

Energy Coaching Visit Facilitation Guide

As an energy coach, you will have technical understanding of home performance and have useful knowledge to share with whānau, to help them make the most out of electricity in their homes.

This guide outlines how you should conduct an energy coaching in-home visit, the different elements of the visit, and how to share the knowledge you've gained as an energy coach.

Remember that each whānau is different

Every whānau will have different needs and your approach will need to be responsive to what is happening for the whānau. Your role as coach is to help empower whānau to actively manage their energy and electricity needs. Through an energy coaching in-home visit, you'll be able to do this by helping them grow their understanding about using electricity efficiently, to read their energy bills, and to build their confidence to reach out to their power company if they need support or have questions about their electricity account.

It is good to be curious as an energy coach so you can offer the best support to meet a whānau's needs. This curiosity means you listen to whānau, look around the house, and decide how best to help that whānau on that day. From your training you will have a lot of knowledge and skills to draw from to give the most appropriate advice and support.

You will be curious about:

- How does this whānau engage with their energy, their house, their budget and their health?
- What is important to this whānau in this house?
- What is the main issue related to energy in this house? (using your detective skills!)
- Who else can you refer this household to for specialist advice – do they need budgeting support, or more detailed home performance support?

- What is the best way to tailor advice to this whānau?
- What is the most effective tip you can offer this whānau so they have a positive experience and can empower themselves with their energy use and health?
- What is the best way to tailor advice to this whānau?

Keeping yourself safe

As you are entering someone's home and there are potential risks, you need to understand the health and safety policy you are working under. Your organisation will need to advise you of your own organisation's health and safety plan and procedures for off-site working, and you will need to be appropriately trained by your organisation in this before you start as an energy coach.

In the great majority of situations, people conducting in-home visits experience no problems with their personal safety and have an interesting and enjoyable time. However, it is important to take positive steps to maximise your personal safety. Things that might put you at risk in a home visit situation include dogs, working by yourself, an angry person, or drug and alcohol use affecting behaviour.

Most important to remember: If you feel uneasy or uncomfortable in a situation, do not ignore it – remove yourself calmly and politely. You do not have to continue the visit.

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Cultural awareness on a home visit

New Zealand is a multicultural country, and energy coaching may include households who have very different world views to yours. It is important that you recognise this and conduct your visits in a manner that is respectful. Remember you are an invited guest in someone's home.

The health and education sectors have been very proactive about addressing cultural sensitivity, and this section is informed by their approaches. Cultural sensitivity is knowing that similarities and differences exist between cultures and not being judgemental or dismissive about these differences.

The following have been identified to help support you and ensure your visit is completed in a culturally appropriate manner:

- Take your time entering the home – take care to ensure the whānau are happy for you to continue. This is particularly important when participants may speak English as a second language.
- Take your cues from the client regarding greetings (e.g. shaking hands and eye contact) with whānau and other people present.
- Be observant when entering the home. Are outdoor shoes collected at the entranceway? If so, don't walk in without removing or changing your shoes. Ask every householder if you need to remove your shoes on entering.
- Accept that a client might have a room they don't want you to enter (someone might be ill or the room may be used for prayer).
- Don't sit on tables or benches where food is prepared or eaten. Similarly, don't place outside items (e.g. your bag which has been sitting on the steps outside) on benches and tables.

Energy coaching kit

You may want to take a technical coaching kit along to the in-home visit. An energy coaching kit contains tools and props which will help make your visit run smoothly and to assess a household's energy use.

- 1 x hygrometer – to measure the indoor temperature and humidity
- 1 x 10L bucket – to measure the shower flow
- 1 x digital thermometer – to measure the hot water temperature at the tap
- 1 x demonstration insulation lagging for hot water pipes – to show whānau how they can reduce heat loss from hot water pipes
- 1 x LED bulb – a demonstration to show whānau what an LED is compared to a standard bulb
- 1 x tape measure – to help whānau measure windows for curtains if required

Paperwork to take on a visit:

- Consent form
- Checksheet
- Action plan
- Evaluation survey form

You could also provide the whānau with a koha (gift) for their hospitality of hosting you in their home.

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Steps in the energy coaching visit:

1. Consent

Once you've been invited into the home, and have introduced yourself and the reason for the visit, the first thing to do is to get written consent that the whānau is willing to participate in energy coaching.

You can sit down with the whānau and explain that before the visit starts, you'll need their consent. Either give them the consent form to read through or help them to read through it so they understand what they are signing up to. This form contains important information about the data you will be collecting, what happens to their data, and how you will keep their privacy safe.

2. Korero (talk) about energy use in their home

Using the checklist as a guide for questions, the next step is to find out how the whānau use energy in their homes. Run through the questions on the checklist with them – noting on the checklist where there are referrals to other organisations or actions for the whānau.

The checklist gives you guide times for how long each section should take to complete.

Things to bear in mind- do they have enough heating for the whole whānau in the living room and bedrooms? Are the curtains adequate to keep them warm in winter? Do they need more support with getting insulation, curtains, or other home improvements?

3. Checking hot water & the meter

When you get to the hot water section of the checklist – this is your opportunity to do some technical testing in the home and see if there are ways that the whānau can be more efficient with how they manage hot water use.

- Check the meter – this is usually outside but it is good to teach the whānau what it does and how to read it
- Check if the hot water cylinder is insulated (remember that newer models are insulated on the inside so you can't see it)
- Check the shower flow (filling the 10L bucket in one minute)
- Check the hot water temperature at the tap (remember to leave the thermometer under a running hot tap until it gives a temperature reading)

4. Kōrero (talk) about energy budgets & bills

Continue to follow the checklist (Section 7) and spend some time with the whānau discussing what is affordable for their energy bills. They may want to know how to calculate the cost of running appliances, especially heaters.

5. Make a call to the power company

As part of the visit, and with whānau consent, you could facilitate a three-way phone call with the whānau and the electricity retailer to discuss the whānau's circumstances and their energy plan. The electricity retailer will be able to advise on appropriate plan and payment options (NB. For privacy reasons the energy retailer will require consent from the named customer on the power account to speak with any third parties).

6. Complete the Action Plan

Review the checklist with the whānau - where there are actions noted for the whānau, list these on the action plan so they can see what they can do themselves. This should be completed with the whānau so they are happy to take forward the recommended actions.

7. Evaluation Survey

Ask the whānau to complete the 2 minute evaluation survey- this is very helpful for feedback so that you can improve the service provided in the future.

Remember to thank the whānau for their time and letting you visit them in their home. You'll touch base with them again when you do the follow-up call 6-8 weeks later.

The whole visit should take about 90 minutes in total. As a guide we have provided time indicators for each section on the checklist.

Over time, as you build up your experience as an energy coach, you will get quicker, and your visits will run smoothly. This document is just a guide to help you as you find the best ways for you to deliver the service and communicate the key message about energy and electricity in your community.