

Peer Powered Cities and Regions

Deliverable 3.3 Guidance Notes for Facilitators

November 2017



The PROSPECT project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement no. 752126.

Peer Powered Cities and Regions

GA#: 7521261

Funding type: CSA

 Scientific Coordinator – **Vlasios Oikonomou**,
 IEECP, vlasias@ieecp.org











 Legal Coordinator – **Stelios Grafakos**, IHS,
s.grafakos@ihs.nl

Deliverable number (relative in WP)	D3.3
Deliverable name:	Guidance Notes for Facilitators
Focus of deliverable:	Frequently Asked Questions Instructions on getting started, working together, meeting up, and moving forward
WP / WP number:	WP3 Development of Peer to Peer Learning Programme
Date:	November 2017
Dissemination level:	Internal: Dropbox; External: Depository on the Learning Platform
Lead partner:	Institute for Housing and Urban Development Studies
Participating partners:	IHS
Responsible scientist/administrator:	Elena Marie Enseñado
Author(s):	IHS: Elena Marie Enseñado, Jen Heemann
Contact person:	Elena Marie Enseñado, ensenado@ihs.nl
Acknowledgement:	PROSPECT partners are acknowledged for their contribution in terms of review and feedback on the report.

Preface

PROSPECT aims to create an easy and replicable *peer to peer learning programme* for *regional and local authorities* to learn with and from each other on how to finance and implement their sustainable energy and climate action plans using innovative schemes. The learning programme includes five (5) thematic modules, namely public buildings, private buildings, public lighting, transport, and cross-sectoral in which regional and local authorities, who can serve as mentors or mentees, will learn in two ways: through peer mentoring and study visits. The learning programme has three learning cycles; each learning cycle offers 5 peer mentoring and 5 study visit programmes.

Who We Are

No	Participant Name	Short Name	Country Code	Logo
1	Institute for Housing and Urban Development Studies BV	IHS	NL	
2	The European association of local authorities in energy transition	ENERGY CITIES	FR	
3	Federation Europeenne des Agences et des Regions pour l'energie et l'environnement	FEDARENE	BE	
4	Institute for European Energy and Climate Policy Stichting	IEECP	NL	
5	Eurocities ASBL	EUROCITIES ASBL	BE	
6	University of Piraeus Research Center	UPRC	GR	
7	Climate-KIC GmbH	CLIMATE-KIC GMBH	DE	
8	O.Oe. Energiesparverband	ESV	AT	
9	Agencia Regional de Energia para os Concelhos do Barreiro, Moita e Montijo	S.ENERGIA	PT	
10	MESTO TRNAVA	TRNAVA	SK	



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Executive Summary

The deliverable on **Guidance Notes for Facilitators** details the step-by-step guidance process and cover all the practical information, including tools and resources, for the PROSPECT peer learning programme that participants need to know and accomplish – from getting started and working together to meeting up and moving forward.

The draft is structured as follows:

- The Frequently Asked Questions (FAQs) and corresponding answers that will be integrated in the PROSPECT website as well as learning platform
- Text for the peer mentoring booklet that will be distributed to the matched pair of 1 mentor and 1 mentee
- Text for the study visit booklet that will be distributed to the peer group composed of 1 mentor and between 2-7 mentees

The final design of the peer mentoring and study visit booklets, including templates and checklists, will be incorporated in the D3.6 Final Detailed Structure and Plan for the Learning programme.

1 Frequently Asked Questions

1.1 About the Learning Programme

What is the PROSPECT learning programme about?

The PROSPECT learning programme aims to enable sharing of knowledge, skills, competencies, and experience among local and regional authorities on the topic of financing sustainable and climate action projects. Participants with similar interests are matched to learn with and from each other on how to apply innovative financing schemes through peer mentoring and study visits.

What are these innovative financing schemes?

Innovative financing schemes are non-traditional ways of raising funds and facilitating sustainable energy and climate investments by mixing different sources (own fund, public and private funds) or engaging different partners (e.g. citizens, private sector) outside of established financial institutions (e.g. banks).

What are some examples of innovative financing schemes?

These innovative financing schemes include energy performance contracting, third party financing, revolving funds, soft loans, green bonds, guarantee funds, and citizen finance, such as cooperatives and crowdfunding. These are also classified under five thematic learning modules, namely public buildings, private buildings, transport (both public and private), public lighting, and cross-sectoral.

No.	Name of Innovative Financing Scheme	Description
1	Citizen finance (crowdfunding and cooperatives)	A crowd-funding involves an open call, mostly through the internet, for the provision of financial resources either in form of donation or in exchange for some form of reward and/or voting rights. This can happen in combination with energy cooperatives, which are business models based on shared ownership and democratic decision-making procedures.
2	Energy performance contracting	Energy Performance Contracting (EPC) is a method to implement energy efficiency projects, by which an ESCO (Energy Services Company) acts as a unique contractor and assures all of the steps of a project, from audit through installation up to operations and maintenance. The ESCO delivers a performance guarantee on the energy savings and takes responsibility for the end result. The EPC contract is the contractual agreement by which the output-drive results are agreed upon.
3	Green bonds	Local government (or their agencies) can issue green bonds to fund their sustainable energy and climate projects. A green bond can operate as a normal bond, which is a debt that will be paid back, depending on the characteristics of the bond, with interest. These can be made attractive via tax-exemptions.
4	Guarantee funds	These are loan guarantees provided to lenders which serve as buffers against first losses of non-payment by the borrowers. These are guarantee mechanisms which provide support to and facilitate credit risk sharing among financial institutions for the energy efficiency investments.
5	Soft loans	Soft loan schemes are loans below market rates and with longer payback periods derived from public funding to facilitate energy efficiency investments.
6	Revolving Funds	A fund established to finance a continuing cycle of investments through initial amounts received from its shareholders, creditors or donors and later on through amounts received from reimbursements of provided funding or loans to projects. These recovered funds become available for further reinvestment in other projects under similar scope (e.g. revolving funds for sustainable energy will use the loans recovered funds to finance new sustainable energy projects).
7	Third party financing	Refers solely to debt financing. The project financing comes from a third party, usually a financial institution or other investor, or the ESCO, which is not the user or customer.

1.2 About the Learning Modules

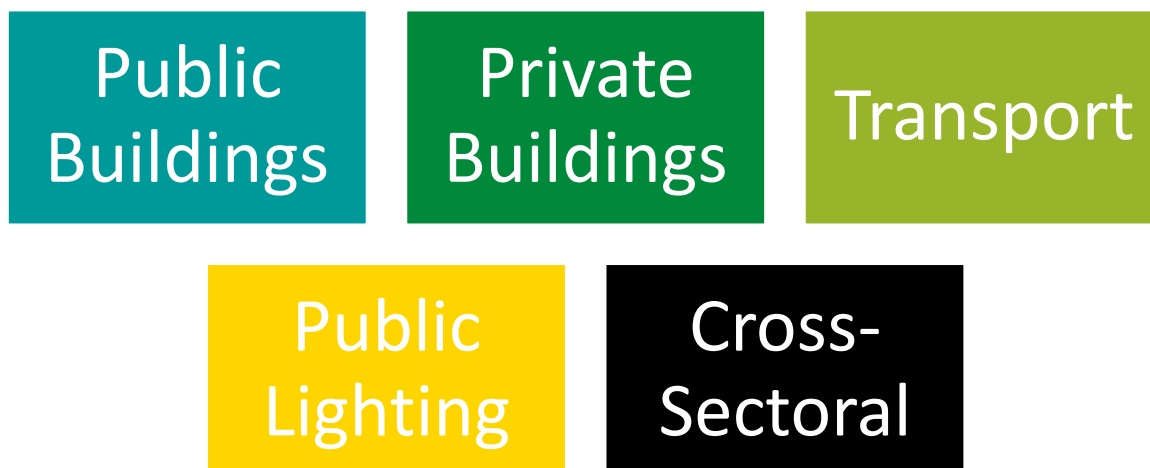


Figure 1: Thematic learning modules under PROSPECT

What are these five thematic learning modules?

Local and regional authorities who are interested to learn how sustainable energy and climate action projects are financed by innovative financing schemes can participate within the theme of the five learning modules. Here are the descriptions of the learning modules.

Table 1: Overview of PROSPECT learning modules

Learning Modules	Description
Public Buildings	Covers buildings and facilities owned, managed, or controlled by public authorities. Facilities refer to energy consuming entities that are not buildings, such as wastewater treatment plants.
Private Buildings	Covers buildings owned, managed, or controlled by private individuals or corporations. This refer primarily to the tertiary sector (services), such as private companies, banks, commercial, and retail activities, hospitals, etc. and residential buildings, including social housing
Transport	Covers the provision of and management of mass transit systems by public authorities, as well as private transport
Public Lighting	Covers the provision of public lighting (e.g. street lighting and traffic lights) owned or operated by public authorities. Non-municipal public lighting is under private buildings.
Cross-Sectoral	Covers all other cross-sectoral energy efficiency investments, for example those related to climate change adaptation or to the production of renewable energy, such as local electricity and heat/cold production to satisfy consumption needs; as well as those interventions falling under two or more thematic areas

What would a participant be able to accomplish for each learning module?

