



ComActivate

Enabling community action for energy sufficiency

COMMUNITY ENGAGEMENT TOOLKIT

LITHUANIA/ HUNGARY/ BULGARIA

D3.6 | September 15, 2026



Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or CINEA. Neither the European Union nor CINEA can be held responsible for them.

Project Acronym: ComActivate

Project Name: Enabling Community Action for Energy Sufficiency

Project Coordinator: Habitat for Humanity International

Project Duration: 36 months

Website: <https://www.bpie.eu/comactivate-enabling-community-action-for-energy-sufficiency/>

Deliverable No.: D3.6 Toolbox of guidelines and training materials

Dissemination Level: PU – Public

Work Package: WP3

Lead beneficiary: Eko Invest & BPIE

Author(s): Belma Jahovic (Eko Invest)

Reviewed by: IWO (Anton Alosyn & Johann Strese)

Date: September 2026

File Name: Toolbox of guidelines and training materials



Table of contents

INTRODUCTION	4
1 KNOW YOUR NEIGHBOURHOOD	5
Tool 1: Defining Purpose and Mapping Stakeholders	5
STEP 1: Defining the purpose of engagement	6
STEP 2: Identifying stakeholder categories	8
STEP 3: Mapping energy-poor and vulnerable groups	10
2 FROM CONTACT LIST TO COMMITMENT	15
Tool 2: Stakeholder Engagement Planning	15
Stakeholder engagement plan	16
Levels of engagement	17
How to build a SEP: step-by-step instructions	18
Understanding barriers to participation	19
3 BUILDING LASTING CONNECTIONS	23
Tool 3: Community Outreach and Trust Building	23
Door-to-door	23
Combining communication channels	24
Trusted intermediaries	24
Targeted outreach for hard-to-reach groups	25
Tactics that actually work for this group	26
Monitoring and evaluating outreach	29
4 MESSAGING THAT RESONATES WITH THE COMMUNITY	30
Tool 4: Communication and Awareness	30
What is the difference between communication and engagement?	30
Supporting behavioural change without creating pressure	30
ANNEXES	33
Annex 1	33
Annex 2	36
Annex 3	37
Annex 4	38

Introduction

The ComActivate Project, funded by the EU LIFE research programme, aims to address the growing challenges of energy poverty and the poor energy performance of buildings across Central and Eastern Europe.

The toolkit grew out of real experience in four pilot municipalities: Burgas (Bulgaria), Józsefváros (Hungary), Elektrėnai and Kaišiadorys (both Lithuania), where teams developed neighbourhood energy sufficiency roadmaps (NESRs). Along the way, some engagement approaches worked well, while others needed to be adapted. Each tool in this toolkit comes from something that worked or had to be fixed in one of those neighbourhoods: translating technical renovation plans into terms residents can act on, adjusting engagement to diverse social groups etc.

Renovated buildings, redesigned mobility patterns and smarter energy use only deliver results when the people affected by these changes understand them, trust them and have had a genuine role in shaping them. Community engagement provides the framework by bringing together residents, people experiencing energy poverty, vulnerable groups, institutions and other local stakeholders to jointly develop a neighbourhood's future. It enables institutions to gain a more grounded understanding of everyday realities, including how households use energy and where they struggle to access it. Residents, in turn, gain a voice in decision-making and opportunities to communicate their needs and priorities.

The purpose of this toolbox is to make community engagement practical and adaptable, so that the approaches it presents can be transferred and applied in other neighbourhoods across Europe.

This toolbox is intended for **community engagement coordinators and other practitioners responsible for engagement in municipalities, one-stop-shops and other institutions**. It provides a structured approach to planning, conducting and sustaining engagement that supports neighbourhood energy transition.

The toolkit is organised into four modules:





1. Know your neighbourhood



Tool 1: Defining purpose and mapping stakeholders

This is the central tool in the entire engagement process, since every step that follows depends on the analytical work done here.

This tool is structured in three steps:



Step 1:
Defining the purpose
of engagement



Step 2:
Identifying stakeholder
categories



Step 3:
Mapping energy-poor
and vulnerable groups

These three steps help a project team understand why engagement matters, identify who needs to be involved, and ensure that energy-poor and vulnerable groups are adequately identified and considered.



STEP 1: Defining the purpose of engagement

Before identifying a single stakeholder, it is essential to understand why engagement is needed and what it aims to achieve. Clarifying the purpose and scope of engagement provides the foundation for deciding:

- **Who should be involved¹**
- **How they should be involved**
- **When their input can make a real difference**
- **What should be different for residents once the engagement is complete**

These questions can help define the purpose, scope and outcomes of the engagement. The visual below illustrates how each question contributes to this process: the left-hand box presents the guiding questions, the middle box explains the relevance of each question, and the right-hand box provides an example of how the question can be answered in the context of the renovation project.

