

# SCCALE 203050 Renewable Energy Community development progress tool

version: 1.79 (31 May 2023) [download the latest version here](#)  
1.79

The Development Progress Tool is a self help tool for Renewable Energy Communities (RECs) to assist them in maturing their organisations and tracking their key goals.

Sustainable Collective Citizen Action for a Local Europe (SCCALE) 203050 intends to bring Europe closer to its citizens by fostering the creation of energy communities, taking full advantage of the favorable EU legal framework on citizen energy.

There are four **stages** (each briefly described on the DASHBOARD tab): INSPIRATION, PREPARATION, IMPLEMENTATION and OPERATION.

By simply answering **QUESTIONS** you can see on the **TO DO LIST** which actions need to be taken in order to reach the next stage, and if you're doing well you can activate that next stage on the **DASHBOARD**.

Some questions are **yes/no** ones, others ask you for a grade from **1 (worst) to 5 (best)**. If you feel a question does not apply to your organisation, you can exclude it by answering 'n/a'.

This will help identify and cover gaps, and get you well on your way towards a mature and stable Energy Community. Good luck!

[More information on SCAALE203050.eu](http://More information on SCAALE203050.eu).

## 1. Tell about YOUR ORGANISATION

## 2. Tell about YOUR PROJECTS

## 5. check your progress on the DASHBOARD

## 3. answer (or update) QUESTIONS

## 4. view your TO DO LIST

**WORKFLOW: use the tabs below!**



# Development Progress Tool background

This tab provides some background information on the different elements within the tool, as shown in the workflow shown in the START tab. The questions have been divided into different categories. This makes it easier to distribute the questions to other members with the appropriate background (for example financial or technology questions).

## QUESTIONS AND ANSWERS

There are two kinds of questions: **threshold** ones where you finish or achieve something, and **continuous** ones where you have to rate how well your REC is doing on something.

For **threshold** indicators you can answer with **YES**, **NO** or **n/a** (not applicable - excludes the question from the score).

For **continuous** indicators you can rate your REC with a score of **1 (worst)** to **5 (best)** (or also **n/a**).

The [SCCALE Community Guide](#) provides further background on how to improve your score, the [TO DO LIST](#) tab refers to the actions there.

## QUESTIONS ANSWERS: CATEGORIES

SFM	<b>Social Factors: Local community</b>	Addresses social engagement of local community members and the social embeddedness of the EC within the local community.
SDE	<b>Socio-demographic characteristics</b>	Socio-demographic characteristics of the CE reflecting degree of diversity.
SFK	<b>Social Factors: Board and personnel</b>	Human capital, knowledge and skills that community the energy board and staff members have, indicating capability to act of the energy community organization.
OAS	<b>Organisation and strategy</b>	Key organisational, strategy and governance characteristics of the community energy organization.
FIN	<b>Financial-economic characteristics</b>	Key financial indicators of the community energy organization indicating key economic assets and financial-economic capacity to act.
POL	<b>Policy &amp; politics</b>	Refers to relationships with political actors and public government, as well as the presence of (public) policy that empowers or hinders the community energy organization in its operations.
TEC	<b>Technology</b>	Refers to technical activities of the community energy organization. 'Technical' here applies to both technological systems and options, as well as to techno-economic operational activities, for example, as to provide stable and high quality energy services to members and clients.
LEA	<b>Learning</b>	This refers to learning capacity of the community energy organization and capacity to scale (up/out) good practice.

## HOW TO USE

The same way that humans are born, grow into their teenage years, study at the university and eventually become professionals, energy communities go through different stages of development. We distinguish four different ones: inspiration, preparation, implementation and operation.

## STAGES

An energy community usually starts with an idea and a small group of enthusiasts: the **INSPIRATION** stage. Following this, the community starts taking a more formal shape in the **PREPARATION** stage, which then makes way for the execution of plans in the **IMPLEMENTATION** stage. Finally, when the community's goals are met, the **MAINTENANCE** stage is entered.

This tool has been set up to serve your needs and help monitor your energy community's progress. At the **YOUR ORGANISATION** tab you can provide some basic information and some categories. Based on these categories, the tool will show you a number of questions. If you feel some of these not apply to your REC, you can specify N/A which will exclude them from the score.

## PROJECTS

In this tab you can specify specific projects with a measurable impact. Examples are a roof PV project, or energy savings goals in the neighbourhood.

## QUESTIONS

On this tab you can answer questions that help determine your REC's progress. If you feel that some of these do not apply, you are free to set the value to n/a ("not applicable"). This will exclude the question from the scoring sheet on the dashboard tab.

## YOUR TO DO LIST

Based on your answers, this tab will provide you a list of actions that will help your REC progress to the next stage.

## DASHBOARD

Finally, the dashboard shows you how well you are doing based on the goals and categories you have set for yourself. Both here and on the questions and to do list tabs, you can then choose to advance to the next stage.

Who are you?

You are currently looking at the **ORGANISATION** tab, where you can define which categories your REC is involved in, and change your REC's stage.

Your Energy Community	
name:	Your energy community name
country:	NL
area:	Groningen
current date:	19 Jan 2023

ALL	Is your community involved in:*	?	ALL
GEN	Generation	no	n/a
SUP	Supply	no	n/a
CON	Consumption and sharing	yes	CON
DIS	Distribution	no	n/a
SRV	Energy services	no	n/a
MOB	Electro mobility	no	n/a
FIN	Financial services	yes	FIN
EEF	Energy Efficiency	yes	EEF
20P	Does your REC have fewer than 20 members?	yes	20P

\*category descriptions are shown by hovering over them

## STAGE 1: INSPIRATION

In this inspiration phase, **the core group is structuring the key components of the energy community**. At this point, the question is less about services and project and more about the creation of the collective group structure. This area should start with a checklist of the following documents:

- List of members
- Rules for decision making
- Vision and mission document

Those will be the three indicators of for your first level of maturity, allowing you to start tracking the first indicators: Number of Members, Decision making, Shared vision.

## STAGE 2: PREPARATION

In the preparation phase, **the community is getting ready to handle to start of an energy project**. This preparation phase usually prepares a share offering and fund raising campaign that should allow you to build your community. The key component of this phase is therefore to track the intensification of the commitment and the interactions between community members. The indicators will be: Commitment of members and Efficacy of interactions.

Which **STAGE OF DEVELOPMENT** is your community in?

## 2 Preparation

The four stages of development are described below. If you have just started your community, or are not sure, leave this at stage 1. The tool will then start with basic questions.

## STAGE 3: IMPLEMENTATION

In the implementation phase **the structuring and launch of the project is under way**. This is a time to test and assess the execution of your governance mechanisms. In order to assess this, we propose to track the renewal of your representation institutions. An healthy governance mechanism should be seeing a level of turn-over in the representatives of the members. Start with assessing if your governance mechanism foresees mechanisms to ensure regular turn-over and protection against conflict of interests. The indicator will be: Efficacy of representation.

## STAGE 4: OPERATION

In the operation phase, **your service should be stable and your energy community should be equipped for a sustainable development**. The operation phase is a time to challenge and deepen the anchorage of your energy community into your local community. For this purpose, there are two major points of development : diversity and quality of the engagement of members. Diversity is crucial as it allows you to be more resilient and more representative of your local community's members. The indicators to assess those challenges will be: Diversity of members and Quality of interaction.



# Development Progress Tool project impact

In this tab you can keep track of the projects your EC has started (pilots), or supports (replication sites). If any of the indicators (renewable energy production, primary energy savings, CO<sub>2</sub> emissions reductions or money invested) are not relevant, just leave them empty.

NAME	location	country type	households (-)		renewable energy production (MWh/yr)		primary energy savings triggered (MWh/yr)		CO <sub>2</sub> emissions reductions triggered (tons/yr)		total amount of money invested (€)		stage**	final investment decision taken?***	comments
			projected	involved	planned	achieved	planned	achieved	projected	achieved	projected	spent			
050BuurtWarmte	Paddepoel, Groningen	NL	3,000	1,473	50 MWh	15 MWh	0 MWh	-	100 t	20 t	€ 150,000,000	€ 2,500,000	2: Preparation	yes	own pilot
	Selwerd, Groningen	NL	500	50	-	-	30 MWh	3 MWh	70 t	7 t	€ 12,000,000	€ 150,000	1: Inspiration	no	own pilot
	Lewenborg, Groningen	NL	150	30	20 MWh	4 MWh	-	-	60 t	14 t	€ 3,000,000	€ 500,000	3: Implementation	yes	replication site
	City Hall, Groningen	NL	-	-	-	-	20 MWh	20 MWh	100 t	100 t	€ 2,000,000	€ 2,000,000	2: Preparation	yes	replication site
second project	here	NL											which stage?	yes/no?	
	there	NL											which stage?	yes/no?	
third project	elsewhere	NL											which stage?	yes/no?	
			3,150	1,503	70 MWh	19 MWh	20 MWh	20 MWh	260 t	134 t	€ 155,000,000	€ 5,000,000			
				48%		27%		100%		52%		3%			

\* see the YOUR COMMUNITY tab for a description of the different categories

\*\* see the DASHBOARD tab for a description of the different stages

\*\*\* you can include planned projects on this tab. Once the final investment decision has been taken, they will be part of your REC's goals and progress tracked.

