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ABCinEnergy

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# WP3.3 – Training Material “*Plan, Monitor & Lead Engagement Campaigns*”

## TRACK 1 – MANAGER TRAINING

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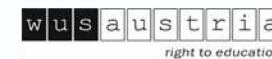
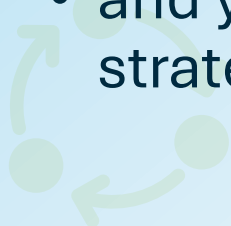




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# (1) Why Act Now?

- Higher Education Institutions are “*living labs*” and community influencers: as campus energy cost spike, a strategic opportunity appears.
- Today’s learning outcomes:
  - You will learn to relate policy drivers like **Green Deal** and **REPowerEU** to a campus strategy,
  - you will be able to incorporate these European strategies into institutional frameworks
  - and you will preview key digital monitoring tools and apply engagement strategies.





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# (1) Why Act Now?

- European Green Deal:
  - Striving to be the first climate-neutral continent
  - Launched by President von der Leyen in 2019
  - Responds to citizens' urgent call – especially from young people – for climate action
  - It aims to cut emissions by at least 50% by 2030, rising towards 55%, while legally binding the 2050 neutrality goal through the European Climate Law
  - The Green Deal invests in innovation, clean technology, and green infrastructure while ensuring a just transition.



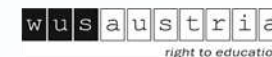


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# (1) Why Act Now?



- REPowerEU:
  - Affordable, secure and sustainable energy for Europe
  - In response to the hardships and global energy market disruption caused by Russia's invasion.
  - REPowerEU was launched in May 2022, is helping the EU to
    - save energy
    - diversify energy supplies
    - produce clean energy
  - REPowerEU safeguarded EU citizens and businesses from energy shortages and accelerated the transition to clean energy and stabilised prices





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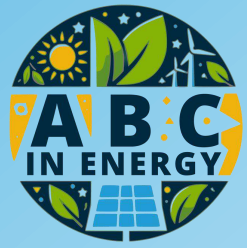
# (1) Why Act Now?



## • United Nations SDG 7

- Goal 7 is about ensuring *access to clean and affordable energy* which is key to the development of agriculture, business, communications, education, healthcare and transportation.
- To ensure access for all by 2030, we must accelerate electrification, increase investments in renewable energy, improve energy efficiency and develop enabling policies and regulatory frameworks
- Countries can accelerate the transition by investing in renewable energy resources, prioritising energy efficient practices, and adopting clean energy technologies and infrastructure.





## (2) Digital Monitoring Toolbox

- Habit Tracker Platform (HTP) = engagement tool & monitoring tool (open, transferable; designed for long-term access)
  - Filter by habit (Mobility / Heating-Cooling / Electricity / Water)
  - Filter by user group (Students / Academic / Administrative)
  - Weekly/Monthly view + date range
  - Comparison between universities (trend lines)

Comparison between universities

Filter by Habit

- Average of all habits
- Mobility
- Heating/Cooling
- Electricity Usage
- Water Usage

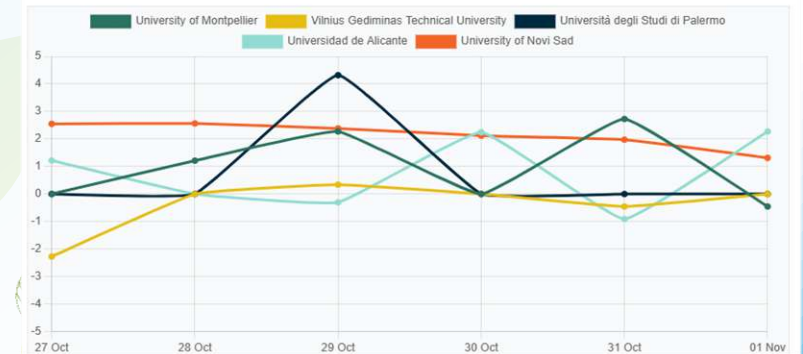
Filter by User Group

- Average of all user groups
- Student
- Academic Staff
- Administrative Staff

Select period range

- Weekly
- Monthly

Oct 27 - Nov 02, 2025





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## (2) Digital Monitoring Toolbox

- “Platform independence” (which skills are transferable to any digital tool)
- Regardless of whether you use: *HTP, Metabase, Superset, Excel, Power BI*, the following skills remain useful:
  - KPI definition & tracking
  - Data cleaning & structuring
  - Dashboard logic
  - Trend interpretation
  - Reporting formats
  - Baseline vs target methodology
- Train people in monitoring logic, not just software buttons!



