

Deliverable 5.3

Provider guide for the 4 ISAs



The EUREMnext project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 785032.

Provider Guides for 4 Implementation Support Actions (ISA)

Deliverable 5.3

The aim of WP5 is to develop concepts for additional activities that support course participants, alumni and possibly other aspiring or newly qualified energy auditors more in-depth with the implementation of the energy measures developed in the course and additional ones.

The results from the alumni survey indicated, that the initial ideas proposed were interesting for the target group, ISA leaders and ISA team members developed these ideas further into draft concepts for each ISA, which served as a basis for discussion.

ISA team members as well as all project partners had the chance to provide additional comments in October. Presentation of the individual ISAs by each team leader and discussion concerning this matter was part of the program of the November 2018 meetings in Prague. These guidelines were set up with the help of and in co-operation with EUREMnext project members and EUREM worldwide providers and are based on their experiences. ISA 1-4 concepts were sent to ISA team members for their comments at first, and were then discussed with EUREMnext project members (NCCI, WKO/EIW, AEL, DGIHK, ESCAN, AIEEx, DEint BiH, ECCI, LCCI, CCIS, DEAS, AEE INTEC) on November 2018 in Prague. We discussed the concept with EUREM worldwide providers on November 2018 followed the 9th international EUREM conference in Prague, too. Based on these results, a provider guide for each ISA was elaborated, which contains the specific information on points like content of the offer, approximate duration, timing at what point during/after course, criteria for choice of persons carrying out the support activity, need for supporting materials, criteria for measuring impact. These guidelines leave leeway to adjust the implementation format to the specific conditions and possibilities in each country.



ISA 1 – Energy Audit Coaching

Prepared by NCCI.

1. Content of offer

The aim of the workshop is on the one hand to gain more practical insight into the subject of energy audits. On the other hand, participants, who are working on an energy audit in their company (or a client company), will have the chance to discuss their own “work in progress” with experts and peers and receive recommendations.

The EUREM training imparts knowledge on all the different energy using areas of a business and how they interrelate, and it also gives trainees checklists and tools helping them determine the status and optimization potentials in the company they work for. For several of the modules in the standard course “homework” for participants includes examining energy consumption of different energy use areas and checking for obvious optimization potentials. So they already have many elements of an energy audit at hand. But as part of the training, participants choose only one major measure to elaborate in detail as the “energy concept” for which they receive monitoring, and which they present at the final test. This additional coaching will take interested participants the next step, helping them put the pieces together to conduct a full energy audit and work out an energy program for their company.

Theoretical inputs: An overview of the contents and structure of an energy audit shall be explained at the beginning, and a detailed “to-do list” of the main activities that need to be carried out in practice during the audit will be discussed (or jointly elaborated). This checklist will also include the responsibilities of the auditor and the client. Moreover, the experienced energy audit experts shall provide different examples and case studies (positive as well as negative) about energy audits in industry and buildings. Furthermore, information about the legal framework related to audits in the respective countries will be given to the participants and exact requirements emanating from there will be discussed.

Practical part / Exchange of experience: should be on discussing questions and issues participants encounter in energy audits they are actually working on, to emphasize the coaching component.

Share of theoretical and practical elements: The weighting of the theoretical and practical parts of the workshop can be determined according to the needs and previous experiences of the participants. In principle, the main focus should be on the practical part and opportunity to exchange experience among participants and with the experts. But if there is a need to include more theoretical background, or if participants have few questions or cases from their own experience, inputs and/or case studies prepared by the trainers can be given more time. Participants also have the opportunity to get the theoretical background from the → new Online Module on Energy Audit Standards.

The initial concept could be to offer a very open workshop format with relatively few pre-defined structured elements, to allow most time for participant’s issues and questions. There should however be a backup of inputs to be offered by the trainers.



2. Approximate duration

2 workshop days (either 2 days with a large group with max. 20 participants or 2 times 1 day with 2 small groups) with one or two experienced energy audit experts.