# Renewable Energy Community development assessment

This tab contains the list of assessment questions. It can be filtered by maturity level in the left column. The answers provided here will update the DASHBOARD and the TO DO LIST tabs, where you can respectively see your progress and actions to take.

category	define your stage	service relevance	questions	your answer	Scoring range (for continuous indicators: <b>1 is worst, 5 is best</b> ). For all questions: <b>n/a</b> means 'not relevant' and excludes the question from the score.
Social Factors: Local community	1	relevant	Has a list of members been created?	yes	yes or no (or n/a)?
	1	relevant	To what extent has a social network formed around the EC and its members?		1 = The EC is not embedded in a social network and does not have access to its resources.; 3 = The EC is moderately embedded in a social network and does have some access to its resources.; 5 = The REC's is well embedded in a social network and does well mobilizing its resources
	1	relevant	Are local community members engaged to participate in your energy collective (e.g., via open events or local newsletters)?	yes	yes or no (or n/a)?
	1	relevant	Has the core team (initiators) of the energy community been established?	no	yes or no (or n/a)?
	1	relevant	Has a stakeholder analysis been performed to map key actors locally?	no	yes or no (or n/a)?
Te Pc Fin: Organisat	1	relevant	Are all skills necessary for the delivery of services available in the core team of your energy collective?		yes or no (or n/a)?
	1	relevant	Do you feel that the rules for decision making are clear (e.g. at the General Assembly)?		yes or no (or n/a)?
	1	relevant	Has the EC developed a shared vision?		yes or no (or n/a)?
	1	relevant	To what extent is the shared vision aligned with the expectations of the EC's members?		1 = low alignment between vision and expectations of members.; 3 = Moderate alignment between vision and expectations of members.; 5 = High degree of alignment between vision and expectations of memebers.
Te Pc Fin: Organisat	1	relevant	Is there sufficient funds available to start the initial activities (like arranging community meetings etc)? Are there sufficient funds available to start the initial activities (like arranging community meetings etc?)		yes or no (or n/a)?
	1	relevant	How do you rate the support by the local community?		1 = Oppositional; 3 = Neutral yet passive; 5 = Actively supportive
Te Pc Fin: Organisat	1	relevant	To what extent does the EC have a formal (legal-organisational) status as a business entity?		1 = No legal status; 2 = Legal status requested; 5 = Legal status approved (e.g. cooperative or association).

# SCCALE 203050 Renewable Energy Community development assessment

This tab contains the list of assessment questions. It can be filtered by maturity level in the left column. The answers provided here will update the DASHBOARD and the TO DO LIST tabs, where you can respectively see your progress and actions to take.

category	define your stage	service relevance	questions	your answer	Scoring range (for continuous indicators: 1 is worst, 5 is best). For all questions: n/a means 'not relevant' and excludes the question from the score.
Social Factors: Local community	1	relevant	Has a list of members been created?	yes	yes or no (or n/a)?
	3	relevant	To what extent do members of the EC participate in the annual General Assembly?	1	1 = Only a minority of members participates ; 3 = A fair amount of the members of the collective participates; 5 = The majority of members of the collective participates
	2	relevant	To what extent is the EC's shared vision still accurate?	4	1 = The shared vision of the EC seems outdated. ; 3 = The shared vision of the RECs seems somewhat up to date; 5 = The shared vision of the REC appears up to date.
	1	relevant	To what extent has a social network formed around the EC and its members?		1 = The EC is not embedded in a social network and does not have access to its resources.; 3 = The EC is moderately embedded in a social network and does have some access to its resources.; 5 = The REC's is well embedded in a social network and does well mobilizing its resources
	2	relevant	To what extent is the REC empowered by professional actors?		1 = To a low extent empowered; 3 = To a moderate extent empowered.; To a large extent empowered.
		relevant	To what extent is the REC embedded within the local community?	n/a	1 = To a low extent; 3 = To a moderate extent; 3 To a high extent
	3	relevant	Does the REC have more than 20 members?	no	yes or no (or n/a)?
	3	relevant	To what extent is the local community aware of the existence of and participating in the EC?	3	1 = Unaware; 3 = Somewhat aware; 5 = Aware
	1	relevant	Are local community members engaged to participate in your energy collective (e.g., via open events or local newsletters)?	yes	yes or no (or n/a)?
	3	relevant	How many households are reached (i.e. persuaded to cooperate or participate in the energy collective) per neighbourhood action?		1 = No household is reached; 3 = Between 1 and 5 households are reached; 5 = More than 5 households are reached
	2	relevant	To what extent is the EC empowered by (regional and national) government actors?		1 = To a low extent empowered; 3 = To a moderate extent empowered.; To a large extent empowered.
	Socio-demographic characteristics	1	relevant	Has the core team (initiators) of the energy community been established?	no
1		relevant	Has a stakeholder analysis been performed to map key actors locally?	no	yes or no (or n/a)?
2		relevant	Has the project proposal been approved by the local community?		yes or no (or n/a)?
2		relevant	Is there a reasonable variation of income levels represented in the membership list?		yes or no (or n/a)?
2		relevant	Is there a reasonable variation of age levels represented and balanced in the membership list?		yes or no (or n/a)?
2		relevant	Is there a reasonable variation in ethnic backgrounds of the local community represented in the membership list?		yes or no (or n/a)?
2		relevant	To what extent is there a reasonable variation of education levels represented in the membership list?		1 = To a low extent. EC membership education level is pre-dominantly tertiary (i.e., higher education); 3 = To a moderate extent. EC membership education includes amoderate variation in education levels (e.g., higher education and vocational school); 5 = To a high extent. EC membership has a high diversity of education levels (e.g., from primary school, vocational school, to university and university of applied sciences).
2		relevant	To what extent is the membership list gender balanced?		1 = Membership is pre-dominantly male; 3 = Membership is in the process of becoming more gender-balanced; 5 = Membership includes all gender identities
2		relevant	To what extent are different education backgrounds of the local community groups represented in the EC's membership list?		1 = To a low extent. EC membership is pre-dominantly mostly engineering or otherwise Beta educated; 3 = To a moderate extent. EC membership contains next to Beta educated persons also persons educated in finance/economic and in law.; 5 = To a high extent. EC membership has a high diversity of education backgrounds: i.e. Alpha, Beta, and Gamma.
4		relevant	How diverse in skills sets and competences is the pool of key personnel?		1 = low degree of diversity of skills & competences among personnel; 3 = Moderate degree of diversity of skills & competences among personnel; 5 = High degree of diversity of skills & competences among personnel
2		relevant	How well are the skills necessary for the delivery of services represented in the core team of your energy collective?		1 = key personnel command a limited skillset; 3 = key personnel command a moderate skillset useful to the EC; 5 = key personnel command a skillset coherent with the EC activities
1		relevant	Are all skills necessary for the delivery of services available in the core team of your energy collective?		yes or no (or n/a)?
2	relevant	To what extent are key personnel regularly communicating with each other?		1 = infrequent (less than on a monthly basis); 3 = moderately (around on weekly basis); 5 = frequent (more than on a weekly basis)	
2	relevant	To what extent does the EC use external resources from its social environment?		1 = The EC operates on its own, and does not use external resources; 3 = The EC uses a limited amount of external resources; 5 = The EC is quite dependent and used a high amount of external resources.	
2	relevant	To what extent is the EC championed by influential individuals?		1 = To a low extent; 3 = To a moderate extent; 5 = To a high extent	
2	relevant	How diverse is the supervisory board?		1 = There is a low degree of diversity among supervisory board members.; 3 = There is a moderate degree of diversity among supervisory board members.; 5 = There is a high degree of diversity among supervisory board members.	
2	relevant	How many active members does the energy collective (or cooperative) have?		1 = Less than 5 active members; 3 = Between 5 and 10 active members; 3= More than 10 active members	
Organisation and strategy	2	relevant	Are decisions taken within the EC transparent and participatory?		1 = Information: decisions are explained and made transparent to members; 3 = Consultation: Members may comment and discuss upcoming decisions; 5 = Participation: Members may cast a vote for or against decisions
	2	relevant	To what extent are decision making rules regularly evaluated and updated?		1 = not at all; 3 = sometimes (once very few years); 5 = regularly
	1	relevant	Do you feel that the rules for decision making are clear (e.g. at the General Assembly)?		yes or no (or n/a)?
	2	relevant	To what extent is decision-making within the EC held in an effective way?		1 = Decision-making in the EC is not effective; 3 = Decision-making in the EC is moderately effective; 5 = Decision-making in the EC is highly effective
		remove	To what extent have rules been defined that limit the number of Board members?		1 = to a low degree; 3 = to a fair degree; 5 = to a high degree
	1	relevant	Has the EC developed a shared vision?		yes or no (or n/a)?
		remove	Have goals and pathways been defined to achieve the goals related to the shared vision?		1 = No goals nor pathways have been defined.; 3 = Goals have been defined, but no pathways.; 5 = Both goals and pathways have been defined.
	1	relevant	To what extent is the shared vision aligned with the expectations of the EC's members?		1 = low alignment between vision and expectations of members.; 3 = Moderate alignment between vision and expectations of members.; 5 = High degree of alignment between vision and expectations of members.
	2	relevant	What governance structure does your energy collective use?		1 = No governance structure used (adhocracy); 3 = Loosely structured governance applied (bottom-up; e.g. 'holacracy'); 5 = Highly structured governance applied.
	2	relevant	What governance and operational circles does your energy collective use?		1 = No differentiation between strategic and operational circles; 3 = Moderate differentiation between strategic and operation group circles; 5 = Clear differentiation between strategic and operation group circles
	3	relevant	How well is leadership organised within the EC?		1 = Poor degree of leadership; 3 = Moderate degree of leadership; 5 = Well-established leadership (with satisfied members)
	3	relevant	Have rules for selecting leaders been defined?		yes or no (or n/a)?
3	relevant	How well do the defined management processes function?		1 = Management processes function poorly.; 3 = Management processes function on a moderate level.; 5 = Management processes function well	
2	relevant	Have clear management processes been defined?		yes or no (or n/a)?	
2	relevant	Do you feel that your General Assembly membership turnout representative to the total membership of your energy collective?		1 = Not representative; 3 = Somewhat representative; 5 = Representative	
Financial-economic characteristics		remove	To what extent do EC operations result in a healthy financial-economic business model?		1 = To a low extent; 3 = To a moderate extent; 5 = To a high extent
		remove	How diversified are the EC's assets?		1 = Not diversified; only one-sided assets.; 3 = Moderately diversified; several diversified assets; 5 = Well-diversified; with many, diversified assets
		remove	Is the EC clear of debt?		yes or no (or n/a)?
		remove	Does the EC's business case run break-even?		yes or no (or n/a)?
		remove	To what extent does the cash flow provide enough incoming revenues to pay for running expenses?		1 = To a low extent; 3 = To a moderate extent; 5 = To a high extent
		remove	How well does the EC perform compared to other organisations, in terms of energy service provision?		1 = Underperforms compared to other (green) investment schemes on the market; 3 = Performs rather well compared to other (green) investment schemes on the market; 5 = Outperforms other (green) investment schemes on the market
		remove	How well are the required resources (capital and work force) covered?		1 = Poorly covered; resources almost exhausted; 3 = Moderately covered; 5 = Covered to a high degree; there is a resource buffer available
		remove	At what level is the debt?		1 = 0.3 or lower; 3 = between 0.3 and 0.8; 5 = 0.8 or higher
		remove	At what level is the interest coverage ratio?		1 = 0.8 or lower; 3 = between 0.8 and 1.2; 5 = 1.2 or higher
	2	relevant	To what extent is the EC depending on public funding (like public funds, subsidies, grants or tax exemptions)?		1 = To a high extent depending on public funding; critically dependent on public funding; 3 = To a moderate extent depending on public funding; somewhat dependent on public funding; 5 = To a low extent depending on public funding; Not really dependent on public funding
		remove	How well are the EC's energy assets (including a renewable energy plant) integrated into the existing energy infrastructure?		1 = To a low extent; independent, but perhaps new stand-alone infrastructure required; 3 = To a moderate extent embedded in energy infrastructure. Depending on DSO.; 5 = To a high extent embedded in current energy infrastructure. Compatible and interconnected with existing structures
		remove	Has the cash burn rate been calculated?		yes or no (or n/a)?
2	relevant	How well-developed is the current EC's business plan?		1 = No business plan available; 3 = Business plan under development; 5 = Business plan available.	
1	relevant	Is there sufficient funds available to start the initial activities (like arranging community meetings etc)? Are there sufficient funds available to start the initial activities (like arranging community meetings etc)?		yes or no (or n/a)?	
2	relevant	To what extent are additional funds available to generate cash flow?		1 = Hardly any additional funds available; 3 = Moderate additional funds available; 5 = Sufficient additional funds available	
	remove	Has the EC business case been evaluated and is it considered feasible?		yes or no (or n/a)?	
2	relevant	Has your EC started preparations on developing a business case?		yes or no (or n/a)?	
	remove	Does the EC have financial commitment from cooperation partners (i.e. local stakeholders)?		yes or no (or n/a)?	
	remove	Has a final investment decision been made by the project consortium?		yes or no (or n/a)?	
	remove	Have contracts with suppliers (of goods and/or services) been finalised?		yes or no (or n/a)?	
	remove	Is there financial commitment from all stakeholders involved for starting the implementation stage?		yes or no (or n/a)?	
	remove	Has a Go/No Go decision been reached for starting the implementation stage of the project?		yes or no (or n/a)?	
	remove	Has a risk register been developed?		yes or no (or n/a)?	
Policy & politics	2	relevant	How would you describe the relationship with the local authority?		1 = Sporadic interaction; only when needed; 3 = Relatively frequent interaction; fairly constructive dialogue; 5 = Bidirectional, eye-level communication; highly constructive; based on trust
	2	relevant	To what extent is the EC a member of any national or regional CE networks, federations or associations?		1 = To a low extent; 3 = To a moderate extent; 5 = To a high extent
	2	relevant	Have solutions been found to overcome the bureaucratic barriers encountered?		1 = Bureaucratic barriers are significant, no solutions have been found; 3 = Some barriers have been solved, some remain; 5 = No bureaucratic barriers are left / all have been dealt with
	2	relevant	Have bureaucratic barriers been identified?		yes or no (or n/a)?
	1	relevant	How do you rate the support by the local community?		1 = Oppositional; 3 = Neutral yet passive; 5 = Actively supportive
	2	relevant	Does the EC experience support from local officials or civil servants?		1 = The EC is operating without support from public official(s); 3 = The EC is operating with moderate support from local officials; 5 = The EC is operating with full support from public official(s)
2	relevant	How is membership of national or regional CE networks, federations or associations experienced?		1 = Not beneficial; 3 = Somewhat beneficial; 5 = Strongly beneficial	

