



PROSPECT

Peer Powered Cities and Regions

Deliverable 3.6

Detailed Structure and Plan for the Learning Programme

July 2018



Peer Powered Cities and Regions

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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 Detailed Structure and Plan for the Learning Programme details the structure and activities of the learning programme as well as the roles and responsibilities of the participants. It informs the step-by-step process and covers all the practical information by presenting the tools and resources that are used by the participants throughout the programme.

The deliverable is structured as follows:

- The Frequently Asked Questions (FAQs) and corresponding answers that integrated in the PROSPECT website
- Peer mentoring booklet distributed to the matched pair of 1 mentor and 1 mentee
- Study visit booklet distributed to the peer group composed of 1 mentor and between 2-7 mentees
- Facilitators' kit distributed to all facilitators

1. Frequently Asked Questions

The Frequently Asked Questions (FAQs) are published in PROSPECT's website and can be accessed via the "Help & Contact" section, through this link: <http://www.h2020prospect.eu/help-contact/faqs-terminology#about-the-learning-programme>

The FAQs section provides relevant information about the learning programme and should reduce the need for contact via Helpdesk. To facilitate the search for answers, the questions are organised into nine topics, which are:

1. About the Learning Programme
2. About the Learning Modules
3. About the Learning Objectives
4. About the Participants
5. About the Role Assignment
6. About the Learning Methodologies
7. About the Learning Cycles
8. About the Participation Process
9. About the Learning Preparation



2. Peer Mentoring Booklet

The Peer Mentoring Booklet contains information about the structure, duration, and activities of the peer mentoring group (1 mentor + 1 mentee) of the PROSPECT learning programme, as well as the roles and responsibilities of the facilitator, mentor, and mentee.

This booklet is distributed to the matched pair of 1 mentor and 1 mentee through the Learning Platform. It is also available in PROSPECT's website under the "Learning Programme" section, which can be downloaded by accessing this link <http://www.h2020prospect.eu/learning-programme>.

The Peer Mentoring booklet can be seen in the following pages.



Peer Mentoring Booklet



Peer Mentoring Booklet



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.



2. What are the steps in peer mentoring?

Peer mentoring is composed of four (4) main steps and one preparatory step that need to be completed within a maximum period of nine (9) months. There is no minimum period established.

Features	Step 0 Preparatory Step	Step 1 Getting Started	Step 2 Working Together	Step 3 Meeting Up	Step 4 Moving Forward
Approach	Online	Online	Online	Physical	Online
Activities	Communication with the participants	Orientation Session	Learning Plan Development	Peer Mentoring Visit and Activities	Transferability & Evaluation Session
Inputs	Benchmarking Survey from mentor and mentees	Mentor's experience	Mentee's projects and needs		Transferability Analysis Action Plan
Outputs	Date for the orientation session	Date for the Learning Plan Development session	Learning objectives (based on mentee's needs and mentor's experience) Date for peer mentoring visit	Take-away from the visit Rethinking the financing scheme	Evaluation of the learning activities and programme Transferability
Lead participant	Facilitator	Facilitator and mentor	Facilitator and mentee	Mentor and Mentee	Facilitator
Host organisation	--	--	--	Mentor	--
Tool(s)	Email Communication, Learning Platform	Webinar, Email Communication, Learning Platform	Webinar, Email Communication, Learning Platform	Peer Mentoring Activities (workshops, excursions, other)	Webinar, Email Communication, Learning Platform
Number of hours / days	Flexible	1 - 4 hours	1 - 4 hours	2 days + 1 day of travel (back and forth)	1 - 4 hours
Indicative Timeline	1 - 4 weeks before	Month 1	Months 2-3	Months 4-6	Months 7-9

3. What are the roles in peer mentoring?

What are the responsibilities of the **mentee**?

Peer Learning Programme

Participate in the learning programme and attend all four steps: Getting Started, Working Together, Meeting Up, and Moving Forward

STEP 0 | Preparatory Steps

1. Register in the **Learning Platform** (you will receive an invitation from Climate Kic)
2. Read this **Peer Mentoring Booklet** and get familiarised with the structure of the learning programme
3. Get familiarised with the **Learning Plan**
4. Fill out the **Benchmark Survey**
5. Agree on the date for the orientation session with the mentor and the facilitator
6. If there are questions or clarifications, contact the facilitator directly

STEP 1 | Getting Started

1. Prepare **1-2 slides** about your experience for the Orientation Session
2. Participate in the **Orientation Session**
3. Get familiarised with the mentor's experience by going through the **presentation** and the Step 1 of the **Learning Plan**
4. Ensure that the **Benchmark Survey** is completed at this step
5. Agree on the date for the Learning Plan Development session

STEP 2 | Working Together

1. Fill out the Step 2 of the **Learning Plan**
2. Participate in the **Learning Plan Development session**
3. Engage in developing the **Learning Objectives** with the mentor
4. Agree on a date for the Peer Mentoring Visit

STEP 3 | Meeting Up

1. Make travel and hotel **arrangements** based on financial guidelines: **provide a record of expenses** for reimbursement purposes to the finance coordinator (as described in Step 3)
2. Visit the mentor during the **Peer Mentoring Visit**
3. Fill out the Step 3 of the **Learning Plan**
5. Agree on the date for the Transferability & Evaluation session

STEP 4 | Moving Forward

1. Fill out the Step 4 of the **Learning Plan**
2. Participate in the **Transferability & Evaluation Session**
3. Work with the mentor and the facilitator in finalising the **Learning Plan**
4. Fill out the **survey** to evaluate the learning programme
5. **Disseminate results** back to your organisation

What are the responsibilities of the **mentor**?

Peer Learning Programme

Participate in the learning programme and attend all four steps: Getting Started, Working Together, Meeting Up, and Moving Forward

STEP 0 | Preparatory Steps

1. Register in the **Learning Platform** (you will receive an invitation from Climate Kic)
2. Read this **Peer Mentoring Booklet** and get familiarised with the structure of the learning programme
3. Get familiarised with the **Learning Plan**
4. Fill out the **Benchmark Survey**
5. Agree on the date for the orientation session with the mentees and the facilitator
6. If there are questions or clarifications, contact the facilitator directly

STEP 1 | Getting Started

1. Prepare **1-2 slides** about your experience for the Orientation Session
2. Fill out the Step 1 of the **Learning Plan**
3. Prepare a **presentation** about your projects using the financing scheme for the Orientation Session
4. Participate in the **Orientation Session**
5. Ensure that the **Benchmark Survey** is completed at this step
6. Agree on the date for the Learning Plan Development Session

STEP 2 | Working Together

1. Read the Step 2 of the **Learning Plan** (filled out by the mentee)
2. Participate in the **Learning Plan Development session**
3. Engage in developing the **Learning Objectives** with the mentee
4. Agree on a date for the Peer Mentoring Visit

STEP 3 | Meeting Up

1. Serve as a host city during the **Peer Mentoring Visit**: organise the learning activities and social events
2. Fill out the Step 3 of the **Learning Plan**
3. Prepare practical information for travel of the mentee and the facilitator; and **arrange** the venue, local transport, food, and other materials and logistics, based on financial guidelines
4. **Provide a record of expenses** for reimbursement purposes to the finance coordinator (as described in Step 3)
5. Conduct the **Peer Mentoring Visit** activities

STEP 4 | Moving Forward

1. Fill out the Step 4 of the **Learning Plan**
2. Participate in the **Transferability & Evaluation Session**
3. Work with the mentee and the facilitator in finalising the **Learning Plan**
4. Fill out the **survey** to evaluate the learning programme
5. **Disseminate results** back to your organisation

What are the responsibilities of the **facilitator**?

Peer Learning Programme

1. Participate in the learning programme and attend all four steps: Getting Started, Working Together, Meeting Up, and Moving Forward
2. Write a summary of the proceedings of each step of the learning programme in preparation for the finalisation of the **Learning Plan**

STEP 0 | Preparatory Steps

1. Register in the **Learning Platform** (you will receive an invitation from Climate Kic)
2. Get familiarised with the structure of the learning programme and the materials
3. Understand the learning objectives of the mentee, and the experience of the mentor
4. Communicate with the participants regarding administrative, financial and practical guidelines, and ensure that these are all adhered to
5. Set the schedule for the **Orientation Session** with the participants

STEP 1 | Getting Started

1. Instruct the participants about the Orientation Session (how to attend and prepare)
2. Ensure that the mentor and the mentee have prepared their presentations
3. Ensure that the mentor has filled out the Step 1 of the **Learning Plan**
4. Facilitate the **Orientation Session**
5. Provide **instructions** for the next steps and be available for questions or clarifications
6. With the mentor and the mentee, **set the date for the next step**: Working Together

STEP 2 | Working Together

1. Instruct the participants about the Plan Development session
2. Ensure that the mentee has filled out the Step 2 of the **Learning Plan**
3. Facilitate the Learning Plan Development session by supporting the creation of the **Learning Objectives**
4. With the mentor and the mentee, **set the date for the next step**: Meeting Up

STEP 3 | Meeting Up

1. Attend the **Peer Mentoring Visit**, and ensure that the participants have made the necessary preparations
2. Ensure that the planned activities support the achievement of the learning objectives
3. Make travel and hotel **arrangements** based on financial guidelines: **provide a record of expenses** for reimbursement purposes to the finance coordinator (as described in Step 3)
4. With the mentor and the mentee, **set the date for the next step**: Moving Forward

Moving Forward

1. Instruct the participants about the Transferability & Evaluation session
2. Ensure the mentor and the mentee have filled out the Step 4 of the **Learning Plan**
3. Carry out the **Transferability & Evaluation session**
4. Gather **Evaluation** for the learning programme
5. With the mentor and mentee, ensure the completion of the **Learning Plan**

4. Step-by-step guide for peer mentoring

Step 0 | Preparation

Activity: Communication with the participants

Approach: Online

Who leads: Facilitator

Tools: Email Communication and Learning Platform

Date: 1 month before the Orientation Session

Time Needed: Flexible

Agenda:

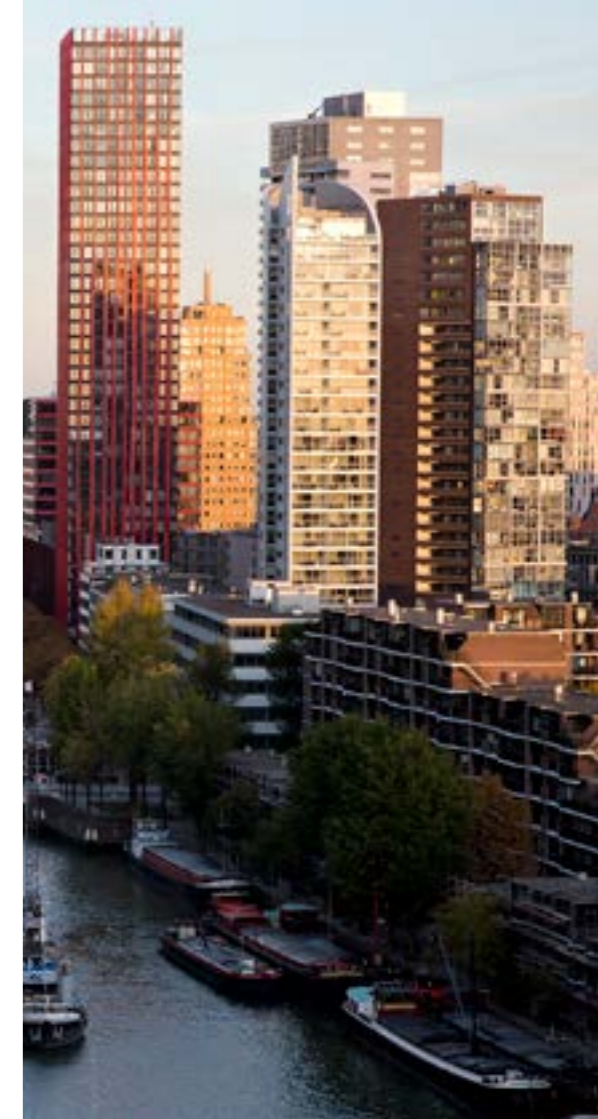
- Officially welcome the participants to the learning programme
- Explain the roles assigned: mentor, mentee, and facilitator
- Provide instructions on the learning platform
- Ensure the completion of the Benchmarking Survey
- Set a date for the orientation session

Input:

- Benchmark survey from mentor and mentee
- Confirmation of availability from mentor and mentee

Output:

- Date for the orientation session



Step 1 | Getting started

For each peer mentoring programme, there will be a **formal orientation** via an **online webinar session** led by the facilitator. Both mentor and mentee should attend this session.

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

The orientation session should take place in Month 1 of the learning programme and lasts around 1-4 hours.

What is needed from the participants before the Orientation session?

- The **facilitator** should inform participants about the date and webinar link/code for the orientation session.
- The **mentor** and the **mentee** need to prepare 1-2 slides about their experience.
- The **mentor** should send, to the facilitator and the mentee, a presentation about his/her experience and projects implemented with the financing scheme.
- **All participants** need to check if their computers are compatible with the GoToMeeting system (more information at <https://support.logmeininc.com/gotomeeting>), which will be used for the session.

Before the session, if there are any questions or clarifications, the mentor and mentee can communicate with the facilitator via email or through the 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.

The mentee can briefly present what the specific learning objectives are, while the mentor will present his/her experience. Both mentor and mentee can prepare questions or clarifications on what the mentee needs or what the mentor can provide.

What is the indicative structure of the Orientation session?

Orientation session (online) 1-4 hours	
Indicative structure	Who leads?
Introduction to the PROSPECT Programme <ul style="list-style-type: none">• Overview of booklet and module• Overview of the Learning Plan• Reminder to make notes during all sessions for the evaluation of the programme (Step 4)	Facilitator
Introduction of the participants <ul style="list-style-type: none">• 1-2 slides presentation each	All
Mentor presents his/her experience on the financing scheme <ul style="list-style-type: none">• What is the financing scheme• Projects developed using the financing scheme• Stakeholders involved• Main factors for success• Main barriers/difficulties	Mentor
Q & A	All
Next steps and practical instructions: <ul style="list-style-type: none">• Learn each other's context• Setting the date	Facilitator
End of orientation session	



Step 2 | Working together

In this step, **mentor** and **mentee** define together the **learning objectives** of the learning programme, which will be crucial for the creation of the peer mentoring activities conducted in Step 3. During the **Learning Plan Development session**, the mentee presents his/her project(s) and the main questions/doubts about the financing scheme (having in mind the projects and experience previously presented by the mentor). Other webinar sessions can be set up during Step 2, if necessary, to further define and finalise the learning objectives as well as come up with ideas for the learning activities to be conducted during the peer mentoring visit.

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

The activities can take place on Months 2 – 3 of the peer mentoring programme. The webinar session is estimated to last 1-4 hours.

What is needed from the participants before the Learning Plan Development session?

- The **facilitator** should inform participants about the date and webinar link/code for the Learning Plan Development session and ensure that the updated Learning Plan and other materials are uploaded in the Learning Platform (or sent via email) within two weeks after the orientation session.
- The **mentee** should fill in the Step 2 of the **Learning Plan** and upload it to the Learning Platform (or send it by email to all participants). S/he can also provide materials about the project(s) that specifically show the type of advice needed from the mentor, and also check the module's handbook, available in the Learning Platform, for guidance.
- The **mentor** should read the Step 2 of the Learning Plan developed by the mentee.

The mentor and the mentee can also ask for clarifications via the Learning Platform or through email communication.

