfaction, and gather evidence on customer feedback and self-reported impacts of the project. We anticipate that a customer survey would be administered to FW App participants annually, or more often if project processes required this.

The survey questions below are focused on LEAD but could be adapted for other NZT projects.

This survey could be sent out via the FW NZT App (i.e. by email), but telephone interviews and/or completion of paper copies are likely to be needed to supplement email responses (because of some people forgetting to respond or not being confident with use of email). Contact preference information collected during the FW App sign-up process and the initial energy advice visit, and stored in the FW App CRM (see Appendix D), will help the NZT team to select the completion method(s) most appropriate for each customer. Resources may need to be allowed for translation of the survey questions and/or data entry, or scanning, of paper responses.

A prize draw or similar incentive could be offered to encourage responses. The survey invitation should explain how responses will help the project to meet people's needs better (i.e. there is something in it for the respondent). A deadline should be set and several reminders should be sent in the run-up to the deadline. The level of response will itself be an indicator of how engaged consumers are with the energy advice project and the FW App. Final response rates of 20-30%, after several reminders, would be good for a survey of this type.

A 'menu' of draft questions is set out below. Questions should be refined and prioritised when finalising the survey. The length and wording of the survey should be tested with a few pilot participants before finalisation. Response rates will be higher if the survey is kept to around 20 minutes in length.

The rationale for these questions, and their linkage to MEL framework indicators, are set out in the NZT and LEAD monitoring spreadsheet.

### Topic – customer insight (relevant to RQ1)

*If not already asked at initial energy advice session:*

1. How did you first hear about this energy advice service? (select 1)
  - a. Event
  - b. Poster
  - c. Leaflet
  - d. Mailshot or letter
  - e. Internet search

- f. Social media
- g. Landlord
- h. Referred by health professional
- i. Referred by council
- j. Referred by another service
- k. Word of mouth
- l. Other (please specify..)

2. Are you happy for us to keep in contact with you? If so, what's the best method for you? (*establish contact preferences: FW App, email, post, telephone, no contact*)

**Topic – creating a baseline and tracking energy costs/comfort (relevant to RQ3)**

*Tracking of energy costs, health risks and comfort compared to the pre-advice baseline:*

3. During the most recent winter, did you feel uncomfortably cold in your living room? (on a scale from 1 to 4)
- 1. Never
  - 2. Sometimes
  - 3. Often
  - 4. Always
  - 5. Other (please explain)
4. During the most recent winter, did you feel uncomfortably cold in your main bedroom? (on a scale from 1 to 4)
- 1. Never
  - 2. Sometimes
  - 3. Often
  - 4. Always
  - 5. Other (please explain)
5. Do you have problems with damp or mould in your home?
- 1. Yes
  - 2. No
  - 3. Don't know or not sure
6. How do you find your energy bills at the moment?
- 4. Keeping up without any difficulties
  - 5. Struggling to keep up
  - 6. Falling behind
  - 7. Don't know
7. Do you know roughly how much you spend on home energy every month?

If yes:

- Gas (averaged across the year; bands of £x/ month or not relevant)
- Electricity (averaged across the year; bands of £y/month or not relevant)
- Other types of energy (please specify) (averaged across the year; bands of £z/month or not relevant)

**Topic – ease of use of FW App (relevant to RQ2)**

8. Do you use the FW App by yourself, or does an energy champion usually help you to use it?
- By myself
  - Energy Champion
  - A mix of both
  - Other, eg a friend/relative

For those who sometimes/always use the App themselves:

9. How easy do you find the FW App to use?
- Very difficult
  - Difficult
  - Neither easy nor difficult
  - Easy
  - Very easy
10. Is there anything that would make the FW App easier for you to use? (open text)

**Topic – level of engagement with FW App (relevant to RQ2)**

For those who sometimes/always use the App themselves:

11. How often do you log into the FW App?
- Regularly (e.g. weekly or monthly)
  - Occasionally (e.g. a few times since signing up)
  - Not since signing-up
  - Never

12. Why is this? (open text)

13. Is there anything that would encourage you to log in more often? (open text)

**Topic – satisfaction with energy advice provided by FW App (relevant to RQ1/2)**

14. Have you used the FW App to access energy advice by yourself, in the past year, without your Energy Champion being present? (yes/no)
15. If yes, how satisfied have you been with the advice provided by the FW App, during the past year (or part of the year)?
- Very dissatisfied
  - Dissatisfied

