



DECA

TOOLKIT QUICK START GUIDE

What this Toolkit can help with

The **Community Energy Project Pipelines Toolkit** is a practical, step-by-step guide for advisors, coaches, local authorities and community leaders who support local groups to initiate, plan and implement community energy initiatives. It brings together a robust **community energy business development methodology** and **supporting guidance** on community engagement, local capacity development, and technical concepts.

Used well, Toolkit helps advisors to effectively help community groups move from interest and early ideas toward clear project concepts aligned with local needs, assets, and stakeholder realities and then to credible business plans and bankable projects.

Who it is for

The Toolkit is primarily designed for practitioners who advise community groups (e.g., energy agencies, NGOs, municipal staff, local development bodies, and other intermediaries). It can also be used as a reference directly by motivated community groups, with facilitation/coaching support.

What's inside

A four-phase methodology for community energy initiative development:

1. Concept & Vision Shaping: participatory ideation and high-level concept planning.

2. Feasibility, Business and Investment Planning: team formation, service modelling, feasibility assessments, financial modelling, investment planning, governance planning and legal form choices, resulting in a robust business plan.

3. Implementation: investment raising, establishing the legal entity and governance, approvals, procurement, and construction/commissioning guidance.

4. Operation and Evaluation: ensuring robust operation, evaluation and scaling.



In addition, the toolkit includes guidance and supporting resources on:

- **Community Activation & Engagement** - to help build participation, trust and local leadership throughout the process.
- **Capacity Development** - explaining how to integrate the DECA Community Energy Training Programme alongside business/project development.
- **Technical Concepts** - offering examples of applicable renewable energy and efficiency concepts that can inspire and support early option assessment.
- Annexes with additional guides and templates (e.g., workshop guides, canvases, feasibility and business plan templates) to help structure and document progress.

How to use it

Start with Phase 1 to help a motivated community group co-create a shared vision, objectives, and an initial project concept. Use the engagement guidance to support the initiative to broaden participation and identify local champions. Then move to Phase 2 and guide the initiative through feasibility testing, developing a viable service and business model, and preparing an investment plan and governance arrangements. Phase 3 provides useful guidance for supporting implementation: raising investment, establishing the legal entity and governance, obtaining approvals, and managing procurement and construction. Phase 4 centers on reliable operations, monitoring performance, and scaling; however, the advisory needs for this stage will likely be more bespoke.

Adapting to your context

The Toolkit was designed for transfer across diverse national and local contexts. You are encouraged to adapt examples, terminology, and references to fit local regulations, available support schemes, and community priorities, while maintaining the overall logic and development sequence.

Quick checklist before you start

- Identify your target community group(s) and clarify the support role you will play (coach, advisor, facilitator, technical support).
- Review Phase 1 tools and plan an initial engagement moment (Intro training and/or Project-in-a-Day workshop).
- Collect basic local context information (energy needs/assets, key stakeholders, municipal priorities, likely constraints).
- Decide which templates you will use for documentation and tracking (options assessment, feasibility report, business plan, governance canvas).
- Agree on next steps and responsibilities with the community team (roles, timelines, communication routines).

Where to find the materials

The toolkit and supporting documents can be found in the DECA online Library: <https://interregdanube.eu/projects/deca/library>

TOOLKIT QUICK START GUIDE

CONTENTS

1. INTRODUCTION 5

Overview	5
How to use this toolkit	6
Toolkit navigation	6
To keep the process manageable, use the table below to select the intervention phase that fits your community's needs and timing.	
What is Community Energy?	7

2. METHODOLOGY FOR COMMUNITY ENERGY DEVELOPMENT 9

Phase 1: Concept & Vision Shaping	10
Overview	10
How to Approach	10
Outputs	12

Phase 2: Feasibility, Business and Investment Planning	13
Overview	13
Forming the Team	14
Business Service Modelling	15
Feasibility Assessments	16
Investment Planning	20
Governance Planning	24
Organisation Form	25
Output	27

Phase 3: Implementation	28
Overview	28
Investment Raise	28
Establishing Community Energy Entity and Governance	30
Legal and Regulatory Approvals	30
Construction	31
Output	32

Phase 4: Operation, Monitoring, Evaluation and Scaling	33
Overview	33
Output	34

3. COMMUNITY ACTIVATION and ENGAGEMENT GUIDANCE 35

Community Scan	36
Awareness Campaigns	37
Activating Local Leaders	37
Co-creation and co-production	38
Member engagement	39
Stakeholder Collaboration	39



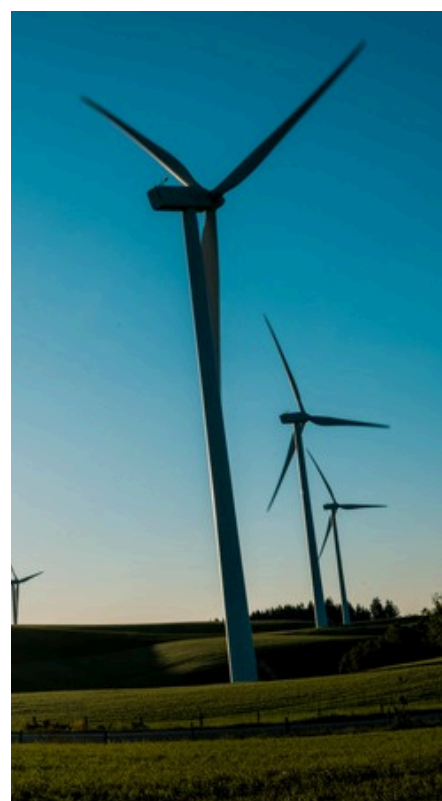
4. CAPACITY DEVELOPMENT GUIDANCE 41

Overview	41
Community Energy Training Programme Design	42
Deploying the Community Energy Training Programme	45



5. TECHNICAL CONCEPTS GUIDANCE 46

Overview	46
ANNEX 1: METHODOLOGY GUIDES / TEMPLATES	48
ANNEX 2: COMMUNITY ACTIVATION & ENGAGEMENT GUIDANCE	82
ANNEX 3: TECHNICAL CONCEPTS	83



1. INTRODUCTION

Overview

This toolkit is primarily intended to support and guide practitioners who are working as advisors and coaches to local community groups that are working to initiate, plan, and develop community energy initiatives.