As part of the EUREMnext project, one workshop is foreseen per country, and thus the language will normally be the language of the country. Providers may, however choose a different language if this is considered more useful. Furthermore, there is the possibility to only offer a one-day workshop at first, and decide, depending on the demand, whether a second workshop day will be offered with the same group some time later to discuss their progress and additional issues, or whether a second workshop with a new group is offered. In case the demand is low, a one-day workshop can also be sufficient.

3. Target group

The primary target group is EUREM course participants and alumni, who are currently preparing an energy audit either in their own company or in a client company.

Also other EUREM participants and alumni as well as non-EUREM-related participants can be included; if there is space left and they fulfill the required characteristics. In general, current EUREM participants and alumni will be informed firstly, and if there is much demand, priority will be given to those, who are in fact currently working on energy audits. If demand is low, it could be considered opening the course to external participants.

4. Recommended timing

The Energy Audit Coaching shall be a voluntary complement to the EUREM training.

In case that all current EUREM participants in a country wish to attend the workshop, a closer integration with the time schedule of that course is possible. For the status quo analysis, some of the “homework assignments” from the course can be used. The potentials will be then discussed and worked on in the different modules during the course. If any of the participants have a practical case, the trainer could use this for some calculation examples. (Possibly it is necessary to change some of the data, e.g. energy prices, if companies wish to treat this as confidential).

Otherwise it is recommended to keep the Energy Audit Coaching and the EUREM course more independent from each other. Nevertheless, it can be useful to aim rather towards the end of or after the EUREM course, so that participants can already build on the knowledge from this course.

5. Evaluation & Documentation

Audit deadlines related to national legal frameworks are another important factor to take into consideration, since the workshop is most useful at a time, when many of the participants are in the situation of having to implement or undertake an energy audit in “their” or a client company, or are preparing for it.

Participants should be asked to fill in an **evaluation form** at the end of the workshop so that the provider and the consortium as a whole can learn from the results! A template for ISA 1 and 2 with some compulsory questions (to ensure all partners collect comparable data) and



suggestions for additional ones is provided in the annex to the provider guide and can be downloaded [here](#).

For workshops organized as part of the EUREMnext project, the evaluation is mandatory. Also, providers should ensure that participants and trainers sign an **attendance list**.

It is also highly recommended to take **some photos** from the workshop (unless data protection rules prevent you from doing so.)

Please send your questions, remarks or suggestions regarding ISA 1 to Ariti Seth (ariti.seth@nuernberg.ihk.de)



ISA 1 ANNEX 1– Example of evaluation form for evaluation of ISA 1 and 2

Energy audit - Workshop [DATE]

1. Have your expectations – based on the workshop program – been fulfilled?

- ☐ yes, totally
☐ partially fulfilled

- ☐ less fulfilled
☐ no, not fulfilled

2. Have your expectations – based on workshop organization – been fulfilled?

- ☐ yes, totally
☐ partially fulfilled

- ☐ less fulfilled
☐ no, not fulfilled

3. Duration of workshop

- ☐ too short ☐ just right

- ☐ too long

4. How would you evaluate the topics as per the following criteria?

Topic 1	😊😊	😊	😐	😞	😞😞
▪ <i>Relevance of content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>Usability for your work</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Topic 2	😊😊	😊	😐	😞	😞😞
▪ <i>Relevance of content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>Usability for your work</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discussion	😊😊	😊	😐	😞	😞😞
▪ <i>Relevance of content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>Usability for your work</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. How would you evaluate the speakers per the following criteria?

Speaker 1	😊😊	😊	😐	😞	😞😞
▪ <i>Professional expertise</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>Applied method</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>Practical relevance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speaker 2	😊😊	😊	😐	😞	😞😞
▪ <i>Professional expertise</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>Applied method</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>Practical relevance</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



6. What could be improved content-related/in the organization to the topic [Energy Audit /ISA 2]?

7. I really liked ...

8. What topics are you interested in/what topics would you recommend for the next workshop?

Thank you very much for your support!



