

Hub re-engagement and evaluation workshop

27 June, 2013 / 9:30am – 4:30pm / EECA Offices, Wellington.

Facilitator: Trish Hall / Attendees: Vicki Cowan (Beacon Pathway), Andrew Pollard (BRANZ), Roman Jaques (BRANZ), Jo Wills (CEN), Jennifer Small (CEA), Richard Morrison (Eco Design Advisor – KCDC), Sarah Fleet (Eco Design Advisor – HCC), Christian Hoerning (EECA), Heidi Mardon (The Enviroschools Foundation), Sally Blackwell (Hub/Meso Consulting), Gleb Speranski (Insulpro) Debbie Hopkins (Otago University), Janet Young (Sustainability Trust), Phil Squire (Sustainability Trust), Sarah Free (Independent)

Sally welcomed everyone and thanked them for making the time to travel, to be here, and to participate in the discussion then handed over to Trish.

Trish Hall introduced herself and talked about the purpose of the day. Our intention was that by the end of the day we would have achieved, or be well on the way to achieving the following:

- 1) Hub collaborators are re-engaged in the Hub discussion and have focussed on what's been achieved and where we want to go next,
- 2) We have agreed shared objectives for the next year,
- 3) We have identified the components necessary to achieve those objectives: business model, resources, membership, management and governance, and
- 4) An action plan for the next stage of work to achieve our shared objectives.

1) Looking back in order to move forward

Introductory presentation - Hub original intent and progress to date

Sally gave a short power point presentation that covered: [POWERPOINT IN BEST PRACTICE LIBRARY]

- ⇒ The drivers for the original conversation about collaborating - leverage better results for and from independent advisors (i.e. leading to the Feb 2012 workshop)
- ⇒ The original proposal for a 'Hub' – what we thought the hub might/should be and how we thought we might achieve that
- ⇒ That the Hub pilot was part of a staged approach – begin with a web-based tool and assess what is working and how we move forward
- ⇒ MoU partnership between The Enviroschools Foundation, Beacon Pathway and CEN to 'activate' and test the Hub. Sally leading the work.
- ⇒ Other funding from EECA, The Working Together More Fund and Godfrey Hall
- ⇒ The objectives of the Hub pilot - which were to:
 - Establish a best practice library for practitioners
 - Trial and establish the most effective mechanisms to facilitate peer-to-peer learning and knowledge transfer (e.g. blogs, tip sheets, roundtable discussions etc.)

AND Establish collaborative arrangements to ensure the Hub is viable long term, including:

- Establishing on-going membership criteria and user guidelines
- Establishing information sharing agreements
- Establishing a quality assurance process to ensure Hub content is high quality
- Establish governance arrangements and the ongoing business / funding model.

We've made good progress on the first part of this, facilitating the second part via the site has been ineffective.

⇒ What has been achieved to date

⇒ The topics, areas online that generated the most discussion and interest

Focussing Questions

Using World Café we split into three groups to answer the following questions.

1. Thinking about the first 6 (16) months of the Practitioners' Hub: What has worked well and why? Discuss *what* have been our most significant achievements as well as *how* we've done this.
2. What lessons has each of us learnt from the first 6 (16) months of the Practitioners' Hub? Which of these need most attention for the next year?
3. Thinking about the first 6 (16) months of the Practitioners' Hub: What has not worked so well? And why is this? Discuss both *what* we do and *how* we do it.

Working in three groups, each group provided answers to one question at one table, then everyone moved to another table and contributed to the next question by adding their comments to those left by the previous group. All responses are summarised below.

1. Thinking about the first 6 (16) months of the Practitioners' Hub: What has worked well and why? Discuss what have been our most significant achievements as well as how we've done this.	
<i>Summary analysis</i>	<i>Comments from participants</i>
New venture	<ul style="list-style-type: none"> • Created something new – not perfect yet but has legs on it and lots of potential • Start-up on a low budget with commitment from a few • Ability to try a new channel to get research knowledge to a householder (Beacon)
New Connections/Collaboration	<ul style="list-style-type: none"> • HOW? Financial and time commitments from a few plus lots of in-kind support and interest from many • Brought together practitioners/stakeholders who may not have connected otherwise • Contribution of blogs – Buy in to share technical expertise • People are engaging with it – they post replies
Limited membership	<ul style="list-style-type: none"> • Closed community – we know the credibility of the posts • Honest discussion because of “closed” membership • Preferable to other forums where people are simply trying to sell stuff
Website functions and content	<ul style="list-style-type: none"> • People actually reply to your posts • Search function is great • Technical info is very helpful • Site is easy to use and well set out • Best Practice Library is great • Daily reminders / notifications are useful • Named posts with user profiles – works well because we get a full picture
Diversity/peer learning	<ul style="list-style-type: none"> • Diversity of opinions and perspectives • Diversity of topics in a short amount of time
Moderator function	<ul style="list-style-type: none"> • Sally as the moderator, necessary and performed well <p>⇒ Backed up by the strategic overview of key partners</p>

