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Aotearoa's Home Energy Advice Landscape – Supporting Appendices

Sally Blackwell, Amanda Scothern and Jodie O'Neill

Project LR20102

Beacon Pathway, Allen+Clarke

Funded by the Building Research Levy



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Appendix 1: Practitioner survey

Content that a respondent would see if they chose "I provide Home Energy Advice" option for Question 2.

Home Energy Advice Survey

Note that questions marked with * were compulsory (respondent couldn't proceed to the next section if the question wasn't answered, and would get a prompt to tell them this if they tried to move on).

The purpose of this Survey

This survey supports research into the Home Energy Advice sector in Aotearoa New Zealand led by Beacon Pathway. Your responses will help Beacon Pathway identify ways to strengthen the sector.

This survey should take 15-20 minutes to complete.

Who should complete this Survey?

People who give Home Energy Advice (see definition below)

People who manage Home Energy Advisors

Key terms

For this survey, 'Home Energy Advice' means personalised advice to make homes healthier, more comfortable, cheaper to run, resource efficient, or have a lower environmental impact. It may cover all or some of these areas, be delivered in person, by phone, or online, and relate to existing or planned homes (including tenants, owners, and landlords). It may involve the use of various assessment tools and methods.

This advice may also be called 'Healthy Homes Advice', 'Home Performance Advice', 'Eco Design Advice', or 'Energy Education'.

'Advisor' refers to anyone providing this kind of advice.

Privacy

This survey is anonymous — we do not gather names that can be linked to survey responses, unless you choose to include your organisation name in a national list of Advice Providers. At the end of the survey, you can choose to provide contact information for further research or a prize draw. If you choose this option, information is gathered through a separate form not linked to your survey responses. We will not publish any responses in a way that can lead an organisation or individual to be identified. Survey answers are securely stored by SurveyMonkey or in a password-protected, two-factor authenticated drive, accessible only to the research team.

What happens to the survey responses?
Responses are combined and analysed by Beacon Pathway. Results will be included in a final report, published on the Beacon Pathway and BRANZ websites, and may be referenced in media releases or articles. Because responses are anonymous, your answers cannot be withdrawn after submission. Data may be securely stored for up to 7 years post-publication, then destroyed.

Can I come back to the survey if I get partway through and have to take a break?
Yes, you can do this, provided that: you use the same survey link and the same device to access the survey when you come back, and you DO NOT disable cookies. (Survey Monkey uses cookies to identify if it is the same respondent coming back).

* 1. By continuing with this survey, you consent to your responses being used in line with the conditions above. Are you happy to continue?

- ◯ Yes, please take me to the next question.
- ◯ No, I don't want to answer the survey.

* 2. Please choose which of the following best describes your role. If both of these apply to you, please choose the one that describes what you do most of the time.

- ◯ I provide Home Energy Advice
- ◯ I manage or employ people who provide Home Energy Advice

* 3. What geographic area does your Home Energy Advice work cover?

- ◯ All New Zealand
- ◯ All of the North Island
- ◯ All of the South Island
- ◯ One or more local council area
- ◯ A locality or area not described above (please specify)

* 4. Please select all City or District Councils for which your advice service covers the whole council area. (List is ordered geographically, north to south)

- ☐ Far North
- ☐ Whangārei
- ☐ Kaipara
- ☐ Auckland
- ☐ Thames-Coromandel
- ☐ Hauraki
- ☐ Waikato District
- ☐ Matamata-Piako
- ☐ Hamilton
- ☐ Waipā
- ☐ Ōtorohanga
- ☐ South Waikato
- ☐ Waitomo
- ☐ Taupō
- ☐ Western Bay of Plenty
- ☐ Tauranga
- ☐ Rotorua Lakes
- ☐ Whakatāne
- ☐ Kawerau
- ☐ Ōpōtiki
- ☐ Gisborne
- ☐ Wairoa
- ☐ Hastings
- ☐ Napier
- ☐ Central Hawke's Bay
- ☐ New Plymouth
- ☐ Stratford
- ☐ South Taranaki
- ☐ Ruapehu
- ☐ Whanganui
- ☐ Rangitikei
- ☐ Manawatū
- ☐ Palmerston North
- ☐ Tararua
- ☐ Horowhenua
- ☐ Kāpiti Coast
- ☐ Porirua
- ☐ Upper Hutt
- ☐ Hutt
- ☐ Wellington
- ☐ Masterton
- ☐ Carterton
- ☐ South Wairarapa
- ☐ Tasman
- ☐ Nelson
- ☐ Marlborough
- ☐ Buller
- ☐ Grey
- ☐ Westland
- ☐ Kaikōura
- ☐ Hurunui
- ☐ Waimakariri
- ☐ Christchurch
- ☐ Selwyn
- ☐ Ashburton
- ☐ Timaru
- ☐ Mackenzie
- ☐ Waimate
- ☐ Waitaki Central Otago
- ☐ Queenstown-Lakes Dunedin
- ☐ Clutha
- ☐ Southland District
- ☐ Gore
- ☐ Invercargill
- ☐ Chatham Islands

* 5. In the last 12 months, how frequently have you provided personalised Home Energy Advice (not large group presentations or seminars) in each of the following ways? Please select a frequency for each option.

	Always	Frequently	Sometimes	Rarely	Never
onsite at the property	○	○	○	○	○
via phone	○	○	○	○	○
via email	○	○	○	○	○
via video call	○	○	○	○	○
online (e.g. online forums, social media messaging)	○	○	○	○	○
in our office/ work premises	○	○	○	○	○
in another public space (e.g. library, community centre, café)	○	○	○	○	○

* 6. In the last 12 months, under what programmes or advice categories have you delivered advice? – please select all that apply.

- ☐ Healthy Homes Initiative (HHI)
- ☐ Support for Energy Education in Communities (SEEC)
- ☐ Warmer Kiwi Homes (WKH)
- ☐ Te Puni Kōkiri (TPK) Māori-owned Homes Repair Programme
- ☐ EnergyMate
- ☐ Eco Design Advisor
- ☐ Other funded programme (eg. Lines company funded programme)
- ☐ HomeFit
- ☐ HomeStar
- ☐ Healthy Homes Standards
- ☐ Other advice offering paid for by the client
- ☐ Other programme or approach (please specify)

  [ ]

- ☐ None of the above

* 7. Please indicate which of the following frameworks or tools you use in order to provide Home Energy Advice? Please select all that apply.