The toolkit comprises:

1. A methodology for robust community energy initiative development (Section 2)
2. Community Activation and Engagement Guidance (Section 3)
3. Capacity Development Guidance (Section 4)
4. Guidance on Technical Concepts that can be tailored to local community energy applications (Section 5)

The methodology offers a robust approach through which an advisor can guide a community group through a community energy development process, made up of:

- Co-creatively shaping vision and concept plans/ideas for community energy initiatives.
- Advancing feasible business plans (technical, investment, legal and governance aspects) for local community energy enterprises.
- Take community energy development projects through implementation.
- Ensure robust operation, evaluation and scaling.



Supporting the methodology, the toolkit includes further guidance on:

- Community Activation and Engagement
- Capacity Development
- Technical Concepts

The Community Activation and Engagement Guidance supports the methodology by outlining key approaches to activating and engaging communities, covering activities that span all stages of the community energy development process.

The Capacity Development Guidance summarises the community energy training programme developed through the Danube Energy Communities Accelerator (DECA) project and can be integrated into advice and support for Community Energy Development. This training programme helps community leaders and citizens to develop their skills and knowledge of community energy development.

The Technical Concepts Guidance summarises ten technical concepts which can be drawn on for inspiration throughout the early phases of the community energy development process. They can be tailored to local community energy applications that align with local assets and interests.

How to use this toolkit

This Toolkit can be used (by advisors and coaches to local community groups and community energy initiatives) in two complementary ways:

1. as a step-by-step guide for advisors supporting a community group to develop a pipeline of community energy projects;
2. as a modular reference for designing workshops, trainings and coaching sessions.

It is intentionally flexible: helping to start with the minimum viable steps, then deepen the level of detail as the initiative matures.

Toolkit navigation

To keep the process manageable, use the table below to select the intervention phase that fits your community's needs and timing.

Phase	Purpose	Core outputs	Suggested tools/templates
Phase 1: Concept & Vision Shaping	Mobilise, build a shared vision and shortlist concepts	Vision + objectives; initial concept note; core team and next steps	Community Energy Project in a Day guide; initial mapping and visioning tools (Annex 1); Community activation tools (Annex 2)
Phase 2: Feasibility, Business and Investment Planning	Test viability and build a bankable business case	Chosen concept; lightweight feasibility check; draft business model; investment pathway	Business model, business plan, feasibility templates (Annex 1) and technical concepts (Annex 3)
Phase 3: Implementation	Set up the entity, secure approvals and deliver the project	Entity and governance in place; permits/approvals; funding secured; project delivered and commissioned	Implementation checklist and planning guidance (Section 2); engagement and stakeholder tools (Annex 2)
Phase 4: Operation, Monitoring, Evaluation and Scaling	Operate reliably, measure impacts and prepare replication	Operations roles and routines; monitoring KPIs; member communication; lessons learned and scale-up plan	Recommended: develop an Operations & Monitoring plan (Section 2; Sections 3-4)

Localisation note: the Toolkit structure is transferable across the Danube Region, but specific legal forms, permitting steps, support schemes, and financing instruments differ by country (and sometimes by network operator). Use the Toolkit's structure and templates but replace country-specific content with local requirements and examples.

Digital tools (optional): for online/hybrid sessions, use a shared whiteboard (e.g., Miro/Mural), live polling (e.g., Mentimeter/Slido), and shared documents for action tracking. Keep the toolset minimal to avoid excluding less tech-savvy participants.

Templates and canvases in the Annexes are designed to be adapted: copy them into editable formats (Word/Excel/online forms) and simplify them where needed. You do not need to complete every template for every community-use only the parts that support the next decision or action.

What is Community Energy?

Community energy initiatives are initiated, led, and governed by citizens with a strong social-benefit focus behind their business models.

Community energy initiatives take action in the energy sector to create locally beneficial, sustainable, and democratically controlled energy systems.

Community energy initiatives challenge the current system's failures, which still struggle to deliver the secure, affordable, clean energy services that our communities need.

This failure has little to do with technology; it is primarily a failure of decision-making, democracy and governance. Community energy initiatives take a positive approach to proving that it is possible to do better.

Successful community energy initiatives around the world often combine these common features.

- Shared ownership and governance;
- Collective financing models designed to share economic benefits;
- Non-profit models that function effectively as social enterprises;
- Local training & skills development;
- Advocacy and activism for system-wide change in the energy sector;
- Leading-edge innovation in renewable energy technologies, financing, and social enterprise business models.





The term "community energy" is not synonymous with "energy community". In the EU, the term "Energy community" has two specific legal definitions under the Electricity Directive and the Renewable Energy Directive: the citizens' energy community and the renewable power community. In the EU, energy communities are legal entities that have the right to participate in energy markets. Community energy, on the other hand, is a broader term that also includes initiatives not strictly tied to entities with the energy community status.



2. METHODOLOGY FOR COMMUNITY ENERGY DEVELOPMENT

Overview

The methodology follows a step-by-step approach that advisors and coaches can use to support local community groups that are working to initiate, plan, and develop community energy initiatives - ensuring successful community energy initiative development, from conceptualising and planning to implementation and evaluation.

By following these steps, any community can be supported through a robust community energy development process that results in viable renewable energy projects and social enterprise business plans.

This methodology includes the following phases of community energy initiative development:

- Concept & Vision Shaping
- Feasibility, Business and Investment Planning
- Implementation
- Operation, Evaluation and Scaling

Cutting across all the community energy development phases is the need for effective community activation and engagement, coaching and capacity development, as community energy projects fundamentally rely on the networks and capacities of community actors for their inception, development, promotion, scaling and ultimately success.



Phase 1: Concept & Vision Shaping

Overview

The concept and vision shaping phase includes a process of ideation and conceptual/high-level planning of a community energy initiative, while developing a common sense amongst a local community group/team of their vision for the impact they want to have. This involves exploring shared goals, evaluating options for developing a project outline, and co-creative discussions of all key elements of the community energy project.

The aim of this stage is to mobilise and upskill community members through co-design, co-creation, and participatory processes, preparing them to develop a community energy initiative in greater detail.

A key focus of this stage is to leverage the guidance on Community Activation and Engagement outlined in Section 3 to grow the group of local citizens interested in leading and supporting the development of a community energy initiative.