Draft concept prepared by AEL.

1. Content of offer

The aim of the workshop is on the one hand to gain more practical insight into the art of presenting a project to decision makers, especially in form of an elevator speech. Also course participants have opportunity to hone their skills with each other with practical exercises’ and experts.

The EUREM training gives great hands-on tools for planning and putting into practice all kind of energy saving projects. Nevertheless, selling the project to decision makers can be a hard job for a solution-oriented engineer, i.e. engineers may see at once the benefits of a project as well as is funding, but for a decision maker, who does not work in the technical field, those benefits may not be so obvious.

This additional coaching for presentation of energy efficiency measures - be it internally to board members and/or externally to financiers - enables participants to better “sell” the project to decision makers. This “pitching practice” shall ensure that all the relevant information for this target group is clearly visible and understandable, both in documents or personal talks. This helps bridging the gap between “engineer speak” and “financial manager/banker/controller speak”, and allows participants to prepare very effectively for project presentations, thus increasing the chances of a positive implementation decision. This workshop concentrates on a concept of elevator speech and how to implement it.

Theoretical inputs: Participants will go through the concept of an “elevator speech” with a trainer and power point sets (PPT-slides available [here](#)) as well as common problems when communicating with decision makers. They will share good practices and discuss on ideas how to sell their projects and projects in general. Also good practices to approach the subject are presented. A guest from a financial department or from executive board would add a great extra value for a group if they could give a small presentation what they personally put focus on when making a decision if project is worth funding and answer questions participants have. This will take two to three hours depending on the size of a group and whether the group has external experts present.

Practical part: The module also includes practical exercises presented in the ppt slides for the classroom where students need to first think of pros and cons of the project as a project manager but also as a decision maker. Then, they work in pairs, where one of them takes the role of the decision maker and the other one of the project manager. In that way, they shall be already prepared for the most obvious questions decision makers will come up with. Again, it is advised to include an expert on financing (e.g. representative from the financial sector, contractor financial expert), who has experience about making decisions on funding, and obtain constructive criticism and feedback. If it is impossible to arrange an expert because of schedule reasons or because participants want to go through some company sensitive details, one to one session could be arranged on a longer timeframe with booking individual coaching. This would take two to three hours, depending on the group size. The module also includes examples of how to use corporate finance department personnel as a



consultant for common questions and doubts decision makers and financial department usually have about projects.

The weighting of the theoretical and practical elements of the workshop can be determined according to the needs and previous experiences of the participants. In principle, the main focus should be on the practical part and the opportunity to exchange experience among participants and with the experts.

The initial concept is to offer a very open workshop format with relatively few pre-defined structured elements, to allow most time for participant's issues and questions. There will however be a backup of inputs to be offered by the trainers.

2. Target group

The primary target group is EUREM course participants and alumni, who are currently preparing a project that needs funding either in their own company or in a client company.

Also other EUREM participants and alumni as well as non-EUREM-related participants can be included; if there is space left and they fulfill the required characteristics. In general, current EUREM participants and alumni will be informed firstly, and if there is much demand, priority will be giving to those, who are in fact currently working on energy audits. If spaces are left, it could be considered opening the course to external participants.

3. Recommended timing

For the participants, pitching practice shall be a voluntary complement to the EUREM training¹. **In case that all current EUREM participants in a country wish to attend the workshop**, a closer integration with the time schedule of that course is possible.

Otherwise it is recommended to keep them independent from each other. Nevertheless, it can be useful to aim rather towards the end of or after the EUREM course, so that participants can already build on the knowledge from this course.

Please send your questions, remarks or suggestions regarding ISA 2 to Markku Harmaala (markku.harmaala@ael.fi)

¹ But it is obligatory for the training providers in the EUREMnext project, to offer this activity once!