	⇒ Moderator performed the link between key partners and community
2. What lessons has each of us learnt from the first 6 (16) months of the Practitioners' Hub? Which of these need most attention for the next year?	
<i>Summary analysis</i>	<i>Comments from participants</i>
Limitations of web interaction:	<ul style="list-style-type: none"> • Not all conversations happen online • Hub of people, the site is only one tool • Faster and more specific to talk to someone on the phone or in person than to go onto the site
New connections, shared outcomes	<ul style="list-style-type: none"> • Peoples personal connections important, better research enabled through the group • Lots of shared objectives
Active Engagement needed from site	<ul style="list-style-type: none"> • Prompting is important to get us using the site
Unclear purpose	<ul style="list-style-type: none"> • Do we need to open it up to more inexperienced people who could benefit more • Closed community very positive in terms of QA BUT misses opportunity to influence wider • Risks If outsiders share values and principals then shame to have them excluded from learning/access to knowledge • Content needs to be of a quality that allows us experts to learn something new
Unclear process and governance	<ul style="list-style-type: none"> • Is it a Hub, a Network, or an Umbrella? • How do we come to a conclusion/synthesis endpoint (tip sheet...?) after long comment thread so collective HUB knowledge is useable? How do you author that synthesis at Practitioner Hub • Financial model for long-term sustainability UNCLEAR?
Risks?	<ul style="list-style-type: none"> • Fear of liability engagement in Hub- QA/Partnership mitigates some of this risk? • Liability still to be watched... see ADNZ plus NZIA shutting chat rooms
Competing priorities	<ul style="list-style-type: none"> • Awareness of competing priorities-Hub is not our core job ⇒ Does it really help us get our job done?
3. Thinking about the first 6 (16) months of the Practitioners' Hub: What has not worked so well? And why is this? Discuss both <i>what</i> we do and <i>how</i> we do it.	
<i>Summary analysis</i>	<i>Comments from participants</i>
Limited reach of pilot	<ul style="list-style-type: none"> • We've only trialled 1 part-website ⇒ Not trialled organisational connections ⇒ Use of materials from the site ⇒ Synthesis/synergistic use of info ⇒ Could there be a quarterly summary? ⇒ A quality control group? • People have been using previous networks, rather than using the Hub. • Actually feel less connected to the "conversation" relying on a web platform
Website functions and content	<ul style="list-style-type: none"> • Library hard to use ...want to be able to drill down. • When you enter site, not connected to search function

	<ul style="list-style-type: none"> • Passwords? Problems • Difficult to find URL • Confusion between “blog” and “forum”- maybe just have forum? • Some long responses put other people off • Once a forum has 30 – 40 responses there needs to be a summary – then start a new thread • Not enough info in prompts to let you know if you want to read it
Unclear purpose - future	<ul style="list-style-type: none"> • Don’t invest time if you think its temporary • Targeting – perhaps the website aspect of the Hub is best targeted to a specific audience or sub-set • Website most effective as part of training package nested in an organisational group • Hub site might be a good place for a body of knowledge but not a place for big picture conversations
Limited engagement - Barriers?	<ul style="list-style-type: none"> • Time pressures • Need to do something new (shift of mentality) • Not front of mind • Newsletter would be better than a digest email – need more of a prompt to look at the forum • Personal profiles and photos/avatars • People haven’t been using the knowledge-there are loads of info in library, need to use the search tool, not enough participation

As a result of answering these questions, the group thought about what aspects of the pilot we wanted to continue, what we wanted to do differently, and what we wanted to create that was new.

Continue	Do Differently	Create New
<ul style="list-style-type: none"> • Quality assurance from the membership of the hub • Really good info on the hub. • Continue having a moderator. • High quality technical knowledge and translating to “people at the door”. 	<ul style="list-style-type: none"> • Need to consider whether we’re being too risk averse and how maybe we need to think about broadening it to keep it alive. • Daily content email needs to contain more information. • Funding/financial model. • Need to pilot other aspects of the hub and who does what outside of the website • Deepening moderators role “Adam”(i.e. typical advisor) sees and uses the resource, connects to other advisers but has a problem with time. • Give info/experience • Putting it out there (sending content from site) so that we can’t ignore it • Make it easy for people to use and read 	<ul style="list-style-type: none"> • New process of communication between organisations • Process of quality assurance. • Synthesis of information into a product to be available to practitioners • Need process for making good ideas into action • Turn knowledge into knowledge into product

2) What do we want to create together in the next year and beyond?