As a mentee, through the learning programme, a participant can:

- Understand the innovative financing schemes that are relevant under the learning module e.g. *public buildings*
- Recognize the barriers, incentives, advantages, and disadvantages for each relevant innovative financing scheme
- Examine which innovative schemes can finance sustainable energy and climate action projects
- Analyse the success factors and lessons learnt from successful projects financed by innovative schemes

As a mentor, through the learning programme, a participant can:

- Share content knowledge on the topic of innovative financing schemes that are relevant under the thematic learning modules
- Share practical experience on implementing sustainable energy and climate action projects and support others in overcoming different barriers
- Showcase your sustainable energy and climate action projects financed by innovative financing scheme(s)
- Learn from other cities and regions on what projects they want to implement and which innovative financing schemes they want to apply

Would a participant be able to learn more about one specific innovative financing scheme?

Yes, each learning module has a set of relevant innovative financing schemes and a participant can choose one (or more) to gain in-depth knowledge to:

- Understand the basic concept of an innovative financing scheme e.g. *energy performance contracting*
- Identify the different steps on how the innovative financing scheme can be developed and/or accessed for a project
- Apply practical tools or techniques relevant to the scheme across one or more stages of a project – from preparation and development to implementation and monitoring
- Examine successful projects using the financing scheme and reflect on how barriers and challenges were overcome

1.3 About the Learning Objectives

Are the objectives set or can a participant individualize the learning programme?

These objectives are set for the learning modules and for each of the innovative financing schemes as learning packages will be available for local and regional authorities who would want to learn more on this topic. However, the learning programme can be individualized or customized based on your own learning objectives!

In what way can the learning objectives be individualized?

Express clearly your learning objectives in the application process! Let us know what innovative financing schemes are you interested in or have experience on, the project you have worked on, are working on, or are currently planning, and which role – whether as a mentor and mentee - you would be more suitable for.

What learning outcomes do we aim to achieve?

At the end of the learning programme, we aim for the participants to have a better understanding about the relevant financing schemes as well as demonstrate know-how on developing and/or accessing these schemes. We aim for cities and regions to develop bankable projects (or proposals) that have high probability of success to acquire funding or attract investments; be inspired to launch sustainable energy and climate actions using any of these schemes in cities and regions; an implement, operate, monitor, and evaluate sustainable energy projects and overcome barriers and challenges!

For mentors, the learning programme can enable you to exhibit a greater degree of content knowledge on innovative financing scheme(s); transfer knowledge, skills, and experience that go beyond technical aspects; demonstrate professional leadership and mentoring skills among peers; engage in a meaningful professional relationship with another local and regional authority; and inspire other cities and regions to implement and finance their sustainable energy and climate actions using innovative means

1.4 About the Participants

Who can participate in the PROSPECT learning programme?

The main target participants for the learning programme are individuals from local and regional public authorities – and public entities who represent them on their behalf – in the European Union. Participants can be from any of the following: regional, city, or municipal authorities; regional, city or municipal energy agencies; public energy sector companies, among others.

Why should local and regional authorities participate?

The learning programme is structured in such a way that local and regional authorities can proactively support the development of each other in financing and implementing sustainable energy and climate action plans. In the long run, we aim to build partnerships from the peer engagements within or even beyond regions.

Can I choose which local and regional authority to partner with?

In PROSPECT, you will learn from successful implementers through our peer learning methodologies! However, the process of selection and matching is internal to the PROSPECT team. We will select the best pair – or group of peers – based on our matching process and criteria, such as geographical locations and political boundaries.

What roles are there in the learning programme?

Based on your level of experience and desired learning objectives, you will be assigned either as a **mentor** or a **mentee** in the learning programme. Providing support in the learning process is a facilitator who is part of the PROSPECT consortium.

1.5 About the Role Assignment

1.5.1 Mentors

Who are the mentors for the learning programme?

A **mentor** is an individual representing a local or regional authority who have had direct experience on or have a specific expertise in financing a sustainable energy project through an innovative scheme and is willing to share insights to a mentee.

What are the characteristics of effective mentors?

Effective mentors should be able to:

- Provide suitable advice on the topic of innovative financing schemes
- Encourage exploration of new ideas or solutions
- Serve as a source of guidance, knowledge, and resources
- Suggest appropriate skills training for the mentees
- Listen to work-related issues and provide constructive feedback

How can the mentor benefit from the learning programme?

Serving as a mentor strengthens the perception of your local and regional authority as an expert on innovative financing scheme for sustainable energy and climate action projects. You will be engaged in a meaningful relationship with another local and regional authority, gain mentoring and leaderships skills, and be recognized for future 'expert' positions.

Moreover, you will represent your city or region at the European level and you will have the chance to showcase your achievements in the field of sustainable energy and climate actions. We will feature your city or region as a best practice on innovative financing and have visibility in our PROSPECT materials, events, and communication channels!

What is expected from the mentor?

- Carry out a **peer mentoring or a study visit** programme tailored towards the challenges identified by the mentee(s) with the support of the PROSPECT team. You can re-use this programme for any future peer visits and local events.
- Exchange knowledge, **share your ideas**, and enrich your experience directly with your peers. The programme gives you direct access to cities, regions and energy agencies!

1.5.2 Mentees

Who are mentees for the learning programme?

A **mentee**, on the other hand, is an individual representing a local or regional authority who would want to learn from an experienced or expert peer on financing a sustainable energy project using an innovative scheme and is interested to apply what they learned in their own context.

What are the characteristics of effective mentees?

- Have an open attitude towards learning and in receiving feedback

- Be proactive in one's personal and professional development
- Commit to the activities with the mentor
- Seek new responsibilities and challenging assignments
- Share the learning process and results back the organization

What can the mentee(s) learn from the mentor?

Mentees can learn from mentors on innovative financing schemes relevant under the five learning modules. The mentors share their experiences regarding not just financial or technical knowledge – but also organizational matters and partnership arrangements, among others. The mentors listen and gather information, provide honest and constructive feedback, and motivate the mentees to accomplish their learning objectives.

Further, you will have the opportunity to **exchange on a one-to-one basis** with your Mentor and get a tailor-made assistance adapted to your learning objectives and needs. You can get direct access to a network of cities, regions and energy agencies facing the same challenges as you.

What is expected from the mentee?

- Identify a **local challenge** you face in terms of financing and implementing sustainable energy and climate actions. Learn how to overcome challenges by engaging with a more experienced peer who has done it successfully!
- Establish and express clearly your personal **learning objectives** – from the time you apply until you meet and discuss with your mentor. Be proactive in your professional development!

1.5.3 Facilitator

How will the facilitator provide support?

The facilitator, which will come from the PROSPECT team, will create and manage effective processes that enable the participants to achieve their learning objectives and produce the expected learning outputs and outcomes. The facilitator supports the interaction between the matched pair and provides over all guidance throughout the learning programme.

What are the characteristics of effective facilitators?

- Committed to the learning programme and the participants
- Communicates effectively the structure and plan of the learning programme
- Comes prepared with the information and resources necessary in the learning process
- Follows through the commitments by the participants
- Keeps the learning process open to relevant perspectives and ideas

What would the facilitator not do?

The facilitator will facilitate the learning process and ensure that the learning programme runs smoothly as possible. As such, the facilitator will not be responsible for booking your travel and accommodations during physical meetings. Instead, the facilitator guarantees that you will be where you are expected to be at a set date!

How can the facilitator interact with the participants?

The learning facilitator establishes the purpose of the learning programme through an orientation session and introduces the participants to each other; supports the development of the learning plan and in carrying out online peer learning activities; monitors the discussions and activities during peer mentoring and study visits, including online engagements; collects feedback on the peer learning process **and carry out a transferability analysis**. Further, the learning facilitator will ensure that the learning participants – or mentors and mentees – adhere to specified administrative, financial, and practical guidelines.

1.6 About the Learning Methodologies

How can local and regional authorities learn from each other?

Local and regional authorities can learn from each other via two learning methodologies: peer mentoring and study visit. Peer mentoring entails a one-to-one relationship between a mentor and a mentee characterized by more in depth counselling and joint problem solving, while study visits, which are participated by a peer group of up to 7 peers, allow mentees to visit an area for knowledge exchange and to learn good practice from a mentor.

What is the difference between peer mentoring and study visits?

The differences lie in the scope of learning, in the number of participants, and the number of mentees. Fundamentally, peer mentoring is more in depth, while study visit is more introductory. Also, the structure for the physical visit (Meeting Up!) differs for each method.

Are there similarities between the two methods?

Both learning methodologies entail one (1) physical meeting. This, however, is complemented by three (3) online learning engagements. Supporting the participants are facilitators who will be present in all physical and online engagements. Moreover, both learning methodologies have the same steps and will run for a maximum period of nine (9) months!