ISA 3 – Implementation follow-up

Prepared by WKO/EIW.

1. Purpose of this ISA:

This ISA serves several purposes:

- Give training providers an opportunity to **verify the implementation rate of the energy efficiency measures developed in the course and of follow-up measures**. (This is useful and required to measure the impact of the EUREMnext project, but also to have these statistics as an argument for future course participants.)
- Have an opportunity to get **feedback on the course** from the viewpoint of participants some time (3 and 6 months) after the immediate course completion.
- To **inform alumni about other relevant activities** – e.g. as part of the EUREMnext project, like the workshops and alumni meetings offered as the other ISAs the conference etc., but also other activities or services offered by the EUREM Provider, and last but not least to
- **Hear about other needs that they may have**, info they may require etc.

2. Suggested implementation:

Obligatory part: Call course alumni² approximately 3 months and 6 months after their course completion and ask them about the implementation status of their course project, any follow-up projects planned and/or implemented.

In addition, inform/remind them of any upcoming EUREMnext activities e.g. ISAs in your country, conference in Athens, etc., and share further information depending on the needs of participants.

Person carrying out activity: no external trainer needed. For ISA 3 it would be obvious to appoint somebody, who is in direct contact with the EUREM training and/or participants. ((Lead) trainer, provider of EUREM training, EUREMnext project partner).

Before the calls:

- Have the **summary from the project work prepared in the course**³ ready for your reference, and also your notes whether the participant at the final presentation said it was already implemented/planned/not planned. (This will help you to update this information as part of the phone conversation.)
- Prepare a “phone guide” for yourself with the questions you want to ask and the information you want to convey. e.g.

² As part of the EUREMnext project, only those alumni, which finish their courses during the project, will be contacted. Alumni from previous „generations“ should have been covered by the alumni survey at the beginning of the project.

³ The empty template is [here](#). All course participants are obliged to submit one summary in English and on in the national language together with their project work.



- Collecting the data for results reporting for the EUREMnext project.
- Other questions could include obstacles to implementation. This can inform training providers what other information or support may be needed by the alumni and feed into our policy paper.
- Inform alumni about alumni meetings, workshops, the conference or other relevant activities and ask them about what would be interesting for them
- Alert them to any relevant changes in legislation, subsidy programs, etc. if relevant.

A template with some compulsory questions (to ensure all partners collect the same data about the status of implementation of the course projects, etc.) and suggestions for additional ones is provided in the annex to the provider guide.

After the calls:

- Fill the results into the excel table⁴ (available [here](#)) provided by the EUREMnext project team. This will help us evaluate the overall implementation rates and measure the impact etc.
- Be sure to follow up on things that came up during the conversation, e.g. send materials requested or similar.
- Keep the records/your notes from the phone calls as documentation!

Please send your questions, remarks or suggestions regarding ISA 3 to Eszter Winkler (e.winkler@energieinstitut.net)

⁴ The table is based on the Summary evaluation form template provided in the toolbox. So if you have filled the data from your summaries in there, you may just add the extra columns to update the documentation with the information gained in the telephone call.



ISA 3 ANNEX 1 – BASIC TEMPLATE FOR QUESTIONNAIRE FOR TELEPHONE INTERVIEWS

REMARK: This template shall support EUREM providers / project partners to prepare their telephone interviews. The **questions marked in red** should not be changed, to ensure we have results that are standardized and that we can summarize over all the countries participating in the EUREMnext project.

The other questions can and should be adjusted to your national circumstances – e.g. to use the call to invite alumni to planned events etc.