Effective communication should be a priority in organising workshops and trainings, with a focus on motivating community engagement and leadership, while encouraging equitable participation.

This phase will feel naturally complete when a group of citizens organises around a core vision for what they want to achieve and specific objectives for community energy action that they want to pursue further in pursuit of this goal.

The group's objectives should be specific, measurable, ambitious, yet achievable, relevant and time-bound (not too far into the future).

To support this work, the next section outlines practical approaches and tools that you can use to help communities co-create their project concept, from mapping local energy assets to running focused visioning sessions.

Capacity development and training courses are valuable during this phase. Section 4 of the toolkit includes guidance on training course formats and how to interweave them with this phase of developing a community energy initiative.

How to Approach

There are many approaches and tools available to support the co-creation of a shared vision and project concepts.

We recommend starting the co-creative concept and vision-shaping journey with a workshop method called "Project in a Day," which encompasses several impactful approaches and tools.

The key benefits of this method are its high level of participation and its focus on ensuring that community voices are heard. At the same time, it is time-efficient, covering all key aspects of project planning in a day (or half a day). Importantly, it is also action-oriented, so participants leave with clear commitments and next steps.

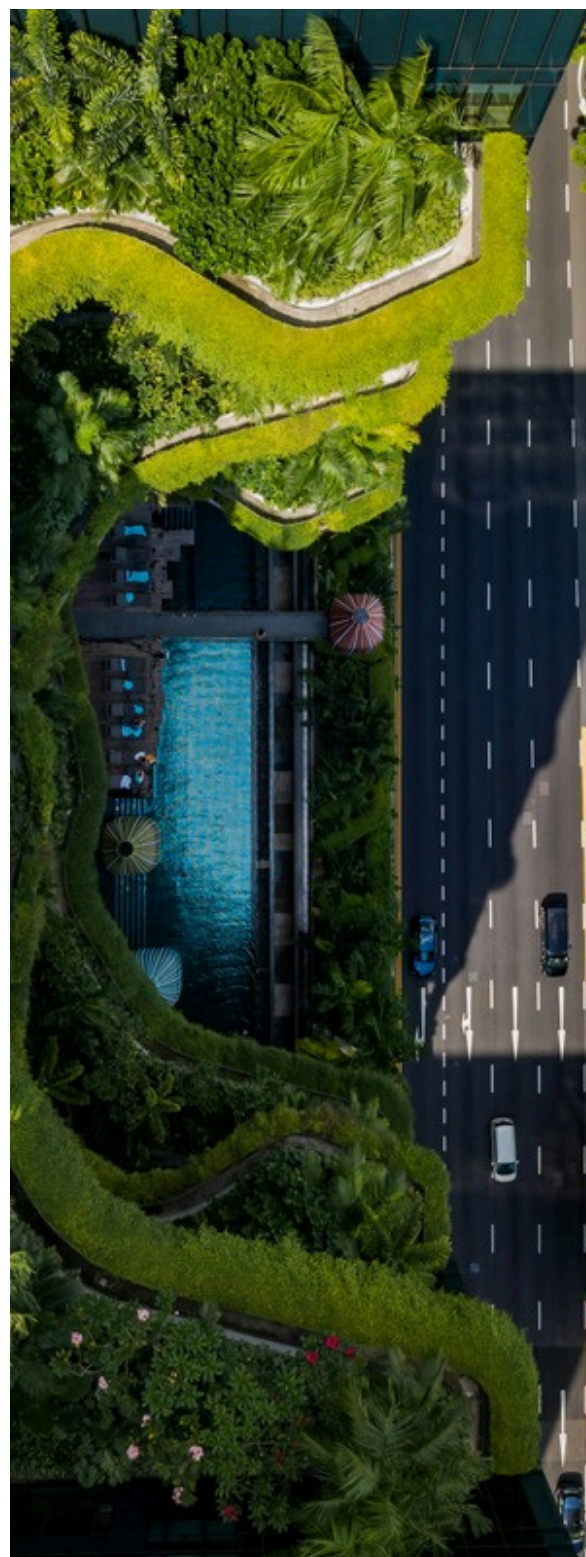
A guide on structuring the Community Energy Project in a Day workshop is available in a separate document in Annex 1. It covers activities which contribute to the following outputs:

- Community Energy Map;
- Defined community vision & objectives;
- Project Concept Design;
- Defined working group for follow-up project development.

A brief workshop overview is in the table below:

Activity	Objective
Context Setting	Align on goals and introduce participants.
Community Energy Mapping	Identify energy needs, assets, challenges, and opportunities.
Visioning Exercise	Co-create a shared vision for energy transition.
Solutions Sprint	Develop a project concept plan with objectives and key actions for launching a community energy initiative.
Commitments & Next Steps	Define responsibilities and secure commitments. Establish a small group of committed citizens willing to take on the next stage of development.

It is possible to organise the Project in a Day workshop online. In the Annex 2 document »Digital and AI Tools for Community Energy Initiatives«, you will find an overview of digital and AI tools that can support community energy mapping, vision co-creation and solution sprint.





Outputs

The key outputs from this phase are a vision and objectives for the community energy initiative that a group of motivated citizens has aligned around. A clear social purpose and target impact should support these. The vision and objectives provide the basis for the business plan (they go into section 2 of the Business Plan template available in Annex 1).

The group of citizens should also be organising around specific ideas for community energy action that they want to take further in pursuit of their vision. These concepts will be further advanced through the next phase of feasibility, business and investment planning.

Key outputs for Phase 1:

- A shared vision statement and 3-5 clear objectives agreed by the group.
- A shortlist of 1-3 technical/action concepts to explore (see Section 5 and Annex 3).
- A simple 1-page concept note: who benefits, what assets are used, indicative scale and next steps.
- A small working group with named roles for follow-up feasibility work and stakeholder outreach.