Table 2: Features of the peer learning methodologies

No.	Features	Name of Learning Methodology	
		Peer Mentoring	Study Visit
1	Scope of Learning	In depth	Introductory
2	Number of Participants	2	3 to 8
3	Number of Mentor	1	1
4	Number of Mentee(s)	1	2 to 7
5	Number of Physical Meeting	1	1
6	Host organization of physical meeting	Mentor	Mentor
7	Number of days for physical Meeting	2 days plus 1 day of travel (back and forth)	2 days plus 1 day of travel (back and forth)
8	Number of Online Engagements	3	3
	Number of hours per online engagement	1-4 hours	1-4 hours
9	Is the facilitator present in the physical meeting and online engagements?	Yes	Yes
10	Steps for the peer learning programme	Getting started Working together Meeting up Moving forward	Getting started Working together Meeting up Moving forward
11	Length of learning period	9 months (maximum)	9 months (maximum)

1.7 About the Learning Cycles

How many times will the PROSPECT learning programme run?

PROSPECT offers three learning cycles:

Table 3: PROSPECT learning cycles and indicative schedule

Cycles	Start Month	End Month
Learning Cycle 1	May 2018	January 2019
Learning Cycle 2	September 2018	May 2019
Learning Cycle 3	March 2019	November 2020

What does a learning cycle comprised of?

In each learning cycle, there are five learning modules. In each learning module, there are two learning methods: peer mentoring and study visit. Each peer mentoring method has two participants, a mentor and a mentee. For the study visit, there is one mentor and up to 7

mentees. For each learning cycle, we offer 5 peer mentoring programmes of 10 participants in total and 5 study visits or 40 participants all in all.

No.	Name of Module	No. of Peer Mentoring	No. of Participants	No. of Study Visits	No. of Participants	Total No. of Participants
1	Public Buildings	1	2	1	8	10
2	Private Buildings	1	2	1	8	10
3	Transport (Public and Private)	1	2	1	8	10
4	Public Lighting	1	2	1	8	10
5	Cross-sectional	1	2	1	8	10

For all three (3) learning cycles, we aim for 15 peer mentoring programmes and 15 study visits!

How many participants does PROSPECT aim for?

We aim for 150 participants from local and regional authorities in Europe! Of course, we can also accept more participants. However, we can only fund one (1) participant per local and regional authority. Additional participants need to get funding from their own organizations.

Is the learning programme for free?

We will reimburse the actual costs for travel and accommodations of participants. As a mentee - whether you are in peer mentoring or study visit, which both have one physical meeting, you will have a maximum budget of 600 euros for return travel and accommodations.

As a mentor, for hosting the learning programme, you will receive budget for materials and logistics e.g. food and refreshments and local transport for participants. The budget is 270 euros for peer mentoring (1 mentee and 1 learning facilitator) and 730 euros for study visits (up to 7 mentees and 1 learning facilitator). The expenses incurred, which you need to report after the learning programme, will be reimbursed.

1.8 About the Participation Process

How can I apply for the PROSPECT learning programme?

There are two (2) registration forms that will be distributed to local and regional authorities: one for the role of mentor, and another for the role of mentee. These forms are available online via the PROSPECT learning platform. The registration is open during the recruitment campaign until 2 months before each learning cycle.

What do I need to provide to apply for the learning programme?

The registration forms ask specific questions on your level of experience and expertise in terms of innovative financing schemes for sustainable energy and climate actions across the five modules; the projects that you worked on or are currently planning, including project descriptions; as well as your local challenges and difficulties; and finally, your specific learning objectives.

How will I be matched with other interested participants?

At the end of the recruitment campaign, which is a month before the learning programme, the PROSPECT team will carry out a matching process to select and group the participants into matched pair for the peer mentoring as well as the peer group for the study visits.

How long do I have to wait to get matched for the programme?

You should be able to know the results of your application a month after the recruitment period ends and a month before the start of the learning programme. For Learning Cycle 1, kindly expect for an announcement from the PROSPECT consortium in the month of April.

Cycles	Recruitment Campaign	Matching Process	Communication to Learning Participants and Signing of Peer Learning Agreement	Start Month for Learning Programme	End Month for Learning Programme
Learning Cycle 1	January - February 2018	March 2018	April 2018	May 2018	January 2019
Learning Cycle 2	May – June 2018	July 2018	August 2018	September 2018	May 2019
Learning Cycle 3	November – December 2019	January 2019	February 2019	March 2019	November 2019

How will I know if I get accepted for the PROSPECT learning programme?

PROSPECT will inform you via email communication that you are selected for the learning programme. The learning facilitator assigned to you will inform you directly.

If I do not get matched, can I apply again for the learning programme?

In case there is no match, we can have you in our wait list until a match is found or apply again in the next round!

Another representative from my organization is interested to apply as a mentor. Can I still apply?

Yes, many mentors from one city or region can apply as we will match accordingly. However, for one method – whether peer mentoring or study visit, there will only be one mentor. You can be a mentor on a different module and for a different method.

Do I need approval for my city or municipality?

Yes, the representative of your organization will sign your peer learning agreement. Before you apply, ask for permission from your employer!

1.9 About the Learning Preparation

If am accepted, what do I need to do to proceed?

A peer learning agreement needs to be signed by all participants – mentor, mentee, and facilitator. The peer learning agreement is a written commitment by the participants to take part in the learning programme. This should be signed at least one (1) month before the start of the learning programme.

What happens after I sign the peer learning agreement?

The facilitator will set an orientation session with you – whether you are part of peer mentoring or study visit. The orientation session is a requirement before you start the learning programme.

Do I need to register for the PROSPECT learning platform?

You will have access to the content of the learning modules and use the online discussion boards via the learning platform. Instructions on how to register and use the learning platform will be provided by the facilitator.

Who should I contact with regarding the learning programme?

If you have any questions regarding the learning programme, contact your facilitator directly. The name and contact information of the facilitator will be given to you via email communication.

2 Text for the Peer Mentoring Booklet

2.1 What is peer mentoring?

Peer mentoring is a one-to-one relationship between a mentor and a mentee which allows transfer of knowledge, experience, and skills in achieving a specific objective and enables in depth counselling and joint problem solving between the two participants.

Both mentor and mentee will benefit and grow from the peer mentoring process. The mentee will learn from the mentor's expertise and strengthen competence, while the mentor can enhance their leadership and mentoring skills and at the same time establish valuable connections with another city and region.

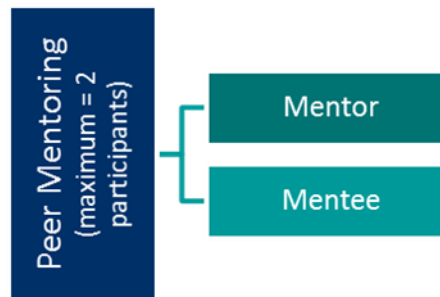


Figure 2: Schematic diagram of participants under peer mentoring

2.2 What are the steps in peer mentoring?

Peer mentoring is composed of four (4) main steps that need to be completed within a maximum period of nine (9) months.



No.	Features	Preparatory Steps	Getting Started	Working Together	Meeting Up	Moving Forward
1	Approach	Online	Online	Online	Physical	Online
2	Activities	Communication with the participants	Orientation Session	Learning plan development	Peer Mentoring Visit	Evaluation and feedback
				Online Peer Learning	Peer Mentoring Activities	Transferability Analysis
	Inputs	Signatures from the Participants	Learning Experiences and Learning Needs			
	Outputs	Signed Peer Learning Agreement, Date for the Orientation Session		Learning Plan	Learning Programme Report	
3	Lead participant	Learning Facilitator	Learning Facilitator	Mentor and Mentee	Mentor and Mentee	Learning Facilitator
4	Host organization	-	-	-	Mentor	-
5	Is the facilitator present in both online and physical meetings?	Yes	Yes	Yes	Yes	Yes
6	Tool(s)	Email Communication, Online Learning Platform and Discussion Boards	Webinar, Email Communication, Online Learning Platform and Discussion Boards	Webinar, Email Communication, Online Learning Platform and Discussion Boards	Peer Mentoring Activities (workshops, excursions);	Webinar, Email Communication, Online Learning Platform and Discussion Boards
7	Number of hours / days	Flexible	1-4 hours	1 – 4 hours	2 days plus 1 day of travel (back and forth)	1-4 hours
8	Indicative Timeline	1 – 4 weeks before	Month 1	Month 2-3	Month 4-6	Month 7-9

2.3 What are the roles in peer mentoring?

What are the responsibilities of the mentee?