What is the indicative structure of the Learning Plan Development session?

Learning Plan Development (online) 1-4 hours	
Indicative Structure	Who leads?
Introduction <ul style="list-style-type: none"> • Reminder: take notes of the session for the evaluation of the programme (Step 4) 	Facilitator
Mentee presents projects and needs <ul style="list-style-type: none"> • Description of project(s) • List of questions/doubts to be addressed during the visit by the mentor • Other relevant topics 	Mentee
Q&A	All
Definition of the learning objectives	Mentor and mentee
Next steps and practical instructions for Step 3 <ul style="list-style-type: none"> • Set date of the visit • Address possible travel and accommodation options • Mentor estimates a date to present the first draft of the visit's agenda (learning activities, lecturers, and overall programme) 	All



Step 3 | 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 can take place during Months 4-6 of the learning programme, but can also happen before in case the learning process is going fast and all participants agree. A peer mentoring visit should take 2 days, plus an additional (1) day of travel for the mentee.

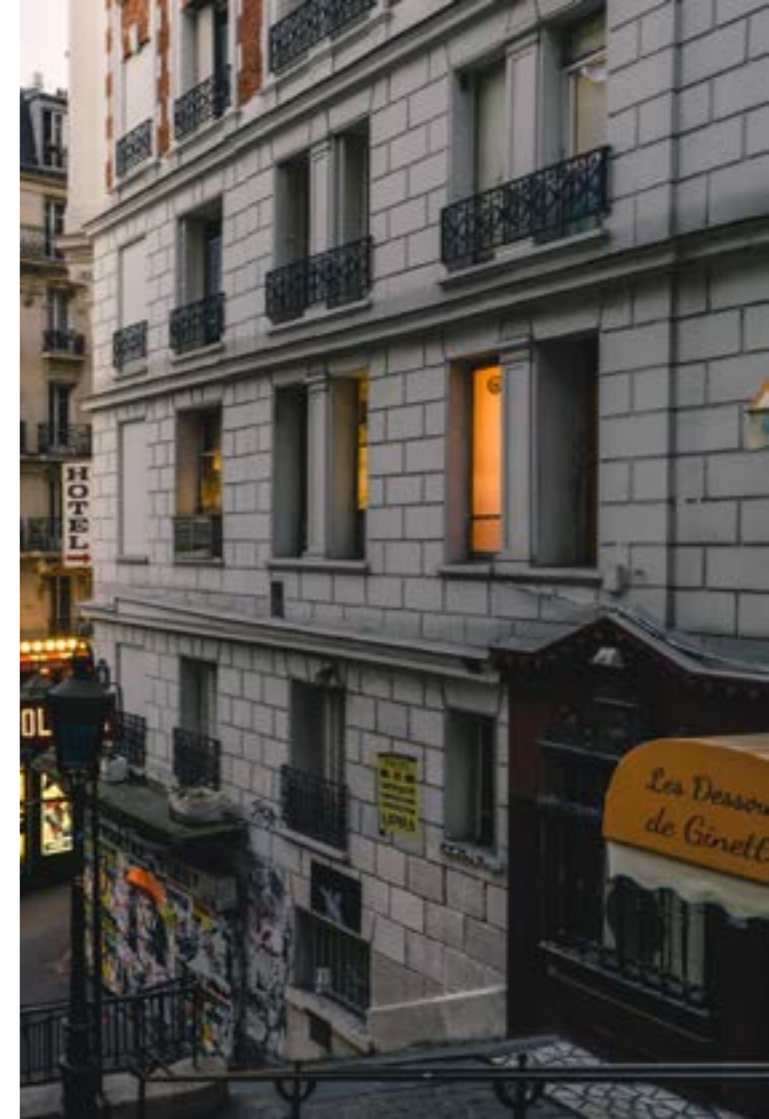
What is needed from the participants before the peer mentoring visit?

- The **mentor** should prepare practical information for travel of the mentee and facilitator (e.g. directions to the venue, suggestions for hotels, information on public transport), and also plan and organise the visit, by defining the learning activities, lecturers (stakeholders can be invited), social events, venue, food, and logistics based on a budget for reimbursement afterwards.
- At least two weeks before the peer mentoring visit, the **mentor** should fill in the Step 3 of the **Learning Plan** with the draft agenda of the peer mentoring visit, and upload it on the Learning Platform or send it by email to the facilitator and the mentee.
- The draft agenda of the Peer Mentoring Visit should be agreed upon and finalised a week before the peer mentoring visit by **all participants**.
- The **mentee** should book travel and accommodations, based on a budget for reimbursement afterwards.
- The **facilitator** should coordinate with the mentor and mentee regarding the structure of the peer mentoring visit, and document the visit by writing case studies/articles about the projects and experience exchanged, as well as take pictures.

What is the agenda for the peer mentoring visit?

The **mentor** will organise 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 **mentee** can monitor the extent the learning objectives are being met and further provide feedback for the mentor. During the visit, the **mentee** should collect information for the Step 3 of the Learning Plan and the transferability session (Step 4 "Moving forward").

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 were 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 organisations. Lastly, the facilitator sets the date for the last step - "Moving Forward".



Example of Peer Mentoring Visit agenda

Peer Learning Objective: To understand the basics of energy performance contracting (EPC) for energy renovation of public buildings.

Day 1 | Seminar and workshops

Time	Session	Expert
9.00	Introduction: Welcome, introduction to participants and objectives	Name position, organisation
10.00	Introduction to EPC: Energy requirements and standards for public buildings	Name position, organisation
11.00	Coffee break	
11.15	Refurbishments of public buildings: Step by step	Name position, organisation
12.30	Lunch at (restaurant, address)	
14.00	Energy accounting, building renovation, and EPC in public buildings	Name position, organisation
15.30	EPC: step by step workshop	Name position, organisation
16.30	Coffee break	
17.00	Q&A and finalisation	Name position, organisation
18.00	Dinner at (restaurant, address)	

Day 2 | Site visits

Time	Site	Expert
9.00	Meeting point: (address)	
9.30	Site visit 1: Local School Energy optimization in the local school	Name position, organisation
12.30	Lunch at (restaurant, address)	
14.00	Site visit 2: Municipal office building Energy efficiency through EPC	Name position, organisation
17.00	Q&A and finalisation	Name position, organisation
18.00	End of site visit	



How to make the trip more sustainable?

Suggestions for the travel:

- Turn off — and unplug! — lights and electronics.
- Turn down the thermostat.
- Walk, bike, or take public transportation means.
- Rent an electric car or a hybrid (and share your ride).
- Estimate your travel carbon print with the Eco Passenger.org

During Your Stay:

- Book “eco-accommodation” or consider staying with family or friends instead of a hotel.
- At the accommodation, try to conserve energy and water.
- Find food places that stock organic product supplied by local farmers.

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 reimbursed based on the real costs upon receipt of the invoice by the financial coordinator.

Budget for mentee		Budget for mentor	
Cost item	Amount	Cost item	Amount
Travel cost (including accommodation)	600	Course materials	20
		Food and refreshments	150
		Transport	100
Total	600	Total	270

The mentor, mentee, and facilitator should provide all the **original receipts** of the expenses, **boarding tickets of flights and/or trains**, as well as **bank details** to the finance coordinator for reimbursement afterwards. Participants can use the sample invoice provided in the Learning Plan.

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

- Both **mentee** and **mentor** should fill in the “Take-away from the visit” section on the Learning Plan.
- The mentee should also describe his/her impressions about the financing scheme on the “Rethinking the financing scheme” section on the Learning Plan.
- The **mentor** can proactively assist the mentee in achieving their learning objectives even after the visit. To sustain the interaction, mentor and mentee can use the Learning Platform or other means for communication (e.g. email).
- **All learning participants** should prepare an invoice with the original receipts for reimbursements and send these to the finance coordinator. After 2-4 weeks, the **finance coordinator** will reimburse the expenses of all participants through bank transfer.
- The **facilitator** should ensure that the mentor and mentee follow the financial guidelines.
- Both **mentor** and **mentee** should disseminate back the results of the peer mentoring visit back to their organisations.



Step 4 | Moving Forward

The main objective of Step 4 is to reflect on **how the mentee can apply the knowledge** gained during the visit, taking into consideration the context of his/her city/region and factors that might constrain the development of the financing scheme. This final engagement is called **Transferability & Evaluation session** and will happen via online webinar. In this step, mentor and mentee will **finalise the Learning Plan** with the support of the facilitator. After the webinar, all participants should also **fill out a survey to evaluate the learning programme** (links to the surveys will be provided by the facilitator).

When will this activity take place and for how long?

It depends on how fast the learning programme is being implemented. However, it should take place on Months 7-9 of the learning programme, the latest. This online engagement is for 1-4 hours.

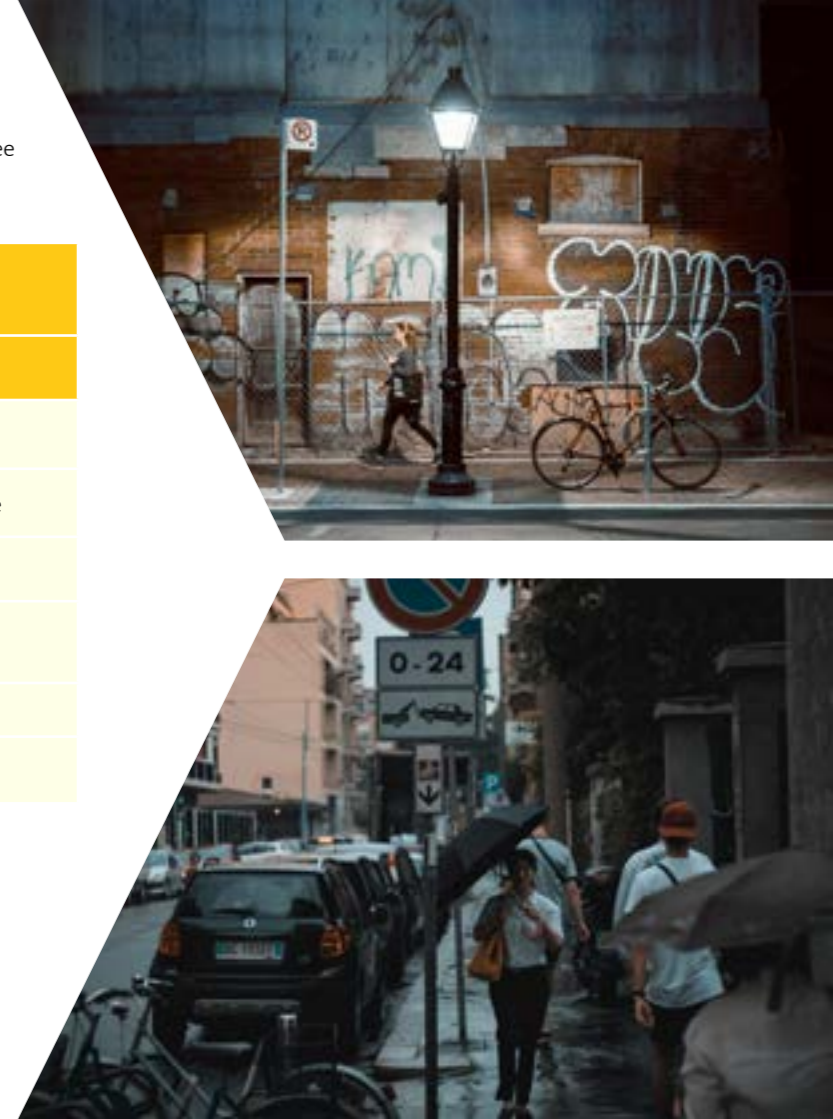
What is needed from the learning participants before this activity?

- The **mentee** should fill in the sections directed to the mentee in the Step 4 of the **Learning Plan** and upload the updated version on the Learning Platform (or send it by email to the facilitator and the mentor).
- The **mentor** should read the Step 4 developed by the mentee, and fill in the sections directed to the mentor.
- The **facilitator** should ensure the mentor and the mentee have filled out the Step 4 of the **Learning Plan** and instruct the participants about the evaluation of the learning programme.

What is the indicative structure for this activity?

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

Transferability & Evaluation session (online) 1-4 hours	
Indicative structure	Who leads?
Introduction to the activity	Facilitator
Transferability analysis (presentation and feedback)	Mentor and mentee
Q & A	All
Evaluation of the learning programme	Facilitator
Finalisation of Learning Plan	All
End of peer learning programme	





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

3. Study Visit Booklet

The Study Visit Booklet contains information about the structure, duration, and activities of the study visit group (1 mentor + up to 7 mentees) of the PROSPECT learning programme, as well as the roles and responsibilities of the facilitator, mentor, and mentees.

This booklet is distributed to the matched pair of 1 mentor and 2 to 7 mentees through the Learning Platform. It is also available in PROSPECT's website under the "Learning Programme" section, which can be downloaded by accessing this link <http://www.h2020prospect.eu/learning-programme>.

The Study Visit booklet can be seen in the following pages.



Study Visit Booklet



Study Visit Booklet



1. What is study visit?

A **study visit** involves a **peer group** composed of **1 mentor** and **2 or more mentees**. The maximum number of mentees should not exceed 8 participants.

The mentees from the **peer group** should have similar learning needs and objectives, and they will be matched through a structured matchmaking process. In the study visit programme, the mentees observe first-hand how the mentor has implemented 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.



2. What are the steps in the study visit?

Study visit is composed of four (4) main steps and one preparatory step that need to be completed within a maximum period of nine (9) months. There is no minimum period established.

Features	Step 0 Preparatory Step	Step 1 Getting Started	Step 2 Working Together	Step 3 Meeting Up	Step 4 Moving Forward
Approach	Online	Online	Online	Physical	Online
Activities	Communication with the participants	Orientation Session	Learning Plan Development	Study Visit and Activities	Transferability & Evaluation Session
Inputs	Benchmarking Survey from mentor and mentees	Mentor's experience	Mentees' projects and needs		Transferability Analysis Action Plan
Outputs	Date for the orientation session	Date for the Learning Plan Development session	Learning objectives (based on mentees' needs and mentor's experience) Date for study visit	Take-away from the visit Rethinking the financing scheme	Evaluation of the learning activities and programme Transferability
Lead participant	Facilitator	Facilitator and mentor	Facilitator and mentees	Mentor and Mentees	Facilitator
Host organisation	--	--	--	Mentor	--
Tool(s)	Email Communication, Learning Platform	Webinar, Email Communication, Learning Platform	Webinar, Email Communication, Learning Platform	Study Visit Activities (workshops, excursions, other)	Webinar, Email Communication, Learning Platform
Number of hours / days	Flexible	1 - 4 hours	1 - 4 hours	2 days + 1 day of travel (back and forth)	1 - 4 hours
Indicative Timeline	1 - 4 weeks before	Month 1	Months 2-3	Months 4-6	Months 7-9

3. What are the roles in study visit?

What are the responsibilities of the **mentees**?

