



ComActivate

Enabling community action for energy sufficiency

D4.2 CAPACITY BUILDING MATERIALS AND TRAINING TOOLS

April 30, 2025

Habitat for Humanity International



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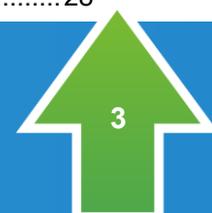
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Background

Capacity building for energy efficiency of multi-apartment buildings (MFAB) comprises the development of awareness raising, knowledge, practical skills and communication capability to implement energy saving measures. Energy efficiency of MFAB has its own specificities, so the joint approach of all stakeholders is crucial to improve and implement energy measures and to reduce energy poverty.

Capacity building materials and training techniques are essential to empower homeowners (HO), companies and other stakeholders in energy efficiency renovation MFAB to act together and create strong and resilient community. These training techniques and tools are aiming to provide sufficient skills, knowledge and attitudes to combat energy poverty and increase energy efficient retrofits of MFABs. These techniques can range from simple behavioural changes to more complex technological interventions that improve energy efficiency.

The title of this publication is Capacity building materials and training tools and is developed to support any trainers, facilitators and consultants who will implement training and workshops for the stakeholders in the residential energy efficiency sector. Designed to support implementation of the ComActivate project, this deliverable is following the D 4.1. Capacity Building Program for Stakeholders and Training needs assessment among different stakeholders. During the previous activities the following stakeholders were identified as a priority: homeowners, Homeowner Associations (HOA), construction and building management companies, Resource Centers (RC) employees. Also, there were identified 4 Training modules: Technical Knowledge; Legal Aspects; Financial Aspects and Communication skills. Some of the training modules are more applicable for different stakeholders, which was clearly recognized in the Capacity Building program (Deliverable 4.1.).

The capacity building materials and training tools for ComActivate stakeholders can differ by country, by capacity of trainees and by type of stakeholders. The facilitators and trainers will assess the general level of knowledge, skills and attitude of the group of participants and will design concrete training program, select the training techniques and tools and will prepare training materials. Based on the actual situation and the needs assessment findings, the trainers and facilitators will design training and/or workshops that fit the requirements of particular stakeholders. The trainers and facilitators are obliged to deliver the training sessions that are beneficial for the whole process of energy efficiency upgrades in MFAB.

Deliverable D4.2 Capacity building materials and training tools is part of task T4.1 Capacity building in the communities of Work Package 4 – Resource Centres Support Services.

This document builds on deliverable D4.1 Capacity Program for Stakeholders and its primary goal is to further develop the capacity building materials in form of tools specifically designed for selected target beneficiaries. These materials will support training courses designed to assist the beneficiaries, including trainers.

The deliverable is initially prepared in English and will be translated into 3 target languages: Bulgarian, Hungarian and Lithuanian.



1 Summary of the Training Modules

Training modules consist of four separate modules:

- Module 1 – General/Advanced technical knowledge
- Module 2 – Financial knowledge
- Module 3 – Knowledge and skills in facilitation of renovation process
- Module 4 – Communication and digital skills and tools

Each module guides the instructors through a specific area providing general information that can be adapted to meet specific needs. Instead of offering rigid instructions, these modules are designed to be flexible, allowing easy modification. They ensure that all readers understand the key aspect essential for the training.

Throughout the four different modules, there are 5 aspects that the trainings should focus on:

- **Technical Knowledge about energy sufficiency:** Subsidy schemes, Benefits of renovation/RES, Advanced EE and RE technology, Energy Sufficiency, Preparation before investment into EE
- **Legal Aspects of energy sufficiency:** Specific legal frameworks and regulations related to EE and RE, Contracts, legal documentation for projects, social rights of vulnerable people.
- **Financial Aspects for energy sufficiency:** Funding opportunities, Platforms to monitor, Cost/benefit analysis of EE/RE investment, Financial planning and securing funding for large-scale renovation, subsidies, financial support for vulnerable people.
- **Skills/Comms (Communication and facilitation skills):** Facilitation and moderation group session, decision making processes in a group, Leadership, Building trusting relationship with residents, Communication skills, persuasion, presentations, Communications Plans, Online Platforms.
- **Tools/Equipment:** Project management software, Info Packages, Software for energy management and monitoring.

Additionally, part of the trainings specifically focuses on RC/Municipality Employees, including: Technical, Legal, Financial Aspects of EE and RES; Emerging EE/RE Technologies; Deep understanding of EE/RE technologies and benefits of renovation; Complex legal and regulatory environment; Regulation - building codes legal aspect of condominium management; Financial Structuring and Investment environment for EE/RE.

Other than the regular technical aspects of EE and RES in the housing sector, additional support and guidance for providing support from the Resource Center should be provided, through:

- **Online and in-person support:** Online comms tools and platforms; In-person support techniques and tools
- **Tech knowledge and skills in facilitation renovation:** Conflict resolution, facilitation, negotiation
- **Info materials and Comms;** Website development: Designs skills; Social media platforms

In general for all of the trainers and Resource Center employees we are recommending that they go through the whole [e-learning platform](#) developed in the scope of project ComAct. The ComAct e-learning platform contains two course categories, one presents the most general educational information on energy efficiency and utilizing renewable energy sources in the homes, and the other one provides a more detailed course for energy advisors acting as energy managers in one building. These courses are available in English, Hungarian, Bulgarian, Lithuanian, and additionally in Ukrainian and Macedonian language.

All the materials provided should support the General Services that each specific Resource Center will provide to its customers. The services are described in different project deliverable D 4.4 .



According to the ComActivate D4.1. Capacity building programme for stakeholders, based on training needs assessment, training materials and tools need to be adjusted to the specific training audience. In ComActivate, the identified training audience is:

- Homeowners,
- Homeowner Associations (HOA),
- Construction companies
- Building management companies, and
- Resource Centres (RC) employees

	Training audience	Comment
Technical Knowledge	Homeowners HOA	Focus on benefits from energy efficiency, subsidies schemes, main steps in EE renovation
	RC Employees Building management companies	Focus on Subsidies schemes, Energy Sufficiency, Preparation before investment into EE
	Construction companies	Focus on energy sufficiency, different needs of homeowners based on their social status
Legal Aspects	Homeowners HOA	Focus on legal procedures for consent and decision-making procedures
	RC Employees Construction companies	Focus on energy and housing regulations, rights of vulnerable groups
	Building management companies	Focus on energy efficiency standards, rights of vulnerable groups
Financial Aspects	Homeowners HOA	Focus on financial incentives, financial literacy, basic on costs for energy efficiency and renovation,
	RC Employees Construction companies	Focus on cost calculation for materials, services and goods, subsidies and other incentives, energy audits, mechanisms for supporting vulnerable groups
	Building management companies	Focus on supporting vulnerable groups, subsidy schemes and incentives
Communication skills	Homeowners HOA RC Employees Building management companies Construction companies	Facilitation and moderation group session, decision-making processes in a group, Leadership, Building trusting relationship with residents, Communication skills, persuasion, presentations, Communications Plans, Online Platforms.
Tools/Equipment	Homeowners HOA	Focus on tools for monitoring energy consumption at households, energy efficiency measures
	RC Employees Building management companies Construction management	Focus on Project management software, Info Packages, Software for energy management and monitoring

1.1 Module 1- General/Advanced technical knowledge

Building renovation presents a variety of possibilities, opportunities, benefits and challenges that needs to be fully understood. Module 1 serves as a guide for understanding the building renovation process. A clear understanding of the benefits of renovation, such as energy sufficiency, the use of renewable energy sources and renewable energy technology will help beneficiaries conduct the training efficiently. Another key aspect is the legal framework, which must be clearly understood, Since the legal framework



may differ across countries, it will be tailored to fit specific country context of each target country. Proposed general topics to be included in the training:

- Benefits of renovation, RES, concept of Energy sufficiency
- Advanced EE and RE technology
- Specific legal framework
- Energy Sufficiency vs. Energy Efficiency: Practical Applications
- Occupant Behaviour and Energy Use Patterns
- Monitoring, Metering, and Energy Management Systems
- Reducing Energy Poverty through Sufficiency Measures
- Load Optimization and Peak Demand Reduction

1.1.1 Aim of the module – Learning Objective

This module should serve as an introduction to the possibilities, opportunities, benefits, and challenges connected to building renovations. The importance of the topic is multifaceted and increasingly relevant in today's world. Energy efficiency improvement, energy sufficiency, and the deployment of renewable energy sources (RES) are becoming integral parts of daily life for everyone, not just professionals in the field. This shift reflects in a need for awareness raising to manage energy more effectively. The topic is closely tied to the fight against climate change. As the global environmental programs seek to reduce greenhouse gas emissions (GHG), the role of energy efficiency and renewable energy becomes ever more critical. Moreover, the European Union, along with national and local governments, has set ambitious targets for decarbonisation and climate change mitigation. Meeting these goals is essential for creating a sustainable future. In addition to environmental benefits, improving energy efficiency and adopting renewable energy sources offer direct financial advantages, such as cost savings on energy bills. However, despite the technical feasibility of many energy solutions, there can be legal challenges or restraints. Sometimes, what is technically possible is not yet supported or fully covered by the national legal framework, showing obstacles to implementation.