- Neither satisfied nor dissatisfied
- Satisfied
- Very satisfied

16. Is there any way in which the services provided by the FW App could be more helpful to you? *(include unless this question has already been fully addressed using a proposed 'feedback' button in the FW App)*

**Topic – satisfaction with energy advice provided by Energy Champion (relevant to RQ1/2)**

17. Have you been provided with energy advice by an Energy Champion, in the past year (e.g. via a home visit, at an event, over the telephone)? (yes/no)

18. If yes, how satisfied have you been with the advice provided by your Energy Champion, during the past year (or part of the year)? *(unless this question has already been fully addressed using the 'in app' satisfaction rating)*

- Very dissatisfied
- Dissatisfied
- Neither satisfied nor dissatisfied
- Satisfied
- Very satisfied

19. How far do you feel that your Energy Champion is someone you can trust?

- Strongly distrusted
- Distrusted
- Neither trusted nor distrusted
- Trusted
- Strongly trusted
- Don't know

20. Do you have any comments about the service that your Energy Champion provides (e.g. timeliness, reliability, politeness)? (open text)

21. Is there any way in which the services provided by Energy Champions could be more helpful to you? (open text)

**Topic – willingness to recommend service to others (relevant to RQ1)**

22. How willing would you be to recommend this energy advice service to others?

- Very unwilling
- Unwilling
- Neither willing nor unwilling
- Willing
- Very willing

- I already do (or have done) this
- Not sure/prefer not to say

23. Is there anything that would encourage you to recommend this energy advice service to others? (open text)

### **Topic – progress on action plan (relevant to RQ3)**

*Note: this section assumes that Energy Champions encourage people to create an action plan on the FW App system and help them to tick off actions that they have completed as time proceeds, in successive visits. Or that people tick off actions on the FW App system themselves. This would mean that information on action plan measures, and progress against them, should already be gathered via the FW App and does not need to be covered by the customer survey. So the questions here are quite general, relating to impact and satisfaction and barriers. If data on actions planned and completed is not available from the FW App, it is important that additional questions on the types of actions planned, and any progress against these actions, are included within this customer survey, to provide evidence about project impacts.*

3. (For those who have taken action) what difference has taking action on home energy made to you? (e.g. has it made your home more comfortable, saved you money etc - open text)
4. (For those who have taken action), how satisfied were you with the result of taking this action/these actions?
  - Very dissatisfied
  - Dissatisfied
  - Neither satisfied nor dissatisfied
  - Satisfied
  - Very satisfied
  - Not relevant
5. (For those who have taken action) is there any way that your satisfaction could have been improved? (open text)
6. (For those who have taken action) where you have taken action on home energy in the past year, do you think that the energy advice service made a difference to your decision to take action?
  - Not at all
  - Not really
  - Difficult to say
  - Yes, a bit

- Yes, a lot
- Not relevant

7. If you haven't taken action, what were your main reasons for not doing so? (tick any that apply)
- I'm too busy
  - I can't afford it
  - I don't know what to do next
  - I need someone to help me
  - I'm not sure it's worth it
  - I'm still thinking about it
  - I may not be staying in this property, so the timing isn't right
  - I would need to get agreement from my landlord
  - I've got to work out wider issues about my home before tackling these actions
  - Illness prevented me from taking action
  - Other reasons (open text)
8. Is there anything else that the energy advice service can do to help you take forward actions on your home energy? [open text]

**Topic – awareness of and interest in Net Zero Terrace Street (relevant to RQ2)**

*(to be asked when the timing is appropriate for NZT, and only for those NZT target zones)*

9. Have you heard of the Net Zero Terrace Street project in Bacup?
- Yes
  - No
  - Unsure
10. If Yes, can you briefly explain what you know about the project? *(open text – to check perceptions of the project)*
11. Would you be interested to hear more about how Net Zero Terrace Street could help you access lower cost, sustainable energy and home improvements at no upfront cost?
- Yes, please send me information via the FW App
  - No, thank you – not at the moment