Peer Learning Programme

Participate in the learning programme and attend all four steps: Getting Started, Working Together, Meeting Up, and Moving Forward

STEP 0 | Preparatory Steps

1. Register in the **Learning Platform** (you will receive an invitation from Climate Kic)
2. Read this **Study Visit Booklet** and get familiarised with the structure of the learning programme
3. Get familiarised with the **Learning Plan**
4. Fill out the **Benchmark Survey**
5. Agree on the date for the orientation session with other participants
6. If there are questions or clarifications, contact the facilitator directly

STEP 1 | Getting Started

1. Prepare **1-2 slides** about your experience for the Orientation Session
2. Participate in the **Orientation Session**
3. Get familiarised with the mentor's experience by going through the **presentation** and the Step 1 of the **Learning Plan**
4. Ensure that the **Benchmark Survey** is completed at this step
5. Agree on the date for the Learning Plan Development session

STEP 2 | Working Together

1. Fill out the Step 2 of the **Learning Plan**
2. Participate in the **Learning Plan Development session**
3. Engage in developing the **Learning Objectives** with the mentor and other mentees
4. Agree on a date for the Study Visit

STEP 3 | Meeting Up

1. Make travel and hotel **arrangements** based on financial guidelines: **provide a record of expenses** for reimbursement purposes to the finance coordinator (as described in Step 3)
2. Visit the mentor during the **Study Visit**
3. Fill out the Step 3 of the **Learning Plan**
5. Agree on the date for the Transferability & Evaluation session

STEP 4 | Moving Forward

1. Fill out the Step 4 of the **Learning Plan**
2. Participate in the **Transferability & Evaluation Session**
3. Work with the other participants in finalising the **Learning Plan**
4. Fill out the **survey** to evaluate the learning programme
5. **Disseminate results** back to your organisation

What are the responsibilities of the **mentor**?

Peer Learning Programme

Participate in the learning programme and attend all four steps: Getting Started, Working Together, Meeting Up, and Moving Forward

STEP 0 | Preparatory Steps

1. Register in the **Learning Platform** (you will receive an invitation from Climate Kic)
2. Read this **Study Visit Booklet** and get familiarised with the structure of the learning programme
3. Get familiarised with the **Learning Plan**
4. Fill out the **Benchmark Survey**
5. Agree on the date for the orientation session with the mentees and the facilitator
6. If there are questions or clarifications, contact the facilitator directly

STEP 1 | Getting Started

1. Prepare **1-2 slides** about your experience for the Orientation Session
2. Fill out the Step 1 of the **Learning Plan**
3. Prepare a **presentation** about your projects using the financing scheme for the Orientation Session
4. Participate in the **Orientation Session**
5. Ensure that the **Benchmark Survey** is completed at this step
6. Agree on the date for the Learning Plan Development Session

STEP 2 | Working Together

1. Read the Step 2 of the **Learning Plan** (filled out by the mentees)
2. Participate in the **Learning Plan Development session**
3. Engage in developing the **Learning Objectives** with the mentees
4. Agree on a date for the Study Visit

STEP 3 | Meeting Up

1. Serve as a host city during the **Study Visit**: organise the learning activities and social events
2. Fill out the Step 3 of the **Learning Plan**
3. Prepare practical information for travel of the mentees and the facilitator; and **arrange** the venue, local transport, food, and other materials and logistics, based on financial guidelines
4. **Provide a record of expenses** for reimbursement purposes to the finance coordinator (as described in Step 3)
5. Conduct the **Study Visit** activities

STEP 4 | Moving Forward

1. Fill out the Step 4 of the **Learning Plan**
2. Participate in the **Transferability & Evaluation Session**
3. Work with the mentees and the facilitator in finalising the **Learning Plan**
4. Fill out the **survey** to evaluate the learning programme
5. **Disseminate results** back to your organisation

What are the responsibilities of the **facilitator**?

Peer Learning Programme

1. Participate in the learning programme and attend all four steps: Getting Started, Working Together, Meeting Up, and Moving Forward
2. Write a summary of the proceedings of each step of the learning programme in preparation for the finalisation of the **Learning Plan**

STEP 0 | Preparatory Steps

1. Register in the **Learning Platform** (you will receive an invitation from Climate Kic)
2. Get familiarised with the structure of the learning programme and the materials
3. Understand the learning objectives of the mentees, and the experience of the mentor
4. Communicate with the participants regarding administrative, financial and practical guidelines, and ensure that these are all adhered to
5. Set the schedule for the **Orientation Session** with the participants

STEP 1 | Getting Started

1. Instruct the participants about the Orientation Session (how to attend and prepare)
2. Ensure that the mentor and the mentees have prepared their presentations
3. Ensure that the mentor has filled out the Step 1 of the Learning Plan
4. Facilitate the **Orientation Session**
5. Provide **instructions** for the next steps and be available for questions or clarifications
6. With the mentor and the mentees, **set the date for the next step**: Working Together

STEP 2 | Working Together

1. Instruct the participants about the Plan Development session
2. Ensure that the mentees have filled out the Step 2 of the **Learning Plan**
3. Facilitate the Learning Plan Development session by supporting the creation of the **Learning Objectives**
4. With the mentor and the mentees, **set the date for the next step**: Meeting Up

STEP 3 | Meeting Up

1. Attend the **Study Visit**, and ensure that the participants have made the necessary preparations
2. Ensure that the planned activities support the achievement of the learning objectives
3. Make travel and hotel **arrangements** based on financial guidelines: **provide a record of expenses** for reimbursement purposes to the finance coordinator (as described in Step 3)
4. With the mentor and the mentees, **set the date for the next step**: Moving Forward

Moving Forward

1. Instruct the participants about the Transferability & Evaluation session
2. Ensure the mentor and the mentees have filled out the Step 4 of the **Learning Plan**
3. Carry out the **Transferability & Evaluation session**
4. Gather **Evaluation** for the learning programme
5. With the mentor and mentees, ensure the completion of the **Learning Plan**

4. Step-by-step guide for study visit

Step 0 | Preparation

Activity: Communication with the participants

Approach: Online

Who leads: Facilitator

Tools: Email Communication and Learning Platform

Date: 1 month before the Orientation Session

Time Needed: Flexible

Agenda:

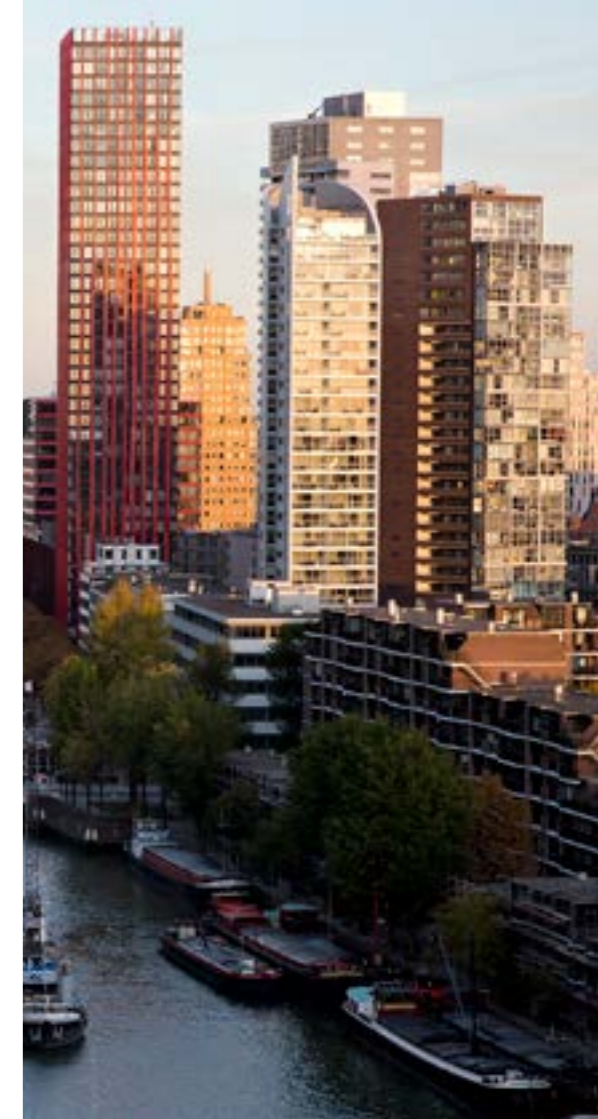
- Officially welcome the participants to the learning programme
- Explain the roles assigned: mentor, mentees, and facilitator
- Provide instructions on the learning platform
- Ensure the completion of the Benchmarking Survey
- Set a date for the orientation session

Input:

- Benchmark survey from mentor and mentees
- Confirmation of availability from mentor and mentees

Output:

- Date for the orientation session



Step 1 | Getting started

For each study visit programme, there will be a **formal orientation** via an **online webinar session** led by the facilitator. Both mentor and mentees should attend this session.

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

The orientation session should take place in Month 1 of the learning programme and lasts around 1-4 hours.

What is needed from the participants before the Orientation session?

- The **facilitator** should inform participants about the date and webinar link/code for the orientation session.
- The **mentor** and the **mentees** need to prepare 1-2 slides about their experience.
- The **mentor** should send, to the facilitator and the mentees, a presentation about his/her experience and projects implemented with the financing scheme.
- **All participants** need to check if their computers are compatible with the GoToMeeting system (more information at <https://support.logmeininc.com/gotomeeting>), which will be used for the session.

Before the session, if there are any questions or clarifications, the mentor and mentees can communicate with the facilitator via email or through the 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.

The mentees can briefly present what the specific learning objectives are, while the mentor will present his/her experience. Mentor and mentees can prepare questions or clarifications on what the mentees need or what the mentor can provide.

What is the indicative structure of the Orientation session?

Orientation session (online) 1-4 hours	
Indicative structure	Who leads?
Introduction to the PROSPECT Programme <ul style="list-style-type: none">• Overview of booklet and module• Overview of the Learning Plan• Reminder to make notes during all sessions for the evaluation of the programme (Step 4)	Facilitator
Introduction of the participants <ul style="list-style-type: none">• 1-2 slides presentation each	All
Mentor presents his/her experience on the financing scheme <ul style="list-style-type: none">• What is the financing scheme• Projects developed using the financing scheme• Stakeholders involved• Main factors for success• Main barriers/difficulties	Mentor
Q & A	All
Next steps and practical instructions: <ul style="list-style-type: none">• Learn each other's context• Setting the date	Facilitator
End of orientation session	



Step 2 | Working together

In this step, **mentor** and **mentees** define together the **learning objectives** of the learning programme, which will be crucial for the creation of the study visit activities conducted in Step 3. During the **Learning Plan Development session**, the mentees present their projects and the main questions/doubts about the financing scheme (having in mind the projects and experience previously presented by the mentor). Other webinar sessions can be set up during Step 2, if necessary, to further define and finalise the learning objectives as well as come up with ideas for the learning activities to be conducted during the study visit.

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

The activities can take place on Months 2 – 3 of the study visit programme. The webinar session is estimated to last 1-4 hours.

What is needed from the participants before the Learning Plan Development session?

- The **facilitator** should inform participants about the date and webinar link/code for the Learning Plan Development session and ensure that the updated Learning Plan and other materials are uploaded in the Learning Platform (or sent via email) within two weeks after the orientation session.
- The **mentees** should fill in the Step 2 of the **Learning Plan** and upload it to the Learning Platform (or send it by email to all participants). They can also provide materials about the projects that specifically show the type of advice needed from the mentor, and also check the module's handbook, available in the Learning Platform, for guidance.
- The **mentor** should read the Step 2 of the Learning Plan developed by the mentees.

The mentor and the mentees can also ask for clarifications via the Learning Platform or through email communication.

What is the indicative structure of the Learning Plan Development session?

Learning Plan Development (online) 1-4 hours	
Indicative Structure	Who leads?
Introduction <ul style="list-style-type: none"> • Reminder: take notes of the session for the evaluation of the programme (Step 4) 	Facilitator
Mentee presents projects and needs <ul style="list-style-type: none"> • Description of project(s) • List of questions/doubts to be addressed during the visit by the mentor • Other relevant topics 	Mentees
Q&A	All
Definition of the learning objectives	Mentor and mentees
Next steps and practical instructions for Step 3 <ul style="list-style-type: none"> • Set date of the visit • Address possible travel and accommodation options • Mentor estimates a date to present the first draft of the visit's agenda (learning activities, lecturers, and overall programme) 	All



Step 3 | Meeting up

Peer mentoring entails a **study visit** where mentor and mentees meet and work further together to achieve the learning objectives through in depth sessions. In study visit, the host is the mentor.

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

The study visit can take place during Months 4-6 of the learning programme, but can also happen before in case the learning process is going fast and all participants agree. A study visit should take 2 days, plus an additional (1) day of travel for the mentees.

What is needed from the participants before the study visit?

- The **mentor** should prepare practical information for travel of the mentees and facilitator (e.g. directions to the venue, suggestions for hotels, information on public transport), and also plan and organise the visit, by defining the learning activities, lecturers (stakeholders can be invited), social events, venue, food, and logistics based on a budget for reimbursement afterwards.
- At least two weeks before the study visit, the **mentor** should fill in the Step 3 of the **Learning Plan** with the draft agenda of the study visit, and upload it on the Learning Platform or send it by email to the facilitator and the mentees.
- The draft agenda of the Study Visit should be agreed upon and finalised a week before the visit by **all participants**.
- The **mentees** should book travel and accommodations, based on a budget for reimbursement afterwards.
- The **facilitator** should coordinate with the mentor and mentees regarding the structure of the study visit, and document the visit by writing case studies/articles about the projects and experience exchanged, as well as take pictures.

What is the agenda for the study visit?

The **mentor** will organise the study visit and prepare more in-depth mentoring sessions, such as workshops or discussions, for the mentees to learn from the mentor's experiences. The **mentor** can also invite relevant stakeholders to the study visit (e.g. public authorities, universities, research institutes etc.). Likewise, the **mentees** can monitor the extent the learning objectives are being met and further provide feedback for the mentor. During the visit, the **mentees** should collect information for the Step 3 of the Learning Plan and the transferability session (Step 4 "Moving forward").

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



Example of Study Visit agenda

Peer Learning Objective: To understand the basics of energy performance contracting (EPC) for energy renovation of public buildings.

Day 1 | Seminar and workshops

Time	Session	Expert
9.00	Introduction: Welcome, introduction to participants and objectives	Name position, organisation
10.00	Introduction to EPC: Energy requirements and standards for public buildings	Name position, organisation
11.00	Coffee break	
11.15	Refurbishments of public buildings: Step by step	Name position, organisation
12.30	Lunch at (restaurant, address)	
14.00	Energy accounting, building renovation, and EPC in public buildings	Name position, organisation
15.30	EPC: step by step workshop	Name position, organisation
16.30	Coffee break	
17.00	Q&A and finalisation	Name position, organisation
18.00	Dinner at (restaurant, address)	

Day 2 | Site visits

Time	Site	Expert
9.00	Meeting point: (address)	
9.30	Site visit 1: Local School Energy optimization in the local school	Name position, organisation
12.30	Lunch at (restaurant, address)	
14.00	Site visit 2: Municipal office building Energy efficiency through EPC	Name position, organisation
17.00	Q&A and finalisation	Name position, organisation
18.00	End of site visit	



How to make the trip more sustainable?

Suggestions for the travel:

- Turn off — and unplug! — lights and electronics.
- Turn down the thermostat.
- Walk, bike, or take public transportation means.
- Rent an electric car or a hybrid (and share your ride).
- Estimate your travel carbon print with the Eco Passenger.org

During Your Stay:

- Book “eco-accommodation” or consider staying with family or friends instead of a hotel.
- At the accommodation, try to conserve energy and water.
- Find food places that stock organic product supplied by local farmers.

What is the budget for the mentor and the mentees?