QUESTIONNAIRE FOR ALUMNI FOLLOW-UP-CALL

- 0. Introductory remark:** According to the summary of your EUREM course project [mention here the title], you calculated the following potentials for the energy measure you analyzed. [Remark: This introduction is just to help you and the person remember the figures, and be sure you are talking about the same thing – have the results from the summary somewhere handy]

Results:	
Energy saving potential [kWh/a]:	Additional energy generated out of renewable energies [kWh/a]:
Energy source: Wählen Sie ein Element aus:	Within the energy concept Renewable Energies new / additionally installed [MWp]:
Cost reduction potential [Euro/a]:	Chance of implementation: Wählen Sie ein Element aus:
CO ₂ -saving potential [t/a]:	or date of implementation:
(please fill in conversion factor: xy kg CO ₂ per kWh)	
Investment costs [Euro]:	
Pay-back time [Years]:	

1. Have you implemented your EUREM course project?

- Yes, roughly as described in the project summary [Please note the month of implementation and continue with question 2] [excel: fill in "2"]
- Yes, partially with somewhat bigger modifications [please briefly describe the changes, indicate the size of change and continue with question 2] [excel: fill in: "2"]
- Not yet but it is planned [continue with question 4]
- Not yet and it is not planned [Continue with question 5]

2. If completed /planned					
realized - mm/yy	Modifications? (yes / no)	Modifications	Energy Savings [kWh/a]	Renew able energy generation [kWh/a]	Investment costs (€)
	yes / no	comment			



2. Are results as expected? [excel: fill in “4 & 5”]

- a) Performance is better than calculated (please give an indication of the new figures, if possible, and of the reason for higher performance)
- b) Performance corresponds to calculations
- c) Performance is worse than calculated (please give an indication of the new figures, if possible, and of the reason for worse performance)

[Continue with Question 3]

4. Performance	5. Savings & renewables per year (realized/new estimate)		
Performance results (better/as expected/worse)	Energy Savings [kWh/a]	Cost Savings [EUR/a]	Renew able energy generated [kWh/a]

3. Are the result being monitored/measured? [excel: fill in “6”]

- a) Yes
- b) No

[Continue with Question 6]

6. Performance
Performance monitored?
yes / no

4. Expected implementation? [excel: fill in “3”]

- For when is implementation planned?
- Will implementation be more or less like in the project or with bigger modifications? *[in case of modifications, please describe briefly, if possible also size of change.]*

[Continue with Question 6]



3. Review: Likelihood of Implementation					
high	medium	low	Date of planned implementation - mm/yy	Modifications?	Modifications
yes / no	yes / no	yes / no		yes / no	Comment

5. What are the main reasons for not implementing the project? [excel: fill in "7"]

Start as an open question. If no answers come, ask for "type" of reasons (financial, decision making etc.). After receiving answers please allocate them to our possible answers listed below:

- Lack of time
- Management change
- Legal restrictions
- Other investments take priority
- Overall economic situation of the company
- Implementation will take place when replacement is needed
- Costs for energy low compared to other cost categories
- Low return on investment for sustainable energy projects
- Long payback-time for sustainable energy projects
- Uncertain energy-saving/energy generation results
- Short-term planning horizon
- No clear responsibility / decision processes in the company
- Lack of interest in energy topics on higher management level
- Fear that measures could cause negative effect on operating procedures / product quality
- Facilities are rented - no interest or possibility to invest in them
- Lack of possibilities to obtain financing
- Other:

[Continue with Question 6]



7. Reasons for non-implementation of course project																
Lack of time	Management change	Legal restrictions	Other investments take priority	Overall economic situation of the company	Implementation will take place when replacement is needed	Costs for energy low compared to other cost categories	Low return on investment for sustainable energy projects	Long payback-time for sustainable energy projects	Uncertain energy saving/energy generation results	Short-term planning horizon	No clear responsibility / decision processes in the company	Lack of interest in energy topics on higher management level	Fear that measures could cause negative effect on operating procedures / product quality	Facilities are rented - no interest or possibility to invest in them	Lack of possibilities to obtain financing	Other
yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no

Questions about follow-up projects

6. Have you implemented any follow-up projects so far? Are there any in the pipeline or planned? [excel: fill in "8 & 9"]

a) If yes, please estimate the following

	Implemented	Planned
Number of projects		
Type of projects		
Total annual energy savings		
Total annual cost savings		
Total investment		
RES generated		
Own organisation/ Client organisation /Both?		
How helpful is the EUREM-knowledge in enabling you to carry out these projects?	a) None of these projects would have been carried out without the course. b) Some of the projects would have been carried out, but the course has enabled me to do more or find better solutions. c) All of the projects would have been carried out the same way also without the course.	