	remove	Has the cooperation with the municipality been formalised (e.g. in a partnership, bi- or multilateral agreement)?	yes or no (or n/a)?	
	remove	Have required regulations, permits and cost that goes along with this been analysed?	1 = required regulations, permits and cost are not yet mapped; 3 = required regulations, permits and cost are mapped to a limited extent, or mapping is outdated; 5 = required regulations, permits and cost are fully mapped and up to date	
Technology	remove	Have the required (renewable) energy potentials been identified, mapped and quantified?	yes or no (or n/a)?	
	remove	Have the required energy savings opportunities in buildings been identified?	yes or no (or n/a)?	
	remove	Has the technology roadmap for your project(s) been defined?	yes or no (or n/a)?	
	remove	How often do breakdowns or service interruptions happen?	1 = Many defects (at least monthly); 3 = A moderate amount of defects (multiple per year); 5 = (Almost) None	
	remove	To what extent are the technologies applied by the EC mature, and have they successfully been applied by other ECs?	1 = Technology is not mature, and rarely used by other ECs; 3 = Technology is fairly mature, and there are some cases of other RECs using them.; 5 = Proven technology that is successfully used by other ECs	
	remove	To what extent have online platforms and control systems been sufficiently secured (in relation to cyber security)?	1 = To a low extent; 3 = To a moderate extent; 5 = To a high extent	
	remove	To what extent has the data management plan already been applied and kept up to date?	1 = Data management plan has not been applied yet; 3 = Data management plan has been applied, but has not yet been updated; 5 = Data management plan has already been applied and has already been updated	
	remove	Has a data management plan been written?	yes or no (or n/a)?	
	remove	To what extent have achieved energy savings reached or exceeded the pre-set target?	1 = The energy savings target has not been reached yet; 3 = The EC is on the verge of achieving its energy savings target; 5 = The energy savings target has already been exceeded	
	remove	To what extent has the achieved amount of renewable energy produced reached or exceeded the pre-set target?	1 = The renewable energy production target has not been reached yet; 3 = The EC is on the verge of achieving its renewable energy production target; 5 = The renewable energy production target has already been exceeded	
	remove	To what extent is the EC growing beyond its original energy targets?	1 = The EC is not growing beyond its original energy targets; 3 = The EC is on the verge of growing beyond its original energy targets; 5 = The EC has already grown beyond its original energy targets	
	remove	To what extent is the EC able to provide sufficient energy to satisfy member demand?	1 = To a low extent; consumption exceeds production; 3 = To a moderate extent; production roughly meets consumption; 5 = To a high extent; production exceeds consumption	
	remove	What is the current status with regard to reaching the EC's CO2 emissions reduction goal?	1 = Emissions reduction has started, but goals are not yet achieved; 3 = Emission reduction is well underway, but the goals has not yet been achieved; 5 = The planned emissions reduction goal has been achieved	
	3	relevant	Does your EC promote energy saving behaviour (e.g. like energy sobriety)?	yes or no (or n/a)?
		remove	Has the existing energy system been mapped?	yes or no (or n/a)?
		remove	Is the EC able to produce sufficient energy itself to satisfy member/client demand?	yes or no (or n/a)?
		remove	Is the EC able to produce sufficient energy itself to satisfy peak member/client demand at all times?	yes or no (or n/a)?
	2	relevant	Which values does the EC promote in its business case?	1 = Single-proposition; 3 = At least two propositions; 5 = More than two propositions
		remove	Has the EC hired its first paid employee?	yes or no (or n/a)?
	1	relevant	To what extent does the EC have a formal (legal-organisational) status as a business entity?	1 = No legal status; 2 = Legal status requested; 5 = Legal status approved (e.g. cooperative or association).
	remove	Does the EC have a structured service offer to its members?	yes or no (or n/a)?	
	remove	To what extent is external expertise available for those skills and competences not covered internally?	1 = Hardly or no external expertise available; 3 = Moderate external expertise available; 5 = Sufficient external expertise available	
4	relevant	Is the EC providing just a single service or does it have a diverse portfolio of services?	1 = Single-service; 3 = Two to five services; 5 = More than five services	
2	relevant	Have the required permits been submitted, or even already been approved?	1 = Permit applications have not been prepared yet; 3 = Permit applications have been filed; 5 = Permit applications have already been approved	
3	relevant	To what extent are energy project assets owned by the EC?	1 = Assets are only owned by external/commercial parties (not by the EC); 3 = A limited number of assets is owned by the EC or its members; 5 = A significant amount or share of the assets is owned by the EC or its members	
	remove	Is the contract or agreement made with cooperation partners (i.e. local stakeholders) re-confirmed?	yes or no (or n/a)?	
Learning	2	relevant	To what extent are handbooks, guides, tools embedded and used in regular operations?	1 = Only to a low extent. No or hardly any use of handbooks, guides, manuals or tools.; 3 = To a moderate extent. Some use of handbooks, guides, manuals or tools; 5 = To a high extent. Intensive use of handbooks, guides, tools in regular operations.
	2	relevant	To what extent is member feedback organised?	1 = To a low extent. Members are not allowed to provide feedback (not even during the annual General Assembly); 3 = To a moderate extent. Members are allowed to provide feedback but mostly during the annual General Assembly.; 5 = To a high extent. Members frequently requested to provide feedback on the strategy and operations of the EC
	4	relevant	To what extent are key members or staff able to take over other duties in case this is required?	1 = To a low extent. Key personnel specialise in their own fields; illness or departure results in knowledge gaps; 3 = To a moderate extent. Ad hoc knowledge sharing between key personnel ; 5 = To a high extent. Each key function is covered by at least one backup person, formal training programme in place
	3	relevant	To what extent do key personnel coach EC members?	1 = To a low extent. Key personnel do not coach members; 3 = To a moderate extent. Ad hoc coaching occurs; 5 = To a high extent. A dedicated coaching programme is in place
	3	relevant	To what extent does the EC promote the principles of the Community Energy movement in external events to a larger audience?	1 = To a low extent; 3 = To a moderate extent; 5 = To a high extent
	4	relevant	To what extent are knowledge and experiences gained shared with other ECs?	1 = Not or hardly shared; 3 = Shared with one or a limited amount of other ECs; 5 = Shared intensively with a fairly large number of ECs, who adopt the knowledge and experiences shared by us.
		remove	To what extent is the EC's shared vision up to date?	1 = To a low extent. The EC's shared vision has not been updated.; 3 = To a moderate extent. The EC's shared vision is in the process of being updated.; 5 = To a high extent. The EC's shared vision is regularly updated.
	2	relevant	To what extent is the EC supported by intermediary agents (or by the capacity building platforms they operate)?	1 = To a low extent. There is no use of intermediary agents or the capacity building platforms they operate.; 3 = To a moderate extent. There is limited support by intermediary agents or the capacity building platforms they operate.; 5 = To a high extent. There is intensive support by intermediary agents or the capacity building platforms they operate.
		remove	To what extent are (serious) games or gaming tools used?	1 = (Serious) games or gaming tools are not used by the EC; 3 = (Serious) games or gaming tools are sometimes used by the EC; 5 = (Serious) games or gaming tools are frequently used by the EC
	3	relevant	To what extent is reflexive learning embedded in the EC's strategy and operations?	1 = To a low extent. No reflexive learning on own organizational development and projects; 3 = To a moderate extent. Limited reflective discussion and associated learning on own organizational development and projects.; 5 = To a high extent. Frequent reflection on own performance, critical feedback and discussion and learning on own organizational development and projects.
	3	relevant	To what extent is there collaboration between research institutes and the EC to foster (mutual) research and learning?	1 = To a low extent. Hardly or no collaboration ; 3 = To a moderate extent. Some, passive collaboration, (a couple of times a year with the research institute taking the initiative, in case of graduation projects or research project development).; 5 = To a high extent. Intensive collaboration (at least monthly), and with clear mutual benefits.
		remove	Does your energy collective (or cooperative) have one or more replication sites?	yes or no (or n/a)?
	2	relevant	Does your energy collective use services from the (REScoop.eu or other community energy) mentor network?	yes or no (or n/a)?
	2	relevant	Does your energy collective use online media (e.g., MOOCs) for learning or training purposes?	yes or no (or n/a)?