Table 4: Responsibilities of mentee under peer mentoring

Roles	Activities of the Mentee
Mentee	Preparatory Steps
	Read the guidance materials and if there are questions or clarifications, contact the facilitator directly
	Review and sign the peer learning agreement
	Agree on the date for the orientation session with the mentor and the facilitator
	Peer Learning Programme
	Participate in the learning programme and attend all four steps, namely: Getting Started, Working Together, Meeting Up, and Moving Forward
	Getting Started
	Participate in the peer learning programme orientation and undertake the preparatory steps
	Express clearly what the specific learning objectives are to the mentor
	Fill out the document “ Learning Needs ” and supply additional materials to the mentor
	Working Together
	Engage in developing the “ Learning Plan ” with the mentor and provide feedback in the structure of the learning programme
	Coordinate with the mentor and the facilitator in the implementation of activities
	Actively engage in the online peer learning activities with the mentor
	Meeting Up
	Visit the mentor during the peer mentoring, including attending social events
	Make travel and hotel arrangements based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator ¹
	Jointly work with the mentor through peer mentoring activities e.g. workshops or exercises in achieving the learning objectives
	Moving Forward
	Assess the learning programme and provide feedback
Participate in the transferability session	
Work with the mentor in developing a learning programme report	

What are the responsibilities of the mentor?

Table 5: Responsibilities of mentor under peer mentoring

¹ The finance coordinator is the Institute for Housing and Urban Development Studies who is in charge of the reimbursement.

Roles	Activities of the Mentee
Mentor	Preparatory Steps
	Read the guidance materials and if there are questions or clarifications, contact the facilitator directly
	Review and sign the peer learning agreement
	Agree on the date for the orientation session with the mentor and the facilitator
	Peer Learning Programme
	Participate in the learning programme and attend all four steps, namely: Getting Started, Working Together, Meeting Up, and Moving Forward
	Getting Started
	Participate in the peer learning programme orientation and undertake the preparatory steps
	Understand the learning objectives of the mentee and the surrounding learning context
	Fill out the document “ Learning Experiences ” and supply additional materials to the mentee
	Working Together
	Carry out the development of learning plan with the mentee and structure the learning programme accordingly
	Coordinate with the mentee and the facilitator in the implementation of activities
	Take the lead in the online peer learning activities with the mentee
	Meeting Up
	Serve as a host city during the peer mentoring, including organization of social events
	Prepare practical information for travel of the mentor and facilitator e.g. directions to the venue, suggestions for hotels, and information on public transport
	Arrange the venue, local transport, food, and other materials and logistics based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator
	Conduct peer mentoring activities e.g. workshops or exercises with the mentee to achieve the learning objectives
	Invite relevant stakeholders to the meeting (e.g. public authorities, universities, research institutes etc.)
Moving Forward	
Assess the learning programme and provide feedback	
Participate in the transferability session	
Work with the mentee in developing a learning programme report	

What are the responsibilities of the facilitator?

Table 6: Responsibilities of facilitator under peer mentoring

Roles	Activities
Facilitator	Preparatory Steps
	Be familiar with the structure of the learning programme and the content of the guidance materials
	Ensure that the mentor and the mentee sign the peer learning agreement
	Understand the learning objectives of the mentee, and the experience of the mentor
	Communicates with the participants – both mentor and mentee(s) – regarding administrative, financial, and practical guidelines and ensures that these are all adhered to
	Sets the schedule for the orientation session with the participants
	Peer Learning Programme
	Getting Started
	Conduct an peer learning programme orientation for the participants via online webinar session
	Ensures that the mentor and the mentee(s) have filled out the templates for “ Learning Needs ” and “ Learning Experiences ”, respectively
	Provide instructions for the next steps and be available for questions or clarifications from the mentor or mentee(s)
	With the mentor and the mentee, sets the date for the next step: Working Together
	Working Together
	Support the development of the “ Learning Plan ” with the mentor and mentee and in structuring the learning programme accordingly
	Ensures that the planned activities support the achievement of the learning objectives
	Support the online peer learning activities between the mentor and the mentee
	With the mentor and the mentee, sets the date for the next step: Meeting Up
	Meeting Up
	Attend the peer mentoring, and ensure that the participants have made the necessary preparations
	Make travel and hotel arrangements based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator
With the mentor and the mentee, sets the date for the next step: Moving Forward	
Moving Forward	
Gather evaluation and feedback for the learning programme	
Carry out the transferability session	
Ensures that the mentor and mentee(s) have completed the learning programme report	

2.4 Step-by-step guide for peer mentoring

2.4.1 Preparatory Steps

Activity: Communication with the participants

Approach: Online

Who leads: Facilitator

Tools: Email Communication, Online Learning Platform and Discussion Boards, Peer Learning Agreement

Date: 1 month before the Orientation Session

Time Needed: Flexible

Agenda:

- Officially communicate the results of the application process to the participants
- Explain the roles assigned: mentor, mentee, facilitator
- Seek the commitment from the participants through a peer learning agreement
- Set a date for the orientation session

Inputs:

- Signatures from the participants
- Confirmation of availability from

Outputs:

- Signed peer learning agreement
- Date for the orientation session

2.4.2 Getting Started

For each peer mentoring programme, there will be a formal orientation via online webinar session led by the learning facilitator and should be attended by both mentor and mentee.

When is the orientation session and how long will it take?

The orientation session should take place on Month 1 of the learning programme, and is around 1-4 hours.

What is needed from the participants before “Getting Started”?

The mentor and the mentee should have signed the peer learning agreement. The learning facilitator should have set the date for the orientation session, and that both mentor and mentee commit to attend this activity.

If there are any questions or clarifications, the mentor and mentee can communicate with the learning facilitator. They can do this via email communication messages and online discussion boards via the PROSPECT learning platform.

What is the agenda of the orientation?

This session serves as a formal introduction to the learning programme and to introduce the participants to each other, enables the clarification on roles and responsibilities, and provides further instructions to the learning programme.

What is the indicative structure of the orientation session?

Table 7: Indicative structure for the orientation session

Name of Activity	No. of Hours	Indicative Structure	Who leads?
Orientation Session (Online)	1-4 hours	Introduction to the PROSPECT Programme	Learning facilitator
		Introduction of participants	Learning facilitator
		Assignment of roles and responsibilities	Learning facilitator
		Overview of peer learning objectives	Learning facilitator
		Overview of needs by mentee	Mentee
		Overview of experience of mentor	Mentor
		Q & A	All
		Next steps and practical instructions <ul style="list-style-type: none"> • Learn each other's context • Setting the date 	Learning facilitator
		End of orientation session	

The mentee can present briefly what the specific learning objectives are to the mentor, while the mentor can present an overview of their experience. Both mentor and mentee can prepare questions or clarifications on what the mentee needs or what the mentor can provide.

What are the next steps and practical instructions?

Learn each other's context

Towards the end of the orientation session, the learning facilitator should instruct the mentor and the mentee to further understand each other's learning context. After the orientation session and before the next step: Working Together, the mentor should fill out the template on "**Learning Experiences**" while the mentee should fill out the template on "**Learning Needs**". These can include other materials already produced by both mentor and mentee that can facilitate better understanding of each other's context.

Templates will be provided for these which can be either downloaded or uploaded (for filled out templates) via the learning platform. The facilitator will ensure that these materials are available for each matched pair to learn each other's needs and experiences. Likewise, the facilitator will ensure that these are uploaded online.

After uploading the two (2) required documents, both mentor and mentee should examine these and carry out an initial analyses before the next step: Working Together. If there are clarifications, both mentor and mentee(s) are also free to discuss online via the discussion boards in the learning platform with the support of the facilitator.

Setting the date for the next step

The facilitator should set the date for the next step: "Working Together" which entails two (2) activities: development of a learning plan and online peer learning.

What is needed from the participants after the orientation session?

- The mentee should fill out the “**Learning Needs**” template and provide documentation or other materials on what they are working on and what the mentee is specifically looking for advice from the mentor.
- The mentor likewise has to fill out the “**Learning Experiences**” and provide additional documentation or other materials for the mentee which shows their experience on the topic.
- The mentor and the mentee can ask for clarifications using online discussion boards via the PROSPECT learning platform
- The mentor and mentee upload these two required documents via the learning platform
- The facilitator ensures that these are uploaded within two weeks after the orientation session
- Both mentor and mentee carry out an analysis for the next step
- The facilitator sets a date for the next step “Working Together”

2.4.3 Working Together

In this step, the mentor and the mentee should have been able to understand each other’s context better. As such, this will focus on developing a learning plan and conducting an online peer learning. The mentor takes the lead in developing a learning plan with the mentee. Further, the mentor can also carry out online peer learning via webinar sessions or recorded presentations based on the initial analysis.

When will these activities take place and how long will it take?

These activities should take place on Months 2 – 3 of the peer mentoring programme. Both activities would take 1-4 hours.

What is needed from the participants before “Working Together”?

From the required documents provided, the mentor should have carried out an initial analysis of the mentee’s learning context, while the mentee should have studied the mentor’s experience. The mentor should already start to think how to develop the learning plan.

What is the agenda for these two activities?