8. Results follow up projects - IMPLEMENTED							9. Results follow up projects - PLANNED						
Number of projects	Type of projects	Energy saved (kWh/a)	Cost savings [EUR/a]	Investment [EUR]	Renewable energy generated [kWh/a]	Organisation (own / client)	Number of projects	Type of projects	Energy saved (kWh/a)	Cost savings [EUR/a]	Investment [EUR]	Renewable energy generated [kWh/a]	Organisation (own / client)



b) If no: Please name the most important reasons for not implementing additional measures

Start as an open question. If no answers come, ask for “type” of reasons (financial, decision making etc.). After receiving answers please allocate them to our possible answers listed below:

- No financially viable projects identified
- Lack of time
- Management change
- Legal restrictions
- Other investments take priority
- Overall economic situation of the company
- Implementation will take place when replacement is needed
- Costs for energy low compared to other cost categories
- Low return on investment for sustainable energy projects
- Long payback-time for sustainable energy projects
- Uncertain energy-saving/energy generation results
- Short-term planning horizon
- No clear responsibility / decision processes in the company
- Lack of interest in energy topics on higher management level
- Fear that measures could cause negative effect on operating procedures / product quality
- Facilities that measures could cause negative effect on operating procedures / product quality
- Lack of possibilities to obtain financing
- Other

10. Reasons for non-implementation of follow up projects																	
No financially viable project identified	Lack of time	Management change	Legal restrictions	Other investments take priority	Overall economic situation of the company	Implementation will take place when replacement is needed	Costs for energy low compared to other cost categories	Low return on investment for sustainable energy projects	Long payback-time for sustainable energy projects	Uncertain energy saving/energy generation results	Short-term planning horizon	No clear responsibility / decision processes in the company	Lack of interest in energy topics on higher management level	Fear that measures could cause negative effect on operating procedures / product quality	Facilities that measures could cause negative effect on operating procedures / product quality	Lack of possibilities to obtain financing	Other
yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no	yes / no

Questions about course and offer

7. Now, with a bit of distance to the completion of your EUREM course, please tell us:

- What has already turned out valuable/useful for you? [*Hint: if something really positive is mentioned, you might ask the person at the end of the interview if you can quote them on this –this may be a nice reference for the next courses*]



- What suggestions for improvement for the course *[and the additional offers, if the respondent has participated]* do you have?

[Continue with question 8]

Information/support offer to alumni *[Remark: these are suggestions, please use (some of) them **IF** relevant in your country and at the time that you carry out the telephone survey!]*

8. Inform/remind alumni about: future alumni meetings, ISA coaching workshops, EUREM conference in Athens, other relevant activities (depending on what is already planned in your country)
9. What kind of support, information etc. would you need to be able to implement more sustainable energy measures?
10. Have you signed up to our newsletter? / Would you like to receive the EUREMnext project newsletter? Check out our social media accounts! Stay informed about events, best practice examples etc...(EUREM website)
11. Inform about relevant changes in legislation, subsidy programs (if something relevant and current is going on, that you are not covering in your newsletter anyway.)



ISA 4 – Guideline for annual national/regional alumni networking meetings

Prepared by AHK r.s.o.