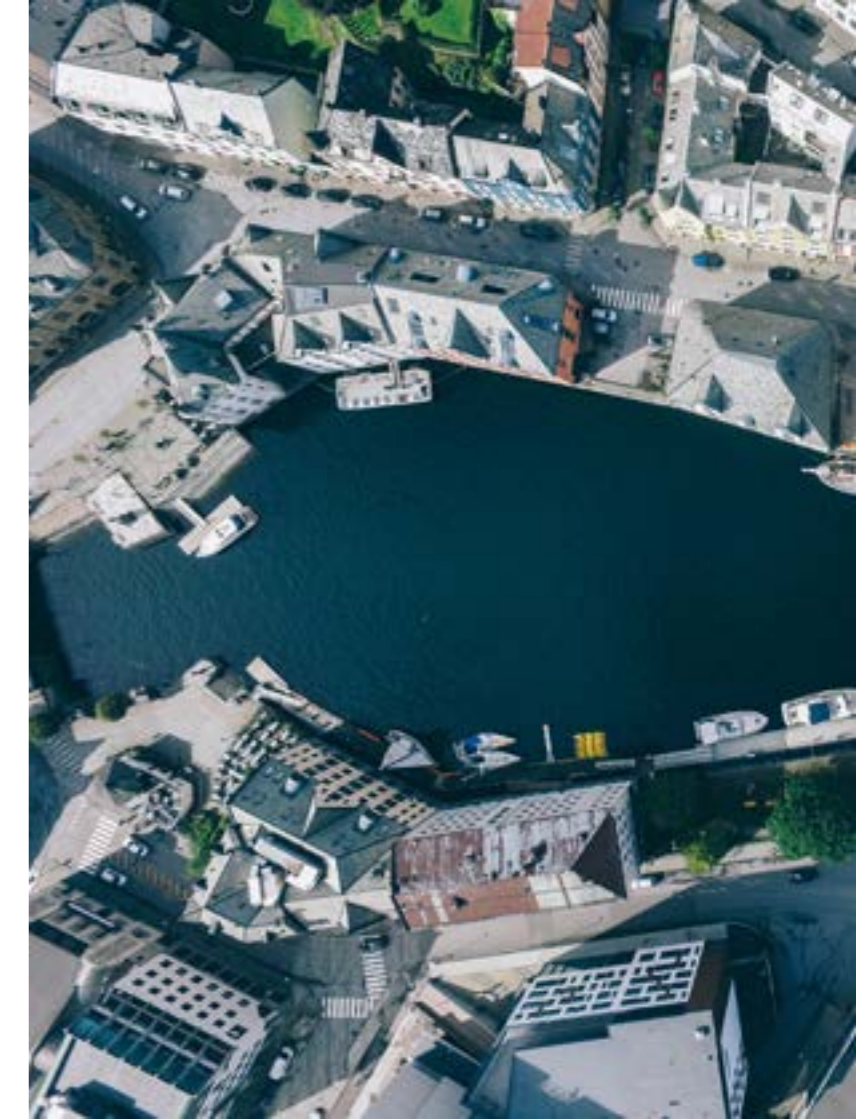
Each mentee has a maximum budget of 600 euros for travel and accommodations for 3 days, broken down into 2 days for the study visit and 1 day for travel (back and forth). On the other hand, the mentor – as the host city- will have a maximum budget of 730 for course materials, food and refreshments and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

Budget for mentee		Budget for mentor	
Cost item	Amount	Cost item	Amount
Travel cost (including accommodation)	600	Course materials	80
		Food and refreshments	450
		Transport	200
Total	600	Total	730

The mentor, mentees, and facilitator should provide all the **original receipts** of the expenses, **boarding tickets of flights and/or trains**, as well as **bank details** to the finance coordinator for reimbursement afterwards. Participants can use the sample invoice provided in the Learning Plan.

What is needed from the participants after the study visit?

- Both **mentees** and **mentor** should fill in the “Take-away from the visit” section on the Learning Plan.
- The mentees should also describe their impressions about the financing scheme on the “Rethinking the financing scheme” section on the Learning Plan.
- The **mentor** can proactively assist the mentees in achieving their learning objectives even after the visit. To sustain the interaction, mentor and mentees can use the Learning Platform or other means for communication (e.g. email).
- **All learning participants** should prepare an invoice with the original receipts for reimbursements and send these to the finance coordinator. After 2-4 weeks, the **finance coordinator** will reimburse the expenses of all participants through bank transfer.
- The **facilitator** should ensure that the mentor and mentees follow the financial guidelines.
- **Mentor** and **mentees** should disseminate back the results of the peer mentoring visit back to their organisations.



Step 4 | Moving Forward

The main objective of Step 4 is to reflect on **how the mentees can apply the knowledge** gained during the visit, taking into consideration the context of their city/region and factors that might constrain the development of the financing scheme. This final engagement is called **Transferability & Evaluation session** and will happen via online webinar. In this step, mentor and mentees will **finalise the Learning Plan** with the support of the facilitator. After the webinar, all participants should also **fill out a survey to evaluate the learning programme** (links to the surveys will be provided by the facilitator).

When will this activity take place and for how long?

It depends on how fast the learning programme is being implemented. However, it should take place on Months 7-9 of the learning programme, the latest. This online engagement is for 1-4 hours.

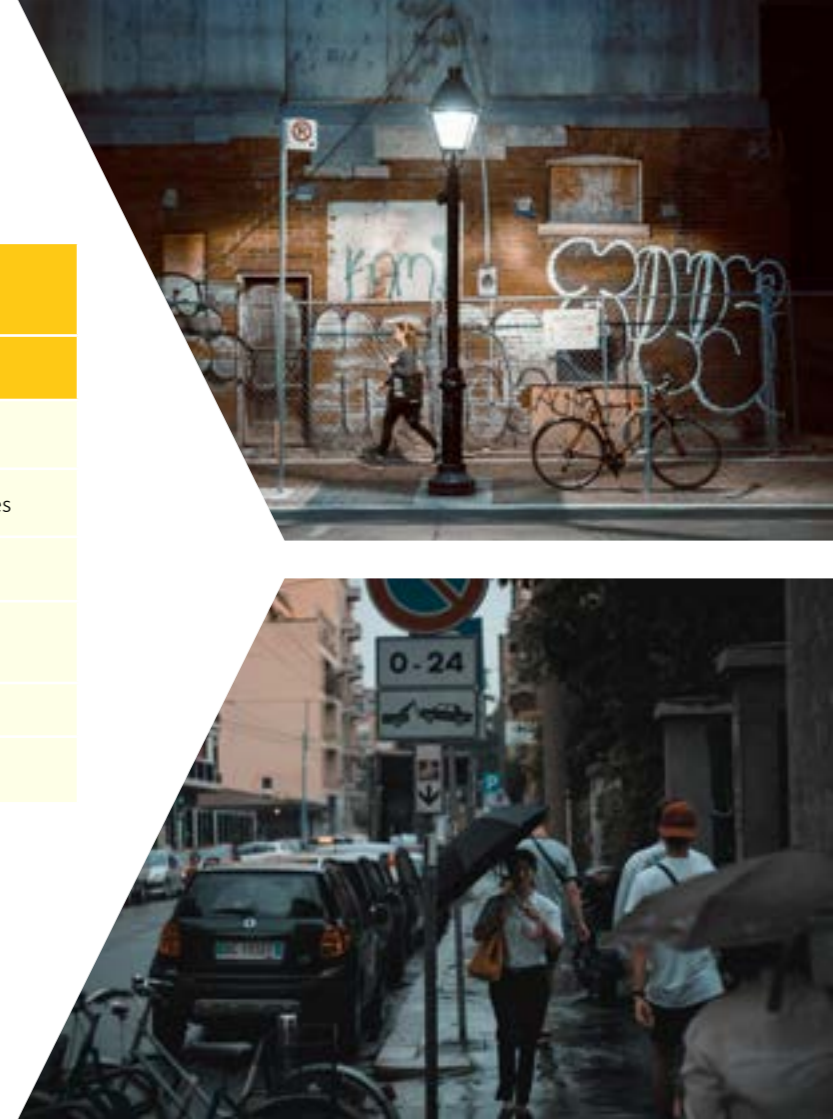
What is needed from the learning participants before this activity?

- The **mentees** should fill in the sections directed to the mentees in the Step 4 of the **Learning Plan** and upload the updated version on the Learning Platform (or send it by email to the facilitator and the mentor).
- The **mentor** should read the Step 4 developed by the mentees, and fill in the sections directed to the mentor.
- The **facilitator** should ensure the mentor and the mentees have filled out the Step 4 of the **Learning Plan** and instruct the participants about the evaluation of the learning programme.

What is the indicative structure for this activity?

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

Transferability & Evaluation session (online) 1-4 hours	
Indicative structure	Who leads?
Introduction to the activity	Facilitator
Transferability analysis (presentation and feedback)	Mentor and mentees
Q & A	All
Evaluation of the learning programme	Facilitator
Finalisation of Learning Plan	All
End of peer learning programme	





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4. Facilitators' kit

At the start of the learning cycle, all facilitators receive a kit with materials to support the facilitation of the learning programme. The materials are shared via Dropbox and organised into two folders:

- 1. Facilitator's folder** - with documents used only by the facilitator, such as:
 - Facilitator's checklist: list of activities to be conducted by the participants and facilitator
 - PPT templates: templates for all 4 steps of the programme can be used for the development of presentations for the sessions
 - Message templates: templates that can be used for communicating with the mentor and mentee(s)
- 2. Materials to participants** - with documents that will be used by the mentor and mentee(s), such as:
 - Peer Mentoring and Study Visit booklets: booklets with relevant information about the learning programme
 - Learning Plan: main document of the learning programme, in which participants input relevant information about their needs, experiences, learning outcomes, and action plan for next steps.
 - PPT Templates: templates that be used for the development of presentations for the sessions
 - Modules' content: content about the financing scheme



Learning Plan



PPT template

Modules



The Facilitator's Checklist, Learning Plan, Message templates, and PPT template for Step 1 are included in this document. The PPT templates for the other 3 steps are similar to Step 1. The Modules are presented in D3.1. Final Report on Content for Learning Modules.

An aerial photograph of a coastal town, likely in Norway, showing a harbor with several boats and a street with a crosswalk. The town features traditional architecture with stone and wood facades. A teal banner is overlaid on the top half of the image.

4.1. Facilitator's Checklist

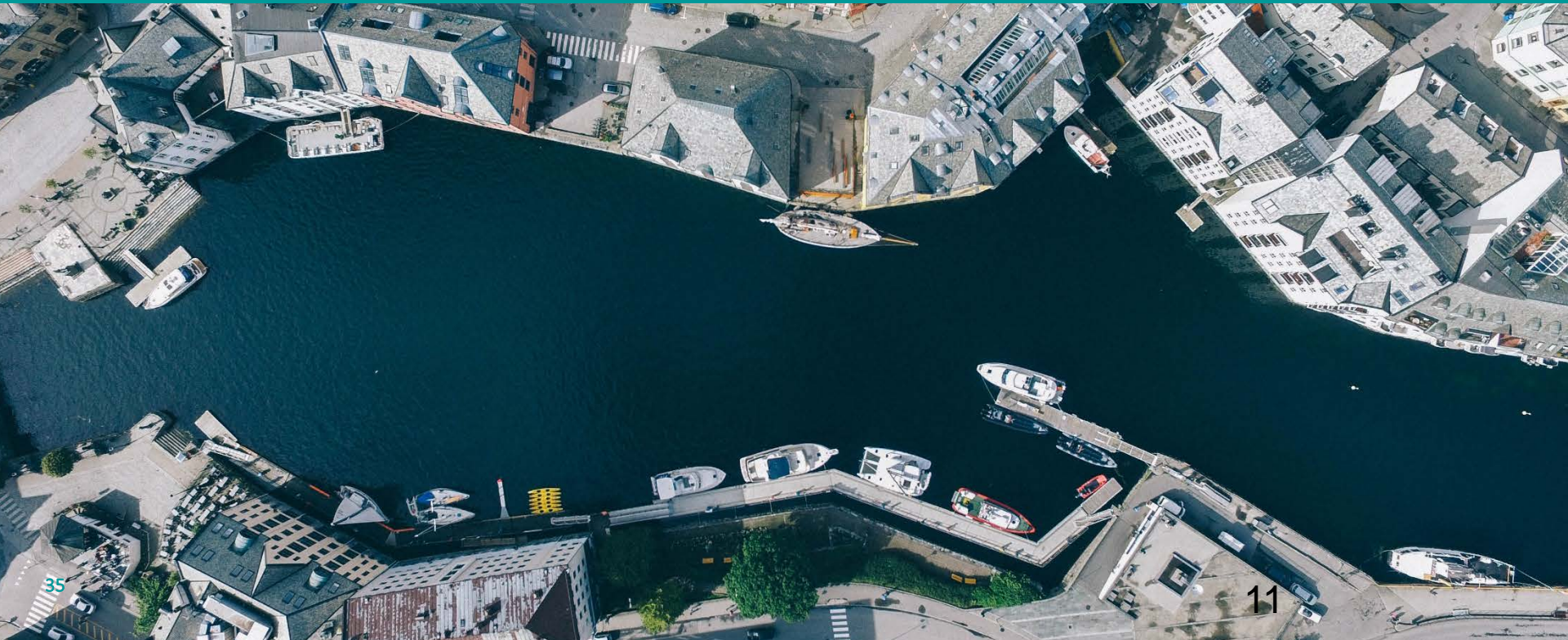
Step	Assigned to	Task	Resource	Resource location	Status	
STEP 0: Preparatory steps Preparation for the Learning Programme Month 0	Facilitator		Materials for the facilitator	Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Facilitator's materials		
	Mentor/Mentee/Facilitator	Read the crucial materials for the learning programme to get familiar with the structure and the documents	Learning programme booklet (study visit or peer mentoring, depending on your group) Modules' content Learning Plan	Learning Platform and/or Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Participants' materials Learning Platform		
	Facilitator	Call or e-mail participants welcoming them to the learning programme, by: Formally introducing yourself to the participants Providing access /information to the learning platform Providing information on the benchmarking Setting a date for the orientation session	Messages templates - Step 0 Learning platform link Benchmark link Doodle poll link	Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Facilitator's materials\Message's templates https://learning.climate-kic.org https://teelab.unipi.it/imesurvey/index.php?r=survey/index/sid/299173&lang=en&newtest=1 https://doodle.com/		
	Facilitator	Send message to participants following up on the pending tasks Agree on the date for the orientation session	Email or learning platform			
	Mentor/Mentee	Fill out the benchmarking survey	Benchmark link	https://teelab.unipi.it/imesurvey/index.php?r=survey/index/sid/299173&lang=en&newtest=1		
	Facilitator	Add the date of the orientation session to the Learning Plan (under Step 1) and to the Learning Platform.	Learning Plan	Learning Platform		
	Facilitator	Set Gotomeeting for the orientation session (Account: GoToH2020Prospect@climate-kic.org)	Gotomeeting account: GoToH2020Prospect@climate-kic.org	https://www.gotomeeting.com		
	Facilitator	Add Gotomeeting link and code on the Learning Plan	Learning Plan	Learning Platform		
	STEP 1: Getting started Formal orientation via online webinar session Months 1-3	Facilitator	Send message to participants (by e-mail or learning platform) guiding them on how to prepare for the session, by: Briefly explaining the objective and activities related to Step 1 Instructing on how to use Go to Meeting and prepare their computers Requesting the mentor and mentee(s) to prepare a self-introduction and overview of experiences Requesting the mentor to prepare a presentation of his/her experience in using the financing scheme Reminding them on the agreed date of the session (available at the Learning Plan) Sending the Gotomeeting link (available at the Learning Plan)	Messages templates - Step 1 Booklet Step 1 - message template Booklet Step 1_Template Learning Plan	Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Facilitator's materials\Message's templates Learning Platform and/or Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Participants' materials Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Facilitator's materials\Message's templates Learning Platform and/or Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Participants' materials Learning Platform	
		Mentor	Fill in the Step 1 of the Learning Plan	Learning Plan	Learning Platform	
Mentor/Mentee/Facilitator		Prepare the orientation session, by finalising the PPT presentation	PPT template_Step 1	Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Facilitator's materials\PPT's templates		
Mentor/Mentee/Facilitator		Conduct the orientation session (1-4 hours), and:	Gotomeeting (link available at "Learning Plan")	Learning Platform		
Facilitator		Provide information for the next steps	Booklet	Learning Platform and/or Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Participants' materials		
Mentor/Mentee/Facilitator		Set the date for the next step: Working Together				
STEP 2: Working together Learning plan development and online peer learning Months 4-6		Facilitator	Add the date of the orientation session to the Learning Plan (under Step 2) and to the Learning Platform.	Learning Plan	Learning Platform	
		Facilitator	Set Gotomeeting for the session (Account: GoToH2020Prospect@climate-kic.org)	Gotomeeting (link available at "Learning Plan")	https://www.gotomeeting.com/nl-nl	
	Facilitator	Add Gotomeeting link and code on the Learning Plan	Learning Plan	https://www.gotomeeting.com/nl-nl		
	Facilitator	Send message to participants (by e-mail or learning platform) guiding them on how to prepare for the session, by: Briefly explaining the objectives and activities related to Step 2 Requesting the mentee to fill out the "Mentee's project" and "Mentee's needs" sections on the Learning Plan Reminding them on the agreed date of the session (available at the Learning Plan) Sending the Gotomeeting link (available at the Learning Plan)	Messages templates - Step 2 Booklet Learning Plan	Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Facilitator's materials\Message's templates Learning Platform and/or Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Participants' materials Learning Platform		
	Mentee	Fill out of the "Mentee's project" and "Mentee's needs" sections on the Learning Plan	Learning Plan	Learning Platform		
	Mentor/Mentee/Facilitator	Conduct the online session on learning plan development (1-4 hours), and:	Gotomeeting (link available at "Learning Plan")	Learning Platform		
	Facilitator	Define a lear list of learning objectives Provide information for the next steps	Learning programme booklets	See learning programme booklets		
	Mentor/Mentee/Facilitator	Set the date for the next step: Meeting Up				
	Facilitator	Fill in the "Learning Objectives" section of the Learning Plan with the objectives agreed during the session on Step 2	Learning Plan	Learning platform		
	STEP 3: Meeting up Physical visit Months 7-8	Facilitator	Add the date of the orientation session to the Learning Plan (under Step 3) and to the Learning Platform.	Learning Plan	Learning platform	
Facilitator		Send message to participants guiding them on how to prepare for the visit, by: Briefly explaining the objectives and activities related to Step 3 Reminding mentee(s) to book travel and accommodations to the mentor's venue Reminding mentor to provide information for the visit and send a plan of activities Providing explanation on the reimbursement of costs Confirming the final date for the physical visit (available at the Learning Plan)	Messages templates - Step 3 Booklet Learning Plan	Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Facilitator's materials\Message's templates Learning Platform and/or Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\template folder\Participants' materials Learning platform		
Mentee/Facilitator		Book travel and accommodations				
Mentor		Organise the visit and plan the activities Check suggestion of topics and structure on the learning module material Add agenda of the visit to the Learning Plan and send it to the facilitator and the mentee(s) at least 2 weeks before the trip	Learning module handbook Learning Plan	Learning platform Learning platform		
Mentor/Mentee/Facilitator		Communicate to agree on the plan and finalise materials for the visit	Email or learning platform			
Mentor/Mentee/Facilitator		Agree on the structure of the visit (at least 1 week before the visit) Finalise the agenda of the visit	Learning Plan	Learning platform		
Mentor/Mentee/Facilitator		Peer mentoring or study visit (2 days + 1 day travel)				
Facilitator		Provide information for the next steps	Booklet	Learning platform		
Mentor/Mentee/Facilitator		Set the date for next step: Moving Forward				
Mentor/Mentee/Facilitator		Save receipts for reimbursement				
Mentor/Mentee		Add notes about the visit to the Learning Plan, on the "Take-away from the visit" section on Step 3				
Mentee		Add your impressions about the financing scheme to the "Rethinking the financing scheme" on Step 3 of the Learning plan				