- [ ] Assessment/advice framework(s) developed by my organisation
- [ ] Assessment/advice framework(s) I developed myself
- [ ] Assessment/ advice framework customised for a particular project / programme
- [ ] Homefit
- [ ] Homestar
- [ ] Passive House design guides and tools
- [ ] Another whole of house thermal modelling tool
- [ ] Superhome Movement Design and/or Renovation Guide
- [ ] Principles and approaches introduced through the Home Performance Advisor (HPA) training courses
- [ ] Online energy calculation tools (e.g. Powerswitch GenLess Home Energy Savings calculator)
- [ ] Other framework or tool (please specify)

- [ ] None of the above

The next set of questions relate to how often clients present with particular needs, concerns or questions. Please indicate a frequency for each option.

* 8. Energy efficiency, reducing energy costs

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 9. Addressing debt to energy provider

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 10. Reducing environmental impact / carbon emissions

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 11. Problems with internal moisture / condensation / dampness/ mould

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 12. Concerns about the house/ parts of the house being too cold

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 13. Concerns about the house/ parts of the house being too warm

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 14. Concerns about housing-sensitive illness (e.g. asthma, respiratory disease)

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 15. Want to increase resilience to climate change or extreme weather events

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 16. Want to assess compliance against legal standards (e.g. Healthy Homes Standards, clean air rules, Building Code)

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 17. Help with specific 'building envelope' solutions (e.g. curtains, glazing, insulation, draughts)

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 18. Help with specific appliances or fittings (e.g. heating options, ventilation systems, hot water systems, solar/ photovoltaic (PV) panels)

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 19. Want general advice on behavioural changes / actions they can take

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

20. Are there other needs or concerns clients present with that are not covered above? Please specify.

The following questions are about how frequently you offer particular solutions in your advice. For each option, please indicate how frequently this is included in your advice.

* 21. Insulation and draught proofing

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 22. Window / glazing upgrades

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 23. Effective curtains

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* Heating/ heating appliances

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 25. Cooling and/or shading

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 26. Ventilation

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 27. Dampness/ moisture control

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 28. Hot water use/ efficiency/ appliances

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 29. PV/ solar

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 30. Other appliances and fittings

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 31. Energy bills/ tariffs

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 32. Low carbon/ high efficiency design

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

* 33. Client behaviour change

Always	Frequently	Sometimes	Rarely	Never
○	○	○	○	○

34 Are there other topics that are sometimes or frequently covered in your advice that are not included above? Please specify.

35 How long after the initial interaction would you normally follow up?

- ○ I don't do regular follow-up
- ○ Within 1 month
- ○ Within 3 months or at 3 months
- ○ Within 3-12 months
- ○ After 1 year

* 36. What does follow up cover? Please select all that apply.

- ☐ Whether they were satisfied with the service they received
- ☐ Whether the advice they received met their needs
- ☐ Whether they have taken, or intend to take, action as a result of advice provided
- ☐ Further questions or points of clarification
- ☐ Other (please specify)

* 37. In the last 12 months, how many clients came to you by each of the pathways below (inbound referrals)? Please estimate.

	All	Most (more than 60%)	Some (between 30-60%)	A few (less han 30%)	None
External organisation or another programme	○	○	○	○	○
Our own education/ outreach activities	○	○	○	○	○
Online enquiry/ phonecall	○	○	○	○	○
Word of mouth	○	○	○	○	○

Other (please specify)

* 38. If clients come to you via referrals, what type of organisation or programme do you get inbound referrals from?

- ☐ Energy company/ provider
- ☐ Business other than energy company/ provider
- ☐ Health agency or health provider
- ☐ Community agency that is not a health provider
- ☐ Council
- ☐ Other (please specify)

39. In the last 12 months, how many clients have you advised one to one through a home visit or other individual consultation?

- ○ Less than 50
- ○ 51-200
- ○ 201-500
- ○ More than 500

* 40. In the last 12 months, how many people have you advised/ provided information to as part of a group (eg. through a seminar, webinar or presentation)?

- ◯ None
- ◯ Less than 100
- ◯ 100-300
- ◯ More than 300
- ◯ I don't know

41. For clients you have advised in the last 12 months, please provide an estimate of what category they fall into.

	All my clients	Most of my clients	Some of my clients	A few of my clients	None of my clients
Owner-occupier seeking advice on existing home	◯	◯	◯	◯	◯
Renter seeking advice on rental home	◯	◯	◯	◯	◯
Landlord seeking advice on a property they rent out/ plan to rent out	◯	◯	◯	◯	◯
Prospective new home buyers/ people building a new home	◯	◯	◯	◯	◯

Other (please specify)

* 42. How often do you believe your advice is able to address your clients' needs?

All the time	Most of the time	Some of the time	Rarely
◯	◯	◯	◯

* 43. Where your advice could not address your clients' needs, what are the reasons? Please choose how frequently each reason has applied.

	Always	Frequently	Sometimes	Rarely	Never
Client does not have the authority to act on my advice (e.g. needs landlord to act)	○	○	○	○	○
Client does not have the funds / resources to act on my advice	○	○	○	○	○
Client has other / competing priorities	○	○	○	○	○
Client doesn't have the confidence to act	○	○	○	○	○
Client needs are outside the scope my advice can address	○	○	○	○	○

Other reason (please specify)

Section 2: Competencies and training

These questions are about the competencies and training that you have or think you would benefit from. This includes technical skills and knowledge (e.g. the science of home energy) as well as 'soft' skills (e.g. How to build trust, enable behaviour-change etc).

* 44. Have you completed any of the following courses or qualifications? Please select all that apply.

