

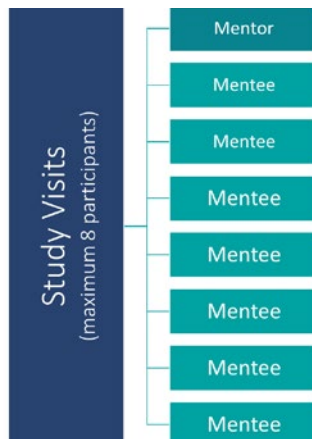
# Study Visit Booklet





## 1. What is a study visit?

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



## 2. What are the steps of the study visit?

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

Features	Preparatory Steps	Getting Started	Working Together	Meeting Up	Moving Forward
Approach	Online	Online	Online	Physical	Online
Activities	Communication with the participants	Orientation Session	Learning plan development	Peer Mentoring Visit	Evaluation and feedback
Inputs	Signatures from the Participants		Online Peer Learning	Peer Mentoring Activities	Transferability Analysis
			Learning Experiences and Learning Needs		
Outputs	Signed Peer Learning Agreement, Date for the Orientation Session		Learning Plan		Learning Programme Report
Lead participant	Learning Facilitator	Learning Facilitator	Mentor and Mentee	Mentor and Mentee	Learning Facilitator
Host organization	--	--	--	Mentor	--
Is the facilitator present in both online and physical meetings?	Yes	Yes	Yes	Yes	Yes
Tool(s)	Email Communication, Online Learning Platform and Discussion Boards	Webinar, Email Communication, Online Learning Platform and Discussion Boards	Webinar, Email Communication, Online Learning Platform and Discussion Boards	Study visit activities (workshops, excursions);	Webinar, Email Communication, Online Learning Platform and Discussion Boards
Number of hours / days	Flexible	1-4 hours	1 – 4 hours	2 days plus 1 day of travel (back and forth)	1-4 hours
Indicative Timeline	1 – 4 weeks before	Month 1	Month 2-3	Month 4-6	Month 7-9

### 3. What are the roles in a study visit?

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

##### Preparatory Steps

1. Read the guidance materials and if there are questions or clarifications, contact the facilitator directly.
2. Review and sign the peer learning agreement.
3. Agree on the date for the orientation session with the mentor and the facilitator.

##### Peer Learning Programme

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

##### Getting Started

1. Participate in the peer learning programme orientation and undertake the preparatory steps.
2. Express clearly what the specific learning objectives are to the mentor.
3. Fill out the document **“Learning Needs”** and supply additional materials to the mentor.

##### Working Together

1. Engage in developing the **“Learning Plan”** with the mentor and provide feedback in the structure of the learning programme.
2. Coordinate with the mentor and the facilitator in the implementation of activities.
3. Actively engage in the online peer learning activities with the mentor.

##### Meeting Up

1. Visit the mentor during the peer mentoring, including attending social events.
2. Make travel and hotel arrangements based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator.
3. Jointly work with the mentor through peer mentoring activities e.g. workshops or exercises in achieving the learning objectives.

##### Moving Forward

1. Assess the learning programme and provide feedback.
2. Participate in the transferability session.
3. Work with the mentor in developing a learning programme report.

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

##### Preparatory Steps

1. Read the guidance materials and if there are questions or clarifications, contact the facilitator directly.
2. Review and sign the peer learning agreement.
3. Agree on the date for the orientation session with the mentor and the facilitator.

##### Peer Learning Programme

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

##### Getting Started

1. Participate in the peer learning programme orientation and undertake the preparatory steps.
2. Understand the learning objectives of the mentee and the surrounding learning context.

3. Fill out the document **“Learning Experiences”** and supply additional materials to the mentee.

##### Working Together

1. Carry out the development of the learning plan with the mentee and structure the learning programme accordingly.
2. Coordinate with the mentee and the facilitator in the implementation of activities.
3. Take the lead in the online peer learning activities with the mentee.

##### Meeting Up

1. Serve as a host city during the peer mentoring, including organization of social events.
2. Prepare practical information for travel of the mentor and facilitator e.g. directions to the venue, suggestions for hotels, and information on public transport.

3. 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.
4. Conduct study visit activities e.g. workshops or exercises with the mentee to achieve the learning objectives.
5. Invite relevant stakeholders to the meeting (e.g. public authorities, universities, research institutes etc.)

##### Moving Forward

1. Assess the learning programme and provide feedback
2. Participate in the transferability session
3. Work with the mentee in developing a learning programme report



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

### Preparatory Steps

1. Be familiar with the structure of the learning programme and the content of the guidance materials.
2. Ensure that the mentor and the mentee sign the peer learning agreement.
3. Understand the learning objectives of the mentee, and the experience of the mentor.
4. Communicate with the participants – both mentor and mentee(s) – 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.