A representative of each organisation was asked to give a 3 – 4 minute response to each of these questions.

1. The major changes or achievements for your organisation (relating to developing effective advisors) in the last 16 months.
2. You or your organisations ongoing commitment to developing effective advisors
3. How this commitment fits with the objectives you and your organisation have in the next 3 years.
4. The three big outcomes your organisation wants to achieve, and how much of this will you achieve on your own.
5. How could this help you achieve your outcomes.

Responses are summarised (very loosely) in Appendix One. A summary of the potentials captured from the discussion is below.

POTENTIALS/POSSIBILITIES FOR THE HUB – IDEAS CAPTURED

Purpose/Mission

- Hub facilitates/digests the relationships/knowledge transfer between researchers, policy makers, community organisations and advisors and maintains QA processes
- 'Hub is the connector between 'experts' and policy makers and end users
- Facilitate connections with member group of stakeholders

Products/Outputs

- Hub connects advisors to certification and training
- Products' of good practice created – i.e. checklists/decision frameworks
- Prioritise the products for synthesising and 'mass' dissemination
- Training programmes based on best practice resources on the Hub and feeding into the Hub
- Provide resources for those who have attended certified training
- Case studies
- 'cultural' checklists

Membership/Governance

- Who are the key organisations needed in the next stage?
- Limit membership to those with our values – community organisations holding some powerful information and tools
- Hub should co-opt expertise if it needs it rather than being open to all
- Hub members become part of a profession body (e.g. CEN??) to partner with other experts

Audience

- Could Hub provide a public online tool to help the public find independent advisors?
- Integrate CEN's public advice forum into the Hub – becomes a public facing aspect.
- Hub can assist people to find what products are out there and how to access them
- Hub could 'layer up' and offer information pathways to different audiences
- Every organisation that uses the Hub could 'man' a public facing enquiry page – reciprocity

- Connection to Industry
- Hub information and advice through educators and schools

Scope

- Can Hub move to provide knowledge to address both social AND technical questions facing advisors?

Business Model

- There is a commercial demand for assessment services – use as part of business model

3) Where do we want to put our energy?

Based on the discussions during the day we synthesised the ideas about where to focus our energy into the four points below.

1. Hub facilitates the connections/relationships between researchers, policy makers, community organisations and practitioners in order to create 'products' and advice e.g. checklists/ synthesis of 'threads'
2. Hub offers both independent and credible technical and social information and advice to practitioners and com. Orgs.
3. Hub is layered up offering information pathways to different audiences (e.g. public onto researches) include integrating a CEN public forum. Organisations consuming information should also to man questions/ answers.
4. Hub is a source for how to find independent advice/advisors

Each table was given two 'votes' to determine where they thought the Hub should focus its energy.

The results were that 1 & 2 were conflated (i.e. 2 couldn't happen without 1.) Two tables voted to focus on 1 and 2, and the other table focussed on 3.

Each group was asked to think through the components (skills, resources, commitments, actions etc.) required to turn their selected point into action.

Group One (focussed on 3).

Started on point 3 but ended up moving away from it. That is...Moved from "Hub is a provision of valuable services to home-owners" TO "Hub is an internal service to its 'members'".

Realised no point integrating CEN forum into Hub as it is already there on CEN site and Hub is focussed inwardly rather than outwardly.

Determined that the necessary components to deliver services to 'members' were:

- Training: This needs money, partners, products
- Certification
- Mentoring

Outcome: Internal service for members not the public. Need to define members. How do they become members? Do we become a brand or a new entity? Need to keep point of difference.

Group Two (Focussed on 1 and 2)

Need to clarify Hubs Objective: Attempted to define this as "The Hub is a platform that facilitates communication between key actors working in the home performance area to improve all partners' effectiveness"

The group determined that the key components needs to be effective in this were:

- Build on existing website to increase effectiveness of website. Also to get QA process right
- Create more of a sense of goals and desired outcomes and who the key actors are.
- More face to face contact time
- Discussed governance form: Need shared objective and principles
- Trying to define the scope-residential
- What's the driver? Environmental and human wellbeing
- Should the Hub be responding to the need of users or households?

Group Three (focussed on 1 and 2)

Defined the Hub Objective as: "Facilitate connection between group in order to manage information to produce products/services"

Partner orgs connected with one another and sharing knowledge and resources (inwardly focussed) to support each other to go out and be more effective at what we do. [Need a picture here!]