NOTE: FULLY EXPANDED QUESTION LIST FOR PDF

this tab shows the actions required per stage - unfilled threshold tasks and continuous indicators with grade 3 or lower are displayed, the rest is filtered out. This tab shows a to do list, **changes to your answers can be made on the QUESTIONS tab.**

stage? **1** ACTION

BACKGROUND

## STAGE 1: INSPIRATION - ACTIONS TO TAKE

SFM001T	yes		
SFM011C		<b>Foster formal and informal networking in social communities, e.g. by organising (networking) activities.</b>	<i>To develop the organizational environment in which community energy collectives operate there is a need for social network formation because social networks enable the mobilization of critical resources (like funds, competences, knowledge). Through interaction in networks, community energy collectives are enabled to exchange information, knowledge and resources. can take place. Different actors bring in different resources that are necessary to make community energy collectives flourish. See also Community Guide action(s): 1: Setting up a core team; 6: Community meeting: networking within the community; 10: Communicating with a broader group of citizens; 12: Community meeting; 23: Activate broader group.</i>
SFM017T	yes		
SFM023T	no	<b>Establish a core team to get things started. Find suitable people to join the core team of the energy community organisation.</b>	<i>A citizen initiative often starts with one or two persons encouraging other people to join. When this grows to five people with complementing skill sets, this provides a good basis for the community process. A good core team forms the basis of a successful community energy project and future legal entity. It ensures sufficient clout, qualities, diversity and democratic legitimacy.</i>
SFM024T	no	<b>Prepare and conduct stakeholder analysis of key actors that are important (in either a positive or negative way) to the energy community organisation.</b>	<i>A stakeholder analysis allows you to identify the importance and degree of influence per stakeholder. Once you have determined the partners, together with them, you establish the format in which you will meet, and at what frequency.</i>
SFK005T		<b>Acquire skill sets required in but missing from the core team</b>	<i>Internal availability of skills and competences necessary for the management of the EC reduced dependency on external help and ensures that skills are applied specifically to the EC's demand. Skills may include negotiation, communication, accounting, engineering, planning, lobbying, legal knowledge, etc. See also Community Guide action(s): 18: Organisation is ready for the preparation stage.</i>
OAS002T		<b>Define rules and make them clear for decision making. This also requires clear and transparent communication about decision-making rules.</b>	<i>Clear decision making rules and procedures lead to transparency and therefore trust in the decisions made by a EC. As new members join the EC and the EC's activities evolve, the procedures currently in place should be re-checked whether they are deemed democratic by all members, and whether they fit to the current set of activities.</i>
OAS005T		<b>Develop an EC shared vision with consent and some participation of the EC members.</b>	<i>The concept of shared vision is an important foundation for proactive learning because it provides direction and focus for learning. This, in turn, fosters energy, commitment, and purpose among organizational members. A strong shared vision also creates a sense of identity that permeates the EC. It drives a cooperative culture that allows (staff and general) members to thrive. A shared vision also helps to clarify an organization's direction on what to do and what to learn.</i>
OAS006C		<b>Define goals and pathways to achieve the shared vision.</b>	<i>Measurable goals and pathways to help them move towards the defined shared vision.</i>
OAS007C		<b>Organise a process and/or workshop to discuss and assess how well the shared vision aligns with the EC's members expectations. In case of defiance, seek ways to improve the alignment between the two.</b>	<i>For strategic purposes, expectations, legitimacy and effective management of the EC, members should be fairly aligned to the defined shared vision. Expectations should not differ away too much from the shared vision, otherwise the vision might lose its value to the EC, which could lead to uncertainties, strategic discussion and loss of organizational identity.</i>
FIN006C		<b>Acquire more capital and required personnel</b>	<i>Similar to landing strip for startup companies, i.e. the timeframe within which sustained revenues must be achieved unless the EC is at risk of collapse. Resources include monetary capital, but also volunteer workforce. See also Community Guide action(s): 42: Get financial commitment from stakeholders for the next stage.</i>
FIN010C		<b>Improve integration with existing infrastructure to reduce costs</b>	<i>Building an own infrastructure dedicated to the EC can be very expensive and time-consuming and may incur additional maintenance costs. Leveraging existing physical assets such as grids, power lines and other technical facilities reduces the overall investment volume for providing EC services. See also Community Guide action(s): 5: General technical plan .</i>
FIN013T		<b>Acquire funds for initial activities</b>	<i>ECs require start-up funds to pre-finance their initial activities like organizing a General Assembly, community workshops and meetings, plan a (renewable) energy project, or run awareness raising campaigns in the local community. Typically, local governments support EC that are in the process of starting-up by providing a start-up subsidy or by making rooms available so that the EC members can have their meetings. See also Community Guide action(s): 9: Financial commitment for next milestone; 20: First business case .</i>
POL004C		<b>Increase visibility and outreach in the local community</b>	<i>Citizens living in the community where the EC is active are potential members and they may influence local policy-makers to support the EC. See also Community Guide action(s): 10: Communicating with a broader group of citizens; 23: Activate a broader group of participants.</i>
TEC104C		<b>Create a formal business entity</b>	<i>Formal contractual capability enables access to market services and facilitates collaboration with external actors. See also Community Guide action(s): 22: Setting up a legal entity.</i>