**Topic – any other comments (relevant to RQs 1-3)**

12. Is there anything else you'd like to tell us, to help us provide a better energy advice service? (open text)

**Topic – demographics (relevant to RQ2 - to allow analysis of reach and inclusivity)**

13. How old are you? *(if not already asked when energy advice was provided)*
- a. Less than 35 years
  - b. Aged from 35 to 65 years
  - c. Over 65 years (some LA help offered to over 65s...)
  - d. Prefer not to say
14. Which of the following best describes your ethnicity? *(this will help us assess how inclusive we are being)*
- e. White (includes British, Northern Irish, Irish, Gypsy, Irish Traveller, Roma or any other white background)
  - f. Mixed or multiple ethnic groups (includes White and Black Caribbean, White and Black African, White and Asian or any other Mixed or Multiple background)
  - g. Asian or Asian British (includes Indian, Pakistani, Bangladeshi, Chinese or any other Asian background)
  - h. Black, Black British, Caribbean or African (includes Black British, Caribbean, African or any other Black background)
  - i. Other ethnic group (includes Arab or any other ethnic group)
  - j. Prefer not to say
15. Do you describe yourself as having a disability? *(this will help us assess how inclusive we are being)*
- k. Yes
  - l. No
  - m. Prefer not to say
16. Name
17. Address
18. Postcode



## Appendix F: Checklist for gathering informal insights/learning

This checklist is currently tailored to LEAD but could be adapted for other NZT projects.

Try to make feedback fun by varying the way you do it, rather than having the same agenda item at every meeting. Reflecting and learning takes time, so be realistic about how often you can include these sessions in a regular meeting.

### Choose a prompt for this particular discussion

Here are some possible questions to prompt discussion about consumer engagement. You could get each person to answer the question quickly, going round the room, and then allow a bit of group discussion about what comes up, recording key points on a flipchart or in meeting notes.

- Name one thing that you've learnt about [...], in the past week/month?
- What has surprised you most, in the past week/month?
- If you could change one thing about [element of project], what would it be?
- What type of customers are easiest to engage? (then discuss why..)
- What type of customers are hardest to engage? (then discuss why..)
- What's the best way of engaging [...]? (then discuss why..)
- What's the best thing about [element of project...]?
- What's the most frustrating thing about [element of project...]?
- What's the most important priority for [element of the project] right now?

### Add a bit of creativity if you can

- Taking turns from week to week, as one person to tell the story of a customer – subject to permissions, capture this using the 'story' template in Appendix G
- Ask people to do a quick drawing to sum up their view on X (this can be really simple – no artistic talent needed) – then take turns to explain their drawings.
- Ask people to write ideas on post-its (e.g. in response to a prompt question) and then stick them on the wall, to prompt a discussion.
- Ask people to rate some aspect of the project on a scale, by putting a mark on a scale, roughly drawn as a horizontal line on a flipchart.
- Ask people to draw smiley or sad or cross faces to represent how they feel about some aspect of the project, and then discuss why they feel this way.

### Share key insights with the rest of the NZT team

Make brief notes from the session, or take a photo of visuals, and share this with the rest of the NZT team. You may find AI tools helpful in reducing the hassle of taking notes.

## Appendix G: Template for qualitative case studies/stories

These templates are currently tailored to LEAD but could be adapted for other NZT projects.

### Template for case studies of project activities

Case studies can make your project activities real to potential replicators. They can also capture important learning about how things were done, and what worked well or less well. The template below is provided as a starting point to structure a case study – it can be adapted as needed.

Think about the audience for, and purpose of, the case study when deciding how long it should be. Is this a short half or one-page case study for a website or social media post, or is it a more technical, longer case study that will be included as an annex in a report, or a case study to be used in a more technical presentation at an event?

The NZT project may want to create a designed template for creation of case studies that could be completed by a range of partners, staff members and replicators, and shared within the 'NZT community'. The prompts below don't necessarily need to be used as headings, but it can be helpful for sets of case studies to have similar structure to each other, so that the reader knows what to find where.

Title of case study	Choose a name that sums up what the case study is about
Photo or image	This helps to make the case study more eye catching, and will help with any social media posts. Make sure you've got permissions
Who are we?	A little background on who the case study is about
What we've been doing?	Outline the purpose of the activity and (briefly) what was involved
What difference did this make?	Draw out the outcomes and impacts of the activity, in terms of the goals of NZT
What helped to make this a success?	Success factors for this activity
What were the challenges, and how did we deal with them?	Don't skate over the difficulties – others are likely to encounter similar challenges