	Mentor/Mentee/Facilitator	Prepare invoice, receipts, and boarding pass or tickets (of flights and/or trains) and send to IHS (invoice template is annexed to the Learning Plan) Send all documents by post to: Elena Marie Enseñado Institute for Housing and Urban Development Studies Mandeville (T) Building, 14th Floor Burgemeester Oudlaan 50 3062 PA Rotterdam	Learning Plan	Learning platform	
	IHS	Reimburse all real costs between 2-4 weeks after the visit	Bank transfer		
STEP 4: Moving forward Evaluation session and transferability assessment	Facilitator	Add the date of the orientation session to the Learning Plan (under Step 4) and to the Learning Platform. Also inform MIA to create the GotoMeeting	Learning Plan	Learning Platform	
	Facilitator	Set Gotomeeting for the session (Account: GoToH2020Prospect@climate-kic.org)	Gotomeeting account: GoToH2020Prospect@climate-kic.org	https://www.gotomeeting.com	
	Facilitator	Add Gotomeeting link and code on the Learning Plan	Learning Plan	Learning Platform	
	Facilitator	Send message to participants guiding them on how to prepare for the session, by:	Messages templates - Step 4	Dropbox\PROSPECT project\WP4\LEARNING PROGRAMME DOCUMENTS\Template folder\Facilitator's materials\Message's templates	
		Briefly explaining the objectives and activities related to Step 4	Booklet	Learning platform	
		Confirm the date for the session	Learning Plan	Learning Platform	
	Mentor/Mentee	Instruct mentor and mentee(s) to finalise the Learning Plan	Learning Plan	Learning Platform	
	Mentor/Mentee	Fill out the Step 4 of the Learning Plan	Learning Plan	Learning Platform	
	Mentor/Mentee	Disseminate results back to organisations			
	Facilitator	Conduct the online session on transferability (1-4 hours), by:		Dropbox\PROSPECT project\WP3\Materials for Facilitators\Facilitators' Kit\Step 4 - Moving Forward\Transferability session	
Mentor/Mentee/Facilitator	Conducting the transferability analysis	Learning Plan	Learning platform		
	Sharing links of the survey for evaluation of the learning programme (to be answered in the days following the last session)	Mentor survey	https://docs.google.com/forms/d/e/1FAIpQLSc-NajGdwu621JwFQqFI_InCva3hAGHJTUVUtmYcAI8Ne/viewform		
		Mentee survey	https://docs.google.com/forms/d/e/1FAIpQLSdSM8jkVipsATLXIS-eWwZ0wFCLPGVSSxNcyKHIR2mfNO-Q/viewform		
		Facilitator survey	https://docs.google.com/forms/d/e/1FAIpQLSdbEzWvZHL4xw2w1JYm_17N75mM8mTQAEp9FfD22_TCr6Q/viewform		
Mentor/Mentee	Dissemination of results	Learning Plan	Learning platform		
Mentor/Mentee/Facilitator	Finalise the Learning Plan	Learning Plan	Learning Platform		
Facilitator	Save a copy of the Learning Plan in the DROPBOX folder you have created for your group	Dropbox			

END OF THE LEARNING PROGRAMME

An aerial photograph of a city street with a teal banner overlaid at the top. The banner contains the text "4.2. Learning Plan".

4.2. Learning Plan





Learning Plan

Group name

This document contains the experience and knowledge exchanged between the following participants:

Mentor:

Facilitator:

Mentee:



<u>LEARNING GROUP</u>	<u>4</u>
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Learning group

Learning group

GROUP NAME	(e.g. PROSPECT-Pilot Learning)	CYCLE	1
MODULE	(e.g. Public Buildings)	START DATE	DD/MM/YY
METHOD	(Study visit or Peer mentoring)	END DATE	DD/MM/YY

Participants

FACILITATOR			
Name		City / Region	
Organisation		Country	
Email address		Mobile/Phone	

MENTOR			
Name		City / Region	
Organisation		Country	
Email Address		Mobile/Phone	
Summary of Learning Objective(s):			
Summary of Learning Outcome(s):			

MENTEE(S)

	Name	Organisation	City/Region	Country	Email	Phone
1						
2						

Summary of Learning Objective(s):

Summary of Learning Outcome(s):

Preparation

Preparation for the Step 1

Mentor:

- Read the **booklet** to get familiarised with the learning programme (available on PROSPECT learning platform)
- Fill out the **Step 1** of this Learning Plan
- Prepare **one-two slide(s)** with your experience
- Prepare a presentation of your **city/region's projects** using the financing scheme
- Fill out the [benchmark survey](#)

Mentee(s):

- Read the **booklet** to get familiarised with the learning programme (available on PROSPECT learning platform)
- Prepare **one-two slide(s)** with your experience
- Fill out the [benchmark survey](#)



Learning Plan

Step 1: Getting started

Online session

STEP 1 Orientation session			
Date:	DD/MM/YY	Time:	hh:mm
GoToMeeting Link:			
GoToMeeting Code:			
Agenda:	<ul style="list-style-type: none">• Introduction to the PROSPECT Programme<ul style="list-style-type: none">○ Overview of booklet and module○ Overview of the Learning Plan○ Reminder: make notes of the session for the evaluation of the programme, in Step 4• Participants present themselves• Mentor presents his/her experience on the financing scheme<ul style="list-style-type: none">○ What is the financing scheme○ Projects developed using the financing scheme○ Stakeholders involved○ Main factors for success○ Main barriers/difficulties○ Other relevant topics• Q&A• Next steps and practical instructions<ul style="list-style-type: none">○ Set the date for next session○ Mentee: fill out the Step 2 section of the Learning Plan		

Mentor's experience

This section is based on the information provided by the mentor in the application for the programme. However, the **mentor** is advised to **further improve** the content below.

PROJECT DESCRIPTION			
Project title:			
Stakeholders Involved:			
Sector:			
Financing scheme:		Source of Funds:	
Phase:	<i>(development, implementation, or monitoring)</i>	Start:	
		End:	
Description:			
Key success factors (replication potential):			
Main Barriers (Difficulties)			
Relevant links or annexes:			
<ul style="list-style-type: none"> • 			

ADD projects by copying and pasting this table.

Summary of mentor's personal skills and expertise to be shared with the mentee(s):

Ex: over 10 years of experience in project financing; vast experience in green bond as responsible for the development and implementation of municipal green bonds; especially interested in market analysis and private financing; experience as lecturer and workshop facilitator.

-

Step 2: Working together

Online session

STEP 2 Learning Plan Development session			
Date:	DD/MM/YY	Time:	hh:mm
GoToMeeting Link:			
GoToMeeting Code:			
Agenda:	<ul style="list-style-type: none"> • Introduction <ul style="list-style-type: none"> ○ Reminder: make notes of the session for the evaluation of the programme, in Step 4 • Mentee presents projects and needs <ul style="list-style-type: none"> ○ Description of projects ○ List of questions to be addressed during the visit by the mentor ○ Other relevant topics • Q&A • Definition of the learning objectives • Next steps and practical instructions for Step 3 (visit) <ul style="list-style-type: none"> ○ Set date for visit ○ Address possible travel and accommodation options ○ Mentor estimates a date to present the first draft of the visit's agenda (learning activities, lecturers, and overall programme) 		

Mentee's project

Initial information can be collected from the mentee's application form. However, the **mentee** is advised to **further improve** the content below.

PROJECT DESCRIPTION			
Project title:			
Sector:		Budget:	
Phase:	(development, implementation, or monitoring)	Implementation start:	
		Implementation end:	
Estimated energy savings:	MWh/a	Renewable energy production:	MWh/a

Estimated CO2 reduction:	tCO2/a	Estimated monetary savings:	
Description:			
Relevant links or annexes:			
<ul style="list-style-type: none"> • 			

ADD projects by copying and pasting the table.

Mentee's needs

Support needed from the mentor (in the form of sentences or questions):

Mentee(s), for guidance, check the module's handbook, available at the Learning Platform.

-

Learning objectives

Based on the needs of the mentee(s) and the experience of the mentor, the participants agree to focus on the following learning goals:

Step 3: Meeting up

Basic information about the visit

STEP 3 Peer mentoring/study visit			
Date:	DD to DD/MM/YY	Time:	From hh to hh
Location:	(street/avenue, number - city, country)		
How to get there:	(overall needed instructions, such as how to get there from the airport, train station, or by car)		

Agenda

***Mentor**, please send the agenda at least **2 weeks before the visit**. The agenda will be finalised after review from the mentee(s) and facilitator. (For guidance, check the module's handbook, available at the Learning Platform)*

DAY 1 DD/MM			
TIME	TITTLE	LECTURER	MATERIALS
18.30	Dinner at (restaurant) – (address)		

DAY 2 DD/MM			
TIME	TITTLE	LECTURER	MATERIALS
18.30	Dinner at (restaurant) – (address)		

Relevant documents

*Mentor, please list the documents the mentee(s) should read **previous** to the visit and/or bring to the visit.*

Preparation for the visit:

-

Mentee(s), please bring the following documents to the visit:

-

Site visits



Substitute with picture of the site

Title of site visit

Description of site visit



Title of site visit

Description of site visit



Title of site visit

Description of site visit

Lecturers



Name
Role/Position

Substitute with lecturer's picture



Name
Role/Position



Name
Role/Position

Take-away from the visit

Mentor and mentee, please fill in the Annex 3.

Rethinking the financing scheme (after visit)

***Mentee**, please fill in the questions below with your impressions and main understanding about the financing scheme presented by the mentor. You are advised to take some time to reflect on the financing scheme, the projects presented, and their key features.*

(Name of the financing scheme)	
Main impressions and understanding about the financing scheme:	
Key strengths of the financing scheme:	
Key weakness of the financing scheme:	
Key steps to set up or develop the financing scheme:	

*Table to be filled by **each mentee**. In case of more than one mentee, please copy and paste the table.*

Remaining comments and questions to be considered:

***Mentee(s)**, briefly summarise your impression of the results of the project(s) that used the financing scheme. You can also add new questions that can be addressed by the mentor.*

-

Step 4: Moving forward

Online session

STEP 4 Transferability & Evaluation session			
Date:		Time:	
GoToMeeting Link:			
GoToMeeting Code:			
Agenda:	<ul style="list-style-type: none"> • Introduction • Transferability analysis by the mentee <ul style="list-style-type: none"> ○ Q&A • Evaluation of the learning programme (inform about surveys so that they are filled out in the following days) • Finalisation of the Learning Plan 		

Transferability analysis

Mentee, how do the conditions of success to set up or develop the financing scheme take place in your local context?