## STAGE 2: PREPARATION - ACTIONS TO TAKE

SFM001C	<b>Ensure members stay around. Make sure that new members are properly engaged, welcomed, accomodated and integrated.</b>	<i>A collective of named, committed members ensures the persistence of the EC. Retention of original members ensures knowledge management and a shared organizational identity. Rotation of members ensures that new ideas enter the EC and that the EC continuously adapts to a changing energy system. New members need to be integrated into decision making procedures and division of responsibilities. See also Community Guide action(s): 1: Setting up a core team, 6: Community meeting: networking with the community, 10: communicating with broader group of citizens, 23: Activate a broader group of participants.</i>
SFM008C	4	
SFM013C	<b>Connect to professionals and gain their support so that the REC is empowered.</b>	<i>ECs depend on professional support. See also Community Guide action(s): 14: Formalising cooperation with municipality and other partners.</i>
SFM014C	n/a <b>Improve alignment with the local community.</b>	<i>Connection with the local community and stakeholders is important to gain both passive and active support. (e.g. contacting neighbourhood organisations, citizen engagement, multi-stakeholder management, reaching a stakeholder agreement. See also Community Guide action(s): 1: Setting up a core team; 6: Community meeting: networking within the community; 10: Communicating with a broader group of citizens; 12: Community meeting; 23: Activate broader group.</i>
SFM022C	<b>Connect to regional and national government actors and gain their support to empower the EC.</b>	<i>Connecting to regional and national government actors to gain their support so that the EC is empowered is important. These actors possess access to critical resources, like investment schemes and subsidies to support (business cases of) community energy projects (e.g. in collective renewable energy generation). This connection is also of critical importance, particularly if community energy collectives seek to "broaden" or "scale-up" their operations. See also Community Guide action(s): 0.</i>
SFM031T	<b>Prepare steps to get the project proposal addressed, discussed and approved by key local community members.</b>	<i>The approval of the project proposal by the local community members provides permission for the project to go ahead. With the approval of your members, you can now work with confidence on the final part of the preparation stage. You can finish the contract with your partners and work towards what is called the 'financial close of the project'. This means you will have all the financing required to build or execute your project.</i>
SDE001T	<b>Engage more potential members from underrepresented income levels from within the community.</b>	<i>Inclusiveness and a clear representation of the local community is important to ECs. Lacking representativeness of the local community or lacking inclusiveness altogether will render the EC without legitimacy, which will lead to lack of acceptance of decisions made, social resistance, ineffective decision-making, and poor implementation. See also Community Guide action(s): 23: Activate a broader group of participants.</i>
SDE002T	<b>Engage more potential members of underrepresented age groups from within the community.</b>	<i>Inclusiveness and a clear representation of the local community is important to ECs. Lacking representativeness of the local community or lacking inclusiveness altogether will render the EC without legitimacy, which will lead to lack of acceptance of decisions made, social resistance, ineffective decision-making, and poor implementation. See also Community Guide action(s): 1: Setting up a core team.</i>
SDE003T	<b>Engage more potential members of underrepresented ethnic backgrounds from within the community.</b>	<i>Inclusiveness and a clear representation of the local community is important to ECs. Lacking representativeness of the local community or lacking inclusiveness altogether will render the EC without legitimacy, which will lead to lack of acceptance of decisions made, social resistance, ineffective decision-making, and poor implementation. See also Community Guide action(s): 1: Setting up a core team; 23: Activate a broader group of participants.</i>
SDE004C	<b>Engage more potential members of all education levels, focus on those that are missing or underrepresented within the community.</b>	<i>Inclusiveness and a clear representation of the local community is important to ECs. Lacking representativeness of the local community or lacking inclusiveness altogether will render the EC without legitimacy, which will lead to lack of acceptance of decisions made, social resistance, ineffective decision-making, and poor implementation. See also Community Guide action(s): 1: Setting up a core team; 23: Activate a broader group of participants.</i>
SDE005C	<b>Engage more potential members of the less represented gender.</b>	<i>Inclusiveness and a clear representation of the local community is important to ECs. Lacking representativeness of the local community or lacking inclusiveness altogether will render the EC without legitimacy, which will lead to lack of acceptance of decisions made, social resistance, ineffective decision-making, and poor implementation. See also Community Guide action(s): 1: Setting up a core team; 23: Activate a broader group of participants.</i>
SDE006C	<b>Engage more potential members of underrepresented education types.</b>	<i>Inclusiveness and a clear representation of the local community is important to ECs. Lacking representativeness of the local community or lacking inclusiveness altogether will render the EC without legitimacy, which will lead to lack of acceptance of decisions made, social resistance, ineffective decision-making, and poor implementation. See also Community Guide action(s): 0.</i>
SFK002C	<b>Strategically recruit new staff members as per need.</b>	<i>When the EC as organization is in the process of organizational growth or professionalization the presence of paid staff is of great importance. Declining staff membership can be a serious challenge to RECs maturing. See also Community Guide action(s): 18: Organisation is ready for the preparation stage; 39: Prepare your organisation for the next stage.</i>
SFK002T	<b>Hire paid staff as part of professionalizing the EC.</b>	<i>When the EC matures its organisation undergoes a process of professionalization. At the same time the EC also becomes responsible in initiating, planning and running one or more (renewable) energy projects. This requires professional support and management, which often cannot be left to volunteers (any more). Therefore, there is a need to hire paid staff. Without paid staff operations of the EC are not likely to grow and the EC is less likely to flourish as an organization in the future. Note that if you're running a all volunteer organisation, feel free to set this one to n/a! See also Community Guide action(s): 18: Organisation is ready for the preparation stage; 39: Prepare your organisation for the next stage.</i>
SFK005C	<b>Review required skills present in the team and improve where necessary</b>	<i>Internal availability of skills and competences necessary for the management of the EC reduced dependency on external help and ensures that skills are applied specifically to the EC's demand. Skills may include negotiation, communication, accounting, engineering, planning, lobbying, legal knowledge, etc. See also Community Guide action(s): 18: Organisation is ready for the preparation stage.</i>
SFK006C	<b>Ensure regular coordination of targets, actions and problems in an open and transparent way</b>	<i>Regular coordination of targets, actions and problems ensures a smooth functioning of the EC. informal and unstructured exchange impedes transparency and causes friction loss if information and decisions are distributed in a partial manner. See also Community Guide action(s): 33: Work out details with community working groups.</i>
SFK008C	<b>Where necessary, get external organisations to mobilise their resources on behalf of the EC</b>	<i>To develop the organizational environment in which community energy collectives operate there is a need for social network formation because social networks enable the mobilization of critical resources (like funds, competences, knowledge). Here, a social network is conceptualized as a system of interrelated actors who exchange resources and are mutually interdependent (Wasserman and Faust, 1994). Through interaction in networks, community energy collectives are enabled to exchange information, knowledge and resources. can take place. Different actors bring in different resources that are necessary to make community energy collectives flourish. See also Community Guide action(s): 0.</i>
SFK009C	<b>Identify influential individuals and get them on board with the EC's goals</b>	<i>These are individuals that have an influence in the community and can set a good example in convincing members of the community to be part of the EC. See also Community Guide action(s): 18: Organisation is ready for the preparation stage.</i>
SFK010C	<b>Increase diversity among the supervisory board</b>	<i>Good leadership requires having a representative and inclusive EC board. Lacking representativeness of the local community or lacking inclusiveness altogether will render the EC without legitimacy, which will lead to lack of acceptance of decisions made, social resistance, ineffective decision-making, and poor implementation. See also Community Guide action(s): 1: Setting up a core team; 13: Mandate for setting up legal entity.</i>
SFK011C	<b>Decide on how to engage or cope with passive membership (e.g. with members having financial participation - i.e. shares -, but are not involved in other ways).</b>	<i>Active members are of critical importance to a EC as an organisation that often relies on volunteers (and especially during the start-up phase). See also Community Guide action(s): 23: Activate a broader group of participants.</i>
SFK017T	<b>Devevelop and/or prepare working groups to start working on the business case and citizen engagement actions.</b>	<i>Working groups are members of the energy community that take up specific roles for different activities within the community. They are important in working out details regarding the business case, citizen engagement approach, and eventually the implementation of the project activities. There are four main workflows (as described in the methodology guide) that the working groups can be active in: citizen engagement and communication, technology and business case, partners and governments, and organisation and financing.</i>
SFK018T	<b>Prepare your EC as a professional organisation to have the right capacities to commence implementing projects and actions that work.</b>	<i>The next stage will be the implementation stage. In this stage you often need other skills and capacities than in this preparation stage. This means you need to re-evaluate the role of all active members. Oftentimes in the implementation stage, you move from volunteering activities (in volunteer time) to daily paid work. This requires you to look whether your current project team has the commitment and the expertise for the next stage.</i>

OAS001C	<b>Ensure transparency in decision making, and involve members democratically in (important) decisions.</b>	<i>Transparency means that everyone understands both the decision-making process and the thinking behind any decision in which they have an interest. Having a transparent decision process means that all stakeholders make the decision at the same time. This helps avoid misalignment. Participative decision-making (PDM) is the extent to which decision-makers allow citizens (or EC members) to share or participate in organizational decision-making. A deeper degree of participation leads to stronger commitment of members. Participatory decisions tend to be better, because they have been scrutinised and refined from multiple perspectives. Close interaction ensures transparency and that all members carry decisions.</i>
OAS002C	<b>Ensure the rules for decision making are regularly reflected upon, evaluated and updated by the key EC members. Changes to decision making rules need to be communicated to the wider membership.</b>	<i>Clear decision making procedures lead to transparency and therefore trust in a EC. As new members join the EC and the EC's activities evolve, the procedures currently in place should be re-checked whether they are deemed democratic and inclusive by all members, and whether they fit to the current set of activities.</i>
OAS003C	<b>Streamline decision-making using easily accessible language, and apply rules to make decision-making more clear and accessible for all members.</b>	<i>Effective decision-making is fundamental to leadership. Effective decisions result from a systematic process, with clearly defined elements, that is handled in a distinct sequence of steps' [Drucker, 1967]. It ensures that EC staff and members drive the RECs mission forward and is not squandered in internal squabble and time consuming, inefficient processes. It also allows for rapid reaction to changes in the EC's organizational environment, or in the energy system (and adapt the EC's strategy accordingly).</i>
OAS008C	<b>Develop a clear governance structure to govern the energy collective. Take into account how to cope with organizational growth and increased complexity.</b>	<i>Governance structure is concerned with structure and processes for decision making, accountability, control and behaviour at the top of an entity. Governance influences how an organisation's objectives are set and achieved, how risk is monitored and addressed and how performance is optimised.</i>
OAS009C	<b>Differentiate governance circles (on strategic matters; monthly basis) from operational circles (on thematic, operational matters; weekly basis), and implement them.</b>	<i>In a REC governance cycles can be organised to discuss how strategic and operational problems can be resolved.</i>
OAS011T	<b>Develop clear, responsible and transparent management practices</b>	<i>ECs are also SMEs, in order to ensure the safe delivery of the services to the community, RECs must develop clear, responsible and transparent management practices. On top of this requirement, RECs must ensure that their management structure integrates well with the members governance structure.</i>
OAS012C	<b>Decide on how to increase General Assembly attendance of your members, and how to make it more representative of the whole membership of your energy collective/cooperative?</b>	<i>General Assembly turnout (i.e. percentage of EC members attending the General Assembly) is important because of the legitimacy it gives to decisions made there, and approval of the policy, strategy and operations proposed and implemented by the EC's Board.</i>
FIN002T	<b>Make an assessment on how to clear the RECs debts</b>	<i>Assets provide financial security for taking out loans or receiving external funding. In a consolidated business model, upfront investment costs amortize over time. See also Community Guide action(s): Activity 27: Detailed community energy plan.</i>
FIN009C	<b>Reduce reliance on public funding</b>	<i>Financial aids, subsidy programs, investment grants, tax exemptions and similar provide a niche environment protected by market forces where a EC may develop at significantly smaller financial risk. As a EC establishes itself on the market, reliance on public funding should gradually phase out. See also Community Guide action(s): 24: Re-confirm contracts for cooperation with partners as legal entity.</i>
FIN011T	<b>Calculate cash burn rate</b>	<i>Cash burn rate refers to the rate at which the EC is spending its initial capital to finance overhead before generating a positive cash flow. This indicator gives an idea of how long a EC can stay active before running out of resources and declaring bankruptcy. Includes checking if the EC is breaking even, healthy financial business case and availability of funds for different activities. See also Community Guide action(s): 20: First business case.</i>
FIN012C	<b>Write a clear business plan that helps define milestones, supervise the progress and ensure common visions of members</b>	<i>A clear business plan helps to define milestones, supervise the progress and ensure common visions of members See also Community Guide action(s): 27: Detailed community energy plan.</i>
FIN014C	<b>Acquire additional funds to generate cash flow</b>	<i>Subsidies, crowdsourcing etc See also Community Guide action(s): 0.</i>
FIN015T	<b>Have the EC's business case evaluated</b>	<i>Each business case for a (renewable) energy projects, and also the business model for the EC at large should be critically assessed and evaluated on financial-economic, technical and organisational feasibility. Without critical assessment poor business cases and models are made that will fail when projects are implemented and during EC operations. This will greatly hinder the EC's development. See also Community Guide action(s): 27: Detailed community energy plan.</i>
FIN016T	<b>Take actions to start developing a(feasible) business case.</b>	<i>The business case development processes include the degree and method of citizen involvement. The business case working group develops various models that could be feasible for the EC. The design and business case becomes part of the community energy plan. This will be the basis on which various parties and partners can decide to make the transition to the preparation stage, according to the methodology guide.</i>
FIN017T	<b>Undertake actions to get commitment and trust from cooperation partners to contribute financially.</b>	<i>It is important to get financial commitment from cooperation partners such as local stakeholders. Financial commitment from members is important in order to cover costs for activities such as application of permits, final business case, technical construction calculations, project managers, and community energy process leaders whose work will become more extensive. There are several possible sources where this financial commitment can be secured from, these include: subsidies from municipalities and regional governments to facilitate the bottom-up initiatives in their communities.</i>
FIN018T	<b>Prepare and organise a meeting where a final decision can be made by the project consortium on the key investment to the project.</b>	<i>Taking final investment decisions is important for the EC as it needs to be transparent as to where the investments are coming from. In making investment decisions, a lot needs to be discussed, such as the minimum dividend level the investment will yield? Also, what will be done with any extra profits if there is a conflict between the member and the energy community about the investment? The more transparent the decision making on investments is, the better the EC will operate.</i>
FIN020T	<b>Finalise contracts with suppliers of goods and/or services.</b>	<i>Finalizing contracts with suppliers can be done after the EC has completed a risk analysis based on the suppliers' conditions and the implications of their changes thereof. Only finalise the contracts with suppliers if the project is deemed financially viable.</i>
FIN021T	<b>Gain commitment from key stakeholders on financial matters, in particular investment.</b>	<i>Financial commitment from stakeholders means that current and new members of the EC are pledging their commitment by investing in the RECs activities going forth. According to the methodology guide, this level of participation by the members gives stakeholders such as banks, investors or municipalities the guarantee that you are ready for the next stage, and that the project does not risk a lack of participation and commitment on the part of the community. This is one of the most important milestones to reach in a community energy project and a reason to celebrate with your members.</i>
FIN022T	<b>Prepare and have meeting to discuss Go/No go for starting the implementation of (the) project(s).</b>	<i>At the final phase of the preparation phase, there is a need to involve your members in a decision whether to continue. In the first place, you have finished all contracts, and you have prepared your organisation for the next stage. At this phase, all the decisions should be transparent, including those of paying some of the members, depending on their responsibilities.</i>
FIN023T	<b>Build a risk register</b>	<i>Specifying risks and mitigating/contingent actions enables foresight and early action on upcoming threats, which may prevent future harm to the organization.</i>
POL001C	<b>Actively engage local authorities</b>	<i>EC's collaboration with local government enables access to expert knowledge, support during critical phases and co-design of the (local) energy system. Announcement and support by authorities may increase public acceptance. Sound collaboration with local government is critical to EC's existence and chances of survival. See also Community Guide action(s): 4: Contact with the municipality; 14: Formalising cooperation with municipality and other partners.</i>
POL002C	<b>Get in contact with a national CE association and inquire about membership</b>	<i>Integration into external networks shows willingness to share knowledge and the amount of support that can be mobilised. See also Community Guide action(s): 15: Prepare to set up legal entity; 23: Activate a broader group of participants .</i>
POL003C	<b>Define solutions to overcome the bureaucratic barriers encountered</b>	<i>Identifying bureaucratic barriers such as those involving local and regional regulations is important in order to find solutions. It's important to refer to what other RECs have done in the past to overcome such barriers and strengthen their activities. See also Community Guide action(s): 19: Analysing regulations, needed permits and its costs .</i>
POL003T	<b>Identify bureaucratic barriers</b>	<i>There are many challenges that EC's encounter in their operations. Bureaucratic challenges have to do with regulations, rules and their implementation by (public) authorities. Bureaucratic barriers can strongly slow down the development of RECs (e.g. related to and slowing down permit request processes). Strategies for overcoming barriers include legal procedures as well as informal processes. Bureaucratic barriers should be identified at an early stage, and not only during operational activity like implementation of a (renewable) energy project. See also Community Guide action(s): 19: Analysing regulations, needed permits and its costs .</i>