A plan for learning for the mentee and how can the mentor support this should be defined at the end of this activity. The learning plan should outline the next steps on how the mentor and mentee can jointly work together. This includes setting the date for the peer mentoring visit.

Based on the initial analyses, the mentor can prepare online peer learning activities e.g. presentations about their specific experience, and the mentor can further ask guidance from the mentor.

What is the indicative structure for these two activities?

The learning facilitator will introduce the agenda of this session, which starts with the analysis of the mentor, followed by the analysis of the mentee. Then the mentor will take the lead in the development of the learning plan. A Q&A is also allotted for.

At the end of this activity, there should be a plan for action for the mentee and how can the mentor support this. The learning plan should outline the next steps on how the mentor and mentee can jointly work together.

Lastly, the learning facilitator with the mentor and mentee establish the date for the peer mentoring visit. The learning facilitator ensures that both the mentor and mentee prepare for the peer mentoring visit.

Figure 3: Indicative structure for Step 2: Working Together

Name of Activity	No. of Hours	Indicative Structure	Who leads?
Learning plan development	1 – 2 hours	Introduction to the activities	Facilitator
		Analysis of Mentor	Mentor
		Analysis of Mentee	Mentee
		Developing a Learning Plan	Mentor with the mentee
		Q&A	All
Online Peer Learning	1 – 2 hours	Online peer learning <i>See indicative content for online peer learning below</i>	Mentor
		Next step and practical instructions	Facilitator
		End of activities	

What is a learning plan?

A learning plan contains the following elements:

Table 8: Main Elements of a Learning Plan

Learning Objectives	Action Steps	Mentor Support	Time Frame	Resources Needed	Evidence of Success
What are my learning objectives?	What are the actions needed to achieve my objectives?	What support do I need from my mentor?	What is the timeline for achieving my objectives?	What are the resources needed to achieve my objectives?	What are the indications that I achieved my objectives?

The next table shows a sample learning plan considering the following sample peer learning objectives and peer learning outcomes from a sample peer learning agreement:

Sample Peer Learning Objectives

Mentee: to understand the basics of energy performance contracting (EPC) for energy renovation of public buildings

Mentor: to provide professional guidance and share practical experience on how to facilitate and implement EPC

Sample Peer Learning Outcomes

Mentee: to demonstrate mastery of the basic principles of EPC and how this can be applied for energy renovation of public buildings

Mentor: to exhibit a greater degree of content knowledge on EPC as well as demonstrate professional leadership and mentoring skills

How can the learning plan be developed?

Through this illustrative example, the mentor and the mentee (with the support of the facilitator) can carry out the development of a learning plan and structure the learning programme accordingly in the step “Working Together”.

Table 9: Sample Learning Plan

Learning Objectives	Action Steps	Mentor Support	Time Frame	Resources Needed	Evidence of Success
What are my learning objectives?	What are the actions needed to achieve my objectives?	What support do I need from my mentor?	What is the timeline for achieving my objectives?	What are the resources needed to achieve my objectives?	What are the indications that I achieved my objectives?
To understand the basics of energy performance contracting for energy renovation of public buildings	Get introduced to what is EPC	Provide an introduction to EPC via online peer learning	Month 2-3 (Working Together)	Online peer learning e.g. webinar sessions, presentations Learning Modules	Subjective evaluation and feedback at the end of the learning programme
	Examine what projects can be financed by EPC	Present the project(s) financed by EPC in the mentor's city or region via online peer learning		Other documentation and materials from the mentor Online consultations (e.g. email, discussion boards)	
	Discuss with an experienced peer (and key stakeholders) on how they set up an EPC	Set up a peer mentoring visit and invite key stakeholders	Month 4-6 (Meeting Up)	Peer mentoring visit Travel and Accommodations	
		Share their practical experience and technical knowhow via peer mentoring activities		Peer mentoring activities e.g. presentations, workshops	
	Examine if EPC is relevant in my context	Provide support and counselling on the relevance of EPC	Month 7-9 (Moving Forward)	Online webinar	
	Reflect on the lessons learned from the experienced peer				

What is an indicative content for online peer learning?

The content for online peer learning will vary: it will depend on the desired learning objectives and outcomes as well as the initial analysis of the mentor on the learning context of the mentee.

Figure 4: Indicative content for online peer learning

Name of Activity	Indicative Content
Online Peer Learning	Introduction to EPC (e.g. definition, characteristics)
	Projects financed by EPC in the mentor's city or region
	Overview of how the EPC was set up and developed

What is needed from the learning participants after this step?

- The mentee and mentor both implement the learning plan
- The mentor pro-actively assist the mentee in achieving their learning objectives
- To sustain the interaction, the pair of mentor and mentee can use online discussion boards or other means for communication e.g. email messages
- If necessary, online webinar sessions can be set up for online peer learning between the mentor and mentee and will be supported by the facilitator
- The facilitator ensures that the date for the peer mentoring visit is set and that both prepare before the visit

2.4.4 Meeting Up

Peer mentoring entails one peer mentoring visit where the mentor and mentee meet and work further together to achieve the learning objectives through in depth mentoring sessions. In peer mentoring, the host is the mentor.

When is the peer mentoring visit and how long it will take?

The peer mentoring visit should take place on Months 4-6 of the leaning programme. A peer mentoring visit is for 2 days plus an additional (1) day of travel for the mentee to travel back and forth.

What is the agenda for the peer mentoring visit?

The mentor will organize the peer mentoring visit and prepare more in depth mentoring sessions, such as workshops or discussions, for the mentee to learn from the mentor's experiences. The mentor can also invite relevant stakeholders to the peer mentoring visit (e.g. public authorities, universities, research institutes etc.) Likewise, the mentor can monitor the status of the learning plan and further provide feedback for the mentee to achieve the learning objectives.

What is needed from the participants before the peer mentoring visit?

- Mentor should be able to prepare practical information for travel of the mentee e.g. directions to the venue, suggestions for hotels, information on public transport.
- Mentee, on the other hand, should be able to book travel and accommodations based on a budget for reimbursement afterwards
- Mentor should be able to organize the visit, including organization of social events, by setting up the venue, food, and logistics based on a budget for reimbursement afterwards
- Mentor should be able to plan in depth mentoring sessions with the mentee and provide further feedback to achieve learning objectives
- The learning facilitator should coordinate with the mentor and mentee regarding the structure of the peer mentoring visit
- The structure should be agreed upon and finalized a week before the peer mentoring visit

What is the indicative structure for a peer mentoring visit?

This peer mentoring visit will have the support of a facilitator to ensure that the peer mentoring visit is moving in the right direction. The peer mentoring visit, as mentioned, will have peer mentoring sessions between the mentor and the mentee.

Table 10: Indicative Structure for the first physical engagement

Name of Activity	No. of Days	Indicative Structure	Who leads?
Peer Mentoring Visit	Day 1	Welcome and introduction by host city	Mentor
		Peer mentoring sessions	Mentor and Mentee
		Lunch	All
	Day 2	Peer mentoring sessions	Mentor and Mentee
		Dinner and Social Evening	All
		Peer mentoring sessions	Mentor and Mentee
		Lunch	All
		Discussion Sessions	All
		Next steps and practical instructions	Learning facilitator
		End of Peer Mentoring Visit	

At the end of the peer mentoring visit, the mentor and mentee should schedule a discussion session which can focus on whether the objectives for the peer mentoring visit was met as well as the next steps. Here, both mentor and mentee are instructed to disseminate the results of the peer mentoring visit back to their organizations. Lastly, the facilitator sets the date for the last step “Moving Forward”.

What is the budget for the mentor and the mentee?

The mentee has a maximum budget of 600 euros for travel and accommodations for 3 days broken down into 2 days for the peer mentoring visit and 1 day for travel (back and forth). On

the other hand, the mentor – as the host city - will have a maximum budget of 270 for course materials, food and refreshments and transport of 3 participants: mentor, mentee, and facilitator. The participants will be reimburse based on the real costs upon receipt of the invoice by the financial coordinator.

Table 11: Budget for mentor and mentee under peer mentoring

Budget for Mentor		Budget for Mentee	
Cost Item	Amount	Cost item	Amount
Travel Cost (including accommodations)	600	Course materials	20
		Food and refreshments	150
		Transport	100
Total	600	Total	270

The mentor, mentee, and the facilitator should provide all the original receipts of the expenses as well as bank details to the finance coordinator for reimbursement afterwards. **See** Deliverable 3.3 for a sample invoice for reimbursement purposes.

What is needed from the participants after the peer mentoring visit?

- All learning participants should prepare an invoice with the original receipts for reimbursements and send these to the finance coordinator
- The learning facilitator should ensure that the mentor and mentee follow the financial guidelines
- After 2-4 weeks, the finance coordinator will reimburse the expenses of all participants through bank transfer
- Both mentor and mentee should disseminate back the results of the peer mentoring visit back to their organizations

2.4.5 Moving Forward

A final engagement called “Moving Forward” via online webinar will be participated in by both mentor and mentee and led by the facilitator.