### Peer Learning Programme

#### Getting Started

1. Conduct a peer learning programme orientation for the participants via online webinar session.

2. Ensure that the mentor and the mentee(s) have filled out the templates for “**Learning Needs**” and “**Learning Experiences**”, respectively.
3. Provide instructions for the next steps and be available for questions or clarifications from the mentor or mentee(s).
4. With the mentor and the mentee, set the date for the next step: Working Together.

#### Working Together

1. Support the development of the “**Learning Plan**” with the mentor and mentee and the structuring of the learning programme accordingly.
2. Ensure that the planned activities support the achievement of the learning objectives.
3. Support the online peer learning activities between the mentor and the mentee.
4. With the mentor and the mentee, set the date for the next step: Meeting Up.

#### Meeting Up

1. Attend the study visit, and ensure that the participants have made the necessary preparations.
2. Make travel and hotel arrangements, based on financial guidelines and provide a record of expenses and receipts for reimbursement purposes to the finance coordinator.
3. With the mentor and the mentee, set the date for the next step: Moving Forward.

#### Moving Forward

1. Gather evaluation and feedback for the learning programme.
2. Carry out the transferability session.
3. Ensure that the mentor and mentee(s) have completed the learning programme report.

## 4. Step-by-step guide for the study visit

### I Preparatory steps

**Activity:** Communication with the participants

**Approach:** Online

**Who leads:** Facilitator

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

**Date:** 1 month before the Orientation Session

**Time Needed:** Flexible

#### Agenda:

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

#### Inputs:

- Signatures from the participants
- Confirmation of availability from mentor and mentee

#### Outputs:

- Signed peer learning agreement
- Date for the orientation session



## II Getting started

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

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

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

### What is needed from the participants before the orientation session?

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

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

### What is the agenda of the orientation?

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

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



## What is the indicative structure of the orientation session?

*Indicative structure for the orientation session*

Orientation session (online) 1-4 hours	
Indicative structure	Who leads?
Introduction to the PROSPECT Programme	Learning facilitator
Introduction of participants (a peer group of 1 mentor and 7 mentees)	Learning facilitator
Assignment of roles and responsibilities	Learning facilitator
Overview of peer learning objectives	
Overview of needs by mentee	Mentees
Overview of experience of mentor	Mentor
Q & A	All
Next steps and practical instructions:	Learning facilitator
End of orientation session	





## What are the next steps and practical instructions?

### Learn each other's context

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

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

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

### Setting the date for the next step

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

### What is needed from the participants after the orientation session?

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

## III Working together

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

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

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

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

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

### What is the agenda for these two activities?

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

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



What is an indicative structure for these two activities?

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

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

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

Indicative structure for Step 2: Working Together

Learning plan development (1-2 hours)		Online Peer Learning (1-2 hours)	
Indicative Structure	Who leads?	Indicative Structure	Who leads?
Introduction to the activities	Facilitator	Online peer learning	Mentor
Analysis of Mentor	Mentor	<i>See indicative content for online peer learning below</i>	
Analysis of Mentees	Mentees		
Developing a Learning Plan	Mentor with the mentees		
Q&A	All	Next step and practical instructions	Facilitator
		End of activities	

What is a learning plan?

A learning plan contains the following elements:

**Learning objectives**  
What are my learning objectives?

**Action steps**  
What are the actions needed to achieve my objectives?

**Mentor Support**  
What support do I need from my mentor?

**Time frame**  
What is the timeline for achieving my objectives?

**Resources needed**  
What are the resources needed to achieve my objectives?

**Evidence of success**  
What are the indications that I achieved my objectives?





Sample Peer Learning Objectives

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

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

Sample Peer Learning Outcomes

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

How can the learning plan be developed?

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

Sample learning plan

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



## What is an indicative content for online peer learning?

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

### *Indicative content for online peer learning*

- Introduction to EPC (e.g. definition, characteristics)
- Introduction to citizen financing (e.g. definition, characteristics)
- Projects financed by EPC in the mentor's city or region

## What is needed from the learning participants after this step?

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

## IV Meeting up

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

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

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

### What is the agenda for the study visit?

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

### What is needed from the participants before the study visit?

- The mentor should be able to prepare practical information for travel of the mentees e.g. directions to the venue, suggestions for hotels, information on public transport.
- Mentees, on the other hand, should be able to book travel and accommodations based on a budget for reimbursement afterwards.
- The mentor should be able to organize the study visit, including organization of social events, by setting up the venue, food, and logistics, based on a budget for reimbursement afterwards.
- The mentor should plan additional activities and discussions with the mentees for further feedback to achieve learning objectives.
- The learning facilitator should coordinate with the mentor and mentees regarding the structure of the study visit.
- The structure should be agreed upon and finalized at least a week before the study visit.