The group determined that the key components needs to be effective in this were:

- 1) Agree on a basic toolkit and topics
 - 2) Rationalising information
 - 3) Develop and agree on a QA process
 - 4) Next Step: reviewing website/information
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- A) Whole list of topics
 - B) Prioritise projects by putting to groups
 - C) Develop process design and QA
 - D) Working groups for different sections/topics

Develop different levels of information: From what the public need, what the advisors need and what the technical people have.

Agreed way forward

At the end of the discussion we came back together as a group and shared our thoughts and reach agreement on some aspects.

1. Hub objective is broadly: a platform that facilitates communication between key actors working in the home performance area and synthesises shared knowledge to produce products/services to improve all partners' effectiveness
2. Hub is aimed at: providing services, benefit for members (not the public) – still need to work on who is a member
3. Hub's main group of services (outputs) should be: training, certification, technical forum/mentoring
4. Should be driven by: members needs (emphasis on serving households)

Governance

Agreed that there needs to be a governance structure to guide and make decisions. Looked briefly at different collaborative models.

Agreed that for the time being the existing structure – i.e. an MoU between CEN, Beacon and The EnviroSchools Foundation that effectively makes a strategy/governance group should remain as the basic structure. However, this group needs to think more about how this will work and what is still needed – this will be fed back to the wider group.

For the time being there will be no new legal entity but CEN is happy to Host the administration

Need to think about other partners, and other collaborative models in the longer term.

Membership

We have a short discussion about membership at the end of the day. No consensus was reached but useful ideas emerged. The strategy group need to tease this out more and put it back to the wider group.

Membership criteria:

- Principles subscribed to: Independent based on good practise and good science
- Values: taking 'holistic view' of what is in best interest of customer.
- Organisation is primarily committed to education, community, well being, delivering back to community

How is this demonstrated? Where is the line drawn?

Possible Members: Local government, CRIs, NGOs, community groups (different levels of membership later), other research groups, other government orgs, social enterprises.

ACTIONS

- 1) Current partnership continues and works on membership criteria
- 2) We pick one "product" to develop based on adviser need – developing the product becomes an experimental process in collaboration. We use this to inform future approaches and develop our model. Including QA process and disseminating final product very important
- 3) Crafting / honing the Hub objective we developed today.
- 4) Distribute outcomes of today via email and then update on work of strategy group
- 5) Strategy group to meet in July to take the next step
- 6) Sally to send out usability survey to get more info on how people have found the site itself.

APPENDIX ONE: RESPONSES TO QUESTIONS FROM ORGANISATIONS PRESENT

- CEA-20 years- A lot more going out to people's houses. Working more in health areas since the earthquake.
- EECA sees the hub as a way to connect to the home energy advise network on the ground
- Eco Design Advisors- had a conference, looking at developing fact sheets and through workshops etc.
 - Survey - 98% thought service was a great thing, 62% did something around behaviour change.
 - Have a workshop coming up for EDAs while using BRANZ and possibility of another conference.
- BRANZ connected to the building industry, leveraging information to wider audience. See the connection is information practicability feedback. What we actually need to know, look at questions and following through practically. BRANZ is supportive of EDA and other initiatives. Beacon Pathway workshops too. Encourage participation in those forums.
- Sust Trust - looking for more training and more advisors happening as fast as possible. No specialist energy advisors any more, lost tender for WCC Home Advice. Wasn't huge customer need and we were moving in a different direction.
- EnviroSchools likes community organisations working together. Drawing together the groups in order to work together to improve each individual organisation, while maintaining integrity of each individual organisation. Also interested in reaching communities and households through schools. Wants to know how widely will be exploring the term energy. EnviroSchools has an ongoing commitment to the hub including a financial commitment.
- EDAs Need a champion on every council
- EECA - important to connect and communicate with the Hub and the on the ground advisors.
- Continuing education, up-skilling all advisors sharing learning
- Central linking of all groups
- CEN will realise a national energy-training program. Consistent best practice advised to produce certified advisors on a National level. Strong business case for the training program will be economically viable - Is the training going to include business aspects? Short answer is NO.
- CEN wants to use the Hub website to help with the training advisors certification program (Jo Wills)
- Hub is extremely useful as an educational tool to insulation association organisation. (Gleb) Wants to use Hub to find synergies for education of insulation installers. Would require much larger penetration into the public to become a large portal for information.
- The hub provides with a resource and works as an online tool. Hub needs to be held within an official body. Against opening up to more in order to maintain a point of difference. (Phil)
- Hub can add a social dimension for across organisations.
- BRANZ (Andrew) Wants to more effectively connect Hub with the breadth of information and material available through BRANZ. BRANZ can provide some quality assurance for the HUB website.
- Beacon is still committed to the future of the Hub.
- (Christian) Sees the Hub as a means of communication between EECA and the on the ground community organisations.