When will this activity take place and for how long?

This should take place on Months 7-9 of the learning programme. This online engagement is for 1-4 hours.

What is needed from the learning participants before this activity?

- The learning facilitator sets the date for the last activity “Moving Forward” which can be done online

What is the agenda for the final step “Moving Forward”?

In this step, the mentee and mentor should assess the implementation of the learning plan and discuss the outcomes as well as of future learning opportunities. Both mentor and mentee will

evaluate the peer learning programme and provide feedback verbally and through an online survey.

Further, a transferability session will be carried out. Lastly, the facilitator provides indicative instructions on how the mentor and mentee can develop the learning programme report.

What is the indicative structure for this activity?

The learning facilitator will lead the activity with both mentor and mentee in attendance.

Figure 5: Indicative Structure for “Moving Forward”

Name of Activity	No. of Hours	Indicative Structure	Who leads
Online Transferability Session and Evaluation and Feedback	1-4 hours	Introduction to the activity	Learning Facilitator
		Evaluation and feedback	Learning Facilitator
		Transferability Session	Learning Facilitator
		Next steps and practical instructions	Learning Facilitator
		Finalization of Learning Programme Report	Mentor and Mentee
		End of peer learning programme	

What is the transferability session?

The transferability session will be a wrap-up of 1-1.5 hours, where the facilitator will guide the mentee to assess the potential and conditions under which the good practices presented by the mentor, can be successfully transferred in their own territory. The transferability session will serve as a basis for participants to write their learning programme report which is the final outcome of the whole exchange.

Indicative Structure	Who leads?	Action
Introduction	Facilitator	Present the purpose of the session and session planning
Identification of the measures that could be transferred	Mentor/Mentee	Recall what are the common challenges faced by the mentor and mentee; List the interesting measures that were presented by the mentor during the visit
Brainstorming on success factors and transferability assessment	Mentor/Mentee	Take the measures listed one by one. For each measure, ask the mentor and mentee to identify: <ul style="list-style-type: none"> - The period needed for implementation and the time frame for expected results - The technical conditions needed - The governance organisation (actors involved, responsibilities) - The legislative/regulatory framework - The additional factors for success
Assessment of transferability	Mentee	On the basis of the elements above, the mentee rates the transferability potential from a scale of 1 to 3: 1 (low), 2 (moderate), and 3 (high)

What is the learning programme report?

The learning programme report contains a summary of the process and outcomes of the learning programme from the point of view of both mentor and mentee. The report, which can include photos or videos, contains the following summaries:

- Peer learning objectives
- Peer mentoring activities
- Peer learning outcomes
- Results of transferability assessments
- Results of dissemination activities

What is needed after “Moving Forward”?

The facilitator is responsible for ensuring that the participants have provided their evaluation and feedback through an online survey, completed the transferability analysis, and finalized the learning programme report by Month 9.

3 Text for Study Visit Booklet

A study visit involves a peer group composed of one (1) mentor and between 2 to 7 mentees. The mentees from the **peer group** should have similar learning needs and objectives, and they will be matched through a structure matchmaking process. In the study visit programme, the mentees observe first-hand how the mentor has implemented its sustainable energy or climate action project(s) using an innovative financing scheme(s) and get insights and recommendations directly from the mentor and from other key stakeholders. A study visit allow mentees to visit an area for knowledge exchange and to learn good practices.

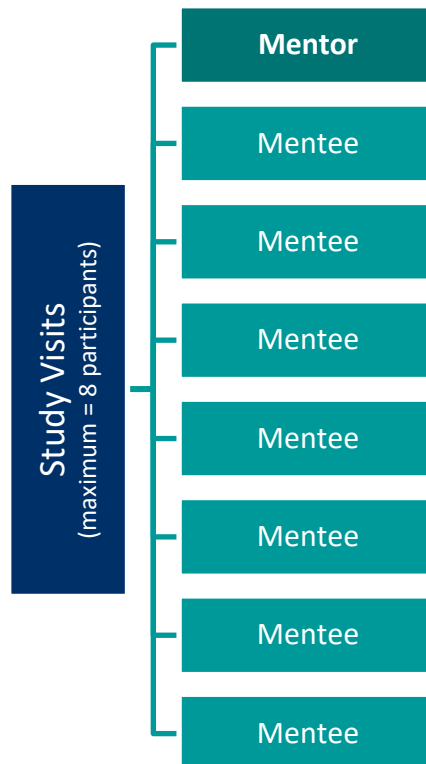


Figure 6: Schematic diagram for the participants under study visit

3.1 What are the steps in study visit?

Peer mentoring is composed of four (4) main steps that need to be completed within a maximum period of nine (9) months.



No.	Features	Preparatory Steps	Getting Started	Working Together	Meeting Up	Moving Forward
1	Approach	Online	Online	Online	Physical	Online
2	Activities	Communication with the participants	Orientation Session	Learning plan development	Peer Mentoring Visit	Evaluation and feedback
				Online Peer Learning	Peer Mentoring Activities	Transferability Analysis
	Inputs	Signatures from the Participants		Learning Experiences and Learning Needs		
				Learning Plan		Learning Programme Report
Outputs	Signed Peer Learning Agreement, Date for the Orientation Session					
3	Lead participant	Learning Facilitator	Learning Facilitator	Mentor and Mentee	Mentor and Mentee	Learning Facilitator
4	Host organization	-	-	-	Mentor	-
5	Is the facilitator present?	Yes	Yes	Yes	Yes	Yes
6	Tool(s)	Email Communication, Online Learning Platform and Discussion Boards	Webinar, Email Communication, Online Learning Platform and Discussion Boards	Webinar, Email Communication, Online Learning Platform and Discussion Boards	Study Visit Activities (workshops, excursions);	Webinar, Email Communication, Online Learning Platform and Discussion Boards
7	Number of hours / days	Flexible	1-4 hours	1 – 4 hours	2 days plus 1 day of travel (back and forth)	1-4 hours
8	Indicative Timeline	1 – 4 weeks before	Month 1	Month 2-3	Month 4-6	Month 7-9

3.2 What are the roles in study visit?

What are the responsibilities of the mentee?

Table 12: Responsibilities of mentee under peer mentoring

Roles	Activities of the Mentee
Mentee	Preparatory Steps
	Read the guidance materials and if there are questions or clarifications, contact the facilitator directly
	Review and sign the peer learning agreement
	Agree on the date for the orientation session with the mentor and the facilitator
	Peer Learning Programme
	Participate in the learning programme and attend all four steps, namely: Getting Started, Working Together, Meeting Up, and Moving Forward
	Getting Started
	Participate in the peer learning programme orientation and undertake the preparatory steps
	Express clearly what the specific learning objectives are to the mentor
	Fill out the document “ Learning Needs ” and supply additional materials to the mentor
	Working Together
	Engage in developing the “ Learning Plan ” with the mentor and provide feedback in the structure of the learning programme
	Coordinate with the mentor and the facilitator in the implementation of activities
	Actively engage in the online peer learning activities with the mentor
	Meeting Up
	Visit the mentor during the study visit, including attending social events
	Make travel and hotel arrangements based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator ²
	Jointly work with the mentor through study visit activities e.g. workshops or exercises in achieving the learning objectives
	Moving Forward
	Assess the learning programme and provide feedback
Participate in the transferability session	
Work with the mentor in developing a learning programme report	

What are the responsibilities of the mentor?

Table 13: Responsibilities of mentor under peer mentoring

² The finance coordinator is the Institute for Housing and Urban Development Studies who is in charge of the reimbursement.

Roles	Activities of the Mentee
Mentor	Preparatory Steps
	Read the guidance materials and if there are questions or clarifications, contact the facilitator directly
	Review and sign the peer learning agreement
	Agree on the date for the orientation session with the mentor and the facilitator
	Peer Learning Programme
	Participate in the learning programme and attend all four steps, namely: Getting Started, Working Together, Meeting Up, and Moving Forward
	Getting Started
	Participate in the peer learning programme orientation and undertake the preparatory steps
	Understand the learning objectives of the mentee and the surrounding learning context
	Fill out the document “ Learning Experiences ” and supply additional materials to the mentee
	Working Together
	Carry out the development of learning plan with the mentee and structure the learning programme accordingly
	Coordinate with the mentee and the facilitator in the implementation of activities
	Take the lead in the online peer learning activities with the mentee
	Meeting Up
	Serve as a host city during the study visit, including organization of social events
	Prepare practical information for travel of the mentor and facilitator e.g. directions to the venue, suggestions for hotels, and information on public transport
	Arrange the venue, local transport, food, and other materials and logistics based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator
	Conduct study visit activities e.g. workshops or exercises with the mentee to achieve the learning objectives
	Invite relevant stakeholders to the meeting (e.g. public authorities, universities, research institutes etc.)
Moving Forward	
Assess the learning programme and provide feedback	
Participate in the transferability session	
Work with the mentee in developing a learning programme report	

What are the responsibilities of the facilitator?