What is an indicative structure for a study visit?

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

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

Indicative content structure for the study visit

Meeting Uo			
Day 1		Day 2	
Indicative Structure	Who leads?	Indicative Structure	Who leads?
Welcome and introduction by host city	Mentor	Study visit activities	Mentor and mentees All All Learning facilitator
Study visit activities	Mentor and mentees	Lunch	
Lunch	All	Discussion Sessions	
Study visit activities	Mentor and mentees	Next steps and practical instructions	
Social Evening	All	End of Study visit	

What is the budget for the mentor and the mentee?

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

Budget for mentor and mentee under study visit

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

What is needed from the participants after the study visit?

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



### V Moving Forward

A final engagement called “Moving Forward” via an online webinar will require the participation of the mentor and of all mentees, and it will be led by the facilitator.

#### When will this activity take place and for how long?

This should take place on months 7-9 of the learning programme. This online engagement lasts between 1 and 4 hours.

#### What is needed from the learning participants before this activity?

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

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

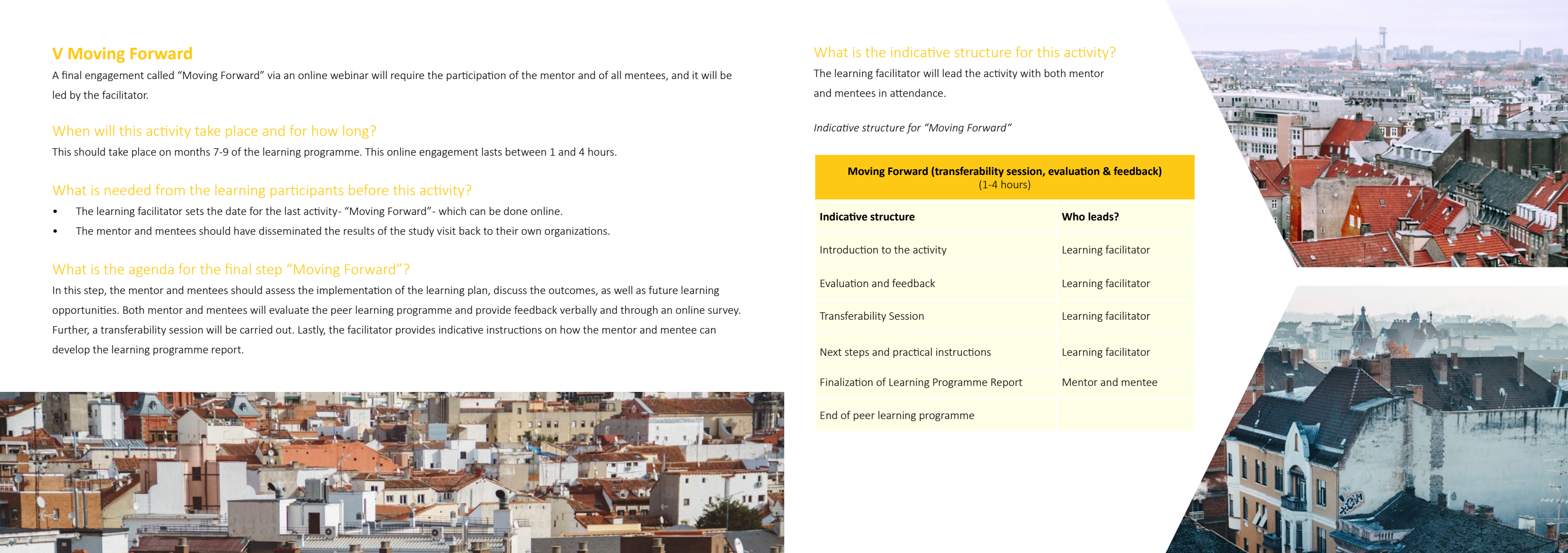
In this step, the mentor and mentees should assess the implementation of the learning plan, discuss the outcomes, as well as future learning opportunities. Both mentor and mentees will evaluate the peer learning programme and provide feedback verbally and through an online survey. Further, a transferability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

### What is the indicative structure for this activity?

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

*Indicative structure for “Moving Forward”*

Moving Forward (transferability session, evaluation & feedback) (1-4 hours)	
Indicative structure	Who leads?
Introduction to the activity	Learning facilitator
Evaluation and feedback	Learning facilitator
Transferability Session	Learning facilitator
Next steps and practical instructions	Learning facilitator
Finalization of Learning Programme Report	Mentor and mentee
End of peer learning programme	



What is the transferability analysis?