This guideline for annual national/regional alumni networking meetings was set up with the help of and in co-operation with EUREMnext project members and EUREM worldwide providers and is based on experiences with organization of alumni meetings. Alumni meeting concept was further discussed at CCI Nuremberg in December 2018 during 18th annual meeting of German Chambers of Commerce and Industry that are EUREM providers in Germany. Annual national/regional alumni networking meetings are a good opportunity for alumni to exchange information, learn about and share new findings and knowledge in the field of energetics, and share particular examples of project implementation. They can complement the international EUREM conferences, which are an excellent occasion for international alumni meetings.

Another goal of the meeting can for example be to help alumni deepen their presentation and negotiation skills (gained during EUREM courses) towards company's top management and financial experts (see 5.2 draft concept). The intention of ISA 4 is to support ISA 1 and 2, too.

The importance of alumni meetings with regard to alumni networking and possibilities of exchanging experience and ideas from project implementation was proven by the results of the EUREM alumni survey, conducted as part of the EUREMnext project in 2018. Those results showed that the majority of alumni found alumni meetings very useful or useful.

Several points – besides the meeting purposes/goals mentioned above – should be taken into account before the meeting is organized, such as the preparation of the meeting program; the choice of lecturers, meeting place and date; ideas how the meeting could be financed and if there will be any complementary program, e.g. excursion. The estimated number of participants (depending on the meeting place) should be considered. In order to get feedback about the event, **evaluation** forms should be prepared in advance and given to participants at the end of the meeting (see sample of evaluation form attached in Annex 1). A template can be downloaded [here](#). For alumni meetings prepared as part of the EUREMnext project, documentation (agenda, signed attendance lists, photos (if possible), evaluation forms) is obligatory.)

The organization of the meetings depends also on the size of the country. Large countries sometimes have several EUREM providers; therefore meetings in countries with more EUREM providers could be organized either for the alumni of one provider or as a regional or nation-wide meeting. Small countries that have only one provider organize meetings only at



national level. For an example of a national level meeting see the description of the first Czech national alumni meeting in June 2018 in Deliverable 5.2 (draft ISA concept).

The **Meeting program** can consist of a workshop part and a complementary program. Workshops can focus either on general novelties in energetics, e.g. new technologies or newest legislation; or on new findings and knowledge in specific topics related to energy use (e.g. lighting) or/and on improving alumni's presentations and negotiation skills.

There are several options for a **complementary program**. One of them are excursions, if possible to companies with EUREM alumni, where a EUREM course project was implemented. EUREM courses are interesting for both – energy suppliers and energy buyers (both groups are represented among the EUREM alumni). Interesting might be the possibility to present to alumni the interconnection between energy provider and energy buyer (we managed this during the first Czech national/regional alumni meeting in June 2018 – see 5.2 draft concept – when we visited the brewery Plzensky Prazdroj, an energy buyer, and at the same time Plzenska teplarenska, an energy producer and supplier. Another option is to organize a workshop during an engineering or energetics trade fair (or any other relevant trade fair) and/or connect the meeting with certificate ceremony of a new European EnergyManagers course (or any similar event).

The choice of **lecturers** depends on the workshop topics. Lecturers may be external (e.g. financial experts; top management representatives from companies; ministry employees; science and research experts) as well as internal, i.e. EUREM alumni – because of their practical experience and sense of what their EUREM colleagues might be interested in.

For example, financial experts or top management representatives of companies may help alumni to improve their skills of how to present technical issues to top management and/or to financial officers as there is often difference between “engineer speak” and “controller/financial manager/banker speak”. For example there could be a presentation / discussion on arguments that are important for negotiation about investment into energy efficiency solutions or arguments how to get the bank attracted by alumni's energy efficiency project. Ministry employees can inform alumni about possible subsidies for project implementation, which may be interesting especially for new countries of EUREMnext project; the latest findings in the area of energetics could be presented by science and research experts.