1.1.2 Techniques for module

While attending the training for this module the participants should gain more knowledge on the general principles of energy efficiency and renewable energy sources implemented in the housing sector therefore the techniques should involve in depth analysis, corona knowledge exchange and great focus on analytical thinking.

Recommended training techniques for this module include:

Training Technique	Examples of Practical Use
Brainstorming	Can be used as starting point to get to know the crowd, on which level of general knowledge of energy efficiency and energy sufficiency they have, gather new ideas for common action, and overall set the tone for the workshop
Buzz groups	Gives the opportunity to the participants to share knowledge, experience and best practices in smaller groups on concrete subject, to hear each other opinion, and get closer relations
Case studies	Via deeper analysis on real case scenarios, the participants can shape their own opinions, gain knowledge and recognize best practices relevant for their community, or for some specific case in their community. Support decision making processes and enhance group cohesion.
Real situation/ problems solving	This technique gives the opportunity to the participants to share and recognize solutions best fit for their context. Support decision making processes, since the problem is analysed from different perspectives.



Role plays	If the participants are given this technique as learning activity, can enlarge their point of view on the matter, especially if they “put on the shoes” of others. Support the positive attitude towards problem solutions and overcoming differences in opinion.
Situation analysis	Similar as case studies, and real situations, this training technique, gives the opportunity to the participants to go deeper in the problem, analyse each aspect and come up with customized solutions

1.1.3 Supporting materials provided for the participants

Each country has specific policies, legal frameworks and regulations when it comes to implementing energy efficiency measures or renewable energy systems into the housing sector. Therefore, in the table below there are the most relevant national documents for each of the piloting countries presented, which should serve as a supporting material while the trainer is preparing the sessions. Additionally, situation analysis such as gap analysis of policies, needs assessment, market assessment can be used.

Table 1 Materials for understanding country-specific legal frameworks and regulations for EE and RES

Bulgaria	Hungary	Lithuania
National relevant documents		
<ul style="list-style-type: none"> • Energy Efficiency Act • The Renewable Sources Act • The Condominium Act • Present the latest versions of the updated Integrated National Energy and Climate Plan • Ensure general knowledge about the Long-term renovation strategy (LTRS) • Public Procurement Act, • Environmental Protection Act (for regulations for environmental impact assessments that may apply to large EE and RES projects) • Spatial Development Act: These frameworks establish the legal environment for contracting and implementing EE and RES projects in Bulgaria, ensuring compliance with national and EU standards 	<ul style="list-style-type: none"> • 9/2023 EKM decree on the energy performance of buildings as a cornerstone of technical standards related to renovation and new construction • Decrees related to energy communities and the latest regulations on installing solar panels (e.g. the modification of the 86/2007 law on electricity in 2024 on the ways of sharing electricity in multifamily buildings) • Local decrees on district heating and the national decree on making district heating measurable on household level (676/2023 government decree) • Local decrees on architectural protection as standards for installing new windows and doors and 	<ul style="list-style-type: none"> • Program for the renovation (modernization) of multiapartment buildings: main document to discuss with the latest amendments from July 2024. • Energy efficiency improvement program for neighbourhoods - Description of the procedure for the development and Implementation of neighbourhood energy efficiency improvement program (approved by the Government in 2016). • Government Decrees amendments (effective as of Sept 1, 2024) in the subsidy application: a new procedure for the preparation of the investment plan, a new methodology for calculating the cumulative contribution,



	<p>regulations on the change of the façade (e.g. the 2/2022 local decree of District 8 of Budapest on protecting the urban landscape)</p> <ul style="list-style-type: none"> • Policy concepts on electrification and the phasing-out of fossil fuels 	<p>rules for the provision and monitoring of State aid, maximum monthly contributions for the cumulative contribution and other contributions.</p> <ul style="list-style-type: none"> • Measures financed by Climate Change Program: modernisation of domestic heating and hot water systems in multi-apartment buildings; On 24 July 2024, the 5th Small Renovation Call for renovation of old, inefficient heat points was launched.
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Situational analysis

- | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Sunrise project: SUNRISE project GAP analysis on RES. • Sunrise project: Needs assessment of HOAs and HO for implementation of smaller RE measures | <ul style="list-style-type: none"> • Sunrise project: SUNRISE project GAP analysis on RES. • Sunrise project: Needs assessment of HOAs and HO for implementation of smaller RE measures. |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

EU level relevant documents

- [Energy Performance of Buildings Directive \(EPBD\)](#)
- [Energy Efficiency Directive \(EDD\)](#)

In addition to the presentation of potential technical solutions, the external consequences of technologies should also be discussed by the participants, which are strongly linked to behavioural aspects: like proper regulation of radiators or proper ventilation to avoid the degradation of air quality.

ComActivate project has developed materials (e.g. presentations, short memo) regarding the concept of energy sufficiency which can be provided as complementing materials for education on this topic. Further materials on this topic include:

- IPCC AR6 WGIII - Climate Change 2022: Mitigation of Climate Change. <https://www.ipcc.ch/report/sixth-assessment-report-working-group-3/>
- Saheb (2021) Sufficiency and Circularity. The two overlooked decarbonization strategies in the "Fit For 55" Package. Chrome-extension://efaidnbmnnnibpcajpcgclefindmkaj/https://www.openexp.eu/sites/default/files/publication/files/2021-09-30_sufficiency_and_circularity_eeb_brief.pdf
- Spengler, Laura. (2016). Two types of 'enough': sufficiency as minimum and maximum. Environmental Politics. 25. 1-20. 10.1080/09644016.2016.1164355. https://www.researchgate.net/publication/299477293_Two_types_of_'enough'_sufficiency_as_minimum_and_maximum
- Thomas et al. (2019). Energy sufficiency policy for residential electricity use and per-capita dwelling size. https://epub.wupperinst.org/files/7184/7184_Thomas.pdf
- Wiese et al. (2022). Why sufficiency? An interdisciplinary perspective. https://osf.io/preprints/socarxiv/bgrp3_v1



It can be suggested for the trainers to provide:

- a list of relevant institutions, laws and by-laws and their interconnections needed for implementing EE measure or installing RES in one MFAB.

1.2 Module 2 – Financial knowledge

Proper financial knowledge enables beneficiaries to make the most of the financial opportunities available to them. Currently, there are numerous options, including funds, subsidy schemes and other financial resources that can be utilized. Module 2 will equip beneficiaries with an understanding of financial models and tools, helping them to prepare for long-term financial planning. The training supports homeowners, companies, building management companies, and homeowner associations in multi-apartment buildings to plan, finance, and implement energy efficiency (EE) renovations in a financially sound and informed way.

They will increase their knowledge and skills into funding opportunities, subsidy schemes, financing mechanisms, and incentives for EE and renewable energy solutions that can lead to the energy sufficiency of the multi-apartment buildings. The training will help participants to reduce upfront costs and select financing models that best match their needs. From the practice it is obvious that homeowners and HOA need practical guidance on contracting service providers, loan agreements, and subsidy contracts, in order to increase confidence and reduces financial and legal risks.