Phase 2: Feasibility, Business and Investment Planning

Overview

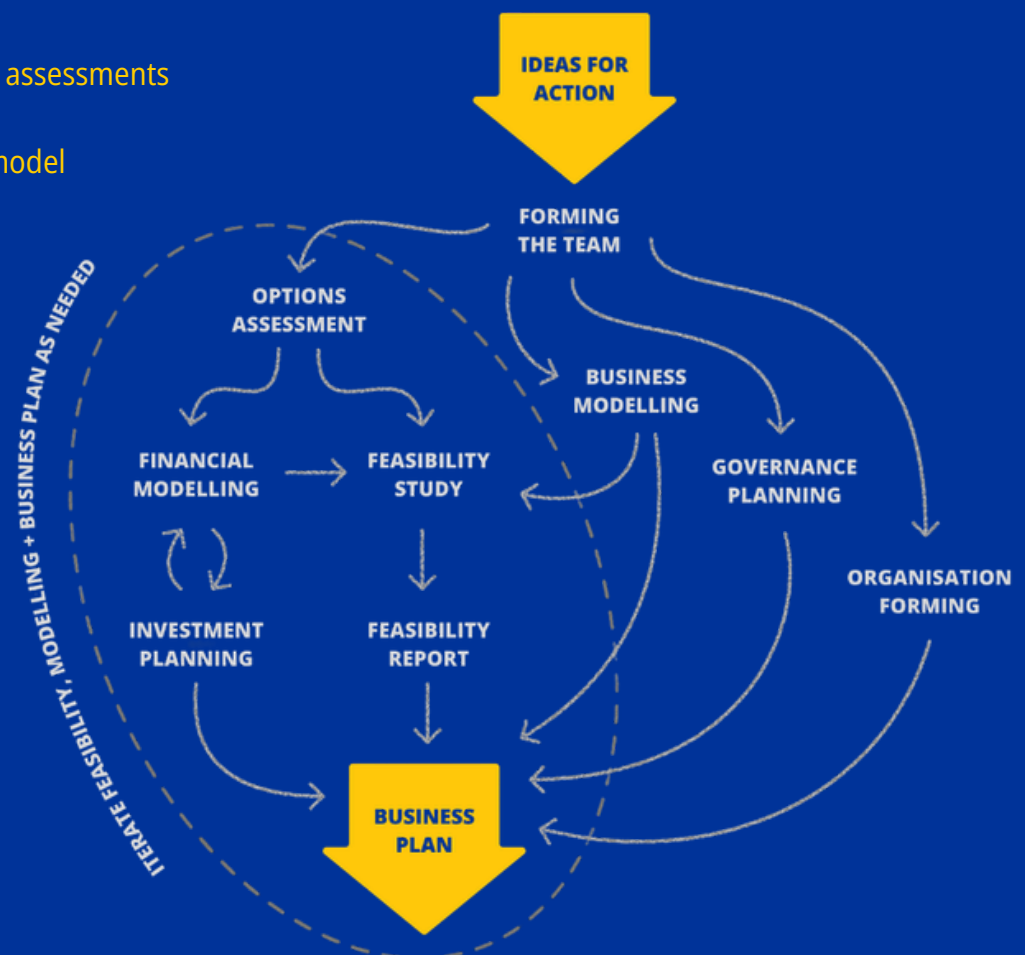
This development phase will ultimately result in detailed business plans for community energy initiatives, readying them for investment raising and implementation. An example Business Plan template is available in Annex 1.

The flow and connection of this work are illustrated in the diagram below.

This phase of work often needs to be approached iteratively, depending on the complexity of the initiative and the stages of investment raising that are needed.

To move from the vision and concept ideas into tangible community energy action, more detailed planning work will be needed on:

- Forming the team
- Options and feasibility assessments
- Financial modelling
- Business and service model
- Investment planning
- Organisation form
- Governance planning
- Final business plan



For example, it might make sense to start with a basic feasibility study and business plan, then raise initial funds, and subsequently move into a second, more detailed stage of feasibility and business planning.

Core outputs for Phase 2:

- Selected technical concept with clearly defined users, sites/assets and indicative capacity/scale.
- Feasibility estimate and a financial analysis (who pays, who benefits, main revenue streams).
- High-level legal and regulatory route (entity type, licensing/permitting, grid connection).
- Draft governance and organisational set-up (roles, decision-making, member onboarding).
- Investment pathway (own capital, municipality, grants, loans, crowdfunding, ESCO/PPA options) and key risks.

Forming the Team

During this phase, you, as an advisor, will likely work with a small group of citizens who have emerged from the first concept and vision phase and have demonstrated passion and enthusiasm for turning initial ideas into community energy initiatives and enterprises.

These individuals are likely to have diverse interests and skill sets, and it is beneficial to leverage this diversity. For example, encourage those who are more technically minded delving deeper into feasibility and financial modelling work. Others in the group might be better suited to lead on developing governance and broader community collaboration models, or on communications work. Help the group of engaged citizens play to their strengths while developing the critical elements of the overall business plan in alignment.

Some of the roles that would be good to have covered in the community team include:

- **Champions**, who are the driving force behind the initiative. They are vital to ensuring things continue to move forward when times get tough. Ideally, they have the skills to lead the business planning process for the initiative and to promote the initiative to a range of audiences.
- **Governance lead:** Someone with strong ethics and collaboration skills who focuses on developing governance arrangements for the initiative.
- **Community Activator:** A person who focuses on developing and facilitating wider community participation, input, and decision-making. Skills in facilitation, communication, storytelling, listening, and building relationships are key assets.
- **A technical expert** who understands energy systems and can lead on feasibility assessments and ensure that the project's technical aspects align with goals for the initiative.
- **A financial advisor/accountant** who can create financial models, analyse revenue stream forecasts and costs, and later manage the financial aspects of the project.
- **A project manager** to organise, manage, and motivate the delivery of work and contracts.
- **A legal advisor** to provide professional-level advice on the advantages and limitations of different legal forms, contracts, and ensure compliance with legal requirements.

Of course, the group may not initially have people with the necessary skills to cover all of these areas. It will be helpful to review a list of roles like this with the core group of motivated citizens to see how they feel they fit and where they identify skills gaps in becoming an effective team. These gaps can be filled by seeking other community members to join the team. As needed, and as funding allows, some skills can be contracted as expert advisors. The core team's capabilities can also be developed. Ultimately, a breadth of expertise is needed to create a successful enterprise.

Like any new team, this group will go through the usual journey of 'forming, storming, norming and performing.' As an advisor, you can coach them and support their team development. A community energy initiative can only be as strong as the team of citizens behind it, and tensions and challenges will inevitably arise. Listen carefully and help them to work well and better together.

As the teams' form, roles, and structure mature, a complete team description should be integrated into the Business Plan (Governance and Team section of the template attached in Annexe 1). Potential investors will take a keen interest in the team behind the initiative to gain confidence in delivery.