- [ ] HPA - Principles of Home Performance Advice (one day course)
- [ ] HPA - Home Performance Advisor Certification (three day course)
- [ ] HPA - Healthy Homes: making energy work for whānau training (online / pre-requisite for EnergyMate coaches)
- [ ] NZGBC - Homefit assessor
- [ ] NZGBC - Homestar Fundamentals
- [ ] NZGBC - Homestar Designer
- [ ] NZGBC - Homestar Assessor
- [ ] Awarua Synergy Healthy Homes Workshop
- [ ] ERANZ - EnergyMate coach training
- [ ] PHINZ – Certified Passive House Designer/Consultant
- [ ] Other - including relevant trade or tertiary qualifications (please specify)

- [ ] None of the above

45. What other background or experience do you have that you draw on in your advice role?

* 46. How do you ensure your knowledge and competencies to provide Home Energy Advice are up to date?

47. What other training or professional development support would you like to have that is currently not available as far as you know.

Section 3: Challenges and Opportunities

These questions are about what you think about the future of Home Energy Advice provision, including emerging needs, risks and opportunities.

* 48. What are the biggest challenges you face in your day-to-day work providing home energy advice?

49. Are clients' needs growing or changing? Tell us about the things you think Home Energy Advisors will need to respond to in the future. This could include new technologies or other emerging issues.

* 50. What do you think is most needed to improve the outcomes from the Home Energy Advice you provide? Please rank from most to least needed.

- Training to improve my technical knowledge
- Training to improve my 'soft skills' (eg. cultural and social knowledge and interactions)
- Access to expert peer support for advisors
- Funding to support Home Energy Advice provision
- Funding to support a greater range and depth of improvements made to homes
- Better information and online tools to support advice provision
- A source of consistent information about appliance performance
- Better engagement with energy retailers about a householder's energy use/bills

Section 4: You and your role

These questions are about you. This will help us understand more about who provides Home Energy Advice.

* 51. What is your age?

- ◯ less than 30
- ◯ 31-40
- ◯ 41-50
- ◯ 51-60
- ◯ 60+
- ◯ Prefer not to say

52. What is your gender?

- ◯ Female
- ◯ Male
- ◯ Prefer not to say
- ◯ Another gender (please specify)

* 53. What is your Ethnicity? You can select more than one.

- ☐ NZ European/ Pakeha
- ☐ Māori
- ☐ Pacific Peoples
- ☐ Asian
- ☐ Middle Eastern/ Latin American/ African
- ☐ Prefer not to say
- ☐ Other (please specify)

* 54. In the last year, which languages have you provided advice in?

- [ ] Māori
- [ ] English
- [ ] New Zealand Sign Language
- [ ] Chinese (including Mandarin and Cantonese)
- [ ] Samoan
- [ ] Hindi
- [ ] Other (please specify)

* 55. Which languages could you provide advice in, if needed?

- [ ] Māori
- [ ] English
- [ ] New Zealand Sign Language
- [ ] Chinese (including Mandarin and Cantonese)
- [ ] Samoan
- [ ] Hindi
- [ ] Other (please specify)

* 56. Which option below best describes the type of organisation you work in/ for?

- ◯ Non-profit/ charitable/ social business
- ◯ Commercial – for profit
- ◯ Central Government run
- ◯ Local government (council) run
- ◯ I am self-employed
- ◯ Other (please specify)

* 57. Is the organisation you work in/for a kaupapa Māori organisation?

- ○ Yes
- ○ No

* 58. How long have you been in your current role?

- ○ Less than 1 year
- ○ 1-2 years
- ○ 2-4 years
- ○ 5 years or more

* 59. Is providing Home Energy Advice the sole function of this role?

- ○ Yes
- ○ No

60. What other work do you have in this role?

105. We may seek to do further research (eg. interviews) with respondents to this survey, to learn more. Are you happy to be contacted for follow-up research in the next 18 months?

- ○ Yes
- ○ No

The next question gathers your organisation name, your name and your email. Information collected through this form is not linked to your survey responses. This information will only be used only in the case that we seek to contact survey respondents for follow-up research (eg. interviews) within the next 18 months. After that time, this information will be deleted.
Once you have pressed 'submit' on the form, please ensure you then press the green 'ok' button to move to the next question which invites you to enter the prize draw.

[respondents were redirected to a 'Wufoo' form, separate from the survey to provide the information]

Thank you

Thank you for your time to respond to this survey, your responses will help us understand more about and provide recommendations to strengthen the Home Energy Advice sector

Would you like to enter the prize draw to win one of three $100 Prezzy cards?

- ○ Yes
- ○ No

The next question is a form to enter your details for the prize draw. This information is not linked to your survey responses, and will be used only for the prize draw. Your information will be accessed only by the research team, and will be deleted once the prize draw is completed.

[respondents were redirected to a 'Wufoo' form, separate from the survey to provide the information]

Appendix 2: Manager survey

Content that a respondent would see if they chose "I manage or employ people who provide Home Energy Advice" option for Question 2.

Note that questions marked with * were compulsory (respondent couldn't proceed to the next section if the question wasn't answered, and would get a prompt to tell them this if they tried to move on).

Home Energy Advice Survey

The purpose of this Survey

This survey supports research into the Home Energy Advice sector in Aotearoa New Zealand led by Beacon Pathway. Your responses will help Beacon Pathway identify ways to strengthen the sector.

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Can I come back to the survey if I get partway through and have to take a break?

Yes, you can do this, provided that: you use the same survey link and the same device to access the survey when you come back, and you DO NOT disable cookies. (Survey Monkey uses cookies to identify if it is the same respondent coming back).

* 1. By continuing with this survey, you consent to your responses being used in line with the conditions above. Are you happy to contine?

- ◯ Yes, please take me to the next question.
- ◯ No, I don't want to answer the survey.

* 2. Please choose which of the following best describes your role. If both of these apply to you, please choose the one that describes what you do most of the time.

- ◯ I provide Home Energy Advice
- ◯ I manage or employ people who provide Home Energy Advice

Section 1: Your organisation and your role

These questions ask about the type of organisation you are responding for, and your relationship to Home Energy Advisors in the organisation

* 61. Please choose the option that best describes the type of organisation you work for.