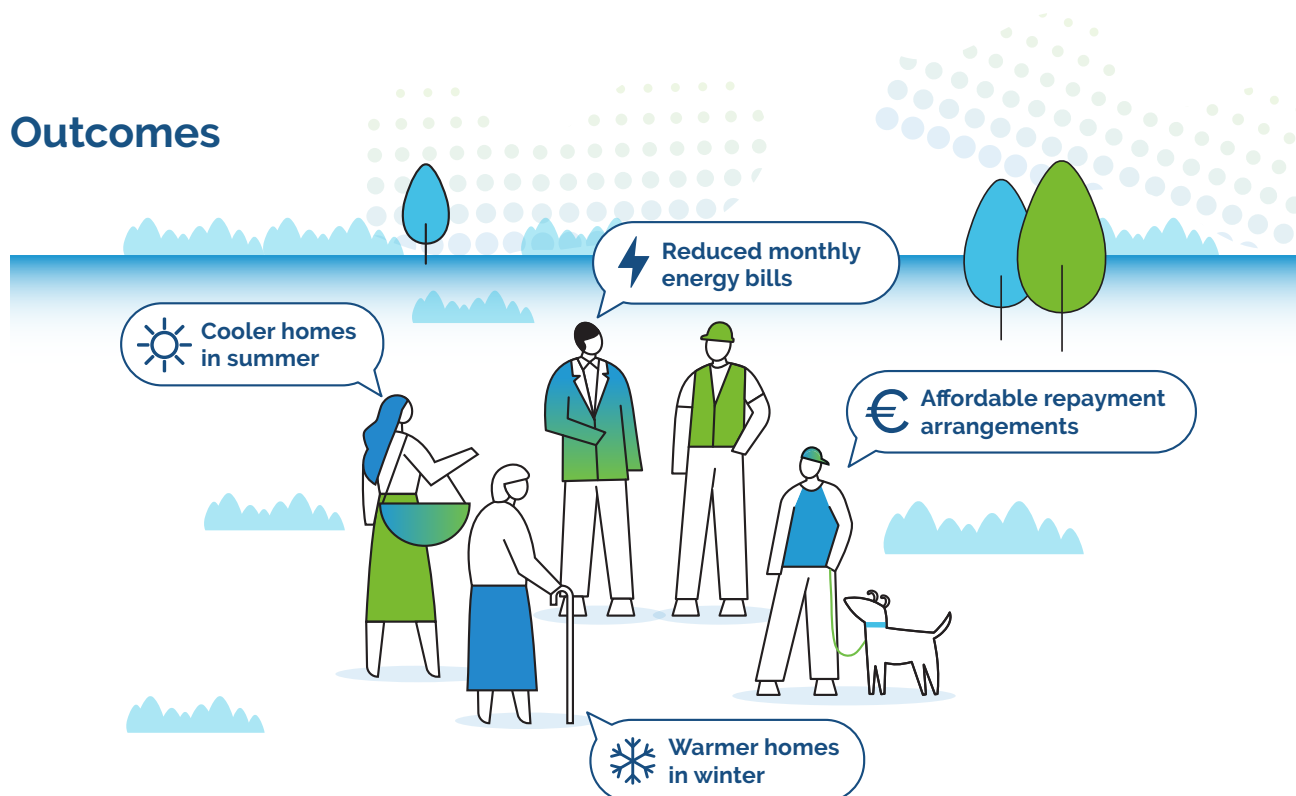
Guiding questions	Why it matters	Example in a renovation project
What key decisions will this engagement help shape?	Clarifies what is open for discussion and what is not, avoiding false expectations and focusing on what residents can influence.	Which insulation and heating measures will be installed in which MFABs, and how residents will contribute financially.
Where can residents have an influence on decisions?	Helps identify the boundaries of influence, sets realistic expectations, and focuses engagement where it can make a difference.	Residents can choose between renovation packages and negotiate the repayment schedule. They can't change their building's technical eligibility.
What needs and challenges of people experiencing energy poverty should be considered?	Ensures the engagement recognises the real-life constraints and priorities of energy-poor households.	Some residents can't cover even a reduced share of the costs or won't see direct benefits.

Figure 1: Guiding questions for defining the purpose, scope and outcomes of the engagement (continued over the page)

¹ Many households have one member who takes the lead in renovation-related decisions, referred to as the primary decision-maker. It is important to identify this person and determine whether other household members should also receive information or be involved in the decision-making process.

Guiding questions	Why it matters	Example in a renovation project
What level of participation is needed?	Defines whether residents are informed, consulted or involved. It is important to be transparent and avoid presenting the engagement as more participatory than it actually is.	Residents are informed and consulted on things that don't require technical expertise, like work scheduling and exterior appearance.
What would meaningful engagement look like from the residents' perspective?	Shifts the focus from staff processes to whether residents feel their concerns were genuinely heard and addressed.	A resident who raises a cost concern receives a specific, direct answer about their repayment terms rather than a generic response.
What could prevent engagement from achieving its purpose?	Engagement is the most effective when it happens before decisions are made. Mapping engagement activities against the project timeline shows when residents' input can still shape outcomes.	Running the consultation after the renovation package is finalised and the cost-sharing agreement is signed.

Outcomes





STEP 2: Identifying stakeholder categories

Stakeholder identification happens in two phases. The first phase involves those who may be affected by, interested in, or able to influence the project. The second phase is about looking more closely at each stakeholder, i.e. understanding what matters to them, their level of influence, and the best way to involve them. The result of this step is a stakeholder map that provides a clear picture of people who need to be considered throughout the process.

To build a complete picture of relevant stakeholders, consider the following questions:

 Who is directly affected?	 Who can influence the outcomes?	 Who has relevant knowledge or expertise?	 Who is at risk of being left out?
People whose lives, homes and incomes may be affected by the renovation. They should be at the centre of the engagement process, with their experiences and needs guiding how engagement is designed.	These are stakeholders whose cooperation, opposition or indifference can affect what is possible and whether the renovation project succeeds. They may not be directly impacted by renovation, but their decisions, relationships or influence within the community can play an important role.	People whose value comes not only from technical expertise, but from their understanding of the community, local context and everyday realities.	Some people are directly affected by the outcome but may be overlooked because they face barriers to participation. Identifying these groups early helps ensure the engagement process is inclusive.
Key questions to ask: Who lives, works or spends significant time in the MFABs?	Key questions to ask: Who has formal authority over relevant decisions? Who influences community views and opinions? Who has the power to block or enable progress?	Key questions to ask: Who has a deep understanding of this community? Who has knowledge of its history, challenges, and how it has changed over time? Who works closely with or supports vulnerable groups?	Key questions to ask: Who may face barriers to participation? Whose needs may be overlooked? Who might be unintentionally excluded by the way engagement is planned or delivered?

After identifying the stakeholders, organise them into the categories presented in Table 1. By categorising stakeholders, community engagement organisers can engage each group in a way that addresses their specific needs and interests, leading to better collaboration.

Table 1: Categorisation of stakeholders

Category	Key considerations
Residents	This category is never homogeneous and should always be disaggregated. Sub-categories to distinguish: • Owners/tenants (including elderly homeowners on fixed incomes) • Renters • Social housing tenants • Households with members who have disabilities or chronic illness • Single-parent households • Elderly residents living alone • Households with children
Apartment owners and building managers	This category makes decisions about physical properties that directly affect residents' comfort and well-being. However, their interests may not always align with those of the residents. Sub-categories to distinguish: • Private landlords • Property companies • Social housing providers and housing associations
Commercial occupants	Entities with commercial interests that may be affected by or benefit from the project's outcomes. Sub-categories to distinguish: • Owners of commercial units • Tenants of commercial units

Note: categories shown in this table are illustrative and can be expanded by other potential types of stakeholders.