What resources were needed?	How much staff time and cost was involved? What skills would someone else need to do this?
What are the next steps in this activity?	What happens next for your activities
What have we learned from this?	Lessons for others trying something similar
Sources of information that may be useful	Websites, guidance etc
Date case study was made	Date of publication and dates (from /to of case study itself)
Sign off process	Approvals/sign off by RVE

### Template for 'stories' showcasing individuals or groups

Stories are powerful ways of evidencing impact to potential customers, to funders, project partners and potential replicators. The template below is just a starting point to capture a story in written form – you may well choose not to use headings, but may want to cover some of the points flagged in the template. Videos, blogs and vlogs provide additional ways for people to tell their stories. You need to think carefully about privacy permissions, making sure that someone telling their story is clear about how the material they provide will be used, how it will be shared, whether it will be anonymous. If their views or identity are identifiable, you will need to make sure they have given appropriate permissions.

As with case studies, it's important to think about how the stories will be used when deciding how long to make them, whether to make them anonymous or not, and whether to present them in the first or third person ('I did this' vs 'XXX did this').

Title and date of story
Photo or image
Who is this about, and how did they get involved in the project?
What difference has the project made to them, so far?
What made this work (or not work) for them, so far?

Could anything have been improved for them?

What's the main message from their story?

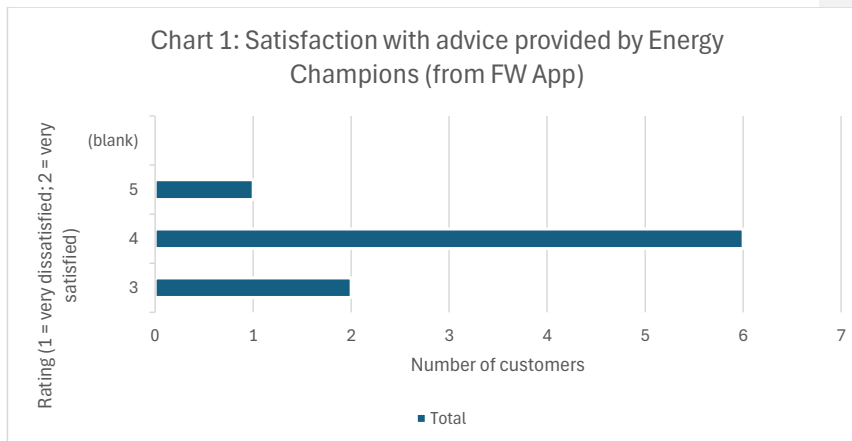
## Appendix H: Template monitoring and evaluation report for LEAD

This report template is currently tailored to LEAD but could be adapted to other NZT projects. It is structured around the proposed MEL research questions for NZT in relation to LEAD.

### RQ1: How far are LEAD activities helping to establish awareness of, and trust in, and systems for RVE delivery of energy services within NZT target communities in Bacup?

Present statistics on:

- Number of customers reached by LEAD to date (from LEAD indicators)
- Number of customers signed up to FW App to date (from LEAD indicators)
- Chart showing Level of satisfaction in service provided by Energy Champions (from FW App and/or customer survey)



- 
- Chart showing level of trust in Energy Champions (from customer survey)

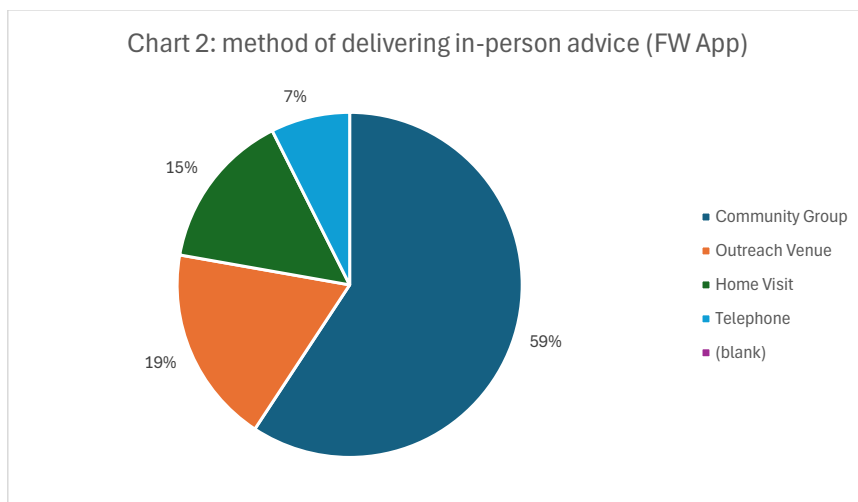
[add qualitative insights/learning points in response to RQ1]