*For each of the conditions provided below, evaluate the potential to apply it to your local context following the scoring criteria. You are encouraged to refer to your answers in the **Benchmark survey** which has already helped you reflect on your current situation and the steps necessary to implement innovative financing schemes in your city. Please, add a short justification for your answer.*

Conditions for success			
Conditions	Scoring criteria	Score	Justification for answer
Staff availability	1 – No staff available 5 – There are available staff	Ex: 1	(Example for score 1: the mentor had 2 dedicated professionals to set up the financing scheme. Currently, we don't have this capacity in place)
Time needed for implementation	1 – The time needed to set up the scheme is not realistic to my context 5 – The time needed to set up the scheme is perfectly fine		
Governance related efforts	1 – The Municipality doesn't have experience or capacity		

	to undertake all the coordination needed with stakeholders 5 – The Municipality is able to undertake all the coordination needed to set up this scheme		
Technical conditions required	1 – The Municipality doesn't have the technical knowledge to set up the scheme and is not able to build capacity or get external support 5 – The Municipality has all technical knowledge necessary to set up the scheme		
Financial framework	1 – There are no funds available to set up the scheme, and no perspective of change 5 – The funds to set up the scheme are available		
Legislative/regulatory framework	1 – There are no regulations, market maturity or other frameworks in place to set up the scheme in my context 5 – Framework to set up the financing scheme is already in place		
Communication	1 – The Municipality does not have experience or capacity to establish communication with stakeholders, citizens, etc. 5 – The Municipality is able to properly communicate with all stakeholders and citizens		
Level of own pre-financing required	1 – The Municipality does not have the necessary initial capital to set up the scheme and doesn't know of alternatives to raise it 5 – The Municipality already has the initial capital to set up the scheme, or an initial capital is not necessary		
(Include other factor specific to the project)	1 – Factor is a barrier in your context 5 – Factor is easy to address		

Add rows to list other relevant factors.

Action plan

Mentee, please fill in the questions below by reflecting on how you can implement a project in your city using the financing scheme presented by the mentor.

For each of the conditions for success with a **scoring lower or equal to 3**, please:

1. Name the condition for success with a score lower or equal to 3 on the table below (use one table for each condition);
2. List the practical steps, timeline, and points to monitor for the improvement of the condition in order to increase the transferability potential of the project.

(Condition for success 1 – e.g. Staff time)

Practical steps to take:	
Timeline:	
Key points to be monitored:	

(Condition for success 2 – e.g. Communication)

Practical steps to take:	
Timeline:	
Key points to be monitored:	

Copy and paste the table as necessary.

Evaluation of the learning activities and process

Please take some time to reflect on your learning experience and provide feedback for other participants.

Mentor's take away

Mentor, please reflect generally in around 10 lines on the learning or inspirations from the learning programme.

Mentor's feedback to mentee(s)

Mentor, please reflect generally on some advice you would like to provide to the mentee(s) for them to implement the financing scheme in their city.

Mentee's take away

Mentee(s), please reflect generally in around 10 lines on the learning or inspirations from the learning programme.

Mentee's feedback to the mentor

Mentee(s), please reflect generally on some advice you would like to provide to the mentee city for them to implement your project in their city.

Dissemination

Please share how you have disseminated the results of the learning programme to your own organisations. And how did your colleagues respond to it?

Dissemination by the mentor

Dissemination by the mentee

Copy and paste the table in case of more than one mentee.

Annexes

Annex 1: Invoice template

Date: DD/MM/YY

Invoice on PROSPECT Learning Programme

Contact: Elena Marie Enseñado

In accordance with the financial guidelines set by PROSPECT: Peer Powered Cities and Regions, I, [name of mentor/mentee] hereby send my invoice for my participation in the [peer mentoring/study visit] held at [name of city/region and country] last [date/month/year].

The following are the itemized costs that I incurred:

Number	Description	Amount
1	Travel costs	
2	Accommodations	
		Sub-total
		VAT
		TOTAL COST

Attached to this invoice are the original receipts that support the itemized costs for my invoice.

I kindly request you to pay the invoice through the IBAN account _____ in the name of _____ (account must be in the same name as the sender).

[Name]

[Organization]

[Signature]

Send the invoice by post to:

Elena Marie Enseñado

Institute for Housing and Urban Development Studies

Mandeville (T) Building, 14th Floor

Burgemeester Oudlaan 50

3062 PA Rotterdam

Annex 2: Sessions' Minutes

Here the facilitator can add relevant information about each session, as well as the physical visit. For example, the main points of discussion and next steps.

Annex 3: Take away from the physical visit

Mentor's notes
<ul style="list-style-type: none">•

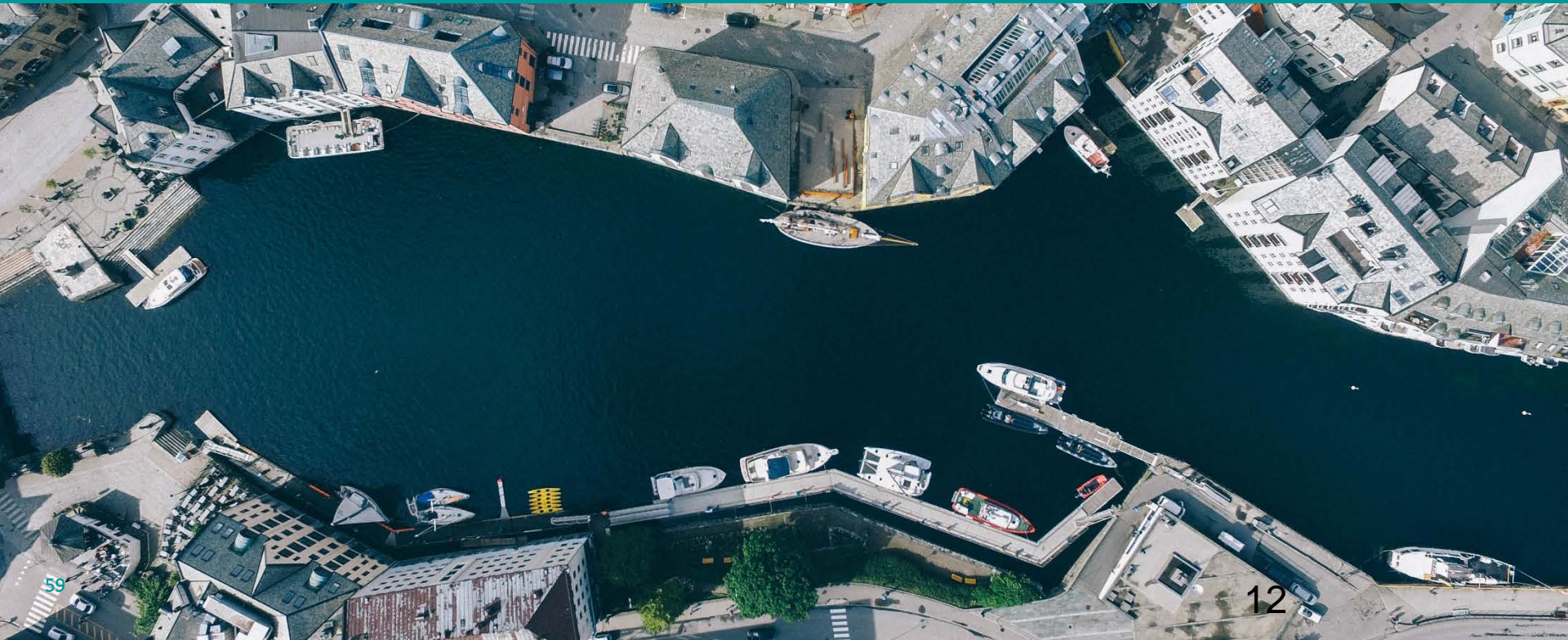
Mentee's notes
<ul style="list-style-type: none">•

Table to be filled by **each mentee**. In case of more than one mentee, please copy and paste the table.

Annex 4: (to be added by the participants)

An aerial photograph of a city street with a teal banner overlay at the top. The banner contains the text "4.3. Message templates".

4.3. Message templates





Message templates – Steps 0 to 4

Purpose of these messages:

These templates are simply suggestions of messages that you can send to the mentor/mentees. Please, feel free to use them or not. You are free to communicate with the participants in the way that suits you better.

Instructions:

[Highlighted] parts need to be adjusted according to the instruction between []. The “[]” and the **highlight** can and should be deleted.

Highlighted parts without []: the text doesn't need to be changed. But these parts have a comment with instructions on what needs to be done. Delete the **highlight** before sending the message.

The templates contain relevant information for the learning programme. However, **you still may need to add or delete certain information** according to the dynamics of your group. Feel free to edit the messages as much as necessary.

Which message templates you find in this document:

- Message template - Step 0
- Message template - Step 1
- Message template - Step 2
- Message template - Step 3
- Message template - Step 4
- Message template – How to use the learning platform

Message template – Step 0

Dear [mentor and mentee(s)' names],

Welcome to the PROSPECT learning programme! As you already know, the programme is based on the exchange of knowledge and experience between cities on innovative financing schemes used to implement sustainable energy and climate plans.

My name is [name of facilitator], and I will be your facilitator. As your facilitator and the main point of contact during the programme, I hope to guide into successfully sharing your knowledge and experiences with each other.

For this learning programme, our mentor is [name of participant] from [name of city / region], while our mentee(s) is/are [provide the names of participant(s)] from [name of city / region].

This group is focused on exchanging knowledge and experience on [innovative financing scheme] for [module].

Soon enough we will meet each other during your visit. But, until then, we'll be sharing our knowledge mostly online. We'll start our collaboration with an online orientation session lead which will take between 1-4 hours. **Please fill in the Doodle so that we can choose a date for the session.**

Our knowledge transfer will mainly take place via the Climate-KIC **learning platform**. However, in the next few weeks, we will continue communicating by email and when the platform is ready, we will notify you on how to use it.

Before we begin the programme, kindly fill out the [Benchmark survey](#). This survey is meant to explore your city's/region's capacity to finance and implement sustainable energy-related projects and will help you to understand your current situation and measure future progress. Please note that you are required to complete the survey (by answering all questions included) before you start the learning programme.

Don't forget to go through the **learning programme's booklet** available [here](#). Please read the **Peer Mentoring/Study Visit** booklet, which is related to our group. Also, you can find in this [link](#) relevant sources about the innovative financing schemes.

I am excited to be the facilitator of this group and looking forward to our programme!

Kind regards,
[facilitator]

Message template – Step 1

Dear [mentor and mentee(s)' names],

Before our first orientation session, I'd like to give you a brief overview of our activities.

We're going to conduct our orientation session on [date]. You can enter the online meeting by clicking this link: [gotomeeting url for the session].

This first session is going to be an introduction to the learning programme, with enough time to understand the learning cycle and to present ourselves. It is going to be particularly important to learn about [mentor's name]'s experience with the financing scheme, and how he/she can support the [mentee's name].

In preparation for this first activity, I kindly ask you to check if your computer is compatible with the **GoToMeeting** system, which will be used for the session, by downloading and testing your system through this [link](#). For other instructions, check this [link](#)

Also, it is important that you have a look at the Learning Plan (available in the [Learning Platform](#)). This is going to be our main document in this learning journey, in which you will find the date of the sessions and the GoToMeeting links, among other relevant content and information. I am going to explain further about this document during the first session but, for now, please follow the instructions under "preparation for step 1", which includes:

- Mentor and mentee(s), prepare 1-2 slides presenting yourselves and your experience
 - You can use the PPT template available in the learning platform, if you like
- [mentor's name], please prepare a presentation showing your experience with the [financing scheme], with information of the projects you have implemented.
 - You can use the PPT template available in the learning platform, if you like
- Make sure that your computer's camera is working. It will be nice to see each other.

In addition, you can check these relevant links we have gathered about the financing scheme:

- [insert links]

If you have any questions or need further clarifications for your preparation of the session, feel free to drop me a line.

I'm looking forward to our first session!

Best,

[facilitator]

Message template – Step 2

Dear [mentor and mentee(s)' names],

It was a pleasure to facilitate the orientation session! I'm certain we are all very excited to move forward to our next session, which will take place on [date]. You can access the meeting through this link: [gotomeeting url for the session].

Before we move on to the part where you start sharing your experiences (which is going to happen in Step 3, with the physical meeting), we need to make sure that [mentor's name] thoroughly understands what the mentee(s) needs to learn.

Therefore, in this Step, I would like to ask [mentee(s)' names] to prepare for the following session by filling out the "Mentee's project" and "Mentee's needs" sections on the Learning Plan, which will be presented and discussed during the meeting. Our aim is to finish the session by having a clear **list of learning objectives**, which will be included in the Learning Plan and serve as a base for the physical meeting.

If you have any questions or need further clarifications for your preparation of the session, feel free to contact me.

I'm looking forward to our session!

Best,
[facilitator]

Message template – Step 3

Dear [mentor and mentee(s)' names],

It's finally time that we meet face-to-face in real life! I'm happy that we'll meet each other in [city] for a study visit/peer mentoring on [date]. The visit lasts for 2 days, but keep in mind that the visitors will have to plan for an extra day of travelling.

During the visit, we will have more in-depth mentoring sessions, such as workshops or discussions where you'll share your experience first-hand. We'll also have a look at the learning plan we developed together and discuss the progress in achieving the learning objectives.

To make sure we have a meaningful meeting and a fruitful discussion, the structure should be agreed upon and finalised a week before the visit. [Mentor's name], we will wait for your agenda proposal for the visit so that we can agree on the activities. Also, kindly inform us about the venue, accommodation options, and other relevant logistical information.

Mentee(s), don't forget to book your travel and accommodation.

I strongly advise you go through the PROSPECT's **booklet** before booking your trip and organising the visit. Make sure you follow the **reimbursement guidelines** for both mentor and mentee (and please save all original receipts and flight/train boarding pass/tickets). Remember: for mentee(s), PROSPECT will only reimburse travel and accommodation costs; and for mentor, course materials, food, refreshments, and local transport.

I'm looking forward to meeting you soon!

Best,
[facilitator]

Message template – Step 4

Dear [mentor and mentee(s)' names],

It's almost time to say goodbye, but not before we have our last session!

This final engagement will be done via a webinar on [date]. Please, click on the following link to access the session: [gotomeeting url for the session].

In this last meeting, we're going to focus on how the mentee can implement the financing scheme considering the city's context, and also evaluate the overall learning programme.

[Mentee's name], please prepare for the session by filling out the “**Transferability Analysis**” and the “**Action Plan**” sections of the Learning Plan, under Step 4. At the end of the session, I will share survey links so that you can evaluate the learning programme (we're looking forward to all your inputs!).

Last, but not least: [Mentor's name], thank you for sharing your valuable knowledge and experience! And [Mentees' name], good luck on implementing your city's sustainable energy and climate plans! I hope you gathered enough information to develop successful projects.

I've enjoyed being your facilitator tremendously, and I hope we can work together again in the future.

Warm regards,

[facilitator]

Message template – How to use the learning platform

The message below can be copied and pasted into other message templates, if you'd want.