The following topics are recommended:

- Financial literacy
- Cost–Benefit and Life-Cycle Cost Analysis
- Financial planning and securing funding for large scale replication
- Funding opportunities including Subsidy schemes.
- Financing Mechanisms and Incentives for EE and RES
- Energy Price Volatility and Risk Management
- Contracting service providers, loan contracts, subsidies agreements
- Payback Periods and Financial Feasibility of EE Measures

1.2.1 Aim of the module

Deciding what constitutes common ground between being innovative, climate-friendly, and financially viable is crucial for successful project planning and execution. It involves balancing cutting-edge solutions with environmental benefits and cost-effectiveness. Additionally, utilising available funds, subsidy schemes, and other financial resources is essential for reducing investment costs and making projects more feasible and attractive.

1.2.2 Techniques for module

Since the financial knowledge and available financial opportunities on energy efficiency and renewable systems implemented in the residential sector are life material, that has constant updates, the training techniques used should include exchange of ideas, knowledge sharing, as well as analytical thinking and broader consideration.

Recommended training techniques include:

Training Technique	Examples of Practical Use
Brainstorming	This technique provides the perfect opportunity to share information and knowledge on financial opportunities, insentives and subsidies that are providing energy sufficiency in multi-apartment buildings.



	Supporting the decision-making process and common understanding on financial models.
Buzz groups	If the brainstorming is followed up with buzz group, it can even bring up some ideas for how those financial opportunities can be implemented. Talking about particular financial aspect in smaller groups enhance common understanding and supports problem solving processes.
Case studies, Situation analysis	These techniques can be used to deepen the knowledge on the financial opportunities and their implementation. In addition, they can serve as a learning curve on recognizing adequate EE reconstruction projects, based on existing analysis of cost-benefit scenarios from real implemented projects.
Role plays	For this module it is crucial to recognize the needs, availability and knowledge to the funding opportunities to create the most appropriate approach and visibility to finances to them.
Real situation/ problems solving,	Once the basic information on available financing models and subsidy schemes is clear, this approach helps participants assess the specific strengths and weaknesses of their situation. It enables them to identify how to best use available opportunities, address potential challenges, and select the most suitable financial model to achieve energy sufficiency for their building.

1.2.3 Supporting materials provided for the participants

In the table below, the most important funding opportunities and subsidy schemes are provided. In each of the countries the trainer should present the financing opportunities as simple and clear as possible.

Table 2 Country - specific materials for financing and subsidy schemes for EE and RES

Bulgaria	Hungary	Lithuania
Sources of funding opportunities		
<ul style="list-style-type: none"> • The Structural Funds 2021-2027, Invest EU program • The Modernisation Fund • International initiatives/LIFE/Horizon Europe/EUCF/SUNRISE/ NET ZERO CITIES 	<ul style="list-style-type: none"> • Generation of own funds (e.g. housing savings schemes, collecting arrears) • State funding for joint loans • Local subsidy schemes • Sources of energy companies: energy efficiency obligation scheme (the latest regulation on the rules of applying the energy efficiency obligation scheme can be found in 25/2025 Law on modifying the 57/2015 Law on energy efficiency) 	<ul style="list-style-type: none"> • Funding for MFAB housing renovation provided by ILTE (former INVEGA, state-owned financial institution) through the Multi-apartment Building Modernisation Fund. The Fund has allocated €192 million for the renovation of multi-apartment buildings from the European Union (EU) investment funds for the 2021-2027 funding period. • The Law on Associations of Owners of Multi-family Residential Buildings and Other Purpose Buildings



		establishes a procedure for the HOA to participate in building renovation processes
Information for subsidy schemes		
<ul style="list-style-type: none"> Such schemes have been available under several national EE and RES programs as part of the National program for energy efficiency in multi-apartment buildings and the National Recovery and Resilience Plan of the Republic of Bulgaria. However currently, there is no continuous mechanism in place. Good examples from abroad can be presented, too 	<ul style="list-style-type: none"> Interest rate subsidy scheme for loans to renovate the common parts of condominium and cooperative buildings. Sometimes locally available small scale municipal subsidy schemes. Application of the energy efficiency obligation schemes that result in a small-scale grant after renovation 	<ul style="list-style-type: none"> The Law on Monetary Social Assistance to Needy Residents discusses the procedure for participation in renovation, and in which cases there is no cost for renovation for needy residents. Law on state support for the renovation (modernisation) of multiapartment buildings (valid from Jun 1, 1992, new version 2022). The Law establishes the conditions, methods and procedures for the provision of state support for the renovation (modernisation) of multi-family houses, as well as the provision of preferential credits for the renovation (modernisation) of multi-family houses

When it comes to additional supporting materials for the trainees, it is suggested to develop country tailored:

- lists with websites including links to EE/RES project funds
- lists with national indicators serving the purpose of following the impact of EE
- improvements and RES utilisation in residential sector
- examples/ templates/ guides of typical reports

1.3 Module 3 – Knowledge and skills in facilitation of renovation process

Module 3 focuses on the crucial process of trust building with various stakeholders. As a training lead, it is essential to understand how to effectively engage with beneficiaries and communicate with them clearly. The renovation process can often be perceived as complex or overwhelming by many, making it all the important for training leads to grasp the best strategies and techniques and ensures that all parties are aligned with the project's goals.

Participants can learn how to engage residents and other actors in a clear, inclusive, and structured way, helping to reduce resistance and address the complexity often associated with renovation projects. In addition, the module covers how to design and lead productive meetings, including setting clear objectives, defining expected outcomes, and structuring agendas that keep discussions focused and constructive.



Recommended topics for Module 3:

- Facilitation and moderation leadership
- Building trusting relationship with residents (including conflict resolution, negotiation skills)
- Principles of neutral and inclusive facilitation in a safe and productive group environment
- Facilitating meetings with diverse interests and power dynamics
- Building trust and cooperation among stakeholders
- Facilitation on decision making (consensus and collective decision-making)
- Techniques for prioritization and voting
- Designing and structuring productive meetings, setting objectives, outcomes and agenda.
- Principles of neutral and inclusive facilitation in a safe and productive group environment.

1.3.1 Aim of the module

Building trust with different stakeholders is vital for successful project outcomes. Acting as a bridge between citizens, the private sector, and the local government facilitates collaboration and ensures that all parties are aligned with the project's goals. Additionally, managing the renovation of a single building with many people involved can be challenging, particularly if the renovation roadmap is complex and difficult to follow. The training enables participants to guide renovation processes more smoothly, build lasting trust with residents, and ensure alignment around shared renovation goals.

1.3.2 Techniques for module

The training for this module should prepare the participants to coordinate energy efficient renovation from start till the end, while taking into consideration all the different factors that can affect one renovation work. Additionally, this should prepare them to use different facilitation techniques with different stakeholders.

Recommended training techniques include:

Training Technique	Examples of Practical Use
Case studies, Role plays, Situation analysis	Similarly, as explained in previous modules, these training techniques, provide standard get to know the topic in depth, as well as the other participants in the group. The hands on experience that offer these techniques is vital, when it comes to improving facilitation skills and analytical thinking
Consensus building	This training technique plays pivotal role on learning and hands on experience on facilitation skill development, constructive discussion and focusing on important solutions for problem resolution.
E- learning and on-line training	In the era of technology, implementing digital resources can boost technical confidence, and guide the participant towards using modern applications for attracting more attention.
Fishbowls	The fishbowl training technique helps the participants to observe as independent participants in discussion, nurturing developing an unbiased opinion for different situations, proving real skill when discussing or negotiating with homeowners or other stakeholders.
World café	The world café enables the participant to train how to quickly adapt to different personalities, approaches, and perspectives, while staying on focus of the main topic/ goal



1.3.3 Supporting materials provided for the participants

As per the materials for easier lecturing, the following examples can be provided:

- stakeholder mapping explanation, including power/interest matrix
- list with short explanations on conflict resolution technics
- list of steps to follow during one negotiation process
- list of most common challenges faced during one renovation cycle in a MFAB

1.4 Module 4 – Communications, digital skills and tools

The renovation process involves a diverse range of target groups, making proper planning a crucial aspect of its success. Effectively advocating for the project to all those involved requires strong communication skills. Module 4 is designed to help training leads to develop the ability to adapt their communication styles and content to suit different target groups. It will also provide strategies for sharing essential knowledge in a way that resonates with each group ensuring tailored communication. This will empower training leads to engage stakeholders more effectively and promote successful outcomes throughout the project.