**RQ2: What can be learned from LEAD activities about how best to implement and improve NZT's REACH-ENGAGE-RETAIN model?**

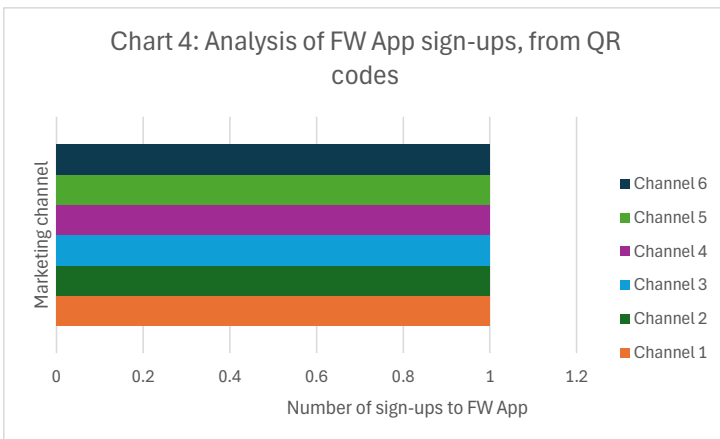
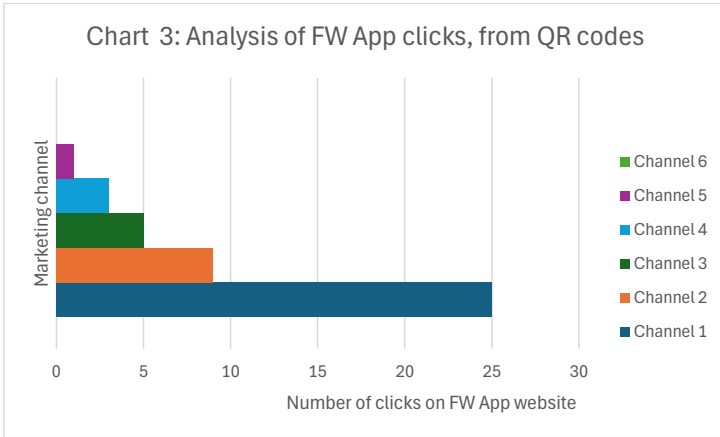
[add text introducing the REACH-ENGAGE-RETAIN model and explaining why it matters, both for LEAD and for NZT]

**RQ2a: What is the relative effectiveness of different methods in reaching, engaging and retaining different types of customers?**

[explain the main methods used to reach customers to date by LEAD, as illustrated in Chart 2]



[Introduce and explain statistics shown on the effectiveness of different methods – as shown in charts 3 and 4 below]



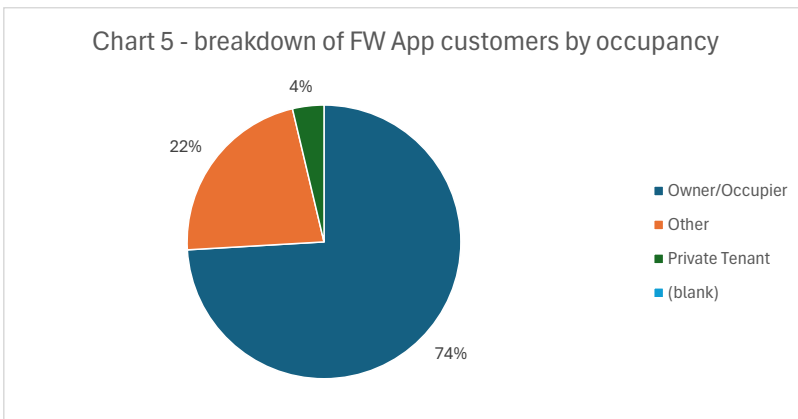
[when available, add chart showing level of retention of customers in FW App – e.g. drop-out over time]

[add qualitative insights/learning points by customer group (e.g. vulnerable/non-vulnerable; different age groups; different levels of household income), outlining insights on the best methods for reaching, engaging and retaining them (based on evidence to date).]

