

Peer Powered Cities and Regions

Deliverable 4.1 Summary Report on Peer Learning Agreements (Draft)

November 2017



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Peer Powered Cities and Regions

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Preface

The overall aim of PROSPECT is to create an easy and replicable *peer to peer learning programme* for *regional and local authorities*, in order to support them on how to finance and implement their sustainable energy and climate plans. The learning programme will enable sharing of information and experience through *peer mentoring activities* and *study visits*. Mentor cities will advise and guide mentees on how to make use of best practises and implement a financing scheme for their SEAPs or SECAPs by building partnerships. The programme will be divided into *five learning modules* that include development of financing for: “public buildings”, “private buildings”, “public lighting”, “transport (private and public)”, “cross sectional”, and it will be conducted in three learning cycles.

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 Summary Report on Peer Learning Agreements (draft) provides an introduction to what is a peer learning agreement and its purpose, what is its typical structure and content, accompanying guidelines, as well as a sample of a peer learning agreement. The next Summary Report on Peer Learning Agreements will be submitted in June 2019.

1 Peer Learning Agreement

1.1 Definition

A peer learning agreement is a signed document that reflects a multiple-party commitment to participate in the PROSPECT peer learning programme. In both peer mentoring and study visit programmes, the multiple parties refer to the *mentor* and *mentee(s)* – *and the representatives of their respective organizations* - as well as of the assigned *learning facilitator*.

1.2 Purpose

The peer learning agreement supports the individualized learning between the mentor and the mentee(s), provides clear direction for the learning program; and enhances self-management among the participants.

1.3 Content

The content of the peer learning agreement is individualized or customized to reflect the peer learning objectives between the mentor and the mentee(s). The learning agreement also specifies the targeted learning outcomes to be achieved during the learning programme. Overall, the learning agreement creates transparency for the learning participants with the following structure.

1.4 Structure

Below is a structure of a peer learning agreement:

- Summary of peer learning objectives
- Target learning outcomes to be achieved
- Description of learning activities
- Roles and responsibilities of multiple parties, including the learning facilitator
- Duration of the learning program
- Confidentiality agreement
- Signatures of the participants, including representatives of their respective organizations, and of the assigned facilitator

1.5 Guidelines

A digital template of the peer learning agreement will be made available to the facilitator who will be the contact person for either a matched pair – a mentor or mentee for peer mentoring – or a peer group – which is composed of one mentor and between 2 – 7 mentees for the study visit.

The peer learning agreement will be made available in both Microsoft Word and PDF documents for signing electronically (e-signatures) which can be a scanned copy of a physical signature.

The learning facilitator is responsible for ensuring that the peer learning agreement is signed by the participants before the learning programme starts. Once the peer learning agreement is signed, the learning facilitator sets the date for the orientation session with the learning participants.

The next section provides the draft text and outline structure of a peer learning agreement for both peer mentoring and study visit programmes. The final design templates will be presented in the Summary Report on Peer Learning Agreements which will be submitted in June 2019.

2 Draft Text and Sample: Peer Learning Agreement for Peer Mentoring

The undersigned parties voluntarily enter a peer learning programme on the topic of implementing sustainable energy and climate actions using innovative financing schemes. We mutually agree on the terms and conditions as outlined in this peer learning agreement.

2.1 Peer Learning Objectives

We aim to achieve the following peer learning objectives:

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

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

2.2 Peer Learning Outcomes

At the end of the learning programme, we should be able to:

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

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

2.3 Peer Learning Activities

In order to accomplish our learning outcomes, we will engage actively in peer mentoring and perform the following activities:

2.3.1 Getting Started:

Participate in the orientation session of 1-4 hours within Month 1 of the peer mentoring programme

| Mentee | Mentor |
|--|--|
| Express clearly what the specific learning objectives are to the mentor | Understand the learning objectives of the mentee and the surrounding learning context |
| Fill out the document “Learning Needs” and supply additional materials to the mentor | Fill out the document “Learning Experiences” and supply additional materials to the mentee |