Therefore, the following topics are of a greater importance in achieving successful results:

- Communication skills, persuasion, presentations,
- Communications plans,
- Marketing,
- Online Platforms.

What is the field of “communications”?

Communications refers to the strategic sharing of information with specific audiences using the channels and formats most effective for reaching them. It involves understanding who the target audience is and selecting the right tools to engage them, being it email communication (newsletters), social media, websites, events, or other platforms. The goal is not only to deliver information, but to ensure it is accessible, relevant, and received through the channels the target audience is most likely to use.

Online communications tools

Online communication tools play a key role in ensuring the RCs' visibility and in promoting its ongoing initiatives in an effective, targeted, and well-structured manner. A clear and consistent online presence enhances credibility and helps present information in a visually accessible and user-friendly way. Social media channels are particularly valuable for engaging younger residents and increasing outreach to more digitally active groups.

In practice, RCs typically rely on municipal websites, dedicated social media channels, and regular newsletters, which together provide a mix of broad public information and more direct, tailored communication with specific audiences. Using a mix of online communication tools creates an integrated communications mechanism allowing for building trust and credibility, cross-promotion, and low-cost outreach.

- **Website**

A dedicated website serves as the central digital hub for RCs, consolidating all essential information in one accessible, organized space. It allows residents to explore services, events, consultations, and guidance at any time, without needing to visit the RC in person. By presenting complex topics such as renovation steps, financing options, and technical guidance in a clear, structured way, websites make it easier for residents to make informed decisions. Additionally, a well-maintained website strengthens the RC's credibility, supports outreach efforts, and connects to other communication channels, creating an integrated ecosystem for engagement and information sharing. The website can:



- Work as a central information hub as the website gather all key information in one accessible place (services, events, consultations, opening hours, contacts).
- Allow for 24/7 accessibility while residents can access guidance and materials anytime, without visiting the RC in person.
- Include structured, topic-based content making the complex topics (renovation steps, financing, technical guidance) organized in a clear, user-friendly way.
- Provide support for renovation decisions with tools such as energy-saving calculators, product guides, and step-by-step renovation sequences that help residents make informed choices.
- Provide access to financing information, such as an overview of the available/planned subsidies, tenders, bank loans, and innovative schemes that support the uptake of renovation.
- Provide practical resources, such as downloadable templates (tenders, contracts), glossaries, FAQs, and myth-busting materials reducing confusion and administrative barriers.
- Connect with professionals by provision of databases of vetted contractors and designers, that increase trust and quality of works.
- Promote the services and events, including consultations, public forums, trainings, and community events.
- Be a gateway to engagement with provision of links to participatory processes, public consultations, and community initiatives strengthen civic involvement.
- Integrate the newsletter and promote the subscription options allowing for ongoing, targeted communication with different interest groups.

- **Newsletter**

Newsletters provide a direct, proactive way to reach residents with timely, targeted information. Unlike websites, which require users to seek out content, newsletters deliver updates straight to residents' inboxes, keeping the RC consistently visible and relevant. They allow for segmented messaging tailored to specific audiences (e.g. municipal tenants, community event participants, vulnerable households) while breaking down complex topics into digestible, actionable pieces. By fostering ongoing engagement, building trust, and encouraging participation in consultations, events, and funding opportunities, newsletters become a key tool in strengthening the RC's relationship with the community. Using the newsletter brings the following benefits:

- Direct communication channel – Information reaches residents proactively, without them needing to search for it.
- Regular engagement – Keeps the RC present in people's minds and maintains long-term relationships.
- Promotion of services – Reminds residents about consultations, support offers, and available RC services.
- Calls to action – Encourages concrete steps (book a consultation, attend an event, apply for funding).
- Updates on funding & deadlines – Ideal for sharing time-sensitive information about subsidies, tenders, and programmes.
- Simplifying complex topics – Breaks renovation, financing, and technical issues into short, understandable pieces.
- Community building – Shares success stories, local examples, and testimonials that motivate others.
- Feedback opportunity – Can include surveys or invitations to engage, helping the RC understand community needs.

- **Social media**

Social media channels offer RCs' a dynamic way to reach residents, increase visibility, and foster engagement with ongoing initiatives. Platforms like Facebook, Instagram, Twitter/X, LinkedIn, and TikTok can complement websites and newsletters by providing real-time updates, interactive content, and targeted outreach to specific audience segments. Social media is particularly effective in engaging younger or digitally active residents, and building a sense of community around renovation and sustainability efforts. Which social media platform is most popular and for whom varies a lot by country and, as social media platforms evolve extremely quickly, this information can change rapidly.

Social media use should be consistent, coordinated, and aligned with the RC's overall communication strategy. Content planning, posting schedules, and moderation guidelines help maintain credibility and



ensure residents receive accurate, timely, and useful information (see section F) Communication Planning).

Among the main benefits of social media usage by the RCs are:

- Real-time updates – Quickly share announcements, event reminders, new funding opportunities, and urgent notices.
- Targeted engagement – Use platform-specific tools (hashtags, groups, paid ads, geotargeting) to reach specific neighborhoods, age groups, or interest communities.
- Visual storytelling – Share photos, videos, infographics, and step-by-step guides to make renovation and sustainability content accessible and appealing.
- Community interaction – Encourage comments, questions, polls, and discussions, creating two-way communication with residents.
- Event promotion – Advertise workshops, consultations, webinars, and public forums, with options for RSVPs or calendar integration.
- Showcasing success stories – Highlight completed renovations, resident testimonials, and local initiatives to motivate and inspire others.
- Feedback and monitoring – Use comments, polls, and analytics to understand resident interests, concerns, and engagement patterns.

- **Online Promotion and Registration Tools for Events**

When RCs organise webinars or in-person events, online promotion tools can help to increase outreach and participation. Promoting events through digital channels alongside newsletters ensures broader visibility, especially among audiences who primarily access information online. The below tools work to improve event visibility, participant management, and overall professionalism of RC-led activities.

- **Visual Content Creation Tools**

Visuals and videos are central to effective communication, as nearly all social media posts, websites, and newsletters rely on strong visual elements to attract attention and convey messages clearly. For RCs, consistent and accessible visual communication helps build recognition, explain complex topics (such as renovation processes), and make information more engaging.

- **Communication Planning**

For sustainable and effective communication, it is highly recommended to develop a structured **communications plan**. Such a plan should clearly define your target audiences, key objectives, core messages, potential risks, and the communication tools and channels you intend to use—along with the reasons for choosing them. It should also outline roles and responsibilities, timelines, and indicators for measuring success.

A communications plan serves as a practical reference document that helps ensure consistency, supports strategic decision-making, and allows teams to monitor progress and adjust activities as needed. It is particularly useful for maintaining continuity over time, even when staff or priorities change.

Best practices

For long-term communications activities, it's best to develop a communications plan that outlines who your audience is, what your goals are, what the risks are, which tools you'll use (and why), and much more. The plan becomes something you can consistently refer back to for evolving which tools are used and tracking progress on goals, for example.

1.4.1 Aim of the module

Facilitating experience exchange helps connect different stakeholders, fostering greater trust, motivation for new EE/RES projects, and raising overall awareness. In addition, interaction with digital platforms is essential for the presentation of the project itself, helping to gain greater visibility and better recognition thus creating a solid foundation for further development and support.



1.4.2 Techniques for module

The outcome of the training for this module should position the participants as better communicators, promoters and drivers towards energy efficient living.

Recommended training techniques include:

- Brain teasers,
- Brainstorming,
- E-learning and online training,
 - Mapping stakeholders: Mapping of the stakeholders can bring great advantage when it comes to real project implementation. This means knowing their level of operations, influence on the market and especially their expertise can play a vital role to the success factor of the RC operations.
- Storytelling,
- World café.