- ◯ Not for profit/ Charitable/ Social Business
- ◯ Social business (business model but non-profit)
- ◯ Commercial – for profit
- ◯ Central Government run
- ◯ Local government (council) run
- ◯ Self-employed
- ◯ Other (please specify)

* 62. Is your organisation a kaupapa Māori organisation?

- ◯ Yes
- ◯ No

* 63. What role does Home Energy Advice work have in your organisation - please choose the option that best describes your organisation

- ◯ Home Energy Advice is our sole focus
- ◯ Home Energy Advice is a significant part of our work but not our only focus.
- ◯ Home Energy Advice is a minor part of our organisation's work
- ◯ Other (please specify)

* 64. How does your role relate to Home Energy Advisors in your organisation? Please select all that apply.

- [ ] I directly manage one or more Home Energy Advisors / people who provide Home Energy Advice as part of their role.
- [ ] I manage an organisation or team that employs Home Energy Advisors but I don't directly manage Home Energy Advisors / people who provide Home Energy Advice as part of their role.
- [ ] I sometimes provide Home Energy Advice myself
- [ ] Other (please specify)

* 65. How many FTEs in Home Energy Advisor roles does your organisation have (whether paid staff or volunteers), at this time?

- ◯ Less than 1 FTE
- ◯ 1.1-3 FTE
- ◯ 3.1-10 FTE
- ◯ More than 10 FTE
- ◯ I don't know

* 66. How many individual people in your organisation deliver Home Energy Advice as part of their role?

- ◯ 1-5
- ◯ 6-10
- ◯ More than 10
- ◯ I don't know

* 67. Please tell us about the type of role held by people who provide Home Energy Advice as part of their role.

- ◯ All paid staff
- ◯ All volunteers
- ◯ A mix of paid staff and volunteers

68. What job title(s) do people in your organisation deliver who have Home Energy Advice as part of their role?

* 69. What geographic area does your organisation's Home Energy Advice work cover?

- ◯ The whole of Aotearoa New Zealand
- ◯ The whole North Island
- ◯ The whole South Island
- ◯ One or more local council area (next question will ask you to specify)
- ◯ A specific area, not covered above (please specify)

70. Please tell us which City or District Council(s) areas your advice service covers - select all that apply. (List is ordered geographically, north to south)

- ☐ Far North
- ☐ Whangārei
- ☐ Kaipara
- ☐ Auckland
- ☐ Thames-Coromandel
- ☐ Hauraki
- ☐ Waikato District
- ☐ Matamata-Piako
- ☐ Hamilton
- ☐ Waipā
- ☐ Ōtorohanga
- ☐ South Waikato
- ☐ Waitomo
- ☐ Taupō
- ☐ Western Bay of Plenty
- ☐ Tauranga
- ☐ Rotorua Lakes
- ☐ Whakatāne
- ☐ Kawerau
- ☐ Ōpōtiki
- ☐ Gisborne
- ☐ Wairoa
- ☐ Hastings
- ☐ Napier
- ☐ Central Hawke's Bay
- ☐ New Plymouth
- ☐ Stratford
- ☐ South Taranaki
- ☐ Ruapehu
- ☐ Whanganui
- ☐ Rangitikei
- ☐ Manawatū
- ☐ Palmerston North
- ☐ Tararua
- ☐ Horowhenua
- ☐ Kāpiti Coast
- ☐ Porirua
- ☐ Upper Hutt
- ☐ Hutt
- ☐ Wellington
- ☐ Masterton
- ☐ Carterton
- ☐ South Wairarapa
- ☐ Tasman
- ☐ Nelson
- ☐ Marlborough
- ☐ Buller
- ☐ Grey
- ☐ Westland
- ☐ Kaikōura
- ☐ Hurunui
- ☐ Waimakariri
- ☐ Christchurch
- ☐ Selwyn
- ☐ Ashburton
- ☐ Timaru
- ☐ Mackenzie
- ☐ Waimate
- ☐ Waitaki Central Otago
- ☐ Queenstown-Lakes Dunedin
- ☐ Clutha
- ☐ Southland District
- ☐ Gore
- ☐ Invercargill
- ☐ Chatham Islands

Section 2: Reasons for providing advice and funding sources

These questions ask about what drives the provision of advice, and the choices about what advice is provided and to whom.

* 71. What are the main reasons your organisation provides Home Energy Advice? Please choose the top three.

- [ ] To support energy wellbeing/ address energy hardship for householders
- [ ] To improve health for householders
- [ ] To reduce households' environmental impact
- [ ] To support house design that better looks after people and/or planet
- [ ] As part of offering sales and service
- [ ] To respond to demand from clients or the public
- [ ] Other (please specify)

* 72. Which of these central government supported programmes or funding sources do you work with? – please select all that apply.

- [ ] Healthy Homes Initiative (HHI)
- [ ] Support for Energy Education in Communities (SEEC)
- [ ] Warmer Kiwi Homes (WKH)
- [ ] Te Puni Kōkiri (TPK) Māori-owned Homes Repair Programme
- [ ] Other (please specify)
- [ ] None of the above

* 73. In general, how important are these factors in whether your organisation delivers Home Energy Advice?

	Very Important	Somewhat Important	Not very important	Not Important
Central government funding targeted for advice services	○	○	○	○
Subsidies for households to make improvements (eg. Warmer Kiwi Homes)	○	○	○	○
Legislative requirements (e.g. Healthy Homes Standards)	○	○	○	○
Households' ability / willingness to pay	○	○	○	○
External contracts to deliver a service	○	○	○	○
Our organisation's own resources / income	○	○	○	○
Finance options for households (e.g. Voluntary Targeted Rates or low-interest home loans)	○	○	○	○

* 74. In the last 12 months, how important have the following sources been to fund your advice delivery.

	Very important - provided all our funding	Significant - provided more than half our funding	Somewhat important - provided less than half our funding	Not important - we haven't received funding from this source in the last 12 months
Central government project funding	○	○	○	○
Local government (council) funding	○	○	○	○
External philanthropic funding	○	○	○	○
External commercial funding	○	○	○	○
Internal funding from my organisation (e.g. income from other activities, retained surplus)	○	○	○	○
Client charge/contribution	○	○	○	○

Other (please specify)

* 75. To what extent has the funding available to you over the past five years allowed you to provide the level and quality of service you want?