2.3.2 Working Together

Engage in the development of the learning plan and in online peer learning activities of 1-4 hours between Months 2 and 3 of the peer mentoring programme

| Mentee | Mentor |
|--|---|
| Engage in developing the “Learning Plan” with the mentor and provide feedback in the structure of the learning programme | Carry out the development of learning plan with the mentee and structure the learning programme accordingly |
| Coordinate with the mentor and the facilitator in the implementation of activities | Coordinate with the mentee and the facilitator in the implementation of activities |
| Actively engage in the online peer learning activities with the mentor | Take the lead in the online peer learning activities with the mentee |

2.3.3 Meeting Up

Join the two (2) full day allocated for the peer mentoring visit (with an additional 1 day for return travel), as well as attend the activities prepared between Months 4 and 6 of the learning programme

| Mentee | Mentor |
|--|---|
| Visit the mentor during the peer mentoring, including attending social events | Serve as a host city during the peer mentoring, including organization of social events |
| Make travel and hotel arrangements based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator | Prepare practical information for travel of the mentor and facilitator e.g. directions to the venue, suggestions for hotels, and information on public transport |
| Jointly work with the mentor through peer mentoring activities e.g. workshops or exercises in achieving the learning objectives | Arrange the venue, local transport, food, and other materials and logistics based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator |
| Discuss the results of the learning plan and of the information dissemination activities | Conduct peer mentoring activities e.g. workshops or exercises with the mentee to achieve the learning objectives |
| Participate in the transferability session | Invite relevant stakeholders to the meeting (e.g. public authorities, universities, research institutes etc.) |

2.3.4 Moving Forward

Assess the learning program, engage in the transferability session, discuss the lessons learnt, and take the necessary steps forward, which would entail 1-4 hours, between Months 7 and 9 of the peer mentoring programme

| Mentee | Mentor |
|--|--|
| Discuss the results of the learning plan and of the information dissemination activities | Discuss the results of the learning plan and of the information dissemination activities |
| Participate in the transferability session | Participate in the transferability session |
| Assess the learning programme and provide feedback | Assess the learning programme and provide feedback |

Supporting us in the learning programme is our learning facilitator who will:

Mentee

Getting Started

Conduct an peer learning programme orientation via online webinar session

Ensures that the mentor and the mentee(s) have filled out the templates for “Learning Needs” and “Learning Experiences”, respectively

Provide instructions for the next steps and be available for questions or clarifications from the mentor or mentee

With the mentor and the mentee, sets the date for the next step: Working Together

Working Together

Support the development of the “Learning Plan” with the mentor and mentee and in structuring the learning programme accordingly

Ensures that the planned activities support the achievement of the learning objectives

Support the online peer learning activities between the mentor and the mentee

With the mentor and the mentee, sets the date for the next step: Meeting Up

Meeting Up

Attend the peer mentoring, and ensure that the participants have made the necessary preparations

Make travel and hotel arrangements based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator

With the mentor and the mentee, sets the date for the next step: Moving Forward

Moving Forward

Carry out the transferability session

Gather evaluation and feedback for the learning programme

Ensure that the learning programme report is finalized

2.3.5 Learning Duration

We agree that our peer learning agreement will start from May 2018 and continue until January 2019. We commit to participate in all the steps and activities for the peer mentoring programme – from Getting Started to Moving Forward. Otherwise, all costs for the peer mentoring visit will not be reimbursed.

2.3.6 Confidentiality agreement

Within this peer learning agreement, we understand that we will maintain confidentiality unless we give each other permission for information to be shared with others.

Name and signature of mentee

Name and signature of mentor

Name and title of representative of the mentee's organization

Name and title of representative of the mentor's organization

Name of learning facilitator

3 Draft Text: Peer Learning Agreement for Study Visit

The undersigned parties voluntarily enter a peer learning programme on the topic of implementing sustainable energy and climate actions using innovative financing schemes. We mutually agree on the terms and conditions as outlined in this peer learning agreement.