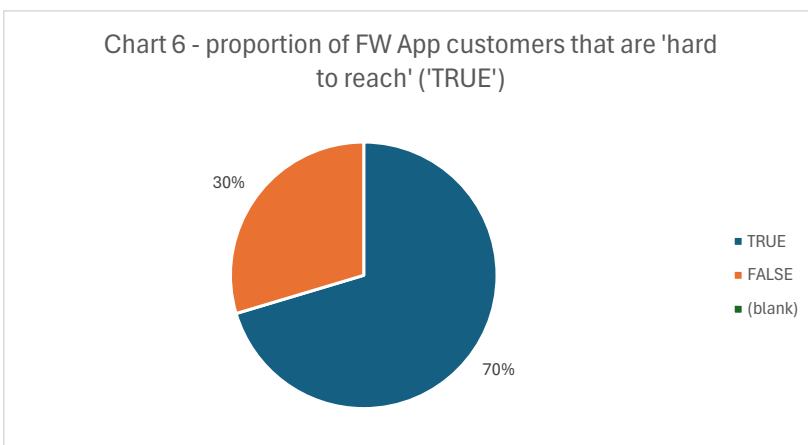
**RQ2b: How are different types of customers engaging (or failing to engage) with the FW App and - based on this - how can the App best be used within the REACH-ENGAGE-RETAIN model?**

[introduce the next few charts, which show breakdown of consumers engaged to date by category]

[add text to explain Chart 5 - nearly three quarters of FW App customers are owner-occupiers]

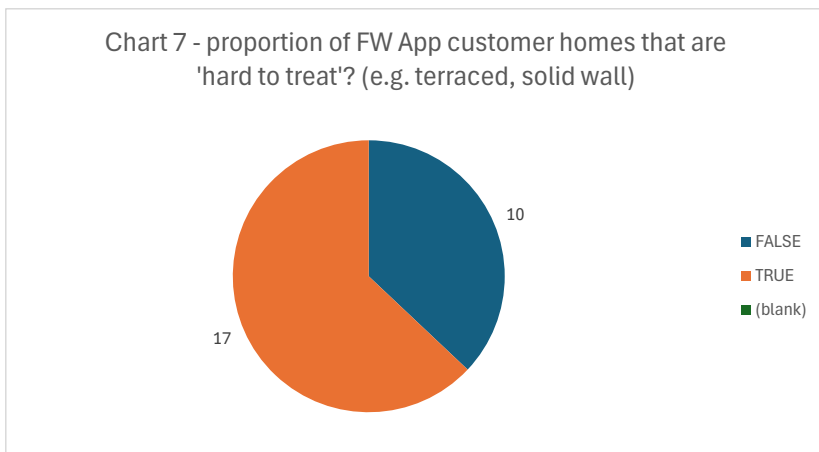


[add text to explain Chart 6 - around 70% of FW App customers are 'hard to reach' - explain what this means]





[add text to explain Chart 7 – over 60% of FW App customers live in 'hard to treat' properties – explain what this means]

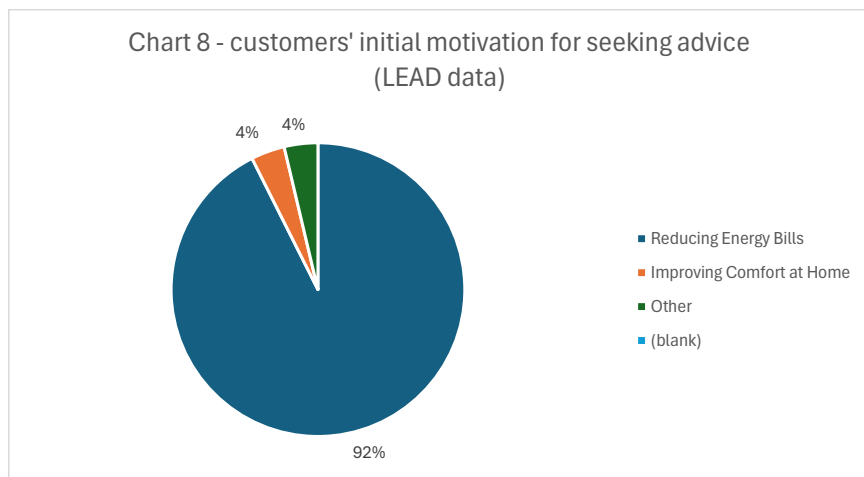


[when available from customer survey, add statistics/charts on the proportion of customers who engage directly with the FW App, and the types of customers who do this]

