

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:

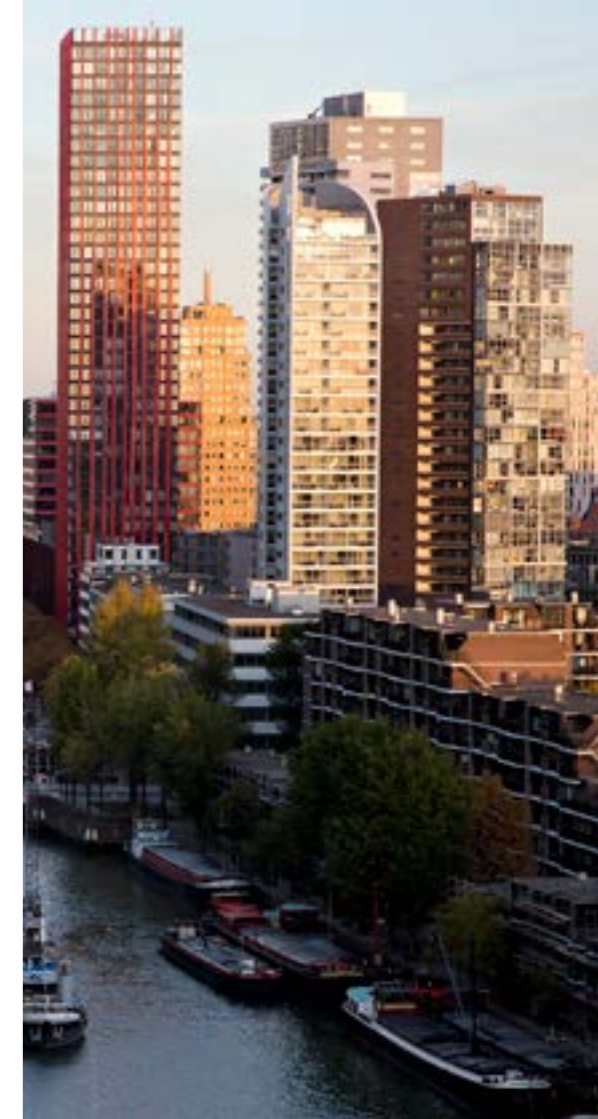
- Officially welcome the participants to the learning programme
- Explain the roles assigned: mentor, mentees, and facilitator
- Provide instructions on the learning platform
- Ensure the completion of the Benchmarking Survey
- Set a date for the orientation session

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.

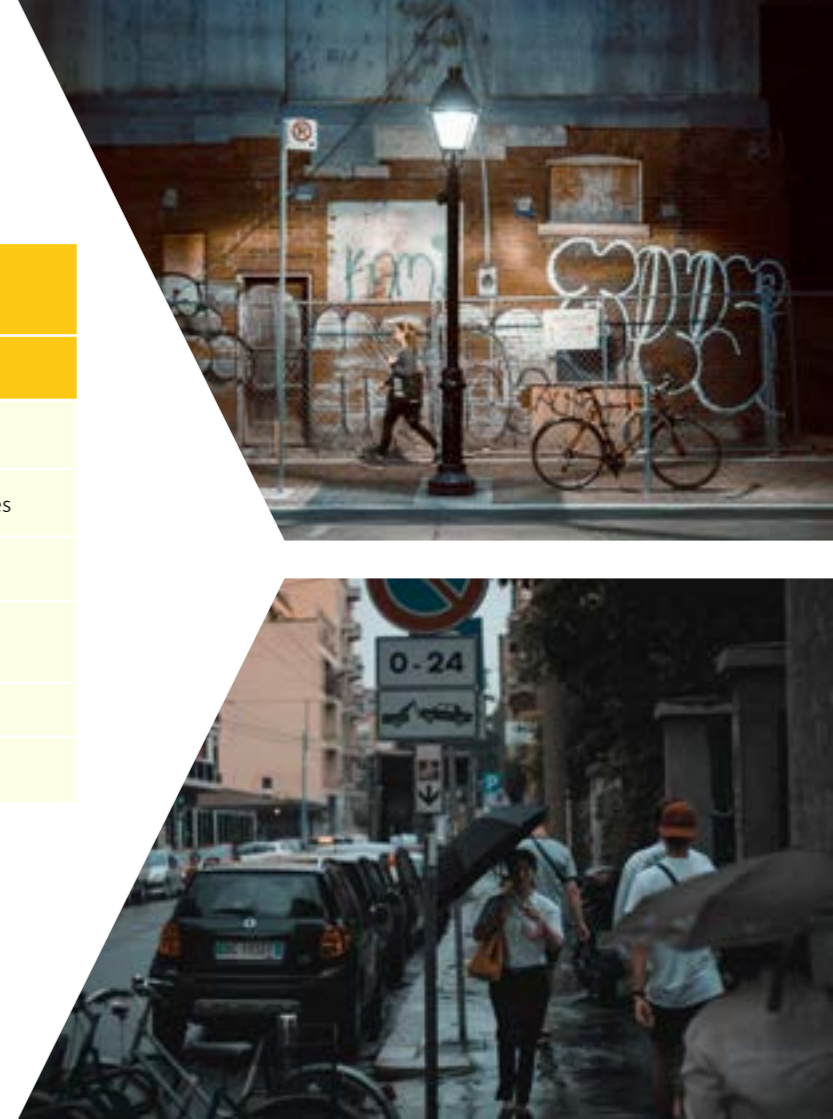
What is needed from the learning participants before this activity?

- 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	





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