STEP 3: Mapping energy-poor and vulnerable groups

This step sets out how to identify and reach energy-poor and vulnerable groups. It explains why conventional methods miss these groups, which household types carry the highest risk, what signs to look for in the neighbourhood, and how to record findings using the screening tools provided.

1. STRUCTURAL BARRIERS TO ENGAGEMENT

The following challenges explain why conventional engagement approaches here fail:



1 They are systematically under-represented in conventional data.

Administrative data, utility records and official registers do not adequately capture many people experiencing energy poverty. As a result, those most affected are frequently the least visible in the data.



2 Conventional engagement approaches are often inaccessible to energy-poor people.

Public meetings, online consultations, community events and other standard forms of engagement are designed for people who have time, mobility, digital access, language proficiency and institutional trust needed to participate. People experiencing energy poverty are often the least able to meet these expectations.



3 The stakes are highest for them.

Energy poverty affects physical and mental health, children's development, household finances and dignity. If those most affected are not meaningfully engaged, policies and programmes are unlikely to respond effectively to their needs.

2. HIGH-RISK HOUSEHOLD TYPES

Energy poverty is typically defined in terms of expenditure ratios and income thresholds. However, the lived experience of energy poverty is far more diverse than the formal definitions suggest. As a result, identifying individuals for engagement purposes requires looking beyond administrative categories. Housing tenure and the condition of a home play a major role in shaping the risk of energy poverty:



Private renters living in poorly maintained homes are among those most vulnerable to energy poverty. They often face high energy bills while having no control over the energy efficiency of the properties they occupy. Many are also hesitant to raise concerns with their landlords for fear of eviction or rent increases.



Social housing tenants may live in better-maintained homes in some contexts, but they remain among the lowest-income households. They may also face specific barriers related to institutional relationships with housing providers (e.g. feeling that they are excluded from decision-making processes, or lack of trust in housing providers), which can affect their ability or willingness to seek improvements.



Low-income owners may own their home but lack funding to invest in improvements. They may also be ineligible for existing financial support or find available funding schemes difficult to understand.



Residents living in non-standard accommodation, such as converted commercial properties, may be entirely absent from official data. As a result, they are often overlooked in support programmes despite experiencing severe energy conditions.

Household characteristics

Certain household compositions systematically raise both the risk of energy poverty and the severity of its impacts:



Elderly people living alone may spend more time at home, increasing their heating and cooling needs. These challenges can be even greater for people with mobility, cognitive or sensory impairments, which can make it more difficult to access information and participate in engagement activities. Additionally, they are less likely to use digital communication channels.



Families with young children are at a high health risk from cold and damp homes. At the same time, childcare responsibilities often leave parents with little time to attend meetings or engage in consultation activities.



People with disabilities or chronic health conditions may have higher energy needs because they often need to maintain stable indoor temperatures or spend more time at home. Physical accessibility, health limitations and other practical barriers can also make it more difficult for them to participate in engagement activities.



Single-parent households often face financial pressure while balancing work and caregiving responsibilities, leaving limited or no time to participate in engagement activities.



Female-headed households* are more likely to face lower average incomes and constrained access to capital or home ownership. Underrepresentation in decision-making structures can also mean that their needs are less visible in consultation processes.



Households experiencing multiple forms of disadvantage, such as low income, poor health, inadequate housing and social isolation, are at greatest risk of severe energy poverty and are often the hardest to reach.

* Female-headed households may include single women living alone, single mothers, and households in which a woman is the primary income earner or the main decision-maker, regardless of the household's composition.

3. INDICATORS OF ENERGY POVERTY

In addition to demographic characteristics, certain behaviours and living conditions can indicate that a household is experiencing energy poverty. These signs can be identified through conversations with residents and trusted intermediaries. Common indicators include:



1 Heating only one or two rooms during cold weather



2 Regular use of extra blankets, multiple layers of clothing and portable heaters



3 Visible signs of damp, mould or condensation inside homes



4 Reported "rationing of energy use", including reduced cooking and appliance use



5 Existing or suspected debt with energy suppliers



6 Expressed concern about energy bills



7 Normalisation of deprivation – some households have adapted to prolonged energy hardship, prioritising the avoidance of energy costs over improvements in comfort or well-being.



8 An inadequate or unbalanced heating system that causes some rooms to be too cold while others overheat, making it difficult to maintain a comfortable indoor temperature

Energy poverty is rarely distributed evenly across a neighbourhood. Even within the same multi-family apartment building (MFAB) or street, households may differ significantly in their ability to meet their basic energy needs. For this reason, available data should always be complemented by local knowledge via insights from social workers and other trusted intermediaries who know the realities residents face.

It is also important to recognise that vulnerability is multidimensional. Many people experiencing energy poverty face multiple challenges at the same time, and the intersection of those disadvantages often makes their situation far more complex than any single category can capture.

4. SCREENING AND RECORDING VULNERABLE HOUSEHOLDS

To better understand these circumstances and ensure tailored support, a **vulnerability screening template** is provided in Annex 1. The screening should be conducted for each household to identify those requiring a more dedicated and tailored engagement approach. The proposed template can be used as a Word document or converted into a digital format using Microsoft Forms. Using Microsoft Forms allows staff to record screening indicators in a consistent, structured format with responses automatically compiled into a shared Excel file for review and analysis. Access to data should be limited to authorised staff, in line with data protection requirements for personal and sensitive information collected under the project. Following the screening, each household should be recorded in the **vulnerability register** (Annex 2) to track outreach and follow-up activities.

Note: Staff must inform residents that any information collected on their situation will be used solely to assess household needs and identify appropriate support, that it will be stored securely and kept confidential, and that residents retain the right to access, correct and request deletion of their data at any time.