Business Service Modelling

A Business Model Canvas is a practical tool that the community group can use to help them co-design their enterprise value proposition and service model.

Various versions of business model canvases are outlined in more depth in the Business Model Canvassing Guide, available in Annex 1.

A good general example is the Social Business Model Canvas (SBMC), shown below, which extends the generic Business Model Canvas for social enterprises.

Social Business Model Canvas



<p>Key Resources</p> <p><i>What resources will you need to run your activities? People, finance, access?</i></p>	<p>Key Activities</p> <p><i>What programme and non-programme activities will your organisation be carrying out?</i></p>	<p>Type of Intervention</p> <p><i>What is the format of your intervention? Is it a workshop? A service? A product?</i></p>	<p>Segments</p> <p>Beneficiary Customer</p> <p><i>Who are the people or organisations who will pay to address this issue?</i></p>	<p>Value Proposition</p> <p>Social Value Proposition Impact Measures</p> <p><i>How will you show that you are creating social impact?</i></p> <p>Customer Value Proposition</p> <p><i>What do your customers want to get out of this initiative?</i></p>
<p>Partners + Key Stakeholders</p> <p><i>Who are the essential groups you will need to involve to deliver your programme? Do you need special access or permissions?</i></p>		<p>Channels</p> <p><i>How are you reaching your beneficiaries and customers?</i></p>		
<p>Cost Structure</p> <p><i>What are your biggest expenditure areas? How do they change as you scale up?</i></p>		<p>Surplus</p> <p><i>Where do you plan to invest your profits?</i></p>	<p>Revenue</p> <p><i>Break down your revenue sources by %</i></p>	

SBMC Source: [Social Innovation Lab](#)

Inspired by The Business Model Canvas

Such a canvas helps a group to work out:

- Who are the target customers that they serve directly, (and more broadly, how they service their community beneficiaries as indirect 'customers').
- Where their enterprise will deliver value to 'customers', and how this 'value proposition' links to their overall vision and objectives.
- The services they will offer in order to deliver their value proposition to customers.
- The assets, resources and partnerships they will need to provide those services (this frames what they need to develop)
- An outline of cost structure and revenues.

The Business Model Canvassing Guide available in Annex 1 outlines a workshop format that you can use to help the community group work through a business model canvas to develop their core value proposition and service model.

The Business Model canvassing workshop can take place in person or online. The curated list of digital tools that can be used is listed in the Annex 2 - Digital and AI Tools for Community Energy Initiatives.

Service ideas that emerge from working on a business model canvas require further interrogation through feasibility assessments to determine whether the necessary assets can be created to deliver the planned services. This is inherently an iterative process.

Combined with the results of the feasibility assessments, the team should reach a clear plan for the services they want to provide to which customers, the assets they need to create to deliver them, the benefits they will generate, **and the financial viability of their plans**. So equipped, they are ready to plan the details of how they will organise and govern their enterprise and raise the investment needed to execute their plans.

The results of business service modelling should be integrated into the Business Plan, with plans for target customers, value proposition and services covered in the Service Plan section.

Feasibility Assessments

Through feasibility assessments, the community team can test the viability of a proposed community venture. Feasibility assessment analyses viability across technical, economic, legal, and operational aspects. In simple terms, it evaluates whether the venture is likely to succeed before significant investments are made.

An iterative approach to feasibility is often most effective: start with an early-stage feasibility assessment as part of an outline business plan to raise development funds, then revisit detailed feasibility to support a comprehensive business plan.

Community teams with a simple idea and good capacities may be able to complete the feasibility assessment in one step. As always, your role as an advisor is to help them design a process that suits their context.

A good test is whether the level of feasibility is robust enough to support a business plan that would attract the next stage of investment.

One common challenge to watch for in the early stages of feasibility work is teams focusing on a single technical idea, often driven by enthusiasm. While this can be motivating, the idea may not actually fit the local context or timing, leading to wasted effort and stalled progress. Careful feasibility work helps avoid this by evaluating which technical options are viable. Starting simple and building into more complex projects over time is often the best approach. Teams with knowledge of certain technical options should also engage other expertise so that they can take a balanced view of possibilities, and then focus on the most viable for their context.

To help start the feasibility assessment process, an initial option assessment is useful to help community groups step back and consider which technologies and actions would be most feasible and impactful for them. This doesn't need to be technically very complicated. The Community Energy Options Assessment template (included in Annex 1) is a helpful tool to guide this assessment process. A small workshop format would be appropriate for this process. The questions outlined in the options assessment template can be returned to throughout the feasibility phase, adding the next level of details. In addition, the ten technical concepts available in Annex 3 are designed as supporting material to use when helping a group to undertake an initial options assessment.

Having narrowed the technical possibilities to a small set of options the group believes have the most potential, they will need to assess these options in greater detail to determine their feasibility.

Attached in Annex 1 is the template for a Community Energy Feasibility Assessment, which you can use with your community teams to frame and document their feasibility assessments for the shortlisted options.

Key areas to address in a feasibility assessment include:

- Does the project/initiative work technically? For example:
 - Is there a suitable site/location to develop the assets needed for the services?
 - Are needed energy resources available/reliable (e.g. sunshine hours, wind or water flows)?
 - Can users of the produced energy services be connected as customers?
 - Are there local technology providers/installers for reliable installation and maintenance?
 - Are there potential opponents who would strongly resist the project?
 - Are planning and permitting requirements likely to be manageable?
 - How quickly can the project be delivered, and does this timeframe fit objectives?