1.4.3 Supporting materials provided for the participants

As supporting materials for the trainees', suggested additions are:

- Pyramid map for level of communication regarding the power-interest grid,
- list of typical types of questions for TNA with general explanation of the method,
- brief explanation of different communication styles used in different circumstances and with different target groups
- example of successful communication plan/strategy.

2 Materials and Tools for Training modules

Before digging deeper into the suggested training materials, it is important to shortly address energy efficiency towards energy sufficiency as technical terms. As processes where the final goal is less energy used, they go hand by hand. Energy efficiency provides the means of using less energy for the day-to-day processes, while employing modern technology, implementing physical measures for improving energy characteristics of the building etc. On the other hand, energy sufficiency goes beyond energy efficiency and focuses on day-to-day habits, and behavior. However, if energy efficient measures don't take place, the change in behavior for reducing energy consumption will lead to drastic reduction of comfort in the building. In conclusion it is of most importance that these two go as processes in parallel, rather as two separate actions.

This deliverable builds on D4.1, where number of materials were provided and can be further utilized.

2.1 Mapping of similar projects

When it comes to using most up to date training materials, it is important to also keep up and collaborate with similar projects implemented in the country. Therefore, the table below presents the mapping of sister projects focused on energy sufficiency. Priority was given to projects and initiatives that are developing a capacity building materials, awareness raising campaigns and development of educational materials for energy sufficiency (especially if they have some materials available also in the demonstration local language).



Sister project title	Funded by	Period	Country	Main goals	Usable materials
SHEERenov+	EU LIFE Programme	2023-2026	Bulgaria	Seamless Services for Housing Energy Efficiency Renovation (SHEERenovPlus) offers practical implementation of the model for integrated home renovation services developed under the H2020 SHEERenov project, supporting the transformation of current renovation policies, based on excessive public grants, towards an innovative market-oriented model. Building on its results, the main objective of the SHEERenov+ project is to trigger significant upscale of the energy renovation in the Bulgarian residential sector through developing a network of market-oriented one-stop shops.	Training programmes for stakeholders; competence development; sharing of best practice; events and networking
SMAFIN Expanded	EU LIFE Programme	2023-2026	Bulgaria	Connecting smart financing with energy efficient projects (SMAFIN Expanded) is a LIFE project supporting smart financing implementation of energy efficiency investments by planning to organize 15 national roundtables, 30 working group meetings, 2 cross country labs and various thematic working groups in Bulgaria, Croatia, Greece, Romania and Slovenia. Building on the experience gained from the previous initiative for financing energy efficiency and RES projects – SMAFIN, the project will offer solutions to the main challenges faced by the energy sector in recent years. International events are planned to facilitate experience exchange and the introduction of	Joint organization of public events for EE and RES financing; outputs relevant for financing; stakeholder network



				European practices in both EU and non-EU countries, contributing to strengthened cooperation in the Balkans and the advancement of the energy transition.	
RePower the Regions	EU LIFE Programme	2023-2026	Bulgaria	The RePower the Regions project will develop the skills and capacity of local authorities and actors to enable the achievement of Fit for 55 and REPowerEU objectives. Using participatory planning methods and with the support of the scientific community, we will create holistic plans and roadmaps for introducing solutions, such as energy saving, energy efficiency, local and community-led renewable energy initiatives and detailed plans for renewables-based heating and cooling solutions (including district heating). The project will be implemented in just transition regions in 9 countries: Bulgaria, Czechia, Estonia, Hungary, Latvia, Poland, Romania, Slovakia, and Ukraine	Results; analysis; best practices on capacity building;
Co-PED (DUT)	Horizon Europe	2025-2027	Hungary	exploring the potential of social and cultural centres to drive the development of Positive Energy Districts and support a just, community-centered energy transition	policy papers, events, local partnerships (Budapest, 11th district)
JUST4CARE	Horizon Europe	2025-2028	Hungary	Co-creation of actions for climate adaptation with vulnerable communities (Budapest, Józsefváros)	climate adaptation measures, training materials
EUPeers	EU LIFE Program	2023-2026	Hungary	Operating in nine countries (among them Hungary and Lithuania) EUPeers creates community of practices of stakeholders who are directly interested in creating and supporting One-stop shops	online sessions in learning labs, policy briefs, case studies, on-line tools developed in other projects and integrated in EUPeers
LIFE IP EnerLIT	EU LIFE Program/	2021-2030	Lithuania	Support implementation of National Energy & Climate Plan; energy efficiency across buildings, transport & industry; strategic capacity building	Training programmes for stakeholders; competence development; sharing of best practice; events and networking



	Lithuania budget				
Save Energy Together	EU LIFE Program	2024-2026	Lithuania	SaveEnergyTogether will implement communication campaigns to empower decision-makers at all levels to support behavioural change in households.	A total of 20 different energy-saving measures will be implemented to encourage more sustainable behavior among residents. These include tips on how to prepare food, how to store food in the refrigerator, how to save water when bathing and washing clothes, and how to save heat and electricity. Information packages and video material are being developed, and information campaigns are being carried out.
Irene	EU LIFE Program	2025-2028	Lithuania	A 36-month project aimed at combating energy poverty and promoting inclusive, large-scale renovation of apartment buildings across Europe. The project is being implemented in four pilot cities in Belgium, Lithuania, and Spain, with the aim of ensuring that vulnerable communities are not left behind in the wave of renovation.	Best practice sharing, competences, policy papers, informational campaigns.



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2.2 Recommended reports and documents

Module 1 - General and advanced technical knowledge

- [Inventory of energy efficiency technical measures for energy-poor households](#)
 - In these documents the general possibilities for energy efficient improvement of the homes are explained, starting from general energy efficiency measures, continuing to behavioural and legal opportunities, explaining the improvement of the building's envelope including thermal insulation of walls roofs, ceilings and floors, explaining the impact of replacement of windows and doors, and also including the impact of the heating system, domestic hot water preparation, as well as electric energy consumption savings.
- [ComAct educational materials](#)
 - There are in total 5 educational fact sheets, or materials on energy efficiency in homes.
 - The first one focuses on energy consumption
 - The second material is diving deeper in measures to increase energy efficiency
 - The third is focused on using renewable energy sources
 - Then an explanation on the benefits from higher energy efficiency in the housing sector are explained
 - The last one is emphasizing the community and its impact for healthy and favorable living conditions

Module 2 - Financial knowledge

This module will continuously evolve, always following the latest available funds and subsidy schemes. Even though the content is highly country specific, the trainer may use some previous materials, delivered from EU funded projects, such as:

- [Toolbox of financing models](#)
 - This report presents the available financial models supporting energy-efficient renovation of multifamily residential buildings in the five target countries of the ComAct project – Bulgaria, Hungary, Lithuania, North Macedonia and Ukraine. They are collected and described with the specific goal of identifying individual approaches to the inclusion of households suffering or at risk of energy poverty in national and local renovation policies, considering the scope, volume of investment and expected energy savings.
- [Innovative financing models](#)
 - This report presents financing schemes for deep energy renovation of multifamily apartment buildings in the five ComAct pilot countries, selected as the most suitable to increase the scope and rate of the renovation programmes, while at the same time taking into consideration the interests and needs of the energy poor households.
 - Validation report is available, via the [link](#).
- [Optimal cost-effective technical solution scenario](#)
 - This report briefly presents information about the current state and analyses all feasible measures leading to the increased energy efficiency of ten multi-apartment buildings in the five ComAct pilot countries.
 - Validation report is available, via the [link](#).

Module 3 – Knowledge and skills in facilitation of renovation process

This module is highly connected to this deliverable itself. The trainer should be able to set a positive example for the participants. Since this topic it's highly dependent on the facilitator or trainer itself, the recommended materials serve as only as a guide.