POL005C	<b>Reach out to local officials and civil servants and get them on board</b>	<i>ECs depend a lot on support by municipalities. Therefore it is necessary that there are civil servants and/or public officials at the municipality who have a general positive intention towards supporting ECs. If they are absent it becomes more difficult for RECs to benefit from the necessary services provided by municipalities (like granting permits to start solar parks, etc). See also Community Guide action(s): 14: Formalising cooperation with municipality and other partners; 24: Re-confirm contracts for cooperation with partners as legal entity.</i>
POL006C	<b>Communicate your experiences with your association or federation</b>	<i>Membership at national or regional CE networks, federations or associations contributes to creating alignment inside a niche and coordinating the actors that can support local projects. Moreover, networks are perceived as important in empowering local RECs with knowledge based on years of experience. See also Community Guide action(s): 15: Prepare to set up legal entity; 23: Activate a broader group of participants .</i>
POL007T	<b>Prepare, discuss and reach an agreement with the municipality on a formalised status of cooperation.</b>	<i>This activity requires that you, as a citizen initiative, choose to commence a constructive partnership with your municipality for the longer term. Also, you want to start a partnership at an administrative level. For the municipality, this often means a change in their role and working method, so it is important that you pay attention to this.</i>
POL008C	<b>Map and analyse the required regulations, permits and cost that go along with these.</b>	<i>According to the methodology guide, it is important to make an analysis of the regulations and permits in order to avoid surprises in the preoperative stage that can cause significant delays in implementing various important activities of the EC. The regulations should not only focus at the project level, but also at entire organisation and its operations.</i>
TEC001T	<b>Create an Energy Potential Map</b>	<i>mapping present and future demand and (locally) available supply potentials and storage opportunities See also Community Guide action(s): 11: Technical design.</i>
TEC002T	<b>Assess the building stock in your EC, identify insulation and reuse opportunities</b>	<i>By identifying opportunities, the EC will be able to scale their activities in the community and beyond. This will also assist in the maturity process of the EC. See also Community Guide action(s): 11: Technical design.</i>
TEC003T	<b>Define technology roadmap for each project</b>	<i>this is essentially future proofing your technology choices - ensuring future availability of supply, and use of no regret options where available See also Community Guide action(s): 11: Technical design.</i>
TEC007T	<b>Write data management plan</b>	<i>Renewable energy systems and community platforms invariably come with IT systems, that may be connected to the internet and access/store personally identifiable information. A data management plan (DMP) involves GDPR compliance, and increases trust of members - technology developments mean a DMP may need updates every few years See also Community Guide action(s): 19: Analysing regulations, needed permits and its costs.</i>
TEC013T	<b>Map the existing energy system</b>	<i>Assessment of the current energy system of the venue where the EC wants to plan and run energy projects is of eminent importance. The current energy systems (its infrastructure and its boundaries) determine the conditions whether an energy project can be feasibly implemented or not. It also addresses key institutional elements like ownership of energy assets (like the DSO owning and operating energy infrastructure). This is critical for the design and development of future energy projects and their business cases. See also Community Guide action(s): 5: General technical plan.</i>
TEC102C	<b>Provide more value propositions (financial gain, social prestige, environmental action, etc.) for (potential) members</b>	<i>Multiple value propositions (financial gain, social prestige, environmental action, etc.) attract and retain more members with selected interests. Robust if public interest in a particular proposition declines or market demand shifts. See also Community Guide action(s): 13: Mandate for setting up a legal entity.</i>
TEC105T	<b>Create a structured service offer. What are you providing to your members, at which cost?</b>	<i>The service offer is the content of the service that the EC plans to offer to your members, including a single value proposition and a notion of positioning in the market. See also Community Guide action(s): 35: Create and present a final proposition to the community.</i>
TEC106C	<b>Connect to external actors and use their expertise (for example energy utilities, grid operators, local to national governments, environmental NGOs, civil society, etc)</b>	<i>Enables access to expert knowledge, support during critical phases and co-design of the (local) energy system. External actors comprise energy utilities and grid operators, local to national governments, environmental NGOs, civil society, etc. See also Community Guide action(s): 15: Prepare to set up a legal entity; 18: Organisation is ready for the preparation stage; 39: Prepare your org for the next stage .</i>
TEC108C	<b>Request the required permits</b>	<i>Legal permits are of imminent importance to implementation and exploitation of EC (renewable) energy projects. Without (or with great delay) them the projects cannot be implemented nor exploited. This is a big threat to the EC. See also Community Guide action(s): 29: Apply for all necessary permits.</i>
TEC111T	<b>Reconfirm the contracts or agreements made with cooperation partners</b>	<i>Reconfirming contracts and/or agreements made earlier with cooperation partners is important for the legal entity especially with known technical and financial details of the EC.</i>
LEA001C	<b>Identify useful handbooks, guides and tools and make them available for use</b>	<i>Learning is an important aspect to avoid mistakes. RECs who learn from others have a clear advantage. See also Community Guide action(s): 41: Communicate the proposal to the community .</i>
LEA002C	<b>Provide a means for members to remark, reflect and assess on EC operations</b>	<i>Successful development of niche innovations requires to reflect on and incorporate the expectations of members. Feedback may be given orally or in written form, through informal or institutionalized channels; in any case, it should be stated how remarks are received, assessed and acted upon. See also Community Guide action(s): 33: Work out details with community working groups .</i>
LEA008C	<b>Make use of intermediary agents or the capacity building platforms they operate</b>	<i>Intermediary actors are organizations or individuals engaging in work that involves connecting local projects with one another, with the wider world and, through this, helping to generate a shared institutional infrastructure and to support the development of the niche in question. They focus on creating conditions in which community energy initiatives can potentially scale, expand or replicate: (i) building capacities and (institutional) embedding; (ii) alleviating barriers and lock-ins; and (iii) opening the existing regime for the uptake, acceptance or breakthrough. The intermediary actors can assist in facilitating acceptance of community energy initiatives by a wider group of people. See also Community Guide action(s): 5: General technical plan; 14: Formalising cooperation with municipality and other partners.</i>
LEA010C	<b>Make (more) use of (serious) games or gaming tools</b>	<i>A serious game or applied game is a game designed for a primary purpose other than pure entertainment. The "serious" adjective is generally prepended to refer to video games used by industries like defense, education, scientific exploration, health care, emergency management, city planning, engineering, and politics. Serious games can be used by EC to simulate (decision-making) situations, which can help them to learn, anticipate and improve their strategic and operational skillset of decision-making in real-life situations like energy project configurations. See also Community Guide action(s): 0.</i>
LEA014T	<b>Contact REScoop.eu (or other community energy federation) and request mentor network support.</b>	<i>Your EC can learn from experiences and lessons from other cooperatives when it starts participating in REScoop.eu's mentor network. Here, (the services of) experienced mentors are available that can help training start-up ECs, so that they can learn to professionalise and mature as an organisation. See also Community Guide action(s): 11: Technical design; 39: Prepare your org for the next stage.</i>
LEA015T	<b>Start using online media (e.g., MOOCs) for learning or training purpose in your energy collective?</b>	<i>MOOCs and other online media are made available by REScoop.eu and national energy cooperative federations so that you can learn good practice, and learn about other benefits that are essential to your EC's professionalisation and operations. See also Community Guide action(s): 0.</i>