Completely	Mostly	Somewhat	Not at all
○	○	○	○

* 76. How confident are you that you can continue to provide advice at the level and quality of service you want for the next two years?

Very confident	Somewhat confident	Not very confident	Not at all confident
○	○	○	○

Section 3: Clients and demand for advice

These questions are about how you contact and communicate with clients and potential clients.

* 77. How important are the following in deciding which households you target with your advice? Please rank from most important (top) to least important (bottom)

- ☐ Our own (formal, documented) organisational strategy or priorities
- ☐ Funder eligibility criteria or targets
- ☐ Practical considerations (e.g. who we can practically or cost-effectively reach)
- ☐ User demand - we provide advice to anyone

* 78. Are there particular segments of the population you target with your Home Energy Advice service? Please select all that apply.

- ☐ 'New' New Zealanders (migrants and/or refugees)
- ☐ People with disabilities
- ☐ People with low incomes
- ☐ Māori
- ☐ Pasifika people
- ☐ Other group/ cohort - eg. a particular life stage or age group (please specify)

  ☐

- ☐ We don't target any specific groups for our services

* 79. In the last 12 months, how many clients has your organisation advised one-to-one through a home visit or other individual consultation?

- ◯ Less than 50
- ◯ 51-200
- ◯ 201-500
- ◯ More than 500
- ◯ I don't know

* 80. In the last 12 months, how many people has your organisation advised/ provided information to as part of a group (eg. through a seminar, webinar or presentation)?

- ◯ None
- ◯ Less than 100
- ◯ 101-300
- ◯ More than 300
- ◯ I don't know

* 81. In the last 12 months, under what programmes or advice categories has your organisation/ team delivered advice? Please select all that apply.

- ☐ Healthy Homes Initiative (HHI)
- ☐ Support for Energy Education in Communities (SEEC)
- ☐ Warmer Kiwi Homes (WKH)
- ☐ Te Puni Kōkiri (TPK) Māori-owned Homes Repair Programme
- ☐ Community Renewable Energy Fund
- ☐ Māori and Public Housing Renewable Energy Fund
- ☐ EnergyMate
- ☐ Eco Design Advisor
- ☐ Other funded programme (eg. Lines company funded programme)
- ☐ HomeFit
- ☐ HomeStar
- ☐ Healthy Homes Standards
- ☐ Other advice offering paid for by the client
- ☐ We use another approach (please specify)

* 82. Please indicate which of the following frameworks or tools your Advisors use to provide Home Energy Advice? Please select all that apply.

- [ ] Assessment/advice framework(s) developed by our organisation
- [ ] Assessment/ advice framework customised for a particular project / programme
- [ ] Homefit assessment framework
- [ ] Homestar assessment framework and tools
- [ ] A Healthy Homes Standards assessment
- [ ] Passive House design guides and tools
- [ ] Another whole of house thermal modelling tool
- [ ] Superhome Movement Design and/or Renovation Guide
- [ ] Principles and approaches introduced through the Home Performance Advisor (HPA) training courses
- [ ] Online energy calculation tools (e.g. Powerswitch GenLess Home Energy Savings calculator)
- [ ] Other (please specify)

* 83. In the last 12 months, what proportion of clients have come to your organisation through each of these pathways? Please estimate.

	All	Most (more than 60%)	Some (30-60%)	A few (less than 30%)	None
Referrals from external organisation or another programme	○	○	○	○	○
Our own education/ outreach activities	○	○	○	○	○
Online enquiry/ phonecall	○	○	○	○	○
Word of mouth	○	○	○	○	○

Other (please specify)

* 84. If clients come to your organisation via referrals, what type of organisation or programme do you get inbound referrals from? Please select all that apply.

- [ ] Energy company/ provider
- [ ] Business other than energy company/ provider
- [ ] Health agency or health provider
- [ ] Community agency that is not a health provider
- [ ] Council or community board
- [ ] Other type of organisation we regularly get referrals from (please specify)

- [ ] None of the above

85. Who do you regularly refer to or work with to help clients act on Home Energy Advice (ie. outbound referrals)? Please select all that apply.

- [ ] Budget advice services
- [ ] Curtain bank
- [ ] Health service(s)
- [ ] Energy retailer(s)
- [ ] Whanau Ora providers
- [ ] Healthy Homes Initiative providers
- [ ] EnergyMate provider
- [ ] Legal advice service(s)
- [ ] Product supplier(s)
- [ ] Non-profit maintenance or repair programme (eg. Habitat for Humanity)
- [ ] Finance providers (banks, mortgage brokers etc)
- [ ] Local government
- [ ] Kāinga Ora
- [ ] Tenancy Services (MBIE)
- [ ] Work and Income (MSD)
- [ ] Other (please specify)

- [ ] None of the above

Section 4: Advisor competencies and training

These questions are about training your organisation provides, commissions, requires or encourages for your Home Energy Advisors.

* 86. What background and experience do you consider important for advisors to have? Please rank options from most important (top) to least important (bottom).

- ☐ Trade or industry training and/or experience
- ☐ Experience providing advice (Home Energy Advisor or other advice)
- ☐ Ability to work with people from different cultural backgrounds
- ☐ Good people skills
- ☐ Technical understanding of home energy

87. Is there other background or experience that you think are important for advisors that are not covered in the previous question?

* 88. Does your organisation have any minimum training requirements for advisors?

- ○ Yes
- ○ No

* 89. What drives or determines your organisation's minimum training requirements?

- ☐ Driven by funder requirements
- ☐ Defined by internal policy
- ☐ A mix of funder requirements and internal policy
- ☐ Other (please specify)

* 90. Please tell us which, if any, of the following course/qualifications your organisation requires your energy advisors to have? - please select all that apply.