For supporting this topic, the following materials can be used:



- [Inventory of community activation and stakeholder engagement techniques with special attention to the geographical coverage of ComAct](#),
 - This document explains the most common ways of improving community engagement techniques and tools, including involvement of the stakeholders.
 - Validation report is available, via the [link](#).
- [Inventory of RC models and typologies](#)
 - This ComActivate report provides a wealth of knowledge on how to design and implement a one-stop-shop, or Resource Centre (RC – a term coined by the ComActivate project), for Member States, regions, cities and other stakeholders who have an active role in enabling residential renovations.
- [Stakeholder engagement and community involvement strategy](#)
 - Even though this deliverable is country focused, and ComAct project based, there are supporting mechanisms for stakeholder mapping and connecting them with engagement activities explained.
 - Validation report is available on this [link](#).
 - The first chapter of this deliverable lines the different training techniques in comparison to training methods, while explaining their similarities to the facilitation parts of organizing one training.
- [Overview of facilitation techniques](#)
 - This short paper on facilitation techniques, explains think and listen, go round, brainstorming, check in, mind maps, affinity grouping, multivoting, six thinking hats and World Café as proven techniques is on improving meeting outcomes.

Module 4 – Communication, digital skills and tools

Materials to present to trainees and/or share with them should be tailored to each group. Broadly, a presentation about what communications is and what it should be used for, different tools, and guidance on best practices for communications should be included.

Online communications tools

- **Website**

Below are examples of platforms that support low-cost, user-friendly, basic website creation. For more complex websites, hiring a dedicated web developer may be necessary.

- [Squarespace/WordPress](#): video tutorials online in multiple languages to create and maintain a website on this platform; customer support available.

- **Newsletter**

Below is an example of a platform that support low-cost, user-friendly newsletter production and send-out.

- [Mailchimp](#): Create an account and send newsletters for free, with limitations on the number of emails sent per month and to how many people. There are different pricing options depending on number of recipients. There are many video tutorials online in multiple languages for using this tool.

- **Social media**

Below are examples of platforms available for use by the RCs (not exhaustive).

- [Facebook](#) – Offers pages, groups, live events, and ad targeting; widely used across all age groups.
- [Instagram](#) – Ideal for visual storytelling, reels, and short videos; strong engagement with younger audiences.
- [X](#) – Effective for quick updates, links, and conversations; useful for connecting with professional networks.
- [LinkedIn](#) – Focused on professional networks, collaboration with contractors, designers, and municipal stakeholders.
- [TikTok](#) – Short, engaging videos for promoting renovation tips, energy-saving advice, and creative initiatives.



- **Online Promotion and Registration Tools for Events**

The below tools work to improve event visibility, participant management, and overall professionalism of RC-led activities.

- **Facebook Events** are a simple and effective tool for creating a dedicated event page, where key information such as date, location, agenda, and updates can be shared. They allow organisers to send notifications, interact with participants, and increase reach through sharing within networks. This also helps build an online community around RC activities.
- **Event registration platforms** such as [Eventbrite](#) provide additional organisational benefits. These tools allow participants to register in advance, giving organisers a clear overview of expected attendance. Registration lists can be exported (e.g. as Excel files) and used for check-in, follow-up communication, or evaluation purposes. Events can be public to reach wider audiences or private via direct links. Such platforms offer user support and tutorials, making them accessible even for teams with limited technical experience.

- **Visual Content Creation Tools**

- **Canva** is a widely used, user-friendly platform for creating visual materials. It offers ready-made templates for event invitations, flyers, social media posts, presentations, and documents. It also provides pre-set formats tailored to different platforms (e.g. Facebook, Instagram, LinkedIn), which helps ensure professional and visually consistent outputs even without advanced design skills.
- **AI-based visual and media tools** are rapidly evolving and can generate images, videos, voice-overs, and even music in various styles. While they can support creativity and speed up content production, their outputs may still lack accuracy or a polished look. In addition, ethical and copyright considerations remain important, as AI-generated content is often based on existing works and styles. Careful, responsible use is therefore recommended.

- **Communication Planning**

Many free guidelines and templates for communications plans are available online. The below examples cover both planning and execution, they include audience, message, channel, schedule and evaluation sections, they are easy to customise and work for both events and ongoing communication activities.

- **Smartsheet** – Includes multiple downloadable templates (Word/Excel) with sections for audiences, channels, timing, responsibilities and success metrics.
- **HubSpot** – Offers clear step-by-step guide with a downloadable template that helps RCs define goals, messages, audiences and tools.
- **Microsoft (Office)** – Offers official editable Word/Excel template that can be easily customised for RC activities (newsletters, events, social media, stakeholder comms).

Guidelines and templates for communications plans are easily found for free online. Here are some (in English) available at the time of preparing this document:

- https://www.projectmanager.com/wp-content/uploads/2016/10/Communication_Plan_Template_PM.com_2018.docx
- <https://zapier.com/blog/communication-plan-template/>



3 Manual of training and facilitation techniques and methods

3.1 Training

In general, training is a transfer of knowledge, skills and attitudes to the trainees to upgrade their capacities. It refers to the improvement of the behaviour and or performance when participants utilize what they learned.

“Training is an educational activity that aims at transmitting knowledge to, and improving the skills and attitude od adults working in a particular professional field or institutional unit. Training usually takes place outside the traditional frameworks of school and university education and usually has a predominantly practical focus.”¹

In ComActivate project, training is considered as a short-term learning process of acquiring knowledge, skills and attitude to enhance stakeholders’ capacities to implement energy efficiency measures in the residential sector.

Preliminary stakeholders are HO, HOAs, building management, energy and construction companies, employees in municipalities and in the RC, but the training is open to any other interested parties.

The training in the frame of ComActivate project is following the adult learning cycle principles that mean to put participants to experience the problem, lead them through reflection, discussions and feedback, generalizing the specific experience in formulating rules for behaviour in real situation and applying/utilizing learned knowledge, skills and attitudes in real life.

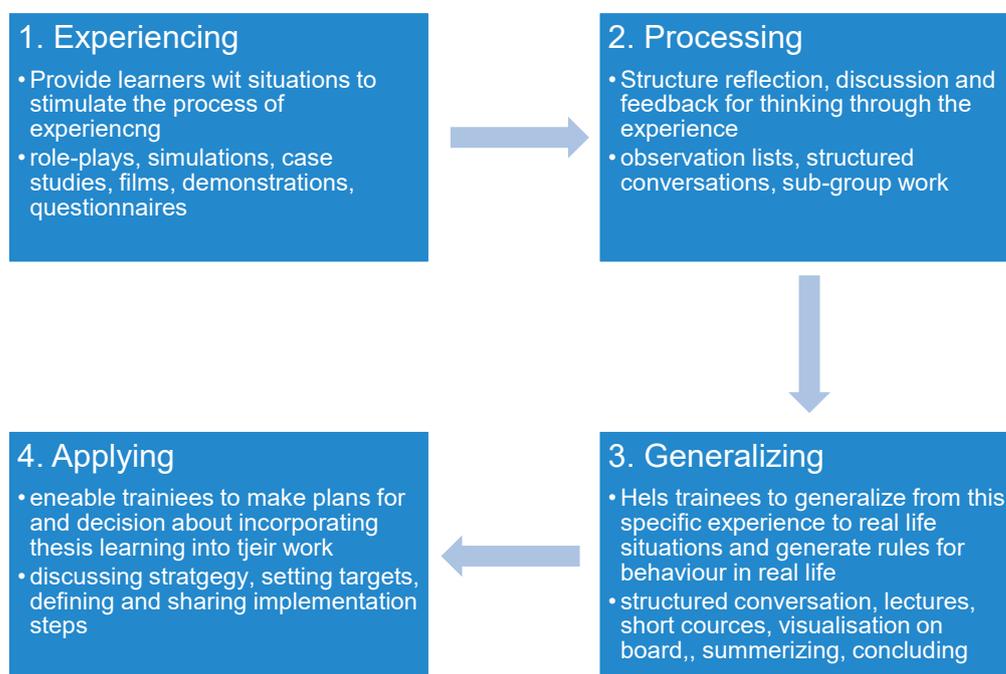


Figure 1 Adult learning cycle in training (MDF, training manual)

¹ HOW TO BE A GOOD TRAINER?; Prague Process Secretariat, International Centre for Migration Policy Development, 2019

Figure presents the four phases of the Adult Learning Cycle, with specific learning activities in each phase and proposed the best training techniques to achieve planned results. In each phase of the Adult Learning Cycle, is recommended to use different training techniques in order to allow participants to go smoothly through the learning process and gain new knowledge, skills and attitudes on the topic, in our case energy efficiency in multi-apartment buildings.