## STAGE 3: IMPLEMENTATION - ACTIONS TO TAKE

SFM005C	1	<b>Persuade more members of the collective to participate in the annual general assembly</b>	<i>The General Assembly is highest tier of decision-making in a EC. This is where the EC Board presents its plans, is accountable for its actions, and where the key democratic decision-making on strategy and operations of the EC takes place. What should be taken into account here is that after initial excitement and interest, mature RECs find it increasingly harder to engage their members in regular decision-making (i.e. in persuading their members to attend the annual General Assembly), which could lead to a low degree of social and democratic legitimacy. Continued involvement of members is important and typically manifests in the attendance of members in general meetings, in particular at the annual General Assembly. See also Community Guide action(s): 23: Activate a broader group of participants; 26: Community meeting / General Assembly .</i>
SFM015T	no	<b>Increase visibility towards local community as well as services offered by the REC.</b>	<i>Membership size is important to ECs. Not just in terms of support, social legitimacy and human capacity but also in terms of (initial) cash flow. When energy communities try to involve citizens in collective action beyond their core membership group, they can focus on snowballing, and extending to supportive groups or can try to reach the broader public. See also Community Guide action(s): 6: Community meeting: networking within the community; 10: Communicating with a broader group of citizens; 12: Community meeting; 23: Activate a broader group of participants.</i>
SFM016C	3	<b>Increase visibility and raise awareness about the REC in the local community.</b>	<i>To increase visibility, the REC can use of energy ambassadors, awareness raising events, inspiration sessions and using mock homes including state of the art energy efficient technology as a role model. Incentive tools (like rewards or competitions) are also observed but appear less frequent. See also Community Guide action(s): 6: Community meeting: networking within the community; 10: Communicating with a broader group of citizens; 12: Community meeting; 23: Activate a broader group of participants.</i>
SFM018C		<b>Conceive plan to engage residents in neighbourhood actions.</b>	<i>It is important for a REC to reach a great number of local households (i.e. community members). Both in terms of increasing its membership, as well as the cash flow it generates from the yearly contribution. This is particularly important to the business model of a REC when the REC is starting-up. See also Community Guide action(s): 6: Community meeting: networking within the community; 10: Communicating with a broader group of citizens; 12: Community meeting; 23: Activate a broader group of participants.</i>
SFM021C		<b>Improve control mechanisms to assess and improve the composition of the EC's board regularly.</b>	<i>Most RECs are based on the a representative democracy model. One of the key signal of an healthy governance structure is a regular renewal of the board of the EC. Regular renewal of board members signals good democratic practice, and lowers the risk of an oligopolies, misues of power and favoritism. See also Community Guide action(s): 15: Prepare to set up a legal entity; 22: Setting up a legal entity.</i>
OAS004C		<b>Define and clarify rules that limit the number of Board members.</b>	<i>Most energy communities are based on the a representative democracy model. One of the key signals of an healthy governance strucutre is a regular renewal of representatives of the members, at the head of the EC.</i>
OAS010C		<b>Establish a core leadership team with clear leading tasks.</b>	<i>Leadership can be organised in different ways. But as a rule of thumb good leadership ought to be discussed at the General Assembly and be codified into the EC's constitution.</i>
OAS010T		<b>Define rules for selecting leaders.</b>	<i>Rules are important to decision-making. Also with regard to selecting leadership. A rule is a conditional statement that can easily be understood. They should be clear and transparent to all EC members. If a leader is chosen in the absence of rules, their leadership can be considered illegitimate, which may lead to lack of support and ineffective decision-making. Unclear leadership may incur diffusion of responsibility and lack of ownership for failures.</i>
OAS011C		<b>Reduce reliance on interpersonal relationships, improve management practices and staff collaboration mechanisms</b>	<i>ECs are also SMEs, in order to ensure the safe delivery of the services to the community, RECs must develop clear, responsible and transparent management practices. On top of this requirement, RECs must ensure that their management structure integrates well with the members governance structure.</i>
FIN001C		<b>Reevaluate the business model to improve financial-economic viability</b>	<i>Return on investment from EC activities is important for a EC to run a healthy business model and allow to build up assets and capital stock. (Renewable) energy projects implemented by the EC require a healthy business case. Without a feasible and healthy business model and feasible business cases for its (energy) projects, the EC cannot operate, and has no future in the long run. See also Community Guide action(s): 25: Getting financial commitment for next stage; 35: Create and present a final proposition to the community.</i>
FIN002C		<b>Diversify the EC's assets more</b>	<i>Assets provide financial security for taking out loans or receiving external funding. In a consolidated business model, upfront investment costs amortize over time. See also Community Guide action(s): 9: Financial commitment for next milestone.</i>
FIN003T		<b>Reevaluate business model to improve profit margin</b>	<i>The break-even point is the moment when operational revenue surpasses your operational cost. This is the point where your service starts to turn a financial profit. However, this is not the debt free point. See also Community Guide action(s): 0.</i>
FIN004C		<b>Increase cash flow, and reconsider running expenses (perhaps lowering them of cash flow is lower than expected).</b>	<i>Positive cash flow provides enough incoming revenues to pay running expenses. See also Community Guide action(s): Activity 27: Detailed community energy plan.</i>
TEC005C		<b>Reevaluate chosen technologies</b>	<i>A newly developed technology increases the risk of technical difficulties in implementation or even breakdown, makes it difficult to learn from best-practice examples and to convince local communities and politicians. See also Community Guide action(s): 11: Technical design.</i>
TEC006C		<b>Improve security of online platforms and control systems</b>	<i>Renewable energy systems and community platforms invariably come with IT systems, that may be connected to the internet for monitoring and control. Ensuring continuity of operations by preventing intrusions increases reliability of operations. See also Community Guide action(s): 19: Analysing regulations, needed permits and its costs.</i>
TEC007C		<b>Ensure dataplan is applied and kept up to date</b>	<i>Renewable energy systems and community platforms invariably come with IT systems, that may be connected to the internet and access/store personally identifiable information. A data management plan (DMP) involves GDPR compliance, and increases trust of members - technology developments mean a DMP may need updates every few years See also Community Guide action(s): 19: Analysing regulations, needed permits and its costs.</i>
TEC011C		<b>Increase renewable energy production, improve energy savings and assess peak demand</b>	<i>The EC should ensure that it has sufficient energy to satisfy member demand. This can be done through increasing and diversifying the means of RE production through further investments and broader partnerships. See also Community Guide action(s): 38: Finalise contracts with suppliers .</i>
TEC012C		<b>Increase renewable energy production and improve energy savings, reduce reliance on grid</b>	<i>The EC should assess and strive for reaching CO2 emissions reduction goals as much as possible. At the last maturity stage of the RECs development, through the technical indicator, it should be clear how much emission reductions can be reached. See also Community Guide action(s): 35: Create and present a a final proposition to the community.</i>
TEC012T		<b>Improve energy savings behaviour of members</b>	<i>Because of their proximity and privileged position in the local community structure RECs have the potential to support and persuade many local community members to adopt energy saving behaviours, and significantly lower their nergy consumption rates. See also Community Guide action(s): 5: General technical plan; 8: Starting document community energy project.</i>
TEC014T		<b>Map ways and prepare a plan to produce sufficient energy itself to satisfy member/client demand.</b>	<i>The EC should map ways and make plans to produce sufficient energy itself to satisfy member/client demand at all times. This can be done through increasing and diversifying the means of RE production through further investments and broader partnerships. See also Community Guide action(s): 0.</i>
TEC015T		<b>Map ways and develop a plan to produce sufficient energy itself to satisfy peak member/client demand at all times.</b>	<i>At the implementation stage of the project, the REC should implement a strategy, that will ensure production of sufficient energy to satisfy peak member/client demand at all times. See also Community Guide action(s): 0.</i>
TEC103T		<b>Hire paid staff</b>	<i>Hiring employees indicates the presence of a steady stream of revenues. Employees provide readily available expertise. See also Community Guide action(s): 18: Organisation is ready for the preparation stage .</i>
TEC109C		<b>Transfer energy project assets to the EC</b>	<i>Local ownership of energy assets (by the EC itself, or its members) is of great importance to energy communities. It is part of the cooperative alliance guidelines, and greatly contributes to energy democracy. See also Community Guide action(s): 9: Financial commitment for next milestone.</i>
LEA004C		<b>Identify areas in which members need coaching, set up a coaching programme</b>	<i>A coach provides space and structure for the reflection that is necessary for (personal) learning and growth. They can help EC members understand what the core values are that the EC cherishes (and may be shared with its members) and where their actions diverge from these values or stated goals, and guide them in understanding and actions to overcome them. They can also help to raise awareness, for example about the practical use of renewable energy technology or share energy saving tips, and help households save energy. See also Community Guide action(s): 0.</i>
LEA005C		<b>Create opportunities to speak, represent or disseminate the benefits of EC to a larger audience at existing external events</b>	<i>Willingness and capacity to explain and promote the EC to non-members. External events could be municipal events, sustainability days etc, promotion could be a speaking opportunity, an information stand etc. See also Community Guide action(s): 41: Communicate the proposal to the community.</i>