- [ ] HPA - Principles of Home Performance Advice (one day course)
- [ ] HPA - Home Performance Advisor Certification (three day course)
- [ ] HPA - Healthy Homes: making energy work for whānau training (online / pre-requisite for EnergyMate coaches)
- [ ] NZGBC - Homefit assessor
- [ ] NZGBC - Homestar Fundamentals
- [ ] NZGBC - Homestar Designer
- [ ] NZGBC - Homestar Assessor
- [ ] Awarua Synergy Healthy Homes Workshop
- [ ] ERANZ - EnergyMate coach training
- [ ] PHINZ – Certified Passive House Designer/Consultant
- [ ] Other (please specify)

91. In the past 12 months, did your organisation **fund or part-fund any training** for your advisors? Please select all that apply

- [ ] HPA - Principles of Home Performance Advice (one day course)
- [ ] HPA - Home Performance Advisor Certification (three day course)
- [ ] HPA - Healthy Homes: making energy work for whānau training (online / pre-requisite for EnergyMate coaches)
- [ ] NZGBC - Homefit assessor
- [ ] NZGBC - Homestar Fundamentals
- [ ] NZGBC - Homestar Designer
- [ ] NZGBC - Homestar Assessor
- [ ] Awarua Synergy Healthy Homes Workshop
- [ ] ERANZ - EnergyMate coach training
- [ ] PHINZ – Certified Passive House Designer/Consultant
- [ ] Other (please specify)
- [ ] The organisation did not fund any training for advisors

92. Are there other ways your organisation supports advisors to stay up to date with their Home Energy Advice knowledge and competencies? If so, please tell us about them?

93. What further training would you like your advisors to have?

Section 5: Matching advice to need

These questions are about follow-up with clients, and how well you consider your advice meets customer needs.

* 94. After the main interaction with a client, when would an advisor normally have a follow-up interaction – please select all that apply.

- [ ] Within 1 month or at 1 month
- [ ] Within 1-3 months or at 3 months
- [ ] Within 3-12 months or at 12 months
- [ ] More than 1 year
- [ ] No regular follow-up
- [ ] I don't know
- [ ] Other (please specify)

* 95. Do you gather data on any of the following information about clients? Please select all that apply.

- [ ] Tenure category (owner-occupier, renter, landlord, new home builder)
- [ ] Household income bracket
- [ ] Housing-related health needs
- [ ] Household type (eg. multi-generational, older with no children at home, sole-parent etc)
- [ ] House type and/ or age (/year of construction)
- [ ] Advice solutions offered to clients
- [ ] None of the above

* 96. Does your organisation measure the impact of your advisor work?

- ○ Yes
- ○ No

* 97. Please briefly describe how you measure impact (eg. through a survey)

Section 6: Challenges, Risks and Opportunities

We would like you to consider the future of energy advice provision. We are interested in emerging or growing areas of client need you are encountering, key opportunities and risks you see for energy advice provision.

* 98. What (if any) existing/emerging needs are there that you believe current Home Energy Advice does not adequately address and needs to better address in future?

* 99. What are the biggest challenges or risks that your organisation encounters in providing energy advice currently?

* 100. What do you see as key areas of risk for energy advice provision in the next 5-10 years?

* 101. What do you see as key areas of opportunity for energy advice provision in the next 5-10 years?

Option to include your organisation in a list of Home Energy Advice Providers

That is all the survey questions, thank you. You are almost done!

We are offering you the option for your organisation to be included in a list of organisations that provide Home Energy Advice in Aotearoa New Zealand. The list will be included with findings of our research, and publicly available.

If you wish your organisation to be included in this list, we will ask you for your organisation name and an (optional) brief description. This will be extracted from the data set, together with the information you have provided on geographic coverage, to include in the Home Energy Advice provider list. Organisation names will then be deleted from the research dataset so that your organisation name is not linked to your survey responses. Organisation names will only be linked to the information provided on geographic coverage.

102. Are you happy for your organisation to be included in a list giving names and geographic coverage of organisations that provide Home Energy Advice in Aotearoa New Zealand?

- ○ Yes
- ○ No

103. Please tell us your Organisation Name to include in the database

104. If you would like to do so, please give us a brief description of the services you provide for us to include with your organisation name and geographic coverage.

105. We may seek to do further research (eg. interviews) with respondents to this survey, to learn more. Are you happy to be contacted for follow-up research in the next 18 months?

- ○ Yes
- ○ No

The next question gathers your organisation name, your name and your email. Information collected through this form is not linked to your survey responses. This information will only be used only in the case that we seek to contact survey respondents for follow-up research (e.g. interviews) within the next 18 months. After that time, this information will be deleted.

Once you have pressed 'submit' on the form, please ensure you then press the green 'ok' button to move to the next question which invites you to enter the prize draw.

[respondents were redirected to a 'Wufoo' form, separate from the survey to provide the information]

Thank you

Thank you for your time to respond to this survey, your responses will help us understand more about and provide recommendations to strengthen the Home Energy Advice sector

106. Would you like to enter the prize draw to win one of three $100 Prezzy cards?

- ○ Yes
- ○ No

The next question is a form to enter your details for the prize draw. This information is not linked to your survey responses, and will be used only for the prize draw. Your information will be accessed only by the research team, and will be deleted once the prize draw is completed.

[respondents were redirected to a 'Wufoo' form, separate from the survey to provide the information]

Appendix 3: Semi-structured interview scripts

Semi-structured interview schedule (stakeholders with direct interest)

Kia ora, thanks for agreeing to participate in the interview today.

Before we begin, can I please check that you have received the participant information sheet?

In a moment, with your permission, I would like to start the recording and record your verbal consent to participate in the research, but before I do, do you have any questions or concerns you would like to raise?

- If yes, respond as needed...
- If no, or once resolved, start the recording and read the consent information.

Consent information

Firstly, can you please state your name, for the record, and the organisation you represent?

Now I am going to read through some questions, can you please respond to each question in turn?