2. From contact list to commitment



Tool 2: Stakeholder engagement planning

Once stakeholders have been mapped and the key groups within the MFAB(s) identified, the next step is to plan how to actually engage with them. This is the stage where many engagement activities quietly fall apart.

It is common for community engagement coordinators to put a lot of effort into identifying stakeholders, only to move straight into organising meetings or distributing surveys or leaflets without first considering the most appropriate ways to engage each stakeholder group or when to involve them. While these activities may create the impression that engagement is progressing, they rarely build the trust, meaningful participation and long-term commitment that renovation projects need to succeed.

This tool is about planning engagement activities that are tailored to different stakeholder groups, ensuring that engagement reaches the people who matter most and creates opportunities for genuine dialogue and collaboration.

Stakeholder engagement plan

A stakeholder engagement plan (SEP) is the tool that turns the stakeholder mapping and vulnerability findings from earlier steps into a concrete working plan. While stakeholder mapping asks "Who are our stakeholders?", the SEP asks "How and when should they be engaged and with what outcome?". The distinction is important. Knowing that a MFAB has 50 households, including four tenants who barely interact with their neighbours, is just a starting point.

A well-designed SEP helps with deciding how to reach those households before renovation decisions are made:

- **Tailor the engagement approach** to each stakeholder group, recognising that different groups require different methods and level of involvement.
- **Plan engagement activities** around key project milestones rather than treating engagement as a one-off activity or as something that happens at the end of a project phase.
- **Assign responsibilities** so that every engagement activity has an identified owner. When responsibility is unclear, important conversations are often delayed or never happen at all.



Levels of engagement

One of the most widely useful frameworks for stakeholder participation is the following five-level framework of engagement, also called the participation spectrum. The appropriate level of engagement depends on stakeholders, the decision being made, and the stage of the project.

 1. INFORM	 2. CONSULT	 3. INVOLVE	 4. COLLABORATE	 5. EMPOWER
Represents the baseline by telling people what is happening. It is one-way communication, focused on providing clear and timely information.	Means asking stakeholders for their views before decisions are made. Their feedback helps shape the project, although final decisions remain with other residents as well.	Is the phase when stakeholders actively participate throughout the process rather than being consulted. Their perspectives and feedback are considered as options are developed and refined.	Means stakeholders work alongside the project team to develop solutions and share responsibility for decisions.	Gives stakeholders the authority to make decisions on specific parts of the project, with the project team committed to implementing those decisions within agreed boundaries.
Example	Example	Example	Example	Example
Posting a notice on the MFAB's entrance announcing an upcoming meeting about the renovation project.	Conducting a survey to understand residents' priorities for shared spaces, such as the laundry room, bicycle storage, improved outdoor areas etc.	Organising regular workshops where residents contribute to discussions on renovation measures throughout the planning phase.	Residents participate in working groups that jointly evaluate renovation options and agree on preferred solutions.	Residents vote on the preferred project options, setting priorities for specific interventions or determining the allocation of resources.

It is important to remember that these levels are not a hierarchy through which every stakeholder must progress. The goal is not to maximise participation at all costs, but to select the level of engagement that is appropriate for each stakeholder group, based on their interests, needs, influence and the decisions that affect them.

How to build a SEP: step-by-step instructions

This section explains how to prepare a SEP, while Annex 3 provides the **operational template**.

- 1 Start from a stakeholder map** which lists all groups identified in Tool 1 and notes their interests, influence and barriers.

STAKEHOLDER MAP			
GROUP	INTERESTS	INFLUENCE	BARRIERS

- 2 Define the engagement level for each group** (inform, consult, involve, collaborate, empower) based on how decisions affect them.

ENGAGEMENT LEVEL	
Inform	
Consult	
Involve	
Collaborate	
Empower	

- 3 Select the most suitable engagement methods for each group** (door-to-door, workshops, phone calls, trusted intermediaries etc.).

ENGAGEMENT METHODS	
	Door-to-door
	Workshops
	Phone calls
	Trusted intermediaries
	Other

- 4 Map engagement activities to the project timeline** showing when each group needs to be involved for their input to matter.

PROJECT TIMELINE					
	APR	MAY	JUN	JUL	AUG
Group A					
Group B					
Group C					
Group D					

- 5 Assign responsibilities** by specifying who leads each activity and who supports it (e.g. community engagement coordinators, social workers, building managers).

ACTIVITY	LEAD	SUPPORT
	A.K.	M.D.
	S.B.	L.H.
	R.P.	A.T.

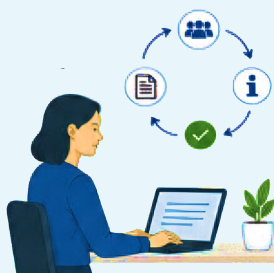
- 6 Identify expected outputs** (e.g. feedback summaries, participation records, decisions made).

	Feedback summaries
	Participation records
	Decisions made

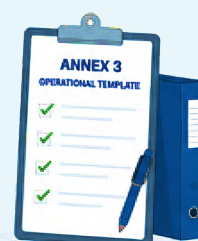
- 7 Check for barriers and add mitigation measures** (timing, accessibility, language, trust-building).

BARRIERS	MITIGATION MEASURES
	Schedule at convenient times
	Choose accessible venues
	Provide translation and materials
	Work with trusted intermediaries

- 8 Review and update regularly** as stakeholder needs evolve or new information emerges.



- 9 Use Annex 3 to document all of the above** in a clear operational format.



A SEP should be treated as a living document and reviewed regularly as the renovation project progresses and stakeholder needs shift.

Understanding barriers to participation

Community meetings may not always reach the households that would benefit most from renovation programmes. For example, an energy-poor household living on the second floor struggling to heat its home in winter is far less likely to attend an evening information session than a retired homeowner who has the time and flexibility to participate. If these differences are not taken into account, "community engagement" may end up reflecting the perspectives of everyone except those the project is intended to benefit most. Before finalising any engagement plan, it is essential to consider the barriers that may prevent people from participating, rather than assuming that low attendance reflects a lack of interest.