[in the absence of statistics/charts about customers engaging directly with the App, add qualitative insights on which types of customers engage most readily with LEAD, and which are able to engage directly with the FW App]

**RQ2c: Why do different types of customers remain engaged or drop out from LEAD, and – based on this - what is the best way of building cohorts of potentially interested customers for NZT?**

[introduce statistics on customers' initial motivations, for those engaging with LEAD]

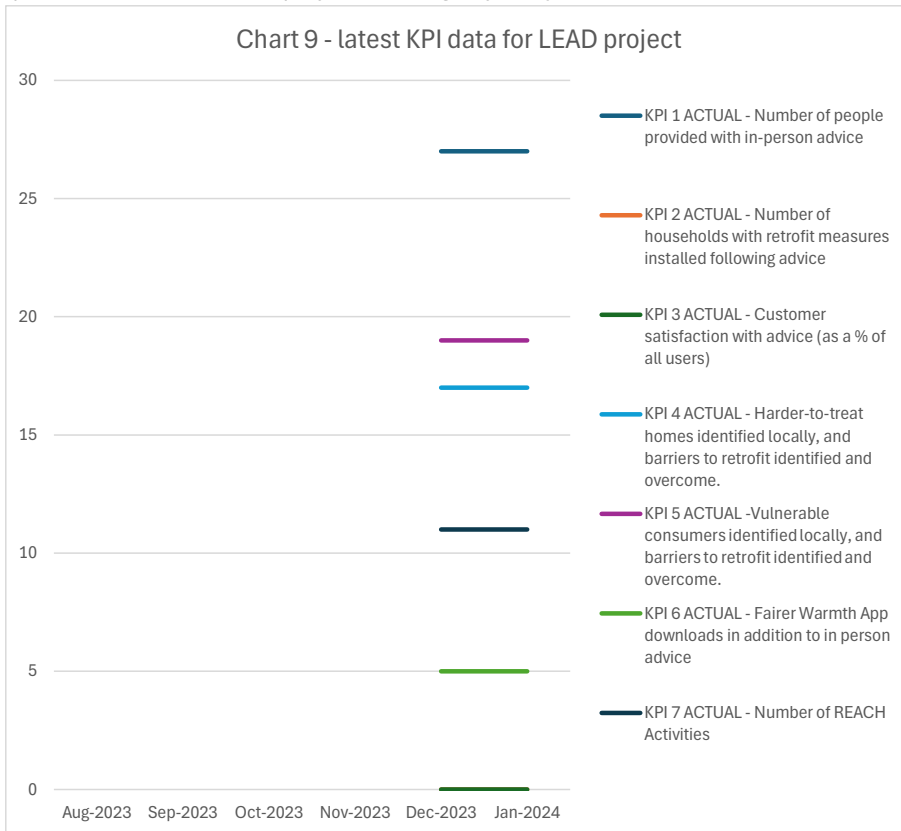


[add insights on engagement and retention rates for different types of customers, and how these relate to motivations]

**RQ3: How successful have LEAD activities been in encouraging different types of customers to implement energy efficiency advice and how have LEAD activities impacted on customer welfare and energy use? Based on this, what can be learned from this for the design of future NZT energy services?**