## (2) Digital Monitoring Toolbox

- **KPI = Key Performance Indicator** makes progress *measurable*, enables data-driven *decisions*, links behaviour to *impact*, translates sustainability into *leadership language*, justifies *budget allocation*:

### **Outcome KPIs**

- 5% electricity use (kWh)
- 10% heating demand (weather-adjusted)
- 15% campus car trips
- +10% renewable energy share

### **Engagement KPIs**

- ≥35% participation rate
- 3 weekly check-ins per user
- 50 building ambassadors
- +12% self-reported behaviour change

### **Operational KPIs**

- ≥20 HVAC\* incidents fixed
- 8% after-hours base load\*\*
- 100% sub-meter coverage

### **Financial KPIs**

- €15,000 quarterly savings
- 2-year payback period
- € savings per m<sup>2</sup>

\*Heating, Ventilation, Air, Conditioning

\*\*The amount of electricity a building consumes when it is supposed to be unoccupied or minimally used (e.g., nights, weekends); kWh during defined off-hours



## (2) Digital Monitoring Toolbox

- GDPR & data ethics: consent, anonymisation, access controls
  - *Consent* - Users must agree clearly before data collection
  - *Purpose limitation* - Data collected only for defined sustainability goals
  - *Data minimisation* - Collect only what you truly need
  - *Anonymisation* - Remove identifying information when possible
  - *Access control* - Limit who can see personal-level data
  - *Right to withdraw* - Participants can opt out
- Core principle: Monitoring must empower, not survey.



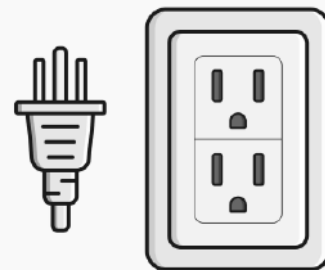
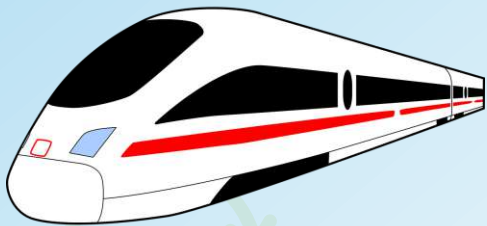


## (2) Digital Monitoring Toolbox

- Digital accessibility:
  - WCAG 2.1 (Web Content Accessibility Guidelines 2.1) basics for inclusive design.
    - *Contrast* - High contrast colours in dashboards
    - *Alt text* - Descriptions for charts & images
    - *Keyboard navigation* - Platform usable without mouse
    - *Simple language* - Clear instructions for habit check-ins
    - *Mobile-friendly* - Works on smartphones
    - *Captioning* - Videos include subtitles
  - If the system isn't accessible, participation data becomes biased

# (3) KPI Analytics & Best Practices

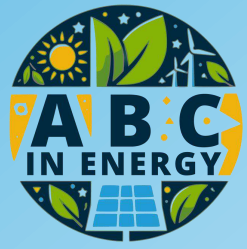
- Four habit categories mapped to KPIs:
  - Mobility (commutes & campus transport)
  - Heating & cooling usage
  - Electricity consumption
  - Water usage





## (3) KPI Analytics & Best Practices

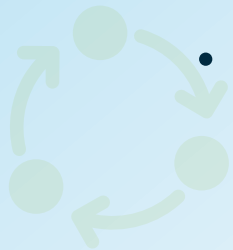
- From *baseline over target and dashboard* to *high-level report*
  - **Baseline** is your starting reference point: 310,000 kWh/month electricity use, 35% campus car trips
    - Best practice: Use at least 12 months of historical data, normalise for weather (heating degree days), account for occupancy changes
  - **Target** is the desired measurable outcome: -5% electricity consumption, -17% campus car trips, +10% renewable share
  - **Dashboard**: Visualises KPI progress, tracks trends over time, compares baseline vs current vs target, enables quick decision-making
  - **High-level report**: Translates KPI into leadership language, connects results to sustainability strategy, links performance to budget decisions



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# (3) KPI Analytics & Best Practices

- Two partner success cases:
  - VilniusTech electric-bike rental pilot (-17 % campus car trips)
    - Clear baseline (car usage level)
    - Defined measurable mobility KPI
    - Pilot scale first
    - Visible reporting
  - Alicante solar-PV expansion (+10 % renewable share)
    - Defined renewable share KPI
    - Infrastructure investment aligned with carbon strategy
    - Annual carbon accounting



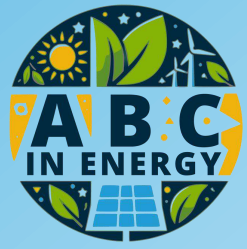


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# (4) How to Build & Lead a Working Group