With thoughtful planning, **many practical barriers** can be addressed by:

- Scheduling meetings outside working hours or offering sessions at different times
- Choosing venues that are wheelchair-accessible
- Offering an option to participate remotely for those who cannot attend in person
- Giving participants sufficient notice of meetings so they can make arrangements
- Holding events in familiar community locations rather than formal institutional settings
- Providing refreshments, particularly for longer sessions

PRACTICE IN JÓZSEFVÁROS

• Community events organised for tenants

Why it worked: Community engagement and facilitation events were organised directly within the municipal rental buildings where residents live. These events were promoted locally through leaflets and posters, while community organisers also approached residents in person during the events to invite them to participate.

• Flexible working hours and expanded availability

Why it worked: Most of the community engagement events organised, especially tenant assemblies, were held outside of working hours. The typical starting point was around 6 p.m., recognising that households are often busy during the day and are more available in the late afternoon/early evening hours. Both the community organisers and municipal staff were willing to organise events that were outside of their typical eight-hour working days. Furthermore, in many cases, tenants were able to reach the community organisers directly by cell phone on working days.

Knowledge and confidence-related barriers can also affect participation in engagement activities. Discussions about renovation projects often involve unfamiliar technical terms that can make residents feel excluded or unsure of their own understanding. Fear of asking the "wrong" question or being judged may prevent some people from participating altogether. This is especially common among older residents and people with lower levels of formal education. Using plain language, visual examples, and questions based on everyday experiences – such as "Does your apartment feel cold in winter?" – is far more effective than relying on technical jargon.

PRACTICE IN ELEKTRÉNAI

- **Simple explanations and visual guidance**

Why it worked: If we see that people do not fully understand the proposed renovation, we try to explain in very simple terms **what they can expect after the renovation, why it is important, and what benefits they will get from it**. We also try to explain things visually, for example showing where and what will be insulated, where the mini heat recovery ventilation systems will be installed and how they work, how to use the upgraded heating system, and how to regulate the temperature and save energy.

PRACTICE IN JÓZSEFVÁROS

- **Hiring an energy expert with previous experience in working with vulnerable groups**

Why it worked: When selecting a professional to provide energy consultancy services, we considered it a key criterion, that in addition to their professional qualifications, the selected person should also possess the interpersonal and social skills that are required when working with the socioeconomically vulnerable households that are typical in Józsefváros's pilot area.

A **lack of trust** is often one of the biggest barriers. In many post-transition communities, residents have experienced years of unfulfilled commitments from institutions, management companies etc. After seeing several consultation activities produce little or no change, it is entirely understandable that many people choose not to participate in another one. Rebuilding trust requires consistent action over time including keeping commitments, communicating openly and honestly and demonstrating that residents' views have influenced decisions.

PRACTICE IN JÓZSEFVÁROS

- **Community organisers as intermediaries between asset management company and tenants**

Why it worked: Issues reported to community organisers by tenants were systematically forwarded to the competent authorities, and **feedback was provided in every case within a short timeframe**. No enquiry or complaint remained unanswered, helping to build trust among residents.

At the same time, community organisers have limited influence over whether technical issues are ultimately resolved. From the residents' perspective, however, there is often little distinction between the various municipal bodies, which can make strengthening institutional trust more challenging.

PRACTICE IN ELEKTRÉNAI

- **Building trust through peer experiences**

Why it worked: At meetings, encourage residents **to share positive renovation experiences they have seen among friends, family members**, and others. When people hear the same information not only from representatives of institutions but also from people they know and trust, even strongly opposed residents may reconsider their position.

Financial and psychological barriers can make it particularly difficult for households experiencing energy poverty. For families already struggling to pay their bills, a conversation about renovation can feel like another financial burden rather than an opportunity. If the available support, expected costs and long-term benefits are not explained clearly from the beginning, many people may decide not to engage at all. It is therefore important to highlight and clearly explain any additional or targeted financial support available for renovation (for example, support for apartment owners who receive heating cost compensation etc.)

Residents may reasonably raise questions such as:



I already struggle to pay my bills and have had to cut back on essentials.
How could I possibly afford this?



Will I be expected to make a financial contribution that is **beyond my means?**



If everyone agrees to renovate the building, **will I have to move out?**
Where will I go?



I'm 80 years old. Do I really need to go through all this now? I just want to **stay in my home** without the disruption.

PRACTICE IN KAIŠIADORYS

• Convincing residents of a MFAB to vote for renovation

Why it worked: Residents of a MFAB built in the 1970s were deciding whether to renovate. Most residents were older and the building had serious maintenance issues, including deteriorating pipes and potential safety risks.

During the first vote, many residents opposed the renovation due to the cost, lack of public funding, and lack of interest among older residents. Younger families engaged with their neighbours and initiated a second vote two years later.

By then, the pipe problems had worsened. During the second voting meeting, all of the building's residents were invited to visit the basement together and see firsthand the condition of the pipes, heating station and other facilities. Most residents had never been to the building's basement before, so seeing the extent of the deterioration helped change their perspective on the urgency and importance of the renovation.

Residents understood that emergency repairs would need to be carried out immediately, and that delaying them could result in an accident and significantly higher costs than those of a comprehensive renovation.

Highlighting the safety risks and higher costs of delaying repairs helped convince those who were initially opposed to the project to vote in favour of renovation.



3. Building lasting connections



Tool 3: Community outreach and trust building

There is no single communication channel that works for everyone. Relying on one channel (a noticeboard, an email etc.) is one of the most common reasons engagement efforts are ineffective. Different people need to be reached in different ways, so the projects that make greatest impact tend to combine several approaches rather than depending on one.

Door-to-door

Meeting residents in person remains one of the most effective ways to build trust. It takes time and patience, but a personal visit shows commitment in a way that printed materials and online messages cannot.

Rather than following a script, a simple conversation structure should be used: introduce yourself, explain the project in plain language, ask about the resident's experience, provide useful information, and end the conversation respectfully even if they choose not to participate.

- **Keep the first visit short.**
- **Visit at times when people are likely to be at home.**
- **If no one answers, come back** – and always leave a leaflet or contact details so residents can reach you later.