Dear [mentor and mentee(s)' names],

Our knowledge transfer will mainly take place via the Climate-KIC **learning platform**. You will receive a message from Climate-KIC inviting you to join a closed group created especially for us (facilitator, mentor, and mentees). In the group, you will be able to:

- Find relevant documents and files needed throughout the learning programme
- Share your own documents in an easy and reliable way (only visible to the members of the group)
- Freely communicate in a dynamic way (similar to Facebook, with comments and likes) without the need of sending several e-mails that could be lost
- Check schedule of the group, in events created by me, for example, the date and time of the first orientation session

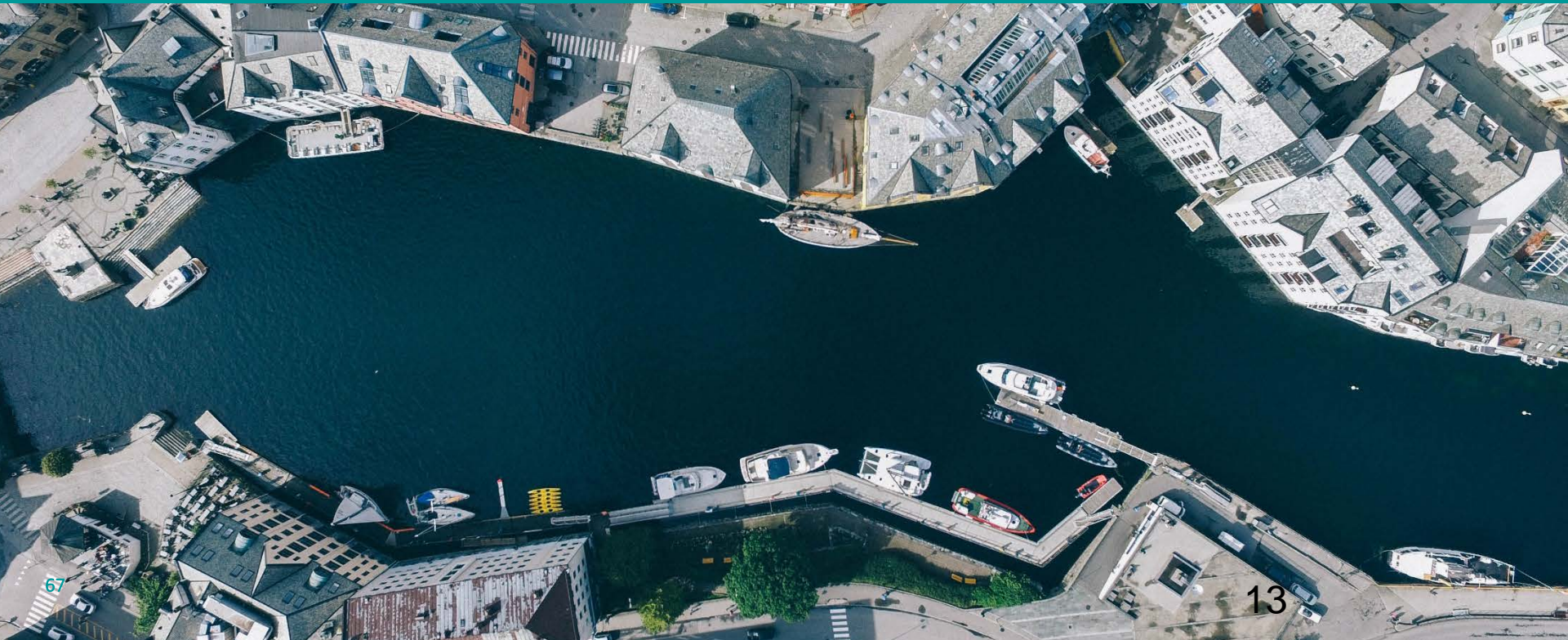
Note: You will need to click on the link provided by the message in order to activate your account. You'll also have to create a password for your account.

Let me know if you have any doubts!

Warm regards,

[facilitator]

4.4. PPT template_Step 1





Peer Powered Cities and Regions

Step 1

Orientation session

Facilitator's name

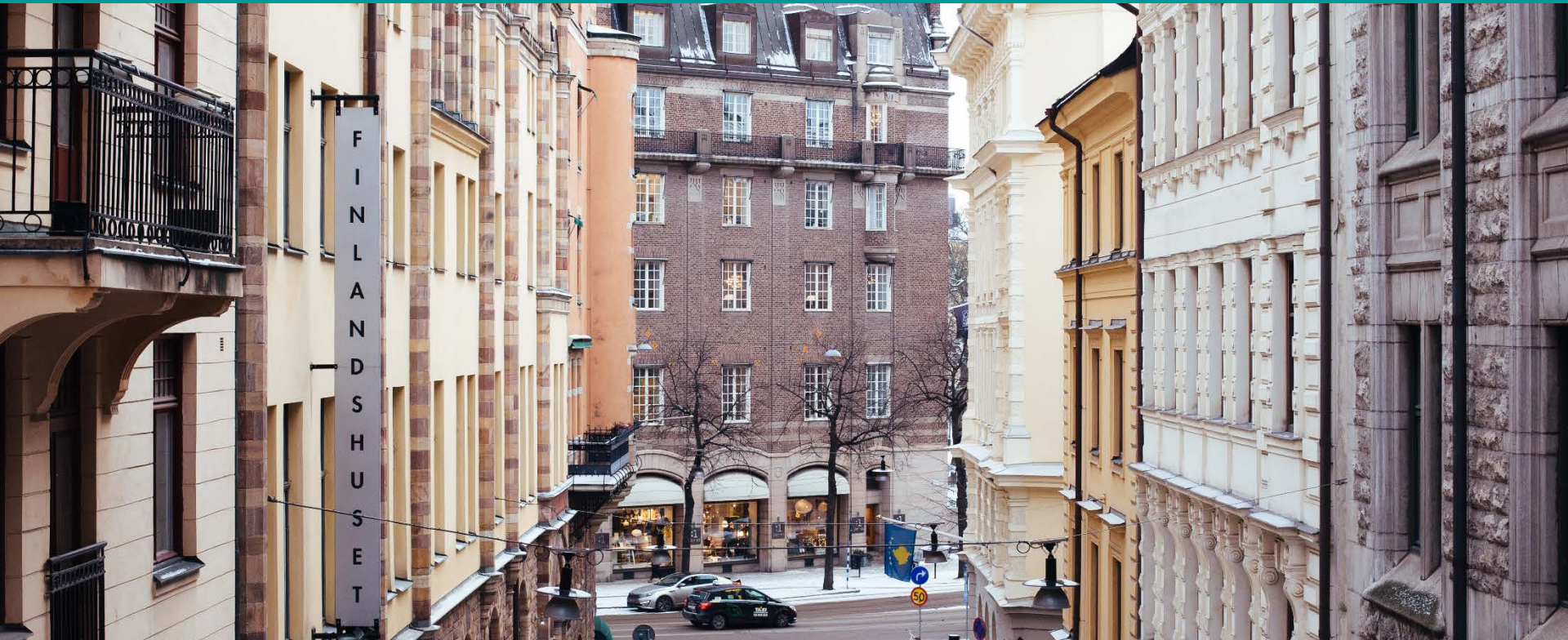


Date

Agenda

- **About PROSPECT**
 - Idea
 - Who we are
- **The learning programme**
 - Structure
 - Materials
 - Platform
 - Reimbursement
- **Presentation of participants**
 - Initial learning objectives
 - Facilitator
 - Mentee
 - Mentor
- **Mentor's experience**
- **Q&A**
- **Next steps and practical instructions**

About PROSPECT



About PROSPECT | Idea

Key questions:

- How can public authorities **carry out simple energy interventions** to secure investments for joint initiatives that span local and regional boundaries?
- What can public authorities **learn from successful and less successful projects and initiatives** and about planning and design phase to accessing funds, developing financing schemes or better access to finance, tracking impacts and benefits through monitoring and reporting systems?
- What kind of support do they need to **enhance their capacity**, to help deliver an **energy transition**?

Need for 'peer to peer learning for public authorities – step up public authorities' capacity to help deliver the energy transition.

About PROSPECT

Title:	Peer Powered Cities and Regions — PROSPECT
Funding:	European Union's Horizon 2020 Research and Innovation Programme
Started:	June 2017
Duration:	36 Months
Legal Coordinator:	Institute for Housing and Urban Development Studies BV - IHS
Scientific Coordinator:	Institute for European Energy and Climate Policy Stichting - IEECP
Participants:	10
Contract No:	H2020-EE-09-2016-2017/752126

About PROSPECT | who we are



IHS
Making cities work
Erasmus

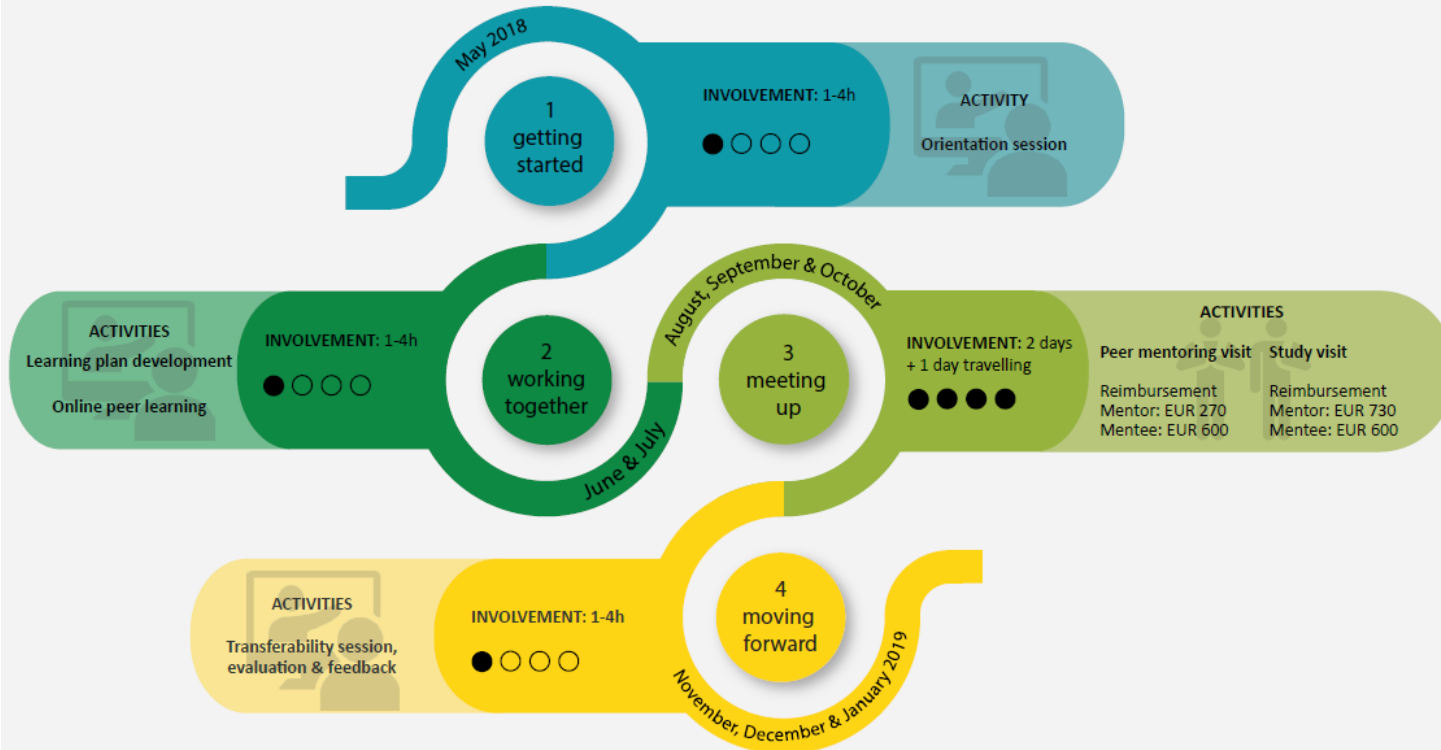


An aerial photograph of a city street, likely in Europe, showing tram tracks running down the center. The street is lined with multi-story buildings, some with light-colored facades and others with darker roofs. A large, ornate building with a blue roof and a central entrance is prominent in the middle ground. The scene is captured from a high angle, looking down on the street and surrounding buildings.

The Learning Programme

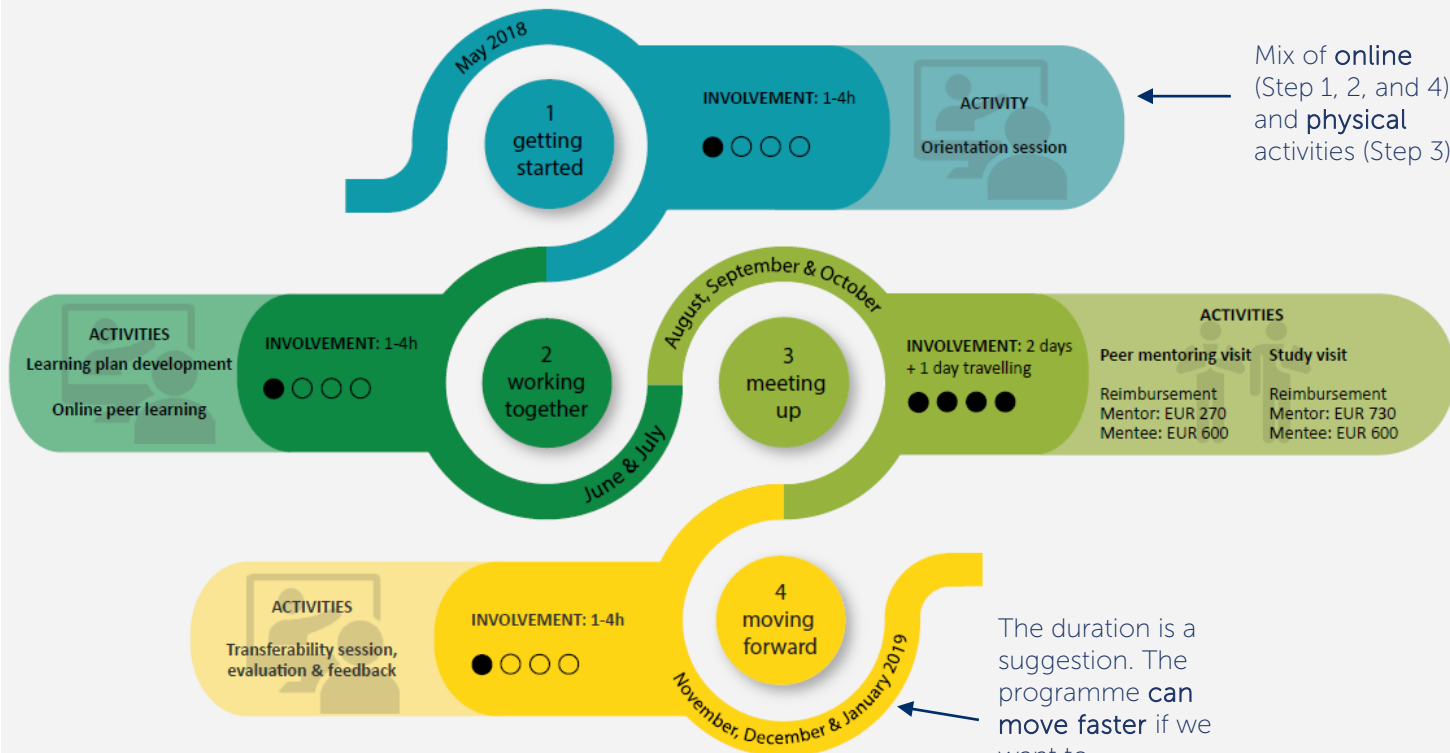
The Learning Programme | Structure

Learning cycle 1



The Learning Programme | Structure

Learning cycle 1



The Learning Programme | Reimbursement

PROSPECT will reimburse the participants' costs related to the **physical visit** (Step 3).

Mentor		Mentee (each)
Budget covers course materials, food, and refreshments as well as transport of the facilitator and mentee(s)		Budget covers travel and accommodation for 3 days
Peer mentoring (1 mentee)	Study visit (up to 7 mentees)	Peer mentoring and/or Study Visit Maximum of 600 euro
Maximum of 270 euro	Maximum of 730 euro	

The participants will be reimbursed based on the **real costs**. Make sure to save all the **original receipts** as well as **flight/train boarding pass/tickets**.