According to the “Manual for trainers”, GIZ, “the characteristics of adult learners include the following:

- self-directed learning approach;
- willingness to learn when transitioning into new roles;
- focus on immediately applying new knowledge to real-life situations and problems;
- self-motivated. “²

This goes in line with the basic principles of trainings in ComActivate:

- Self-directed – participants share the responsibility for their own learning;
- Fills an immediate need – participants have high level of motivation when training meets their needs;
- Participative – active participation in the training and workshops;
- Experiential – participants are sharing experience among themselves and with the trainers, creating learning atmosphere from each other;
- Reflective – participants are reflecting the presentations and lecturers, develop conclusions and find models for implementation;
- Provide feedback – effective feedback that is supportive and leads to improvements;
- Building mutual respect and trust – trainers/facilitators and participants are building safe, trustful and pleasant atmosphere.

In general, training is considered as a systematic process that, according to generally accepted logic, necessarily consists of the following steps:

- identifying needs of participants,
- designing the training,
- implementing the training, and
- evaluating the training performance.

3.1.1 Training cycle

From a trainer/facilitator perspective, the training course can be presented as a continuous process of 6 phases. This model of the training process facilitates effective and efficient transfer of knowledge, skills and attitudes based on the needs and requirements of the participants with significant positive impact.

The training cycle starts with the training needs assessment, continuing with training design and implementation using different methods and techniques for transferring knowledge, skills and attitudes, evaluation of the training and planning next activities.

² Manual for trainers, Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, 2022

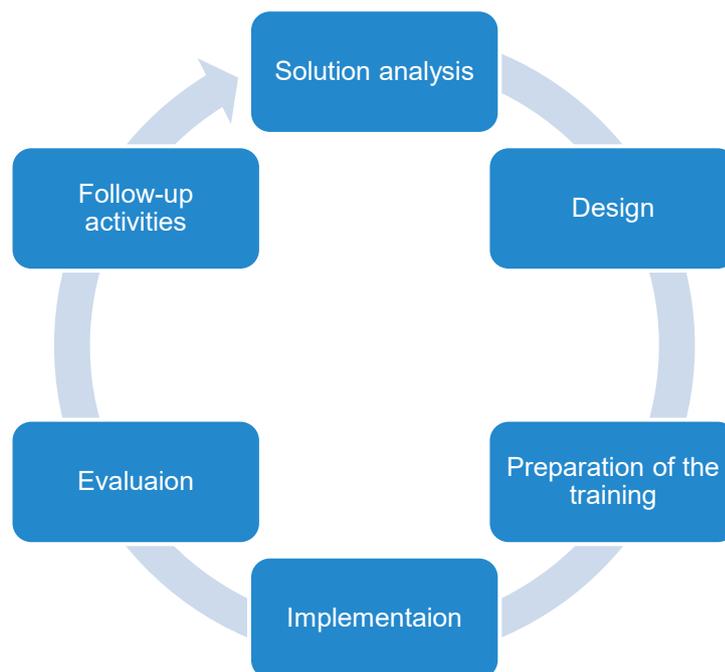


Figure 2 Training cycle (MDF, training manual)

Phase 1: Situation Analysis

Every training is aimed to improve the capacities of the trainees/participants in order to better perform their work and thus produce effective, efficient and quality results. In this phase, it should be determined where the gaps in knowledge, skills and attitudes are, that prevents participants to have effective and efficient work performance and achieve better results. The following activities are usually carried out: collecting information, identifying the biggest problems and obstacles in work performance, providing job descriptions, identifying gaps in the knowledge and skills of potential participants, discussing with potential participants (individuals, groups) from all hierarchical levels and others involved in the training, reviewing reports, observing, monitoring, monitoring personnel, monitoring work and conditions.

Phase 2: Design

After the need has been identified and the training topic has been determined, the second phase is about training design. While in the previous phase, potential participants were played the key role, the training design is mainly the job of the trainers. They usually need to carry out the following activities: defining the general objectives of the training; determining the content (training curriculum); identifying possible sources of cooperation (exchange of materials, trainers, training content, certificates, etc.); formulating the objectives for each of the training sessions; designing each session (in detail) and determining the training methods and techniques; clearly defining the training participant groups and determining the entry criteria including possible development of an entry questionnaire to ensure the level of knowledge of the training content by the participants; Planning the dates and details of the training; Foreseeing the training budget; Development of a training logistics plan; Selecting the trainers.

Phase 3: Preparation of the training

The preparation of the training is specifically aimed at the thematic and logistical preparation of the event. In this phase, the trainers, with the support of the organizers of the training event, concretize all the aspects of interest for the successful implementation of the training, such as: usage of local



resources; planning the time frame; determination of suitable training methods and techniques; lesson plan preparation; preparing a plan for secondary tasks; procurement of materials for work; preparation of training materials (visual aids, manuals; translation of training materials (if necessary); preparation of logistics for training (vehicles, accommodation, coffee breaks, audiovisual equipment, etc.); preparation of certificates.

Phase 4: Implementation

The implementation of the training is the key moment in the training cycle. This phase is actually the transfer of knowledge, skills and attitudes are delivered by the trainers to the participants, which is carried out through: delivering the training in accordance with the training goals, explaining the training goals to the participants; checking the participants' qualifications and determining the training restrictions; suggestion to the trainees to keep training diary; adapting the sessions, lessons and titles to observe and evaluate the results (but within the framework of own limitations); training assessment (at the session, at the end of the lesson, at the middle of the course, final evaluation); self-evaluation of students during training (feedback, check list, conversation with colleagues).

Phase 5: Evaluation

The purpose of the evaluation phase is to determine whether the results of the knowledge and skills transfer have been achieved, i.e. whether what was delivered to the participants has influenced the improvement of their work performance. The assessment of the training is the most important moment in the training cycle, because it legitimizes the process participants' development, determines the effect of the delivered training in terms of acquired knowledge and skills and about used resources. This phase consists of the following activities: application of the assessment during the session and afterwards (feedback, checklist, peer); assessment by the participants (written or verbal); administration of a test after completing the training (if necessary); possible monitoring of the work performance of the participants to assess the application of what has been learned (in exceptional situations, when the client requests it); discussion with the participants; writing the report of the evaluations.

Phase 6: Follow-up activities

Follow-up activities depend on the findings and recommendations from the training evaluation. Most often, this involves additional training on a different topic, organizing a practice where the lessons learned from the training will be applied, preparing a plan for organizational change and implementing the plan. All of these activities aim to improve operational efficiency of the participants.

3.1.2 Training methods vs training techniques

The terms "training methods" and "training techniques" are often used interchangeably, but they refer to different concepts.

Training methods refer to the overall approach or strategy used to deliver training. These are broad, structured ways of training that dictate how learning will be delivered and managed. Training methods tend to focus on the big picture of the learning process.

Training techniques are more specific and are the individual activities or exercises used within a method to help learners achieve the desired outcomes. These are the practical ways of implementing the training, often focusing on the best ways to engage participants and promote effective learning.

In essence, training methods set the framework for how the training is conducted, and training techniques are the detailed actions or activities that make the training effective.



Key Differences:

- **Scope:** Methods are broader approaches to training (e.g., classroom, online), while techniques are the specific activities used within those methods (e.g., role-playing, case studies).
- **Application:** Methods determine the structure and environment of training, while techniques define the practical exercises or tools used to engage learners.
- **Level of Detail:** Methods are high-level and strategic, whereas techniques are specific and tactical.

Table 3 Examples of training methods and training techniques

Training methods	Training techniques
Classroom-based training – Traditional instructor-led sessions.	Role-playing – Participants act out scenarios to practice skills or behaviors.
E-learning – Online courses, webinars, or virtual classrooms.	Simulations – Realistic exercises that mimic real-world situations for hands-on learning.
On-the-job training – Learning while performing tasks or working.	Case studies – Analyzing specific real-life or hypothetical situations to develop problem-solving skills.
Workshops – Group-based, interactive training focused on specific skills.	Group discussions – Encouraging collaborative learning and idea exchange among participants.
Coaching/mentoring – One-on-one guidance for personal or professional development.	Demonstrations – Showing how something is done, often followed by practice.
Blended learning – A mix of in-person and online learning.	Brainstorming – Generating ideas in a group to solve problems or foster creativity.
Classroom-based training – Traditional instructor-led sessions.	
E-learning – Online courses, webinars, or virtual classrooms.	