- What are the beneficial impacts of the project/initiative?
 - What are the direct benefits to primary customers/users?
 - What are the expected local social benefits and can these be quantified?
 - What employment is likely to be generated/supported?
 - What ecological benefits can be predicted?
 - What greenhouse gas emission reductions are predicted?
 - What improvements to energy security can be expected?
 - What are any negative impacts of the project?
 - Are there short or long-term pollution risks?
 - Are there noise or visual impacts?
 - Are any greenhouse gas emission increases predicted?
 - Can materials be recycled?
 - Are impacts equally distributed?
 - Would some members of the community miss out on the benefits or face more negative impacts?
 - What are the risks facing the initiative and how can they be mitigated/lived with?
 - Can the initiative be financially viable as a social business and what are the economic benefits?
 - What are the expected capital and operating costs?
 - What is the range of pricing and revenues that can be anticipated from customers in return for their direct benefits?
 - What investment returns could be possible based on returns against costs?
 - How sensitive are financial returns to variations in key costs and revenues?
- To reiterate, these questions can be addressed lightly to prepare a preliminary feasibility assessment. Then they would be addressed more comprehensively through a detailed feasibility assessment, once resources are secured to complete all the needed work thoroughly. The technical concepts included in this toolkit are also designed to support such a pre-feasibility assessment stage.
- A financial model should be prepared to determine the financial viability and economic benefits of the venture. This is quite straightforward for a basic project, such as a small solar PV installation. The situation becomes more complex for larger projects.
- A financial model should incorporate the following:
- Capital costs (detailed design, permissions, equipment, site, installation, project management etc.)
 - Operating and maintenance costs
 - Financing costs – allowing for a blend of potential investment sources
 - Expected revenues from customers (based on a range of potential pricing scenarios and revenue sources aligned to service plan)
 - Income from any grants and subsidies
 - Cashflow
 - Return (internal rate of return/net-present-value) and pay-back scenarios,
 - Space for sensitivity testing of key assumptions and variation in key factors

The level of detail in a financial assessment should match what's needed to move the project to the next stage. In the early stages, a simple estimate with basic assumptions can be sufficient to indicate whether the project is likely to succeed. This might help secure a small grant or encourage community members to get involved. However, later, if the group wants to raise money through loans or community investment, a more detailed financial plan will be necessary, as the group will need to stand behind the financial projection numbers it presents to shareholders and stakeholders. Therefore, a financial model may be included in any pre-feasibility assessment, while a thorough financial model should be part of a full feasibility assessment.

If unsure how to start building a financial model, the group can initially draw on the included technical concepts and/or look online for examples of models from similar projects as a starting point. It also helps to speak with local installers or developers, who can usually provide rough estimates of costs and expected energy savings or production.

It is important that some members of the core group get involved in the financial model development so that they understand the mechanics that drive it and can adjust parameters for new scenarios as their understanding of the project details evolves (even if experts are engaged to help develop the model). Financial models need to be sufficiently flexible to enable testing of different scenarios and sensitivity to key assumptions (like costs and energy prices) that will affect the projected returns from the initiative.

This is important for preparing a sufficiently robust assessment that will convince investors to get on board.



As an advisor, it is good to keep to the principle that you can advise and help a group to find ways to develop their feasibility study and financial model, but you should not do it for them. Ultimately, this is their initiative, and it is important that they take ownership of this key element of business planning.

The results of the feasibility assessment should be consolidated into a report, for example, using the template for a Community Energy Feasibility Assessment that is attached in Annex 1. This assessment report informs parts of, and can be attached to, the business plan.

Having completed their feasibility assessments, alongside business service modelling, the community team will have tested the viability of their venture. If the feasibility assessment indicates that the venture is worth pursuing, the team can proceed to the next stage of development, which includes investment planning and the remainder of their business plan elements.



Investment Planning

Community energy projects have varying financial needs at each stage-concept development, project feasibility, construction, and operation. Different sources of investment can be appropriate at each stage – e.g., grants and volunteering for early development activities, and crowd investment and long-term debt for the construction and operational stages.

Sound feasibility studies and business plans are vital tools for attracting investment. As already noted, different investors may require varying levels of detail in ideas, feasibility studies, and business plans; therefore, it is essential to tailor investment planning accordingly.

Community energy teams should plan to blend different investment options effectively - considering project-specific factors like scale, risk tolerance, returns and regulatory requirements. For example, combining equity contributions from community members with loans secured through established financial institutions offers both local engagement and financial stability.

Investment options to consider include:



Crowdfunding: A great way to embed broader community involvement, by allowing local stakeholders and citizens to directly participate in energy initiatives and invest in renewable energy projects. Crowdfunding is often organised more as donations, with a focus on social benefit. Perhaps funders get some form of reward. Crowdfunding is a powerful tool for engaging the broader community in the initiative, mobilising resources and fostering public buy-in and awareness. Online platforms can help to simplify the process.

Crowd investment: The concept of crowdfunding can be extended into crowd-investment, offering a balanced mix of financial and social returns. This is typically structured as a form of equity investment, with the equity comprising numerous (usually smaller) investments from a range of individuals or organisations within the community.

It is also possible to structure crowd-investment as debt or loans, where investors get an annual return and their capital back after a period, without a linked ownership stake.

Equity financing entails member or investor contributions in return for ownership shares, which embed financial and operational risks but align stakeholders with the community's mission. Exactly how to best structure crowd investment needs tailoring in every context. As there is usually little to no market for the 'shares' purchased, crowd investment in community energy is usually structured more like a long-term loan scheme with membership so that investors get a fixed interest rate return on their investment and a membership vote not proportional to their investment, with (potential) eventual return of their capital.



Loans/debt: Loans from regular financing institutions (banks and/or state loan mechanisms) offer stable financing for mature projects but require a robust financial plan and often collateral. While it could be expected that banks would want to lend on renewable energy projects with a sound financial model, they are often sensitive to a range of risks, notably, the governance of a new community energy enterprise (even if technology is well proven). Securing debt can be easier once other financing sources are secured. Guarantees for a loan, e.g., from a municipality, can help, but this requires the guarantor to take the risk for no direct return.



Grants/donations: Grants are suitable for early-stage development and/or high social-impact projects. Grants can reduce financial risks, but often have extensive reporting requirements and administrative overheads. Sometimes, grants can help move a viable project to an extremely viable one, accelerating the speed at which returns can be generated and reinvested to benefit the community. Alternatively, grants can be essential for supporting projects with high social returns but lower direct financial returns.

Volunteering: Most community energy initiatives benefit from the voluntary efforts of their leaders and members, which builds inclusion and helps to keep financial costs down. Therefore, volunteering should be considered a valuable form of investment in the initiative. Groups can use creative ways to encourage other citizens to join the efforts where they have expertise and/or time to help. Also, it is important to track and report volunteering as a valuable form of investment (possibly also to reward it with a form of equity once the project is set up, if appropriate).