PRACTICE IN ELEKTRÉNAI

• **Primary engagement method: Meet residents where they are**

Why it worked: Residents of a specific department are invited in advance to a scheduled meeting held outside the building or in its stairwell. If turnout is low, the team switches to a door-to-door approach, inviting all residents individually to join. While most are willing to participate, some residents with health or mobility limitations are often unable to attend or engage with the information in person, and residents under time pressure from household responsibilities are frequently unwilling to take on an additional engagement. After the meeting, a notice is posted on the building's noticeboard summarising the decisions made and outstanding matters. Additional information may also be distributed to residents via their mailboxes.

Combining communication channels

Door-to-door outreach is most effective when combined with other communication channels. Using noticeboards, flyers, mobile application groups and community meetings ensures that information is accessible to a wide range of residents.



Building noticeboards are a useful supporting channel, especially for announcing dates and locations, although they can be easy to miss.



Chats on social media (WhatsApp, Viber and other messaging and Facebook groups) tend to reach younger residents but may miss older residents and households with limited digital access.



Phone calls are often overlooked but can be a highly effective way of reaching residents. For residents who are hard to reach in person or who have difficulty leaving the house, a brief phone call can be more effective than knocking on the door, especially if the renovation project is introduced by someone they trust.



A website provides residents with easy access to project information, updates, resources, eligibility requirements and contact details.



Printed information materials need to be developed in plain language – and, where relevant, translated into any other languages spoken in the neighbourhood.

Trusted intermediaries

A trusted intermediary is someone the community already knows, listens to and trusts. Because they are seen as reliable and knowledgeable, they can play an important role in encouraging participation, building confidence and supporting the adoption of new practices. In the context of the energy transition, trusted intermediaries may include community leaders, social workers, neighbours, energy advisors, and representatives of local authorities who help residents put renovation measures into practice.

Female intermediaries deserve specific attention, not as a token addition but because they can reach those most in need. Women often play an important role in informal networks of communication and support, and may be able to connect with other women of various ages and stages of life. If a project team is male-dominated, it may simply never reach these women through formal channels. Recruiting and supporting women as intermediaries can therefore help to close this access gap, strengthen trust, and create a network of local contacts who can facilitate communication between residents and the project.

When identifying trusted intermediaries, look for people who:	
	1 See residents regularly.
	2 Are already listened to , without needing to be convinced first.
	3 Come from the same community as the vulnerable or hard-to-reach people, as people are more likely to trust and engage with someone from their own community.
Identification alone will not activate the relationship with trusted intermediaries. Such relationships need to be deliberately brought into the project:	
	1 Reach out to them directly and explain the project's purpose clearly.
	2 Clearly communicate what support you need from them , for what purpose and for how long, so both sides have a common understanding of the commitment.
	3 Provide them with clear and accurate information , and training where needed, so they can answer residents' questions accurately and consistently.
	4 Give them a defined role in the SEP , with clear responsibility for specific outreach activities.
	5 Establish a direct feedback mechanism that allows them to flag concerns, questions or difficulties they encounter in the neighbourhood.
	6 Recognise their contribution appropriately through formal acknowledgement, compensation or another locally appropriate form of recognition.

Targeted outreach for hard-to-reach groups

An inclusive energy transition requires that all residents have equal opportunities to access the information, support and resources they need to participate. However, conventional communication and engagement methods often fail to reach everyone due to various barriers (refer to Tool 2 Understanding barriers to participation). Hard-to-reach groups may include elderly residents, low-income households, residents with disabilities, energy-poor households, Roma and other minority communities, or individuals with limited digital or language skills.

Targeted outreach is a proactive approach that tailors communication, engagement methods and support services to the specific needs of these groups. Such outreach not only increases participation and awareness but also promotes social equity by ensuring that no group is left behind.

Tactics that actually work for this group

Work through trusted intermediaries. Collaborate with individuals and organisations that already have established relationship with the community. When these trusted individuals or organisations act as partners, they can introduce the topic with familiarity and credibility, making residents more willing to engage.

PRACTICE IN JÓZSEFVÁROS

- **Energy consultation service for the most vulnerable**

Why it worked: In cooperation with the arrears management group of the local social service provider, community organisers reached out to tenants with the highest utility debts. Besides agreeing on instalment payments, this enabled us to deliver energy consultancy services directly to these households in order to prevent the further accumulation of arrears.

- **Resource Centre staff as intermediaries**

Why it worked: The Józsefváros Resource Centre (RC) was established with the primary aim of providing a new connection between tenants and local authority bodies. The aim was to speed up certain bureaucratic processes through closer ties and continued personal presence, combined with the idea that the RC's staff would become the most approachable, easily understandable "face" of the municipality. They often had to work as mediators and facilitators, especially when solving disagreements between residents within a building or when they referred the residents' issues with the contractor to the local authority's asset manager.

Involve trusted neighbours. Neighbours who have already completed a similar renovation or benefited from a subsidy can often be more persuasive than project staff. Hearing about a positive experience from someone they know and trust can make people feel more confident about taking part themselves.

PRACTICE IN JÓZSEFVÁROS

- **Implementing a common space renovation or solving a community problem via social facilitation**

Why it worked: In the selected municipal rental buildings, community organisers facilitated cooperation among residents around a shared problem or towards a common commitment to improving communal spaces. **One of their key methods was to work through residents who already held a more influential position within the community and could help engage others.** However, this approach also carries the risk of concentrating excessive influence in a single individual, which may ultimately undermine rather than strengthen community cohesion.

Frame messages around the benefits to users before presenting technical or procedural details. Start by explaining what matters most to people, such as a warmer home in winter, a cooler home in summer, lower energy bills or improved comfort and well-being, before presenting technical and other details. Energy-poor people are more likely to engage when they clearly understand how an initiative can improve their everyday lives.

PRACTICE IN JÓZSEFVÁROS

• Particular emphasis on explaining the benefits for tenants

Why it worked: During forums and events related to services and renovation projects, particular emphasis was placed on explaining the benefits for tenants. As these services were specifically designed to improve residents' living conditions, highlighting these advantages formed a central element of all community meetings and information sessions. In the case of building renovations, this helped to partially offset the inconvenience associated with construction works and made the process more acceptable from the tenants' perspective.