LEA011C

**Make more use of reflexive learning on own organizational development and projects**

*Reflexive learning refers to a type of learning in which EC's (i.e., their board or members) explore their experiences to become more conscious, open-minded, and self-critical. The EC - as a learning organization - accepts feedback and criticism, thinks independently, and produces tangible ideas. This also holds that a EC will analyse what happened, and automatically self-assess and react to circumstances as they are happening (Dewey). The EC as an organization will know itself well, and will look both inwardly as well as outwardly. Reflection on experiences can help to open up, and conceive or design new experiences (or projects for that matter). (Kolb, 1984; Boone, 1985). See also Community Guide action(s): 0.*

LEA012C

**Engage local, national or international research institutes to foster (mutual) learning**

*Research institutes can collaborate with RECs in different ways and help them create added value. For instance, by running a system analysis for a (renewable) energy project, design an energy installation, or the assess a business case for (renewable) energy project the EC aims to develop. Research institutes can also help by providing students who perform internships at the EC and provide human capital, or by becoming involved in a learning community that accomodates the EC and provide feedback to the way the EC is performing or projects are designed. Of course, research institutes can also help to provide state of the art knowledge, or collaborate in acquisition of funds for experimental (renewable, community) energy projects. See also Community Guide action(s): 0.*

## STAGE 4: OPERATION - ACTIONS TO TAKE

SEK003C	<b>Try to diversify key personnel in skills sets and competences.</b>	<i>As a EC matures and professionalizes so does its set of skills and competences. This should diversify, and not only stand out in terms of e.g., electrical engineering expertise. Also other skillsets and competences are required, like on law, social science, or finance. High diversity provides a differentiated skillset, multiple perspectives and access to networks for the EC. See also Community Guide action(s): 33: Work out details with community working groups.</i>
SEK004C	<b>Increase attendance of key personnel at meetings</b>	<i>Highly committed people are more willing to invest time and resources in order to promote the EC. Key personnel act as ambassadors and frontrunners, spreading their commitment to members. See also Community Guide action(s): 15: Prepare to set up a legal entity; Set up operational committees.</i>
FIN005C	<b>Consider payback flows (e.g., reduced energy prices, interest rates) and re-investment of profits</b>	<i>Provides an incentive for continued membership. When interpreting this indicator, consider payback flows (e.g., reduced energy prices, interest rates) and re-investment of profits. See also Community Guide action(s): Working towards a professional design and organisation.</i>
FIN007C	<b>Repay debts, decrease dependence on external funding institutions</b>	<i>Financial ratio that allows to estimate the level of independence of the EC from external funding institutions, mostly banks. See also Community Guide action(s): 42: Get financial commitment from stakeholders for the next stage.</i>
FIN008C	<b>Repay debts or increase revenue</b>	<i>Financial ratio calculating the amount of time that you are able to cover your debt with your revenues. The goal of this ratio is to see how long your activities can last before defaulting on your obligations. This ratio should preferably be calculated over the span of 1 fiscal year. See also Community Guide action(s): Activity 27: Detailed community energy plan.</i>
TEC004C	<b>Improve reliability of systems and services</b>	<i>Repeated malfunctions, particularly in the initial trial phase after introducing new technologies or services, impair the provision of value to members and undermine trust from external actors. See also Community Guide action(s): 0.</i>
TEC008C	<b>Improve energy savings measures of the EC's systems and buildings</b>	<i>Achieving pre-set energy saving goals is important to the effectiveness and credibility of the REC. Without achieving its goals members will be dissatisfied, and the REC will lose reputation and legitimacy. See also Community Guide action(s): 0.</i>
TEC009C	<b>Increase renewable energy production</b>	<i>Achieving pre-set renewable energy goals is important to the effectiveness and credibility of the REC. Without achieving its goals members will be dissatisfied, and the EC will lose reputation and legitimacy. See also Community Guide action(s): 0.</i>
TEC010C	<b>Improve the EC's agility and competitiveness by fostering growth</b>	<i>Achieving pre-set renewable energy goals is important to the effectiveness and credibility of the REC. Without achieving its goals members will be dissatisfied, and the EC will lose reputation and legitimacy. See also Community Guide action(s): 0.</i>
TEC107C	<b>Increase the number of services the EC provides to its community</b>	<i>A diversified portfolio is more robust against adverse, unforeseen market developments. Multiple services enable a EC to assume a central role in energy islands. See also Community Guide action(s): 35: Create and present a final proposition to the community.</i>
LEA003C	<b>Make sure each key function has at least one backup person, include a formal training programme</b>	<i>Learning from each other ensures that skills are built up and experiences enter EC procedures. Retaining knowledge if key personnel leave the EC. Training key personnel in taking over other duties or in substituting for other personnel who withdraw temporarily. See also Community Guide action(s): 33: Work out details with community working groups.</i>
LEA006C	<b>Diffuse knowledge and experience both actively (meetings, sessions) and passively (websites, repository) with other ECs</b>	<i>Mature, robust business models are adaptable to various contexts. Key personnel of the EC diffuse their knowledge to other, less mature ECs. See also Community Guide action(s): 23: Activate a broader group of participants .</i>
LEA007C	<b>Refine the existing shared vision</b>	<i>Existing members communicate the core values and the mission of the EC to new members. This encourages existing members to question presuppositions, and allows new members to introduce new perspectives. See also Community Guide action(s): 2: Defining vision, scope and goals .</i>
LEA013T	<b>Develop a replication site in another town, region, or country</b>	<i>Replicating successful projects of its own is an important way for a EC to scale its strategy, business model or operations, and make more societal and environmental impact. See also Community Guide action(s): 0.</i>



# Renewable Energy Community development dashboard

this tab provides an overview of your EC's progress

## define your stage: 2

category	achieved	target
renewable energy production:	19 MWh/yr	27%
primary energy savings triggered:	20 MWh/yr	100%
CO <sub>2</sub> emissions reductions triggered:	134 tons/yr	52%
total amount of money invested:	€ 5,000,000	3%

your goals:	
desired share of thresholds achieved (0 to 100%):	70%
desired average grade (0 to 5):	3.5

In this DASHBOARD tab you can **track your community's progress**, both **organisationally** by following the stages (on the right), and on a **project level** with measurable targets (above).

In the dark green bar at the top you can define the stage your community is in. You can see your current score, based on which questions you have answered (and which ones you consider to be not applicable to your community).

If these have reached your goals (as defined above, default values are 70% of thresholds and a score of 3.5 out of 5), you should consider moving to the next stage.

### STAGE 1: INSPIRATION

% of thresholds reached:	25%
threshold indicators still open:	6
continuous indicators:	5 0
	4 0
	3 0
	2 0
	1 0
non relevant indicators (total):	0
average grade:	?

In this inspiration phase, **the core group is structuring the key components of the energy community**. At this point, the question is less about services and project and more about the creation of the collective group structure. This area should start with a checklist of the following documents:

- List of members
- Rules for decision making
- Vision and mission document

Those will be the three indicators of for your first level of maturity, allowing you to start tracking the first indicators: Number of Members, Decision making, Shared vision.

### STAGE 2: PREPARATION

% of thresholds reached:	0%
threshold indicators still open:	29
continuous indicators:	5 0
	4 1
	3 0
	2 0
	1 0
non relevant indicators (total):	1
average grade:	4.0

In the preparation phase, **the community is getting ready to handle to start of an energy project**. This preparation phase usually prepares a share offering and fund raising campaign that should allow you to build your community. The key component of this phase is therefore to track the intensification of the commitment and the interactions between community members. The indicators will be: Commitment of members and Efficacy of interactions.

### STAGE 3: IMPLEMENTATION

% of thresholds reached:	0%
threshold indicators still open:	6
continuous indicators:	5 0
	4 0
	3 1
	2 0
	1 1
non relevant indicators (total):	0
average grade:	2.0

In the implementation phase **the structuring and launch of the project is under way**. This is a time to test and assess the execution of your governance mechanisms. In order to assess this, we propose to track the renewal of your representation institutions. An healthy governance mechanism should be seeing a level of turn-over in the representatives of the members. Start with assessing if your governance mechanism foresees mechanisms to ensure regular turn-over and protection against conflict of interests. The indicator will be: Efficacy of representation.

### STAGE 4: OPERATION

% of thresholds reached:	0%
threshold indicators still open:	1
continuous indicators:	5 0
	4 0
	3 0
	2 0
	1 0
non relevant indicators (total):	0
average grade:	?

In the operation phase, **your service should be stable and your energy community should be equipped for a sustainable development**. The operation phase is a time to challenge and deepen the anchorage of your energy community into your local community. For this purpose, there are two major points of development : diversity and quality of the engagement of members. Diversity is crucial as it allows you to be more resilient and more representative of your local community's members. The indicators to assess those challenges will be: Diversity of members and Quality of interaction.



# Development Progress Tool colophon

The Development Progress Tool was developed as part of the Sustainable Collective Citizen Action for a Local Europe (SCCALE) 203050 research project.

The starting point of the SCCALE Development Progress Tool was the COMPILE maturity scale, as described in the COMPILE working paper (linked on the right here). COMPILE's list of Key Performance Indicators has been elaborated and applied in this tool. More information on the conceptual basis for the monitoring tool can be found in the SCCALE literature study (also linked on the right). The latest version of this tool can also be found there.

The SCCALE Development Progress Tool has been developed with the helpful feedback of all consortium members. Special thanks go to:

- REScoop: Daan Creupelandt & Stanislas d'Herbement
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- Porec: Dunja Babic & Gordana Lalic

## MORE INFORMATION

[SCCALE 203050 \(project website\)](#)

[SCCALE toolkit \(project repository\)](#)

[SCCALE Development Progress Tool \(find the latest version here\)](#)

[SCCALE literature study](#): Hoppe, T, A. Itten, F. Trovalusci, M. Fremouw. (2022). Energy Communities Coming of Age; Developing a Tool to Monitor Maturity and Scaling. Horizon 2020 SCCALE 203050 Deliverables 2.1 and 2.2. Work Package 2: Research and Academic Validation. Delft University of Technology. Delft. pp. 1-91.

[SCCALE Community Guide](#) (edition dec 2022 - check the TOOLKIT section on our website for newer versions)

[COMPILE \(project website\)](#)

[COMPILE working paper](#): Seebauer, S., Brenner-Fliesser, M., Tuerk, A., D'Herbement, S. (2022). Developing a tool to assess the maturity and growth of energy communities. COMPILE Working Paper. March 2022. pp.1-8.

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