Over time, a community energy project should become cash flow positive and generate revenue beyond the returns paid to initial investors. The extent of revenues is directly related to decisions made on pricing and the social benefits targeted through cheaper energy prices. Clear cash flow analysis and accurate projections as part of feasibility financial modelling are therefore critical for establishing long-term viability and plans for using a surplus (see previous section).

With reinvestment for social purpose as the priority, what is done with any eventual returns is a critical part of how social benefits are realised, ensuring that the initiative is a community energy initiative, not a private-profit energy initiative. These plans need to be clear to investors to align priorities and expectations.

Careful design of the investment plan, alongside governance and business planning, is essential to achieving social benefits and ensuring a sustainable community energy enterprise. For example, an equity-based financing model for a community energy project might lead to governance complications if ownership shares are concentrated in the hands of a small number of investors, thereby undermining the democratic value of the community.

For example, an equity-based financing model for a community energy project might lead to governance complications if ownership shares are concentrated in the hands of a small number of investors, thereby undermining the democratic value of the community. Likewise, depending too heavily on grants could compromise financial sustainability, as grants are often one-time funds with strict reporting requirements and erratic availability. Dependency on one source of financing, such as bank loans or crowdsourcing, renders the project financially vulnerable. Shortfalls or delays in expected cash inflows may cause operational interruptions, cash flow crises, and debt obligations that cannot be fulfilled. These risks are especially important to consider during the building stage, when most capital expenses occur; such delays can have domino effects on project budgets and schedules.

Inadequate risk-sharing mechanisms between stakeholders and investors can lead to mistrust and reluctance to commit resources. For instance, if guarantees or collateral structures are poorly designed, potential investors may perceive the project as too risky and withhold participation. Addressing these risks requires a pragmatic, data-driven approach to financial modelling, robust community engagement strategies, and meticulous regulatory planning to ensure a balanced, sustainable financing plan.

The results of investment planning should be a clear investment plan, based on robust financial modelling, that is integrated into the Investment Plan section of the Business Plan.

Governance Planning

While community energy initiatives and enterprises can take many legal forms, in any form they take, they must have excellent governance structures and procedures to ensure sound management in the interest of shared community ownership and social benefit goals.

Governance is a critical failure point in existing energy systems, especially where communities already have most of their energy system in public ownership, and yet the energy system is not very clean, secure and affordable. Therefore, demonstrating excellence in community governance is even more important for community-led energy initiatives.



Ultimately, governance is about managing power. Community energy is about addressing societal power imbalances (which result in some people benefiting a lot more than others from how our energy systems are run) and doing and demonstrating better. However, community energy groups also face challenges in terms of power and influence. Sometimes, certain people gain more control without the group realising it, leading to problems. It's essential for those leading these initiatives to recognise both formal and informal power, and ensure it is shared fairly within the group.

It is vital that governance models and practices are developed in a manner that builds trust. Trust between managers and members of the community energy initiative, as well as between them and users and beneficiaries. Good group dynamics are equally important. It is vital that a community energy group takes the time to create social bonds in the core team and governance group, understand each other's motivations, and turn these into a set of shared values that capture common intent and purpose.

Most groups working for change will face some internal challenges. Disagreements and conflict are normal; don't let them discourage you or the community team. When managed effectively, such challenges can strengthen the group. Your support during these times is especially important. As an external advisor, you can help the group recognise and work through these dynamics. Be prepared for this challenge, stay patient, and respond with understanding.

Community ownership and democratic control go some way to ensuring good governance. The [Co-operative Alliance Principles from the International Alliance Cooperative](#) provide internationally agreed upon principles for acting together to build a better world through co-operation:

- Voluntary and open membership
- Democratic member control
- Member economic participation
- Autonomy and independence
- Education, training, and information
- Co-operation among co-operatives
- Concern for community

In practice, many community-owned enterprises and initiatives end up with rather light involvement of most members, while a smaller core group of members and/or board members still drive decisions. This can work well if systems are in place to ensure trust between the wider community and the governing decision makers, and as long as decisions continue to reflect and serve the initiative's social purpose and values.

It is important to support community groups in designing systems that empower members to address situations where an individual gains excessive decision-making power or acts contrary to the group's purpose. Formal tools, such as terms of reference, statutes, and agreements, are important for setting clear rules and expectations. Just as important are group dynamics and clear accountability. Good governance depends on both. Remind groups that weak governance is a common cause of failure, so ongoing attention to this aspect is essential.

The Community Energy Governance Planning Canvas guide, available in Annex 1, outlines a format to help advisors workshop key governance aspects with an engaged community group.

Ultimately, groups should have developed a clear and robust governance plan that becomes an integral part of their final business plan.



Organisation Form

Each community group will have various organisational legal forms of organisation to choose from, depending on their national context and legislation. A core principle of the community energy initiative is that the social enterprise should be ultimately not-for-profit (once any returns are reinvested towards their social purpose). Hence, the legal form selected should enable co-ownership and a not-for-profit approach.

Some common legal forms of organisation used for community energy include:

- Not-for-profit Cooperatives
- Associations
- Not-for-profit company.



Co-operatives are often mentioned as a great model for community energy projects, but they aren't always non-profit, and their legal requirements vary by country. In some cases, it may be better to choose a different legal form while still using co-operative principles to shape the business model, ownership, and governance.

Work with the community group to evaluate available/useful organisational legal models in their country and present and discuss the pros and cons. It is important to carefully identify legal and regulatory requirements and potential drawbacks that may not be immediately apparent.

Many successful community initiatives actually use multiple legal forms in an integrated way to achieve a robust overall legal form. This can be very important for 'ring-fencing' parts of operations and to protect investors in a specific set of assets.

These decisions should be included in the Organisation section of the Business Plan.





Output

The key output from this phase is a robust Community Energy Business Plan that consolidates the results of the work outlined above, and sets out for the social enterprise:

- Vision, Objectives and social purpose;
- Planned services and value proposition;
- Plan for development projects needed;
- Investment Plan – setting out a blend of investment sources to be targeted and key financial parameters;
- Risk assessment;
- Governance and team model;
- Organisation Form;
- Feasibility Assessment(s) (as an appendix);
- Business Model Canvas (optional as an appendix).

A comprehensive business plan that covers these aspects positions the community group to secure the necessary investment to create or expand the enterprise and initiate implementation. A template for Community Energy Business Plans is attached in Annex 1.