3.1.3 Aim of training techniques

There are many and diverse training and facilitation techniques that can be combined, re-designed, upgraded and modified. The basic rule for choosing a training technique is to achieve the objective of the session and thus the overall training goals. This depends on the type, composition, and number of participants, the topic, duration and location/ facility of the session/training/workshop, as well as of the technical equipment available and training materials. Thus, flexibility, creativity and adaptability are crucial characteristics of trainers and facilitators.

When selecting tools/techniques for conducting training on energy efficiency in residential buildings, the key parameter is the level of participation. Specifically, tools/techniques should be chosen that provide a high or medium level of participation. Since achieving group cohesion is particularly important for the success of energy efficiency interventions (including so-called "soft measures") in residential buildings, the techniques and tools used in training residents should be interesting, entertaining, educational, and participatory.

The selection of training tools also depends on the topic being addressed. For example, for training in technical knowledge, techniques should enable the transfer of knowledge and skills using data, information, case studies, and the give opportunity for experience sharing. On the other hand, for communication training, tools that facilitate interaction among participants and promote unity and group solidarity should be used.



3.1.4 Training techniques

Overview of the training techniques

Training techniques refer to specific methods or strategies used to improve skills, knowledge, or performance in a particular area. These techniques are designed to enhance the learning process, optimize outcomes, and help individuals or groups achieve their training goals more effectively. Training techniques can be applied in various fields such as sports, education, business, and personal development. The choice of training technique often depends on the training objectives, the participants' needs, available resources, group size and level of participation.

The high level of participation is a crucial condition for the trainings in the ComActivate project, thus the training techniques that will be used need to provide a significant of engagement of participants during the whole process.

Number of participants in the training, or size of the trainees' group is another crucial element in ComActivate training. Namely, having in mind that the project objectives, among others, are to create group cohesion, establish linkages between different stakeholders and motivate citizens' engagement, the recommended number of trainees is 15-25 participants. This predominately refers for specific trainings for HOs and HOAs, as well as for the joint training of different stakeholders.

Table 4 Recommended training techniques

Training technique	Description	Participation	Group size
Brain teasers	To stimulate creativity, promote mental agility, and encourage collaboration among team members. These activities are often used as icebreakers, to encourage teamwork, or to sharpen participants' mental focus during the training...	high	Any size
Brainstorming	To stimulate creativity and focus the group on a specific question. It is meant to generate a lot of ideas in a short period of time	high	Max 10 per group
Buzz groups	To encourage active participation, idea-sharing, and collaboration among participants, to stimulate discussions, promote peer learning... They "buzz" with ideas, often for about 5 to 10 minutes, and afterwards, share their findings or insights with the larger group.	high	3-5
Case studies	To stimulate analytical, creative and decision-making skills, using real-world scenarios, discuss possible solutions, critically observe the situation and make decisions. Case study is a real life or hypothetical story and gives description of an actual situation happened.	medium	5-8 per group
Consensus Building	To facilitate the process of reaching agreement or a common decision without voting, leading the decisions that have wide support. The facilitator helps the group find common ground by discussing concerns and opinions, ultimately reaching a decision that everyone can support or at least live with.	high	Max 30



E-Learning and Online Training	To provide flexible, self-paced learning opportunities which are convenient and scalable, allowing learners to learn at their own pace and revisit material as needed. Trainees access training materials (videos, quizzes, readings, etc.) online, including modules, webinars, or digital courses that learners complete on their own.		
Feedback and Reflection	To foster self-awareness, improvement, and skill development and assess progress and encourage continuous improvement. Trainees receive feedback on their performance, and then reflect on their actions, outcomes, and areas for improvement.		
Fishbowl	To facilitate in-depth discussion while allowing some participants to observe a concrete situation. It's an interesting and insightful technique for all participants: for those who are sitting inside (fish bowl) of the circle and discuss the topic, and for the others who are sitting around.	high	10-12
Lecturers	To convey knowledge, theories, and concepts in a structured format and efficiently deliver a large portion of information and theory to the participants. The trainer/lecturer is presenting themes to the participants, using visual aids and examples.	low	Any size, convenient for big groups
Mapping stakeholders	To analyze stakeholders and relations with, including their interrelations, discuss the quality of the relations to make informed decisions on subject. The map is placed on the table and has the names of stakeholders, the relation between them, including information about quality of those relations.	high	Max 10
Mentoring and Coaching	To Builds strong, trusting relationships and provides tailored support for individual growth and problem-solving providing personalized, one-on-one support for development. A mentor or coach works with a learner on a regular basis to provide guidance, feedback, and advice, typically focused on career development or specific skills.		
Real situation/problems solving	To stimulate participants to think of the subject of concrete topic or aspect of it. Usually, participants observe simplified versions of concrete situations and discuss possible solutions.	high	8 - 10
Role plays	To develop interpersonal skills, communication and understanding through presenting concrete situation and analyse the reactions of people within that situation. Participants act out roles in a scenario to practice behaviours, reactions, or decision-making in a controlled environment.	high	8-10
Situation analysis	To analyze socio-economic, political, technical and other factors, to support decision making processes in the group. Participants identify major factors	high	Max 10



	influencing the concrete situation and visualize them discussing the intensity of their impact.		
Starters	To create an atmosphere and situation that involves trainees in the process. Different techniques can be used as starters, but normally they are fun and interesting introduction of participants.	high	Any size
Story telling	To improve communication skills, reflection and contextual learning, engaging participants and conveying information in the form of a memorable and meaningful story. It involves sharing a personal, hypothetical or fictional story that illustrates key concepts, lessons, or challenges related to the training topic.	medium	Any size, convenient for big groups
SWOT analysis	To analyze and evaluate particular idea, project, or situation from different perspectives and help to make participative decisions. SWOT is for Strengths, Weaknesses, Opportunities and Threats. The same problem can be assessed from diverse aspects in different groups, who can afterwards share the findings and conclusions in plenary.	high	5-8 per group
Workshops	To engage participants actively in learning through hands-on activities encourages active learning, collaboration and practical application of skills. It is a method which can use different techniques and facilitate exercises, group discussions, role-playing, and other activities that require participant involvement.		
World cafe	To facilitate group discussions and stimulate diversified opinion and give different perspectives around specific topics. Participants are rotating at small tables where they can sit and discuss specific themes.	high	Big groups, over 25

These techniques are often tailored to the specific needs of the participant and the training objectives, and they are used to improve the effectiveness of the training process.

Each of these techniques has its own set of advantages and can be tailored to suit different learning styles and objectives. Combining multiple methods can often yield the best results, ensuring the training is engaging, comprehensive, and effective.

As the demand for energy continues to grow and environmental concerns increase, homeowners play a pivotal role in contributing to energy conservation and efficiency. To empower individuals in reducing their energy consumption, capacity building techniques are essential. These techniques aim to provide HO with the knowledge, skills, and tools needed to make informed decisions about energy efficiency in their homes.

Capacity building for energy efficiency involves the development of awareness, practical skills, and the confidence to implement energy-saving measures. These techniques can range from simple behavioural changes to more complex technological interventions that improve energy efficiency. The goal is to equip HO with the necessary tools and insights to reduce energy consumption, save on utility bills, and reduce their carbon footprint, all while enhancing the comfort of their homes.



3.2 Facilitation

“Facilitation techniques” as a term is commonly used in development workshops and trainings¹. Facilitation techniques are methods used to guide a group or team through discussions, decision-making, or problem-solving processes. They are aimed to encourage active participation, ensure productive conversations, and reach consensus or solutions. Basically, the difference between training techniques and facilitation techniques is in the goal of the training and/or workshop. The same technique can be interpreted as a facilitation or training technique depending on the training objective. In general, each technique is suitable for different purposes, depending on the goals of the meeting or discussion. Using a variety of techniques can keep the group engaged and ensure productive outcomes.



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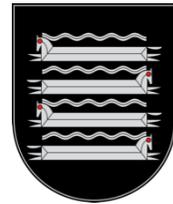
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