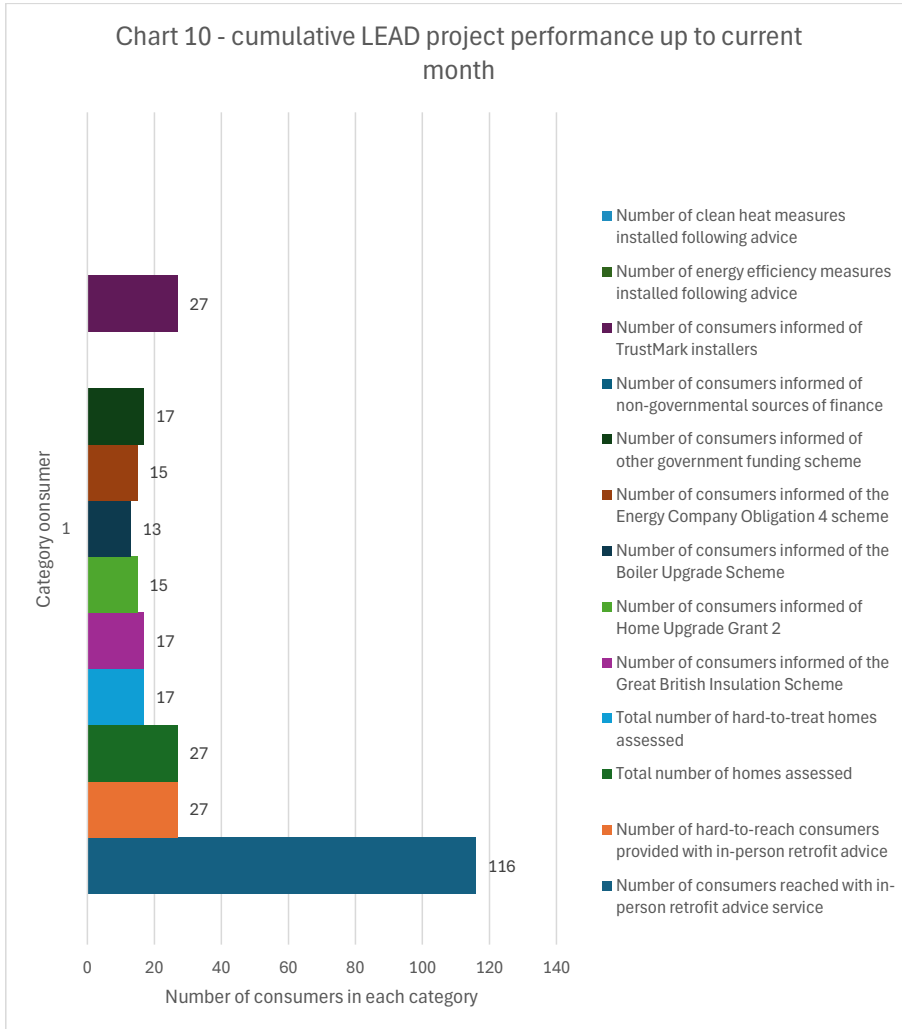
[Introduce KPI data from LEAD, and describe key points relating to the latest cumulative data for the KPIs.]

[present KPI data for LEAD project, showing trajectory over recent months]

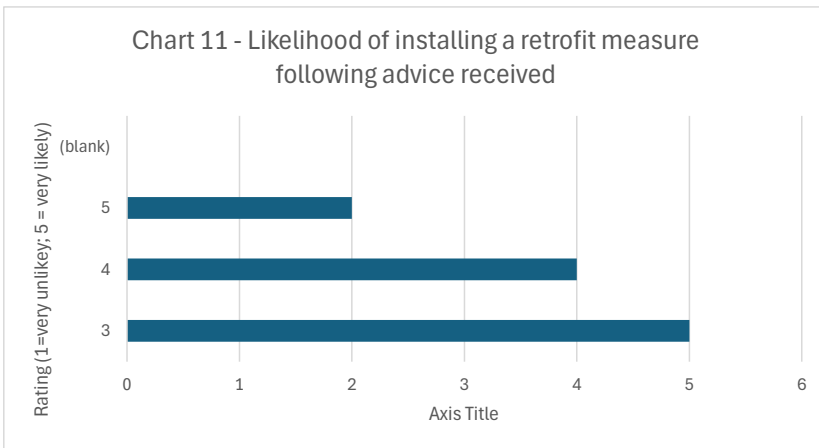


[present statistics for LEAD project performance up to the most recent month for which data is available]

Chart 10 - cumulative LEAD project performance up to current month



[introduce the LEAD indicator re likelihood of installing a retrofit measure – as assessed by Energy Champion]



[when available from customer survey, add charts/statistics on ACTUAL take-up of retrofit measures by different types of customers]

[when available from baseline statistics and customer survey, include charts/statistics on customer impacts i.e. changes in comfort levels, damp/mould problems and energy bills, before and after customer engagement with LEAD project]

[add insights/learning to inform future of NZT project]



## CAG CONSULTANTS

Founded in 1983, CAG Consultants is an independent, employee-owned co-operative. We provide support, research and analysis, policy advice and training in a wide range of fields relating to sustainable development and climate change. We have practitioners in stakeholder & community involvement, regeneration, evaluation, economics and regulatory affairs. We deliver high quality, innovative and thoughtful work for our clients, who include government departments, local authorities, public agencies, the NHS and regeneration and community planning partnerships across the UK. We pride ourselves on our strong ethical approach and our commitment to social justice and improving and protecting the environment.

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