An invoice and original receipts and tickets should be sent to the financial coordinator for reimbursement. For more information, check the **booklet**.

The Learning Programme | Materials



Booklets

Information about the entire learning programme: steps, process, tasks and roles, activities, reimbursements, and other information. **Fundamental guide!**

Learning Plan

Our main learning document. Here, we will input relevant information about mentor's experience, mentee's needs, the agenda of our visit, main conclusions and action plan for next steps.

Learning Plan

Step 1: Getting started

Online session

STEP 1 Orientation session			
Date:	DD/MM/YY	Time:	Start
OutReaching Link:			
OutReaching Code:			
Agenda:	<ul style="list-style-type: none">Introduction to the PROSPECT Programme<ul style="list-style-type: none">Overview of booklet and moduleOverview of the Learning PlanBenchmark: main scope of the session for the evaluation of the programme, in Step 4Participants present themselvesMentor presents his/her experience on the financing scheme<ul style="list-style-type: none">what is the financing schemeProjects developed using the financing schemeDisruptive model5M1 Factors for SuccessLearn barriers/OpportunitiesOther relevant topicsGEA<ul style="list-style-type: none">Send steps and practical instructionsSet the date for next sessionMentee: fill out the step 2 section of the Learning Plan		

Mentor's experience

This section is based on the information provided by the mentor in the application for the programme. However, the mentor is advised to further improve the content below.

PROJECT DESCRIPTION	
Project title:	
Tech:	Financing scheme:

The Learning Programme | Materials



Modules handbook

Basic content prepared by PROSPECT about the main innovative financing schemes under each module.

It can support the **mentee** on better understanding the scheme and creating questions for the mentor (**Step 1**).

It can also guide the **mentor** on developing a draft agenda for the physical visit (**Step 3**).

PPT template

Available for participants to use in any presentation.



The Learning Programme | Platform

Learning platform: our main communication channel, under the Climate-KIC Community.

Link to the platform: <https://learning.climate-kic.org/>

- The platform is free of charge and not connected to a subscription.
- You can unsubscribe from the platform at any time.
- You will not receive advertisement because of your registration to the platform.
- The platform offers a variety of free online learning nuggets. Feel free to browse the “Programmes & Courses” section and participate in as many as you like.

The Learning Programme | Platform

Learning platform: our main communication channel, under the Climate-KIC Community.

The Learning Platform is similar to other social media platforms, such as Facebook and LinkedIn. There will be 2 types of groups (Learning Platforms) :

1 closed group only for us
(facilitator, mentor, and
mentees)

1 (big) group for all
PROSPECT's participants

The Learning Programme | Platform

Learning platform: our main communication channel, under the Climate Kic Community.

The Learning Platform is similar to other social media platforms, such as Facebook and LinkedIn. There will be 2 types of groups (Learning Platforms) :

1 closed group only for us
(facilitator, mentor, and mentees)

- Find relevant documents and files needed throughout the learning programme
- Share your own documents in an **easy** and **reliable** way (only visible to the members of the group)
- Freely communicate in a dynamic way (similar to Facebook, with comments and likes) without the need of sending several e-mails that could be lost
- Check schedule of the group, in events created by the facilitator

1 (big) group for all
PROSPECT's participants

The participants of all learning groups and cycles can freely communicate, sharing experiences, news, interesting documents, posting questions, etc.

The Learning Programme | Platform

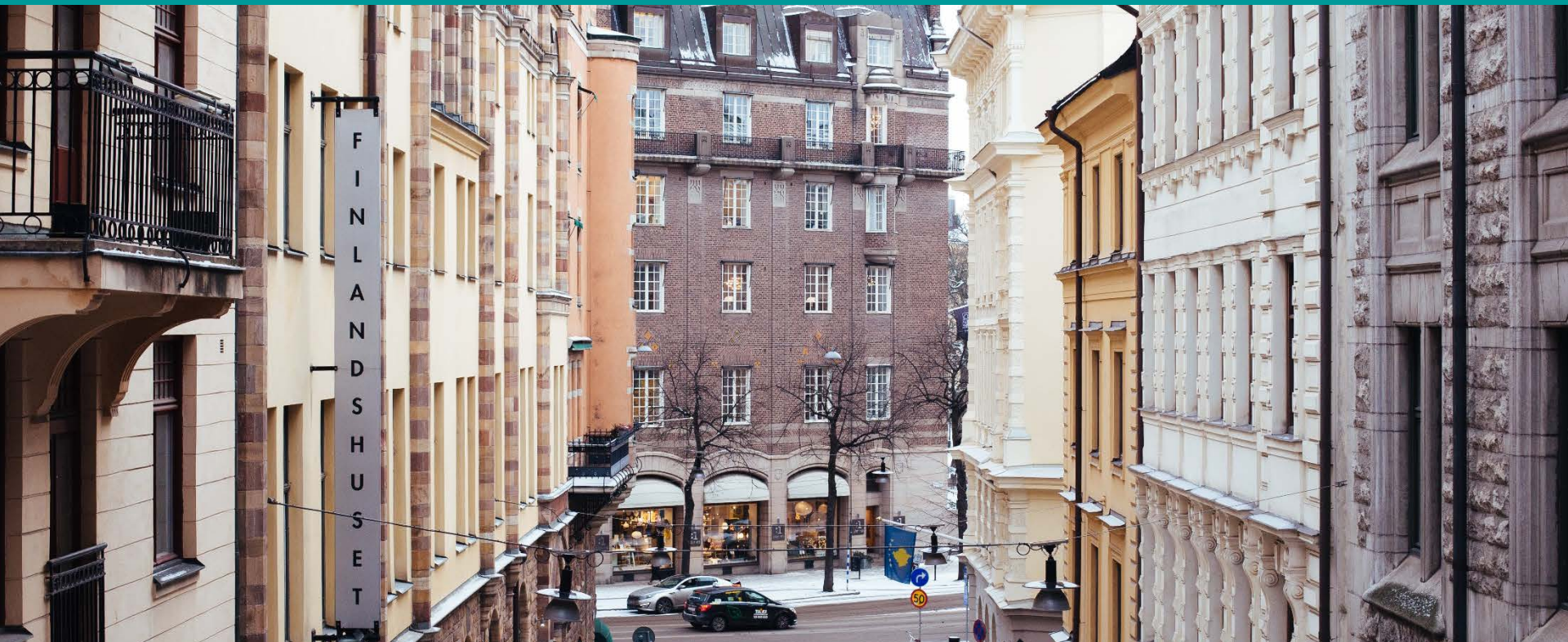
How does the **Learning Platform** work:

1. When the learning programme starts, the participants are **automatically signed up** for the Climate-KIC learning platform and registered for both PROSPECT groups.
 1. We will use your name, e-mail address and country of residence for this purpose as you stated them in the application form. All other personal details are not mandatory for the usage of the platform.
2. Participants will **receive an e-mail from Climate-KIC** with a preliminary password. Please follow the link in the e-mail to accept and finalise the registration for the platform. In this step you will be asked to create a new password.
3. After signing in to the platform, you can find all groups you are a member of in the section **“Community > Groups”**

Note: WE ADVISE TO USE THE LEARNING PLATFORM FOR PROSPECT, BUT IT IS NOT MANDATORY

If the participants prefer to use other communication channels (e-mail, facebook, phone) and drives to share files (Dropbox, Google Drive, WeTransfer), **you are allowed to use other options**. But make sure that all participants are comfortable with sharing these information within the group.

Presentation of participants



Initial learning objectives

Summary of learning objectives and level of experience with the financing scheme (info available from the application)

Facilitator

Logo:

Insert your logo here

Insert your
photo here

Name: Your Name

Position: Your Title

City/Region: Name of your city/region

About: Please write a few sentences about yourself, your expertise and your interests related to this project.

Mentee

Logo:

Insert your logo here

Insert your
photo here

Name: Your Name

Position: Your Title

City/Region: Name of your city/region

About: Please write a few sentences about yourself, your expertise and your interests related to this project.

Mentor

Logo:

Insert your logo here

Insert your
photo here

Name:

Your Name

Position:

Your Title

City/Region:

Name of your city/region

About:

Please write a few sentences about yourself, your expertise and your interests related to this project.



Mentor's experience



Mentor's experience

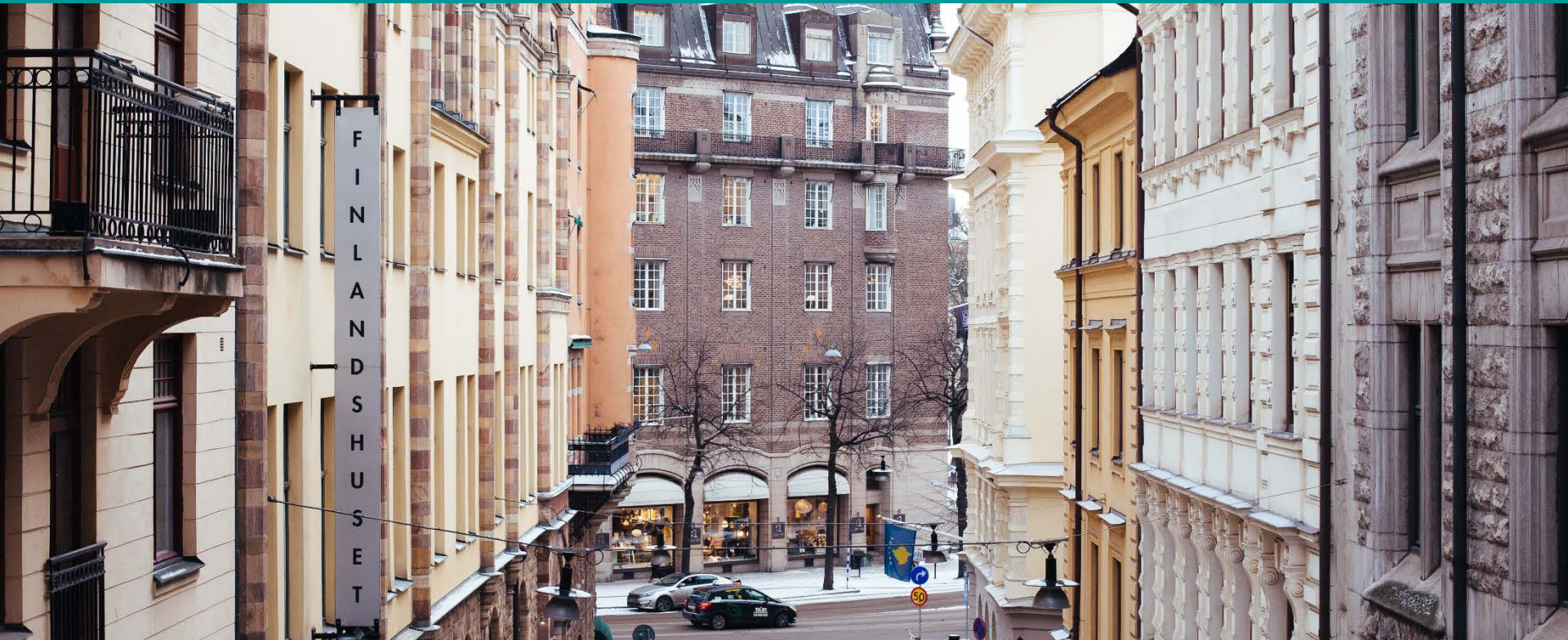
Project name

- Short description
- Financing scheme used
- Stakeholders
- Main success factors
- Main barriers
- Other topics...



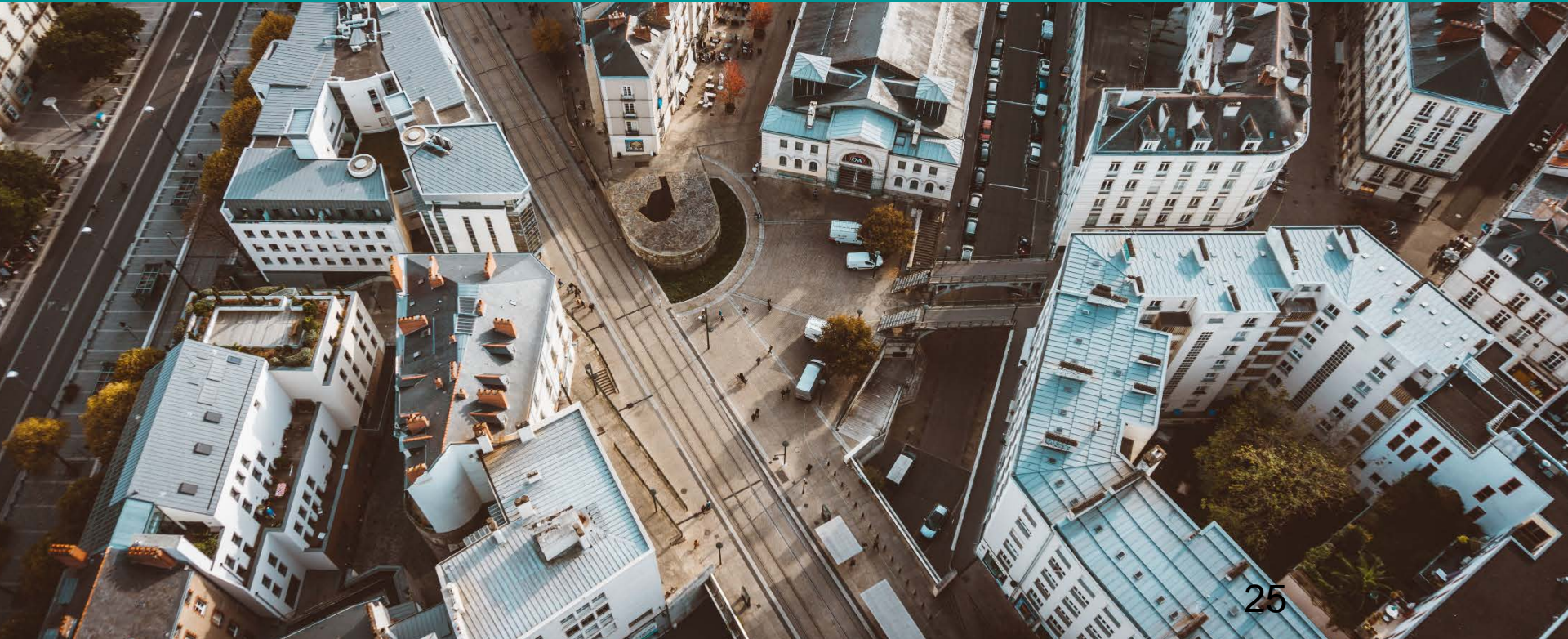
Sample: Insert own pictures

Questions?





Next steps



Next steps

Documents to be prepared before Step 2 session:

Learning Plan

Mentee

- Add “Mentee’s project” and “Mentee’s needs”
- Upload to the Learning platform or send it by email to facilitator and mentor

Mentor

- Read the Step 2 of the Learning Plan, developed by the mentee

Next meeting

Mentee and mentor

- Agree on date for session: [doodle link](#)

Benchmark

Mentee and mentor

- Complete benchmark → **deadline xx/xx**
 - Link to document

At the end of step 4 you will all be asked to fill out a **survey** asking for your feedback and possible recommendations. We would appreciate it if, during the course of the entire programme, you **write down notes any comments or impressions** so that you can easily remember them when filling out the survey.



PROSPECT

Peer Powered Cities and Regions

Thank you!

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