3.1 Peer Learning Objectives

We aim to achieve the following peer learning objectives:

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

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

3.2 Peer Learning Outcomes

At the end of the learning programme, we should be able to:

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

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

3.3 Peer Learning Activities

In order to accomplish our learning outcomes, we will engage actively in the study visit programme and perform the following activities:

3.3.1 Getting Started:

Participate in the orientation session of 1-4 hours within Month 1 of the study visit programme

| Mentee | Mentor |
|--|--|
| Express clearly what the specific learning objectives are to the mentor | Understand the learning objectives of the mentee and the surrounding learning context |
| Fill out the document "Learning Needs" and supply additional materials to the mentor | Fill out the document "Learning Experiences" and supply additional materials to the mentee |

3.3.2 Working Together

Engage in the development of the learning plan and in online peer learning of 1-4 hours between Months 2 and 3 of the study visit programme

| Mentee | Mentor |
|--|---|
| Engage in developing the “Learning Plan” with the mentor and provide feedback in the structure of the learning programme | Carry out the development of learning plan with the mentee and structure the learning programme accordingly |
| Coordinate with the mentor and the facilitator in the implementation of activities | Coordinate with the mentee and the facilitator in the implementation of activities |
| Actively engage in the online peer learning activities with the mentor | Take the lead in the online peer learning activities with the mentee |

3.3.3 Meeting Up

Join the two (2) full day allocated for the study visit (with an additional 1 day for return travel), as well as attend the activities prepared between Months 4 and 6 of the learning programme

| Mentee | Mentor |
|--|---|
| Visit the mentor during the study visit, including attending social events | Serve as a host city during the study visit, including organization of social events |
| Make travel and hotel arrangements based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator | Prepare practical information for travel of the mentor and facilitator e.g. directions to the venue, suggestions for hotels, and information on public transport |
| Jointly work with the mentor through study visit activities e.g. workshops or exercises in achieving the learning objectives | Arrange the venue, local transport, food, and other materials and logistics based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator |
| Discuss the results of the learning plan and of the information dissemination activities | Conduct study visit activities e.g. workshops or exercises with the mentee to achieve the learning objectives |
| Participate in the transferability session | Invite relevant stakeholders to the meeting (e.g. public authorities, universities, research institutes etc.) |

3.3.4 Moving Forward

Assess the learning program, engage in the transferability session, discuss the lessons learnt, and take the necessary steps forward, which would entail 1-4 hours, between Months 7 and 9 of the study visit programme

| Mentee | Mentor |
|--|--|
| Discuss the results of the learning plan and of the information dissemination activities | Discuss the results of the learning plan and of the information dissemination activities |
| Participate in the transferability session | Participate in the transferability session |
| Assess the learning programme and provide feedback | Assess the learning programme and provide feedback |

Supporting us in the learning programme is our learning facilitator who will:

| Mentee |
|--|
| Getting Started |
| Conduct an peer learning programme orientation via online webinar session |
| Ensures that the mentor and the mentee(s) have filled out the templates for “Learning Needs” and “Learning Experiences”, respectively |
| Provide instructions for the next steps and be available for questions or clarifications from the mentor or mentee |
| With the mentor and the mentee, sets the date for the next step: Working Together |
| Working Together |
| Support the development of the “Learning Plan” with the mentor and mentee and in structuring the learning programme accordingly |
| Ensures that the planned activities support the achievement of the learning objectives |
| Support the online peer learning activities between the mentor and the mentee |
| With the mentor and the mentee, sets the date for the next step: Meeting Up |
| Meeting Up |
| Attend the study visit, and ensure that the participants have made the necessary preparations |
| Make travel and hotel arrangements based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator |
| With the mentor and the mentee, sets the date for the next step: Moving Forward |
| Moving Forward |
| Carry out the transferability session |
| Gather evaluation and feedback for the learning programme |
| Ensure that the learning programme report is finalized |

3.3.5 Learning Duration

We agree that our peer learning agreement will start from May 2018 and continue until January 2019. We commit to participate in all the steps and activities for the study visit programme – from Getting Started to Moving Forward. Otherwise, all costs for the study visit will not be reimbursed.

3.3.6 Confidentiality agreement

Within this peer learning agreement, we understand that we will maintain confidentiality unless we give each other permission for information to be shared with others.

Name and signature of mentee 1

Name and signature of mentor

Name and title of representative of the mentee 1's organization

Name and title of representative of the mentor's organization

Name and signature of mentee 2

Name and title of representative of the mentee 2's organization

Name and signature of mentee 3

Name and title of representative of the mentee 3's organization

Name and signature of mentee 4

Name and title of representative of the mentee 4's organization

Name and signature of mentee 5

Name and title of representative of the mentee 5's organization

Name and signature of mentee 6

Name and title of representative of the mentee 6's organization

Name and signature of mentee 7

Name and title of representative of the mentee 7's organization

Name of learning Facilitator



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