1. Have read and understood the Participant Information Sheet?
2. Have you had the opportunity to ask questions, and have you received satisfactory answers?
3. Do you understand that your participation is voluntary and you can withdraw at any time?
4. [If sent ahead of time to be signed... I consent to the interview being conducted via Microsoft Teams]
5. Do you consent to the interview being recorded and transcribed using MS Teams?
6. Do you consent to the use of a secure licence of Co-Pilot to assist with analysis of the transcript, or would you like to opt out of the use of Co-Pilot and request manual transcription and analysis?
7. Do you understand that your responses are confidential, and your identity and organisation will remain anonymous unless you give explicit permission otherwise?
8. Do you agree to take part in the research?

Introductions

[Depending on the context we may need to do another round of intros? E.g. if people have signed the consent ahead of time]

Your organisations' interest in Home Energy Advice

We would like to understand more about the provision of personalised Home Energy Advice to New Zealand households.

We are interested in what is happening now and any challenges or issues facing the sector, and opportunities to respond. We would also like to learn about what might be on the horizon that the sector may need to respond to.

As outlined in the Participant Information Sheet, in this research, we use the term 'Home Energy Advice' to refer to personalised advice that is provided to a client or household and aimed at making homes healthier, more comfortable to live in, cheaper to run, more resource efficient or have a lower environmental footprint. Home Energy Advice may:

- cover some or all of the above topics.
- be delivered in a variety of ways, including face-to-face, via phone or online.
- be provided about a home people live in or own (including tenants in rentals, owner-occupiers and landlords), or plan to live in and/or own if new builds.
- include the use of a range of assessment tools or methodologies.

This advice is also sometimes called 'Healthy Homes Advice' or 'Home Performance Advice' and may go by other names too (e.g. Energy Education, Eco Design Advice).

We understand that your organisation supports, enables or advocates for the provision of Home Energy Advice to New Zealand households in one or more ways.

1. In what way or ways does your organisation support or enable the provision of personalised Home Energy Advice in Aotearoa?
2. In what ways does the provision of personalised Home Energy Advice to New Zealand households help your organisation to meet its objectives or obligations?

We are aware that there are a range of services, funded programmes and approaches used to deliver some form of personalised Home Energy Advice in New Zealand households at present.

3. What role do you think personalised advice plays in supporting New Zealand households and / or homeowners to improve them homes?

[Prompts / additional questions if needed?]

a. Do you consider that Home Energy Advice is an effective tool to support people to improve their homes?

4. In your view, what are the factors that make Home Energy Advice more or less effective?

We would like to know more about the level of training amongst advisors working in the field as well as the key competencies needed for them to be effective. We would also like to understand where there may be gaps in the competencies of advisors either currently or to meet potential future need/demand.

5. From your perspective, what are the key competencies needed for advisors to be effective in their role?

6. Do you have any concerns about the competencies of advisors currently working in the field? If, so, what are your concerns?

[Prompts / additional questions]

a. What do you think might help address these concerns?

7. Are you aware of any gaps in the provision of training or other relevant professional development that you consider it would be useful to fill?

[Prompts / additional questions]

b. How might those gaps be filled?
c. What impact do you think this would have?

It is important that advisors' knowledge and competencies remain current.

8. What options are you aware of for advisors to keep their skills and competencies current and reflecting good practice?
9. What other support/what else is needed?

We understand that a lot of the advice that is currently available to households is funded by programmes with a specific target group (e.g. households on low incomes with high health needs)

10. Are you aware of any groups of the population that in your view do not have sufficient access to Home Energy Advice?

11. Do you think existing services are meeting the needs of New Zealand households?

We are also interested in your perspectives on issues, challenges and opportunities facing the sector now and over the next five years.

12. What **risks and challenges** do you observe related to the provision of Home Energy Advice In New Zealand currently?

[Prompts / additional questions]

    a. Any particular issues of concern?

13. What **opportunities** do you observe related to the provision of Home Energy Advice to New Zealand households?

14. Have you observed any **trends or emerging needs** related to Home Energy Advice that you think the sector will need to respond to?

[Prompts / additional questions]

    b. What might be needed in order for the sector to appropriately respond?

15. What other o**rganisations or sectors do you think have an interest** in the provision of Home Energy Advice or might do in the future?

[Prompts / additional questions]

    c. What do you think that interest might be?

16. Can you suggest any other organisations we should speak with to understand the current Home Energy Advice landscape or future trends?

17. Do you have any other comments you would like to make?

Thank you very much for your time.

Semi-structured interview schedule (stakeholders with indirect or emerging interest)

Kia ora, thanks for agreeing to participate in the interview today.

Before we begin, can I please check that you have received the participant information sheet?

In a moment, with your permission, I would like to start the recording and record your verbal consent to participate in the research, but before I do, do you have any questions or concerns you would like to raise?

- If yes, respond as needed...
- If no, or once resolved, start the recording and read the consent information.

Consent information

Firstly, can you please state your name, for the record, and the organisation you represent?

Now I am going to read through some questions, can you please respond to each question in turn?

1. Have read and understood the Participant Information Sheet?
2. Have you had the opportunity to ask questions, and have you received satisfactory answers?
3. Do you understand that your participation is voluntary and you can withdraw at any time?
4. Do you consent to the interview being recorded and transcribed using MS Teams?
5. Do you consent to the use of a secure licence of Co-Pilot to assist with analysis of the transcript, or would you like to opt out of the use of Co-Pilot and request manual transcription and analysis?
6. Do you understand that your responses are confidential, and your identity and organisation will remain anonymous unless you give explicit permission otherwise?
7. Do you agree to take part in the research?

Semi-structured interview schedule

We would like to understand more about the sector that provides personalised Home Energy Advice to Aotearoa New Zealand households. We are interested in what is happening now and any challenges or issues facing the sector and opportunities to respond. We would also like to learn about what might be on the horizon that the sector may need to respond to.

For this research, *Home Energy Advice* means:

- personalised advice to help people make homes healthier, more comfortable, cheaper to run, more resource efficient, or have a lower environmental impact.
- It may cover all or some of these areas, be delivered in person, by phone, or online, and relate to existing or planned homes—including those lived in by tenants or owners, and landlords.
- Advice may involve the use of various assessment tools and methods, and may also be known by names such as *Healthy Homes Advice*, *Home Performance Advice*, *Eco Design Advice*, or *Energy Education*.