Questions like “How many years have you been offering EUREM courses?” and “How many alumni and current EUREM course participants do you have?” might be useful for the



estimation of the **number of participants** who would join the meeting because this will influence the choice of meeting place (the number of participants may also influence the meeting schedule – if there is an excursion to a production plant as complementary program – due to production plant safety requirements with regard to the number of people who are allowed as visitors in the production area).

The choice of **meeting place** depends on the complementary meeting program and the number of meeting participants. Meetings could be organized either in the place where EUREM courses are held, which is usually in the capital or main regional city (it is easier to invite relevant state ministry employees or financial experts to these meetings) or in companies – if possible each meeting in a different region – where there are EUREM alumni and where either EUREM project was/is implemented. This would make possible “live/face-to-face” alumni networking, experience sharing and during the excursion, it would enable alumni to see energy saving measures coming from project implementation.

If there is an **excursion** to a company as part of the meeting, meeting premises have to be considered because not all companies – depending on its size – have a sufficiently large room for meetings. Bigger companies usually have meeting rooms where meeting could take place. Meeting organized in small company could be held in some other suitable place close to that company, for example in a restaurant, hotel, at a university or in a technical library. If a production company and production plant tour is a part of the excursion, the company’s tour guide should be aware of energetic processes because alumni have profound knowledge in this area and ask a lot of technical questions.

Meetings should not be organized during **periods** when there are important trade fairs or conferences (about one week before and after that event). Christmas or summer holidays (usually July and August) should not be considered as convenient time, either.

However, the possibility of meeting during an important trade fair (engineering, energetics or another appropriate trade fair), which has professional complementary program, may be taken into account in this situation – as already mentioned above in “complementary program” part. The meeting could be held one day before or after that trade fair (not during); the trade fair itself would be the alumni meeting complementary program. If there is any company with EUREM alumni participating in/exhibiting at the trade fair, that company could offer their free entrance ticket to EUREM alumni.



Sponsorship – even partial one – of any EUREM partner may make it easier to **finance** the meeting.⁵

Please send your questions, remarks or suggestions regarding ISA 4 to Hana Potucková (potuckova@dtihk.cz)

⁵ For those alumni meetings which are organised as part of the EUREMnext project, please note that all revenues – such as sponsoring – need to be documented and declared as part of the financial report!



ISA 4 ANNEX 1– Example for evaluation form for an alumni meeting

[First] EUREM-Alumni workshop with excursions

[DATE]

This survey was designed to help us to improve our services for this program.

Therefore, we would like to know your opinion and would like to ask you for a few minutes of your time to share with us your point of view about the services we offered.

1. Have your expectations – based on the workshop program – been fulfilled?

- ☐ yes, totally fulfilled
- ☐ yes, fulfilled
- ☐ no, not completely
- ☐ no, not fulfilled

2. Have your expectations – based on workshop organization by AHK Services/DTIHK – been fulfilled?

- ☐ yes, totally fulfilled
- ☐ yes, fulfilled
- ☐ no, not completely
- ☐ no, not fulfilled

3. How would you evaluate the whole course of the workshop as per following criteria?

Premises:	Very good	Good	Satisfying	Sufficient	Not sufficient
- place	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Very good	Good	Satisfying	Sufficient	Not sufficient
- organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- workshop topic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- excursions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Have the lecturers fulfilled your expectations?

- ☐ yes
- ☐ with some reservations
- ☐ no



5. How would you evaluate the topics as per the following criteria?

	excellent	very good	good	sufficient	not sufficient
Bank officer's lecture					
▪ <i>lecture content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>answering questions</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-ON Energie representative's lecture					
▪ <i>lecture content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>answering questions</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lighting lecture					
▪ <i>lecture content</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▪ <i>answering questions</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. What could be improved in the organization of the next EUREM alumni meeting?

7. What topics are you interested in/what topics would you recommend for the next alumni meeting?

8. Comments and criticism

Name: _____

EUREM alumni: Yes ☐ No ☐

Company: _____