Go to people instead of expecting them to come to you. Places such as senior centres, religious facilities, public health centres, libraries etc. are often trusted far more than formal meetings or public events.

PRACTICE IN JÓZSEFVÁROS

• Reaching out to the most vulnerable and being continuously present in the neighbourhood of our target group

Why it worked: We recognised that those most in need of energy consultancy services were often difficult to reach through indirect or online communication channels. Therefore, in cooperation with the municipal asset management company and social service workers, community organisers visited tenants in person and **arranged appointments with our energy expert on their behalf**. In addition, all events were held either at LakóTér, our RC office located within the pilot area, or directly within the municipal rental buildings themselves.

Start with a conversation, not paperwork. Avoid opening with a stack of forms or a survey, as this can feel intimidating for vulnerable people. Instead, begin with a genuine conversation to build trust. If paperwork is needed, introduce it only after a relationship has been established.

PRACTICE IN JÓZSEFVÁROS

- **Reaching out to the most vulnerable and being continuously present in the neighbourhood of our target group**

Why it worked: During the initial phase of the project, community organisers conducted a comprehensive assessment of municipal rental buildings. They visited the buildings in person and carried out door-to-door outreach, speaking directly with residents about their daily lives, their experiences of living in the building, and their views on the main challenges they faced and the changes they considered necessary.

Explain how personal data will be handled. Do not assume residents understand how their information will be handled. Many people are reluctant to seek support because they worry that sharing personal information could have negative consequences for them.

PRACTICE IN JÓZSEFVÁROS

- **Starting the events and programmes by stating their exact purpose**

Why it worked: Community organisers began every event, consultation and questionnaire by clearly explaining its purpose and intended outcomes. They outlined the changes the activity was expected to contribute to and, most importantly, how these changes would affect residents' everyday lives and improve their quality of life.

Monitoring and evaluating outreach

A **simple outreach record** should be maintained throughout the renovation project, recording who has been contacted, when and how they were reached, and if any follow-up was required. This will help community engagement coordinators monitor outreach and ensure outstanding follow-ups are completed. A template for the outreach log is provided in Annex 4.

Outreach should also be coordinated among project team members. Responsibilities for particular MFABs or groups should be agreed in advance, with regular updates. This helps avoid repeatedly contacting the same households while others may be missed, which can lead to frustration and dissatisfaction among residents who are approached multiple times.

Finally, the community engagement coordinators should periodically assess whether the outreach is actually reaching the intended groups. This means looking beyond the number of people contacted and considering who has engaged, and whether hard-to-reach groups are being reached at the appropriate level.

The indicators in the table below can help community engagement coordinators identify gaps:

Category	Key considerations
Outreach rate	% of target group contacted • Broken down by group, gender and MFABs
Engagement rate	% of those contacted, who were engaged • Attended meetings/workshops • Requested information • Required additional clarification % of engaged individuals rating their experience as satisfactory or above (survey or interview)
Drop-off share	% of those engaged who didn't complete the next step • Where possible, the reason for drop-off should be identified
Trusted intermediary	% reached through trusted intermediaries • Neighbours • Social workers • HOAs • Others
Repeated contact	% of individuals who needed more than two contacts before engaging • Broken down by vulnerable category (e.g. disability, elderly, single-parent household, low-income), gender and MFABs



4. Messaging that resonates with the community



Tool 4: Communication and awareness

Communication and awareness-raising activities are often viewed as secondary to the technical aspects of renovation work, and are given lower priority. Consequently, they sometimes involve little more than distributing a leaflet or issuing a press release once the key decisions have been made.

What is the difference between communication and engagement?

Communication is about sharing information, and it usually flows in one direction. It helps people understand what is happening and what is planned. A poster explaining what "energy sufficiency" means, flyers, and notices about the upcoming renovation are all forms of communication. Nevertheless, communication alone does not give residents a real say in the final outcome. People receive the information, but they are not involved in making decisions.

By contrast, engagement is a two-way relationship which means including people in the process (e.g. asking for their opinion, incorporating their needs and concerns into design decisions etc.). Meaningful engagement takes time and requires ongoing effort, but it gives people a genuine sense of ownership.

Supporting behavioural change without creating pressure

Energy transition initiatives often require people to adopt new behaviours or do something differently. This may involve using less energy, investing in home improvements, adopting new technologies, or making other small adjustments to everyday routines. Even small actions, such as lowering the thermostat or switching off unused appliances, may require people to change established habits.

Changing established habits depends on individual decisions which can be influenced through clear and thoughtful communication with residents. Technical solutions are the initial step but are not enough. People need to understand why a change is being recommended and what benefits people can expect. Messages that focus on practical outcomes – such as lower energy bills, a warmer home and greater comfort – are more meaningful and impactful than messages that focus on climate targets and sustainability.

Studies show that when people choose to act because they personally value the outcome, it contributes more to energy-saving behaviour than previous habits or even perceived control. At the same time, messages that rely on pressure or fear often have the opposite effect. Instead of motivating people, they can create resistance and reduce long-term engagement.²

Another useful approach³ is to encourage positive behaviour by making the preferred choice easier without limiting people's freedom to choose. This can be achieved through simple changes such as setting energy-efficient thermostat temperatures as the default option or simplifying energy bills. Small changes in how information and choices are presented can therefore make sustainable behaviour easier. Consequently, people need to understand why a recommendation is being made, and recognise that they have a choice and can easily opt out.

The guidance below sets out how to apply this approach to written and verbal communication materials, and advises which communication channels to select.