We are interested in whether Home Energy Advice is something that may be of interest to your organisation, either now or potentially in the future. We would like to explore this with you to understand the ways the sector may need to respond.

1. Are you aware that there are organisations in New Zealand providing personalised Home Energy Advice to households?
    a. If so, can you please tell us what you understand about the provision of Home Energy Advice in New Zealand and what it entails?
2. Does your organisation currently have an interest in the provision of personalised Home Energy Advice to households?
3. In what ways might the provision of personalised Home Energy Advice to New Zealand household help your organisation to meet its objectives or obligations?
    a. How do you think this interest might change in the next 5 – 10 years?

    [For participants who are already aware of Home Energy Advice and the sector...]

    We are aware that there are a range of services, funded programmes and approaches used to deliver some form of personalised Home Energy Advice in New Zealand households at present.

4. *What role do you think personalised advice has in supporting New Zealand households and / or homeowners to improve their homes?*

[Prompts / additional questions]

   a. *Do you consider that Home Energy Advice is an effective tool to support people to improve their homes?*

   b. *In your view, what are the factors that make Home Energy Advice more or less effective?*

5. *Do you think existing services are meeting the needs of New Zealand households?*

We are also interested in your perspective on issues, challenges and opportunities facing your sector over the next five years and if Home Energy Advice might have a role to play in responding to, or be affected by these issues.

6. What risks and challenges do you think your sector will face in the next 5 – 10 years and how might Home Energy Advice interact with these risks/challenges?

What opportunities do you observe in your sector and how could the Home Energy Advice sector assist in leveraging these opportunities?

7. Have you observed any trends or emerging needs related to Home Energy Advice that you think the sector will need to respond to?

[Prompts / additional questions]

   a. What might be needed in order for the sector to appropriately respond?

8. What other organisations or sectors do you think have an interest in the provision of Home Energy Advice or might do in the future?

[Prompts / additional questions]

   a. What do you think that interest might be?

9. Can you suggest any other organisations we should speak with to understand the current Home Energy Advice landscape or future trends?

Appendix 4: Participant information sheet

Home Energy Advice Sector Project – Interview Participant Information Sheet

You're invited to take part in a research project that aims to build a clearer understanding of the Home Energy Advice sector in Aotearoa New Zealand and explore how it can be strengthened.

The project has two phases. In this Phase (Phase 1), we're mapping the current sector—looking at who provides advice, how it's delivered, who supports it, and who it reaches. We're also exploring what's missing and where there may be opportunities to improve. In Phase 2, we'll use insights from this research to work with stakeholders to co-design practical solutions that help the sector deliver better advice and better outcomes. This work is led by Beacon Pathway, in partnership with Allen + Clarke. Phase 1 is funded by BRANZ through the Building Research Levy.

What do we mean by Home Energy Advice?

For this research, *Home Energy Advice* means personalised advice to help people make homes healthier, more comfortable, cheaper to run, more resource efficient, or have a lower environmental impact. It may cover all or some of these areas, be delivered in person, by phone, or online, and relate to existing or planned homes—including those lived in by tenants or owners, and landlords. Advice may involve the use of various assessment tools and methods, and may also be known by names such as *Healthy Homes Advice*, *Home Performance Advice*, *Eco Design Advice*, or *Energy Education*.

Why is this research important?

Home Energy Advice can help households to live in healthier homes, reduce energy costs, improve energy and housing affordability, and lower environmental impacts. Despite its potential, there's limited shared understanding of how the sector currently operates, what supports it, and what challenges it faces. This research aims to fill that gap and support the sector to have more impact.

Why participate?

In this first phase, we're speaking with people who have a direct interest in Home Energy Advice—for instance through funding, training, policy, advocacy, or organisational support. Your insights will help us understand what's needed to make advice more effective, accessible, and aligned with the needs of households and practitioners.

What does participation involve?

You are invited to take part in a semi-structured interview, lasting approximately 45–60 minutes, conducted via Microsoft (MS) Teams at a time that is convenient for you. With your permission:

- The interview will be recorded using MS Teams.
- MS Teams will automatically transcribe the interview.
- We may use Copilot, a secure AI tool licensed by Beacon Pathway, to assist with transcript analysis. If you prefer not to use AI tools for transcription or analysis, you may opt out. In that case:
  - We will manually transcribe the interview from the recording.
  - We will not use AI to support with analysis of your interview.

How will my data be handled?

All data—including recordings, transcripts, and analysis—will be stored securely in a password-protected environment with two-factor authentication. Only the research team will have access to this data. Your responses will remain confidential, and your identity and organisation will remain anonymous unless you explicitly agree otherwise. Once the transcription has been checked by the research team the recording of the interview will be deleted.

Are there any risks?

MS Teams and Co-Pilot

In some instances, MS Teams may transcribe words inaccurately; for instance, word in te reo Māori or if there is a weak internet connection. To manage this a member of our research team will check the transcription for accuracy while listening to the recording. If there is any doubt about what was said, we will ask you to clarify. If the internet connection is poor quality, we may need to reschedule until a better connection can be maintained.

Co-Pilot is a powerful tool that can help speed up the research process by analysing a lot of text quickly. Our license means all the data is held securely, it is not accessible to anyone else, and it cannot be used for machine learning. We will use it to help us identify themes from the interviews. Sometimes Co-Pilot can be inaccurate or biased in the themes it generates. We will manage this by checking all the themes for accuracy ourselves and validating them manually. The research team takes responsibility for all the research outputs and uses AI tools transparently.

There are no other significant risks associated with participation. However, you will be contributing to a project that aims to improve the coordination, effectiveness, and impact of the Home Energy Advice sector in Aotearoa.

Voluntary participation and withdrawal

Participation is entirely voluntary. You may decline to answer any question or withdraw from the study at any time. If you withdraw, you may request that your data be deleted.

Ethics approval

This research has been reviewed and approved by Aotearoa Research Ethics Committee reference number 25_70.

Contact for more information

If you have any questions or concerns about the research, please contact Sally Blackwell: <email; <phone

For concerns about your rights as a participant, you may contact Aotearoa Research Ethics Committee admin@aotearoaresearchethics.org.

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