- A **working group** institutionalises responsibility!
- Key roles & responsibilities in a working group:
  - **Group chair, manager** (connects the campaign to institutional strategy and financial decision-making)
  - **Data officer** (turns behaviour into measurable impact)
  - **Communications lead** (translates data and strategy into motivating messages)
  - **Student representatives** (bridge institutional initiatives with real behaviour change)





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# (4) How to Build & Lead a Working Group

- Engagement funnel: Awareness → Challenge → Celebration
  - **Awareness:** Inform and motivate
    - Launch event, Email campaign, Posters, Dashboard visibility
    - Psychological trigger: *“This matters, and I can participate.”*
  - **Challenge:** Activate behaviour
    - 30-day energy habit challenge, Dorm competition, Department leaderboard, Weekly check-ins
    - Psychological trigger: *“I want to improve / compete / contribute.”*
  - **Celebration:** Reinforce behaviour
    - Public recognition, Certificates, Social media spotlight, Small rewards
    - Psychological trigger: *“My effort was seen and valued.”*





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# (4) How to Build & Lead a Working Group

- *Exercise (30 min breakouts): draft a **3-month** “energy-habit” campaign plan:*
  - *Apply KPI logic*
  - *Think through role allocation*
  - *Design engagement stages*
  - *Anticipate participation rates*
  - *Structure timeline phases*
- **Use sticky notes to collect ideas and conduct the exercise!**





# (4) Exercise - Sample Solution

**Objective:** Reduce electricity consumption in pilot buildings by  $-5\%$  vs baseline while reaching  $\geq 35\%$  participation rate

- **Month 1: Strategic focus: Awareness + System Setup**

- Finalise baseline (12-month normalised data)
- Confirm KPI targets ( $-5\%$  electricity,  $\geq 20\%$  participation)
- Launch event (Chair endorsement)
- Onboarding via HTP platform
- Publish first dashboard + leaderboard
- Recruit building ambassadors

- **Month 2: Challenge + Quick Wins**

- Weekly themed focus (lighting, standby, Heating, Ventilation, Air, Conditioning)
- Incident reporting channel activated
- Fix quick operational issues (lights/HVAC stuck on)
- Mid-campaign pulse survey (2 questions)
- Publish energy trend update
- Recommendation: Scale / Extend / Adjust

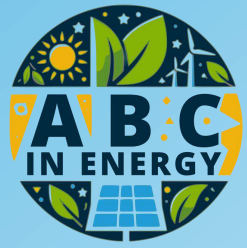
- **Month 3: Celebration + Measurement**

- Intensify competition (department vs department)
- Spotlight 3 success stories
- Final measurement week
- Compare baseline vs campaign period
- Celebration event + public results
- Draft leadership summary report

- **End-of-Campaign Deliverables**

- KPI summary dashboard
- Engagement metrics report
- Lessons learned





## (4) Exercise – Common Problems/Fixes

- **In case of low participation:** simplify check-in ( $\leq 1$  minute), recruit ambassadors in each building, tie to a visible reward.
- **If no sub-metering/building:** use main meters and proxy KPI (after-hours base load if available) or compare same building vs baseline.
- **If behaviour changes but kWh doesn't:** report “what we fixed operationally” and extend campaign, check and note if occupancy/weather are confounders.
- **For managers:** “If participation increases but energy does not decrease, we have engagement success but no energy impact. If energy decreases but nobody understands why, we have technical success but no cultural change. Strong campaigns track both!”

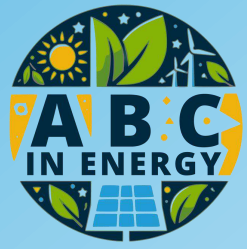


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# (5) Reporting & Continuous Improvement

- How a quarterly report template looks like while linking to the Sustainability Strategy:
  - Section 1: KPI dashboard summary
  - Section 2: engagement metrics & qualitative feedback
  - Section 3: lessons learned & next target
- Closed-loop cycle: data → reflection → revised targets
- Safeguards & enables accessibility checks, inclusive nudging (= gentle encouragement that works for diverse users)





# Short quiz

- 5 quick questions to confirm understanding (could also be MCQ):
  - What is the difference between a baseline and a target?
  - Name one outcome KPI and one engagement KPI for an electricity campaign.
  - Why might weather-normalisation be needed for heating KPIs?
  - Give one example of inclusive nudging.
  - What should Section 3 of the quarterly report include?





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Do you have any questions?

Thanks!

*Note: This project is funded by the European Union. Views and opinions expressed are those of the authors and do not necessarily reflect those of the European Union or the EACEA. Neither the European Union nor EACEA can be held responsible for them.*

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