Table 14: Responsibilities of facilitator under peer mentoring

Roles	Activities
Facilitator	Preparatory Steps
	Be familiar with the structure of the learning programme and the content of the guidance materials
	Ensure that the mentor and the mentee sign the peer learning agreement
	Understand the learning objectives of the mentee, and the experience of the mentor
	Communicates with the participants – both mentor and mentee(s) – regarding administrative, financial, and practical guidelines and ensures that these are all adhered to
	Sets the schedule for the orientation session with the participants
	Peer Learning Programme
	Getting Started
	Conduct an peer learning programme orientation for the participants via online webinar session
	Ensures that the mentor and the mentee(s) have filled out the templates for “ Learning Needs ” and “ Learning Experiences ”, respectively
	Provide instructions for the next steps and be available for questions or clarifications from the mentor or mentee(s)
	With the mentor and the mentee, sets the date for the next step: Working Together
	Working Together
	Support the development of the “ Learning Plan ” with the mentor and mentee and in structuring the learning programme accordingly
	Ensures that the planned activities support the achievement of the learning objectives
	Support the online peer learning activities between the mentor and the mentee
	With the mentor and the mentee, sets the date for the next step: Meeting Up
	Meeting Up
	Attend the study visit, and ensure that the participants have made the necessary preparations
	Make travel and hotel arrangements based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator
With the mentor and the mentee, sets the date for the next step: Moving Forward	
Moving Forward	
Gather evaluation and feedback for the learning programme	
Carry out the transferability session	
Ensures that the mentor and mentee(s) have completed the learning programme report	

3.3 Step-by-step guide for study visit

3.3.1 Preparatory Steps

Activity: Communication with the participants

Approach: Online

Who leads: Facilitator

Tools: Email Communication, Online Learning Platform and Discussion Boards, Peer Learning Agreement

Date: 1 month before the Orientation Session

Time Needed: Flexible

Agenda:

- Officially communicate the results of the application process to the participants
- Explain the roles assigned: mentor, mentee, facilitator
- Seek the commitment from the participants through a peer learning agreement
- Set a date for the orientation session

Inputs:

- Signatures from the participants
- Confirmation of availability from

Outputs:

- Signed peer learning agreement
- Date for the orientation session

3.3.2 Getting Started

The study visit will have a formal orientation via online webinar session led by the learning facilitator and should be attended by both mentor and mentees.

When is the orientation session and how long will it take?

The orientation session should take place on Month 1 of the learning programme, and is around 1-4 hours.

What is needed from the participants before the orientation session?

The mentor and the mentees should have signed the peer learning agreement. The learning facilitator should have set the date for the orientation session, and that both mentor and mentees commit to attend this activity.

If there are any questions or clarifications, the mentor and mentees can also communicate with the learning facilitator. They can do this via email communication messages and online discussion boards via the PROSPECT learning platform.

What is the agenda of the orientation session?

This session serves as a formal introduction to the learning programme and to introduce the participants to each other, enables the clarification on roles and responsibilities, and provides further instructions to the learning programme.

What is the indicative structure of the orientation session?

Table 15: Indicative structure for the orientation session under study visit

Name of Activity	No. of Hours	Indicative Structure	Who leads?
Orientation Session	1-4 hours	Introduction to the PROSPECT Programme	Learning facilitator
		Introduction of participants (a peer group of 1 mentor and 7 mentees)	Learning facilitator
		Assignment of roles and responsibilities	Learning facilitator
		Overview of peer learning objectives	
		Overview of needs by mentee	Mentees
		Overview of experience of mentor	Mentor
		Q & A	All
		Next steps and practical instructions	Learning facilitator
		End of orientation session	

The mentees can present briefly what their specific learning objectives are to the mentor, while the mentor can present an overview of their experience. Both mentor and mentee can prepare questions or clarifications on what the mentee needs or what the mentor can provide. As there can be up to 7 mentees, each mentee can present between 5-10 minutes each.

What are the next steps and practical instructions?

Learn each other's context

Towards the end of the orientation session, the learning facilitator should instruct the mentor and the mentees to further understand the learning context. After the orientation session and before the next step: Working Together, the mentor should fill out the template on “**Learning Experiences**” while the mentees should fill out the template on “**Learning Needs**”. These can include other materials already produced by the mentor and the mentees that can facilitate better understanding of each other's context.

Templates will be provided for these which can be either downloaded or uploaded (for filled out templates) via the learning platform. The facilitator will ensure that these materials are available for each peer group to learn each other's needs and experiences. Likewise, the facilitator will ensure that these are uploaded online.

After uploading the two (2) required documents, the mentor and mentees should examine these and carry out an initial analyses before the next step: Working Together. If there are clarifications, both mentor and mentees are also free to discuss online via the discussion boards in the learning platform with the support of the facilitator.

Setting the date for the next step

The learning facilitator should set the date for the next step: “Working Together” which entails two (2) activities: development of a learning plan and online peer learning.

What is needed from the participants after the orientation session?

- The mentees should fill out the “**Learning Needs**” template and provide documentation or other materials on what they are working on and what the mentees are specifically looking for advice from the mentor.

- The mentor likewise has to fill out the “**Learning Experiences**” and provide additional documentation or other materials for the mentee which shows their experience on the topic.
- The mentor and the mentees can ask for clarifications using online discussion boards via the PROSPECT learning platform
- The mentor and mentees upload these two required documents via the learning platform
- The facilitator ensures that these are uploaded within two weeks after the orientation session
- Both mentor and mentees carry out an analyses for the next step
- The facilitator sets a date for the next step “Working Together”

3.3.3 Working Together

In this step, the mentor and the mentees should have been able to understand each other’s context better. As such, this will focus on developing a learning plan and conducting online peer learning. The mentor takes the lead in developing a learning plan with the mentees. Further, the mentor can also carry out online peer learning via webinar sessions or recorded presentations.

When will these activities take place and how long will it take?

These activities should take place on Months 2 -3 of the study visit programme. Both activities would take 1-4 hours.

What is needed from the participants before “Working Together”?

From the required documents provided, the mentor should have carried out an initial analysis of all the mentees’ learning context, while the mentee should have studied the mentor’s experience. The mentor should already start to think how to develop the learning plan.

What is the agenda for these two activities?

A learning plan for the mentees and how can the mentor support this should be defined at the end of this activity. The learning plan should outline the next steps on how the mentor and mentees can jointly work together. This includes setting the date for the study visit.

Based on the initial analyses, the mentor can prepare online peer learning activities e.g. presentations about their specific experience, and the mentor can further ask guidance from the mentor.

What is the indicative structure for these two activities?

The learning facilitator will introduce the agenda of this session, which starts with the analysis of the mentor, followed by the analyses of the mentees. Then the mentor will take the lead in the development of the learning plan. A Q&A is also allotted for.

At the end of this activity, there should be a plan for action for the mentees and how can the mentor support this. The learning plan should outline the next steps on how the mentor and mentees can jointly work together.

Lastly, the learning facilitator with the mentor and mentees establish the date for the study visit. The learning facilitator ensures that both the mentor and mentees prepare for the study visit

Table 16: Indicative structure for learning planning and online peer learning

Name of Activity	No. of Hours	Indicative Structure	Who leads?
Learning plan development	1 – 3 hours	Introduction to the activities	facilitator
		Analysis of Mentor	Mentor
		Analysis of Mentees	Mentees
		Developing a Learning Plan	Mentor with the mentees
		Q&A	All
Online Peer Learning	1 hour	Online Peer Learning <i>See indicative content for online peer learning below</i>	
		Next step and practical instructions	Learning facilitator
		End of activities	

What is a learning plan?

A learning plan contains the following elements:

Table 17: Main Elements of a Learning Plan

Learning Objectives	Action Steps	Mentor Support	Resources Needed	Time Frame	Evidence of Success
What are my learning objectives?	What are the actions needed to achieve my objectives?	What support do I need from my mentor?	What is the timeline for achieving my objectives?	What are the resources needed to achieve my objectives?	What are the indications that I achieved my objectives?

The next table shows a sample learning plan considering the following sample peer learning objectives and peer learning outcomes from a sample peer learning agreement:

Sample Peer Learning Objectives

Mentees: to understand the basics of relevant innovative financing schemes for energy renovation of public buildings, namely energy performance contracting (EPC) and citizen financing

Mentor: to provide professional guidance and share practical experience on how to facilitate and implement EPC and citizen financing for energy renovation of public buildings

Sample Peer Learning Outcomes

Mentees: to demonstrate mastery of the basic principles of EPC and citizen financing and how these can be applied for energy renovation of public buildings

Mentor: to exhibit a greater degree of content knowledge on EPC and citizen financing as well as demonstrate professional leadership and mentoring skills

How can the learning plan be developed?

Through this illustrative example, the mentor and the mentees (with the support of the facilitator) can carry out the development of a learning plan and structure the learning programme accordingly in the step “Working Together”.