Table 2: Principles for effective communication

Designing effective messages	Tailoring communication for vulnerable groups
• Start with benefits that matter to people. Messages about lower energy bills, warmer/cooler homes, better health and improved comfort are usually more persuasive than messages on environmental responsibility. • Make it concrete and familiar. Describe what residents can expect to experience (e.g. warmer/cooler homes or faster-heating rooms). Use measures people can easily relate to (e.g. monthly costs, degrees, time saved) and avoid technical units (kWh/m², U-values etc.). • Keep to one message per item. Each leaflet or poster should focus on one key message, rather than trying to explain the technology, the subsidy and the timeline all at once. • Be honest about why recommendations are being made. When people understand the reasons behind a recommendation and know they are free to decide for themselves, they are more likely to engage with the process. • Provide choices whenever possible. Presenting several ways to achieve the same goal allows residents to choose the option that best fits their circumstances (e.g. adjusting heating practices, changing daily routines).	• Meet residents where they are. Combine door-to-door visits with printed materials and phone contact. • Adapt formats. In addition to a standard leaflet, develop alternative versions, including large-print and plain language formats, to meet the needs of different audiences. • Focus on encouragement rather than blame. This is especially important for households experiencing energy poverty, as high energy costs are often driven by inefficient housing rather than personal choices. • Plan for repeated contact. Vulnerable groups are less likely to act on a single communication. Use repeated and varied forms of contact.

² Webb D., Soutar G.N., Mazzarol T. and Saldaris P. 2013. Self-determination theory and consumer behavioural change: Evidence from a household energy-saving behaviour study. *Journal of Environmental Psychology*, 35, 59–66. <https://doi.org/10.1016/j.jenvp.2013.04.003>

³ Prosci. 2024. What is Nudge Theory? Does It Apply to Change Management? Available at: <https://www.prosci.com/blog/nudge-theory>

Choosing communication channels

Communication channels should be selected based on the purpose, target audience and level of interaction required. Where access to digital channels is limited, digital communication should be complemented by non-digital channels.

Purpose	Suitable channels
Awareness raising / announcements	• Leaflets • Municipal newsletters • Local media • Social media
Two-way engagement	• Information sessions • Door-to-door visits • Community meetings • Focus groups
Ongoing updates	• SMS, mailing lists, social media • Building entrance noticeboards, HOAs, community groups
Individual support	• One-to-one meetings, phone contact • HOAs, trusted intermediaries
Reaching hard-to-reach groups	• Door-to-door visits • Trusted intermediaries • Phone contact

Annexes

ANNEX 1

Part A: Vulnerability screening template for a MFAB located at [street name and no.]

Purpose	Suitable channels
Household ID	1 floor, Apt. No. 3
Address	
Contact name	
Owner/tenant	☐ Owner ☐ Tenant ☐ Owner & occupier
Household composition	☐ Presence of children ☐ Single-parent household (F/M) ☐ Person living alone (F/M) ☐ Elderly resident (F/M) ☐ 65+ ☐ 75+
Household size	Indicate the number of adults and children
Age groups [EJ1.1] of household members	
Contact method	☐ Phone ☐ In-person ☐ Trusted intermediaries
Screened by	
Date	

Part B: Screening criteria

Criterion	Yes/No	Notes
Financial vulnerability		
Household income below the locally defined low-income threshold		
Unable to pay utility bills		
Receives social assistance		
Existing debt affecting the household's ability to contribute to renovation costs		
Unable to cover required co-financing contribution despite available subsidies		
Accessibility needs		
Requires home visits		
Requires assistance with completing application forms		
Requires materials in large print		
Contact method		
Communication barriers		
Rarely checks phone		
Does not answer unknown numbers		
No or limited digital access		
Hearing impairment		
Vision impairment		
Mobility impairment		
Difficulty in understanding official documents		
Previous negative experience with public institutions		
Staff's observations		

Part C: Screening outcome

Support and follow-up	Entry
Recommended engagement track	☐ Home visit ☐ Phone ☐ Other _____
Best time to contact	☐ Morning ☐ Afternoon ☐ Evening ☐ Weekend
Support measures	☐ Application assistance ☐ Overview of planned renovation measures ☐ Other _____
Responsible staff	
Follow-up date	DD/MM/YYYY

ANNEX 2

Vulnerability register for a MFAB located at [street name and no.]

Household ID	Owner/Tenant	Primary risk factor(s)	Track assigned	Status
<i>e.g. Floor 1, Apt. No. 3</i>	<i>Owner</i>	<i>Elderly, alone, disability</i>	<i>Targeted</i>	<i>Contacted</i>
<i>e.g. Entrance A, Floor 4, Apt. No. 9</i>	<i>Tenant</i>	<i>No digital access</i>	<i>Targeted</i>	<i>Pending</i>

ANNEX 3

Stakeholder engagement plan for a MFAB located at [street name and no.]

Last update: DD/MM/YYYY Updated by: _____									
No	MFAB's	Stakeholder	Energy-poor household (YES/NO)	Interest (what they want from a project)	Influence (their capacity to affect its outcome or delay)	Barriers (what stops them from engaging)	Engagement level	Engagement method	Timing
1	Address 1 Block A	Apartment owner	No	High (due to high heating costs)	High (voting)	Scepticism about long payback periods; limited time for meetings	Consult and involve	Meetings, formal consultation; info sessions, flyers, noticeboard	Pre-decision, decision
2		Tenant (female-headed single parent household)	Yes	High (due to high heating costs, health issues)	Low	Childcare, work schedule; possible fear that engagement flags financial hardship	Involve, consult through a trusted intermediary, tailored approach	Door-to-door, in-person support	All phases
3	Address 1 Block B	Tenant (non-owner)	No	Medium (bills)	Low, but can obstruct	No formal voting right	Consult and involve	Info sessions, noticeboard; one-to-one meetings	All phases
4		Vulnerable household (owner) – disabled	Yes	High (health)	Low, but can block consent through refusal	Mobility barriers; potential communication barriers	Involve, consult, tailored approach	Trusted intermediary; home visits at accessible times; in-person support	All phases
5		Vulnerable household (tenant) – elderly person	Yes	High (due to high heating costs)	Low, but can block consent through refusal	Possible sensory impairment; digital exclusion	Involve, consult, tailored approach	Trusted intermediary; door-to-door visits with phone follow-up; in-person support	All phases

ANNEX 4

Outreach tracking log

No.	MFAB's address	Group reached	Outreach method used	Follow-up needed



EXOINVEST



ComActivate

Enabling community action for energy sufficiency