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

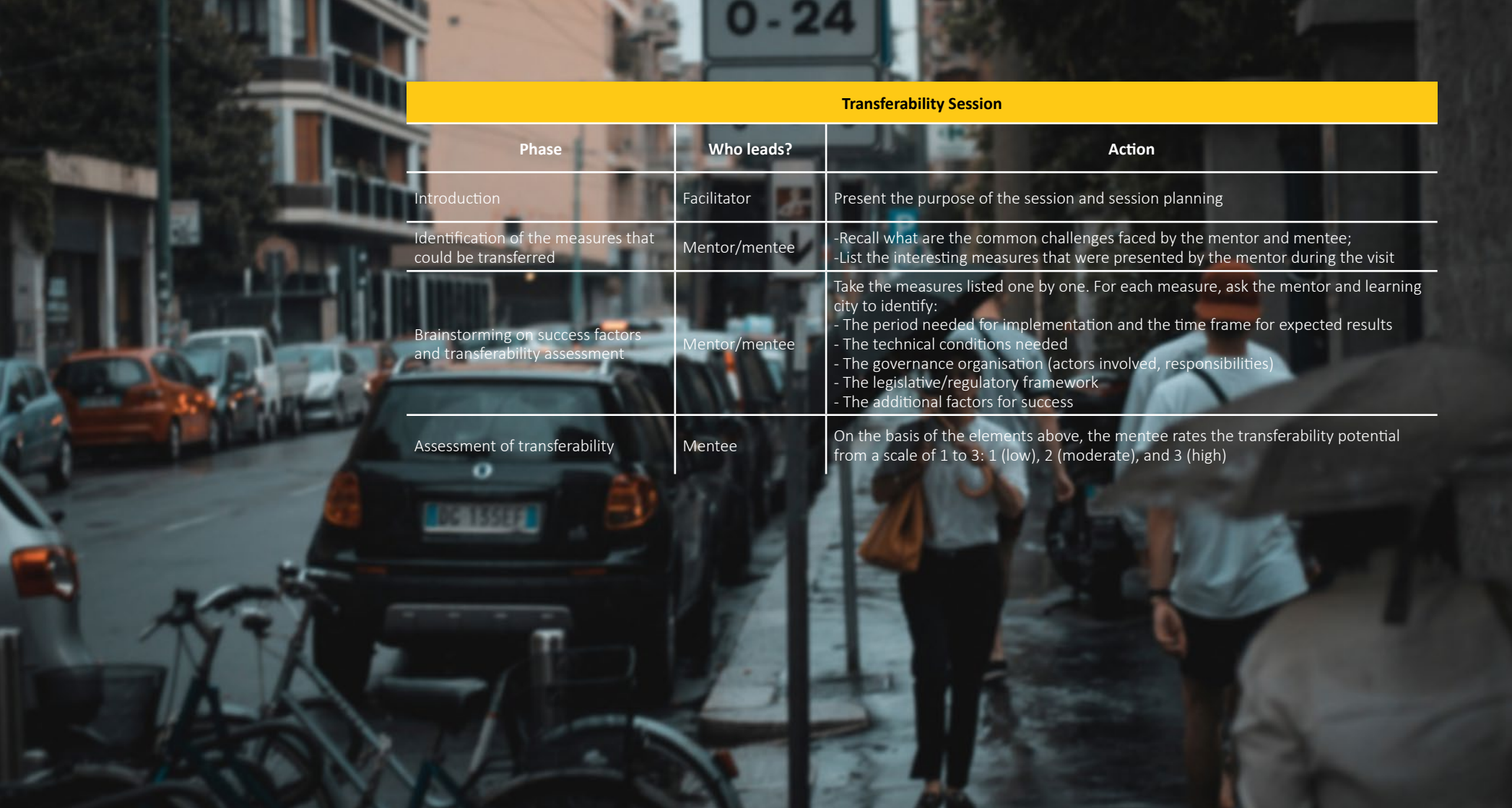
What is the learning programme report?

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

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

What is needed after final engagement?

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



Transferability Session		
Phase	Who leads?	Action
Introduction	Facilitator	Present the purpose of the session and session planning
Identification of the measures that could be transferred	Mentor/mentee	-Recall what are the common challenges faced by the mentor and mentee; -List the interesting measures that were presented by the mentor during the visit
Brainstorming on success factors and transferability assessment	Mentor/mentee	Take the measures listed one by one. For each measure, ask the mentor and learning city to identify: - The period needed for implementation and the time frame for expected results - The technical conditions needed - The governance organisation (actors involved, responsibilities) - The legislative/regulatory framework - The additional factors for success
Assessment of transferability	Mentee	On the basis of the elements above, the mentee rates the transferability potential from a scale of 1 to 3: 1 (low), 2 (moderate), and 3 (high)





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