Learning Objectives	Action Steps	Mentor Support	Time Frame	Resources Needed	Evidence of Success
What are my learning objectives?	What are the actions needed to achieve my objectives?	What support do I need from my mentor?	What is the timeline for achieving my objectives?	What are the resources needed to achieve my objectives?	What are the indications that I achieved my objectives?
To understand the basics of relevant innovative financing schemes for energy renovation of public buildings, namely EPC and citizen financing	Get introduced to what is EPC and citizen financing	Provide an introduction to EPC and citizen financing via online peer learning	Month 2-3 (Working Together)	Online peer learning e.g. webinar sessions, presentations Learning Modules	Subjective evaluation and feedback at the end of the learning programme
	Examine what projects can be financed by EPC and citizen financing	Present the project(s) financed by EPC and citizen financing in the mentor's city or region via online peer learning		Other documentation and materials from the mentor Online consultations (e.g. email, discussion boards)	
	Discuss with an experienced peer (and key stakeholders) on how they set up an EPC and citizen financing	Set up a study visit and invite key stakeholders	Month 4-6 (Meeting Up)	Study visit Travel and Accommodations	
	Examine if EPC and citizen financing is relevant in my context	Provide support and counselling on the relevance of EPC and citizen financing	Month 7-9 (Moving Forward)	Online webinar	
	Reflect on the lessons learned from the experienced peer				

What is the indicative content for online peer learning?

The content for online peer learning will vary: it will depend on the desired learning objectives and outcomes as well as the initial analysis of the mentor on the learning context of the mentees. Here is an indicative content from the above-mentioned example.

Table 18: Indicative content under online peer learning

Name of Activity	Indicative Content
Online Peer Learning	Introduction to EPC (e.g. definition, characteristics)
	Introduction to citizen financing (e.g. definition, characteristics)
	Projects financed by EPC and citizen financing in the mentor's city or region

What is needed from the participants after this step?

- The mentees and mentor both implement the learning plan
- The mentor pro-actively assists the mentees in achieving their learning objectives
- To sustain the interaction, the mentor and the mentees can use online discussion boards or other means for communication e.g. email messages
- If necessary, online webinar sessions can be set up for online peer learning between the mentor and mentees and will be facilitated by the facilitator
- The facilitator ensures that the date for the study visit is set and that both prepare before the visit

3.3.4 Meeting Up

The study visit is comprised of one physical visit of 2 days by the mentees to the mentor. The mentor serve as the host in study visit.

When is the study visit and how long it will take?

The study visit should take place on Months 4-6 of the leaning programme. The study visit is for 2 days plus an additional day for the mentees to travel back and forth.

What is the agenda for the study visit?

The mentor will organize the study visit and prepare activities, such as presentations, discussions, or excursions, for the mentees. The mentor can also invite relevant stakeholders to the study visit (e.g. public authorities, universities, research institutes etc.). Likewise, the mentor can monitor the status of the learning plan, and further provide feedback for the mentees to achieve the learning objectives.

What is needed from the participants before the study visit?

- Mentor should be able to prepare practical information for travel of the mentees e.g. directions to the venue, suggestions for hotels, information on public transport.
- Mentees, on the other hand, should be able to book travel and accommodations based on a budget for reimbursement afterwards
- Mentor should be able to organize the study visit, including organization of social events, by setting up the venue, food, and logistics based on a budget for reimbursement afterwards

- Mentor should plan additional activities and discussions with the mentees for further feedback to achieve learning objectives
- The learning facilitator should coordinate with the mentor and mentee regarding the structure of the study visit
- The structure should be agreed upon and finalized at least a week before the study visit

What is the indicative structure for a study visit?

This study visit will have the support of a facilitator to ensure that the study visit is moving in the right direction. At the end of the study visit, the mentees discuss with each other about the lessons learnt.

At the end of the study visit, the mentor and the mentees should schedule a discussion session which can focus on whether the objectives for the study visit was met as well as the next steps. Here, the mentor and mentees are instructed to disseminate the results of the study visit back to their organizations. Lastly, the facilitator sets the date for the last step “Moving Forward”.

Table 19: Indicative structure for the study visit

Name of Activity	No. of Days	Indicative Structure	Who leads?
Meeting Up	Day 1	Welcome and introduction by host city	Mentor
		Study Visit Activities	Mentor and Mentees
		Lunch	All
	Day 2	Study Visit Activities	Mentor and Mentees
		Social evening	Mentor
		Study Visit Activities	Mentor and Mentees
		Lunch	All
		Discussion Sessions	All
		Next steps and practical instructions	Learning facilitator
		End of Study Visit	

How much is the budget for the mentor and the mentee?

Each mentee has a maximum budget of 600 euros for travel and accommodations for 3 days broken down into 2 days for the study visit and 1 day for travel (back and forth). On the other hand, the mentor – as the host city – has a maximum budget of 730 for course materials, food and refreshments and transport of 3-7 mentees and one (1) learning facilitator. The participants will be reimbursed based on the real costs upon receipt of invoices by the financial coordinator.

Table 20: Budget for mentor and mentee under study visit

Budget for Each Mentee		Budget for Mentor	
Cost Item	Amount	Cost item	Amount
Travel Cost (including accommodations)	600	Course materials	80
		Food and refreshments	450
		Transport	200
Total	600	Total	730

The mentor, mentees, and the facilitator should provide all the original receipts of the expenses as well as bank details to the finance coordinator for reimbursement afterwards. **See** D3.5. for a sample invoice for reimbursement purposes.

What is needed from the participants after the study visit?

- All learning participants should prepare an invoice with the original receipts for reimbursements and send these to the finance coordinator
- The learning facilitator should ensure that the mentor and mentee follow the financial guidelines
- After 2-4 weeks, the finance coordinator will reimburse the expenses of all participants
- The mentor and the mentees should disseminate the results of the study visit back to their organizations

3.3.5 Moving Forward

A final engagement called “Moving Forward” via online webinar will be participated in by the mentor and all mentees and led by the facilitator.

When will this final engagement take place and for how long?

This should take place on Months 7-9 of the learning programme. This online engagement is for 1-4 hours.

What is needed from the learning participants before this activity?

- The learning facilitator sets the date for the last activity “Moving Forward” which can be done online
- The mentor and mentees should have disseminated the results of the study visit back to their own organizations

What is the agenda for the final step “Moving Forward”?

In this step, the mentor and mentees should assess the implementation of the learning plan discuss the outcomes as well as of future learning opportunities. Both mentor and mentee will evaluate the peer learning programme and provide feedback verbally and through an online survey. Further, a transferability session will be carried out. Lastly, the facilitator provides indicative instructions on how the mentor and mentee can develop the learning programme report.

What is the indicative structure for this activity?

The learning facilitator will lead the activity with both mentor and mentees in attendance.

Table 21: Indicative structure for “Moving Forward”

Name of Activity	No. of Hours	Indicative Structure	Who leads
Online Transferability Session and Evaluation and Feedback	1-4 hours	Introduction to the activity	Learning Facilitator
		Evaluation and feedback	Learning Facilitator
		Transferability Session	Learning Facilitator
		Next steps and practical instructions	Learning Facilitator
		Finalization of Learning Programme Report	Mentor and Mentee
		End of peer learning programme	

What is the transferability analysis?

The transferability session will be a wrap-up of 2 hours, where the facilitator will guide the mentees to assess the potential and conditions under which the good practices presented by the mentor, can be successfully transferred in their own territory. The transferability session will serve as a basis for participants to write their learning programme report which is the final outcome of the whole exchange

Phase	Who leads?	Action
Introduction	Facilitator	Present the purpose of the session and session planning
Identification of the measures that could be transferred	Mentor/Mentee	<ul style="list-style-type: none"> - Recall what are the common challenges faced by the mentor and mentee; - List the interesting measures that were presented by the mentor during the visit.
Brainstorming on success factors and transferability assessment	Mentor/Mentee	<p>Take the measures listed one by one. For each measure, ask the mentor and learning city to identify:</p> <ul style="list-style-type: none"> - The period needed for implementation and the time frame for expected results - The technical conditions needed - The governance organisation (actors involved, responsibilities)

Phase	Who leads?	Action
		<ul style="list-style-type: none"> - The legislative/regulatory framework - The additional factors for success
Assessment of transferability	Mentee	On the basis of the elements above, the mentee rates the transferability potential from a scale of 1 to 3: 1 (low), 2 (moderate), and 3 (high)

What is the learning programme report?

The learning programme report contains a summary of the process and outcomes of the learning programme from the point of view of both mentor and mentees. The report, which can include photos or videos, contains the following summaries:

- Peer learning objectives
- Peer mentoring activities
- Peer learning outcomes
- Discussion results and lessons learnt
- Results of transferability assessments
- Results of dissemination activities

What is needed after the final engagement?

The facilitator is responsible for ensuring that the participants have provided their evaluation through an online survey, completed the transferability analysis, and finalized the learning programme report by Month 9.



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