Phase 3: Implementation

Overview

Equipped with a robust business plan, the community group you are guiding will be well-prepared to move into the implementation process.

By the end of this implementation phase, the community energy initiative will have an established legal entity, secured investment, and operational energy assets and services.

Key Activities in this phase include:

- Securing investment;
- Establishing Community Energy Organisation and Governance;
- Securing Legal and Regulatory Approvals;
- Procurement;
- Construction / Delivery;
- Commissioning.

Implementation tip: the initiative should maintain a simple and regular communication rhythm with community members and investors (updates, milestones, risks and decisions). This reduces drop-off and builds trust during long permitting/procurement periods. Use the stakeholder engagement tools (Annexe 2) to assign responsibilities and keep coordination visible.

Investment Raise

The key bridge between the business plan and full implementation is securing the necessary investment for the community energy enterprise. The completed business plan included an investment plan; now it is time to put it into action by preparing and launching a successful investment raising campaign. Depending on the planned blend of investment sources, this may include a mix of:

- Preparing and running crowdfunding and/or crowd investment campaigns;
- Applying for and negotiating debt finance;
- Applying for grant funding.

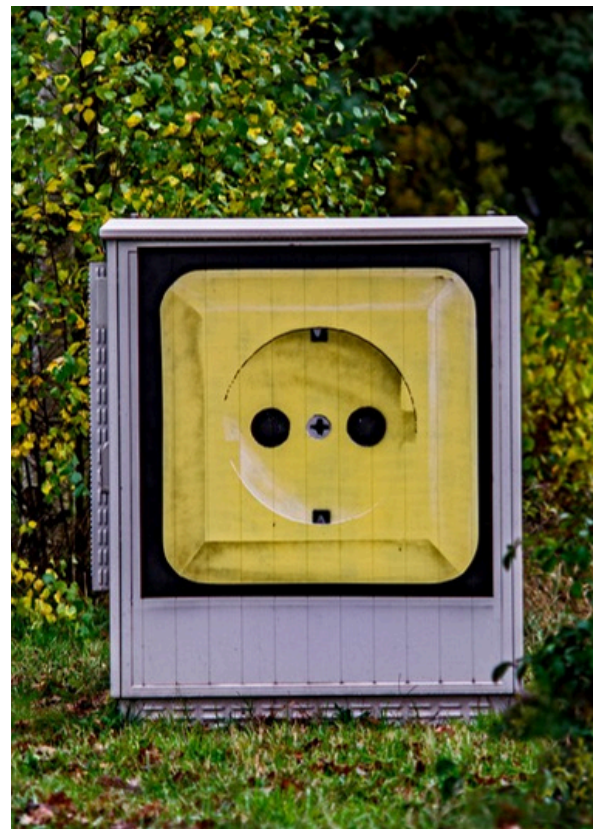
Crowdfunding and/or investment will likely be a key part of raising funds for most community energy initiatives. Building on the plans already developed, further detailed planning should be completed, covering compliance, promotion, contracts, and communication with investors. Groups should develop clear, engaging, and transparent offer documents that include key project details, expected returns, associated risks, and how the funds will be used. It's essential that the materials are accessible to a broad audience, using plain language and visuals to explain technical or financial aspects.



Working with a reputable crowdfunding platform with experience in community energy projects is an excellent idea, provided one exists in the local context. The platform should support financial compliance and investor due diligence, providing tools for tracking investments and communicating with investors. If no suitable platform exists, the community group will need to undertake additional work to address these aspects in a way that is appropriate for their context.

Marketing and outreach are vital to a successful crowdfunding campaign. As an advisor, you should aim to help groups leverage community networks, local media, social media, and public events to build awareness and enthusiasm for the investment raise. Testimonials or endorsements from trusted community figures help drive engagement.

Securing debt finance means approaching a bank (or other lender) to obtain the funds needed, which will be repaid with interest over an agreed-upon period. In theory, it is the simplest form of investment, which should be easy to secure for a project with a robust feasibility assessment showing positive financial returns. In practice, many banks and lenders are sensitive to a range of risks relating to governance, new business models and new technologies. Securing debt for a portion of the investment required can be easier once other financing sources are secured. These issues should have already been worked through in the investment plan. Now, a further stage of more detailed discussions/negotiations with potential lenders will be required.



Grant applications need to be approached on a case-by-case basis. As an advisor, you can help groups conduct due diligence on potential grant funding sources before submitting their applications. They should focus on what potential grant funders want and need, and how/whether their community energy plans will align with the funder requirements. Otherwise, if proposals are not well aligned to the funder's needs, making grant applications can be a time-consuming process with low rewards.

Investment raising is a critical and challenging step in the investment process. Help the groups to keep working on their investment raising and refining their investment plans, if needed, until the required investment for the initiative has been secured.



Establishing Community Energy Entity and Governance

If a new legal entity is planned, it should be registered and established alongside the investment raising process, as an established entity will be needed to close contracts and financing arrangements. Opening a bank account and setting up administrative procedures and documents need to be completed, and this can take some time.

If an existing entity will be the legal vehicle for the community energy organisation, then the planned governance and collaboration agreements need to be prepared and signed to establish the framework for the community energy initiative.

The governance part of the business plan should be initiated, supporting the establishment of the legal entity. This means setting up the governance group and putting governance processes into motion with regular meetings, agreements and communication of decisions.

Legal and Regulatory Approvals

As an advisor, you should support groups to complete and execute needed legal agreements and regulatory approvals, for example:

- Secure necessary legal and regulatory approvals for development, such as planning and building permissions, as well as grid connection agreements.
- Establish planned partnership/contract agreements with users and key stakeholders.
- Establish purchase agreements with customers.
- Establish any initial employment contracts.



Construction

Once investment and legal permissions are secured, the community teams are ready for construction! By this point, the strategic complexity is narrowing, and the priority is more to follow excellent project construction management processes. Key steps include:

- **Design and Management**

- Appoint a Project Manager to oversee delivery and manage contractors;
- Complete detailed designs of installations;
- Develop a project timeline;
- Meet permitting/planning conditions;
- Conduct necessary site surveys;
- Procure services and materials through tendering, including contractors for civil works, technology supply, commissioning and operations;
- Award contracts.

- **Construction Phase**

- Hand over the site to the main contractor;
- Oversee the delivery and installation of equipment and supporting works;
- Manage grid/network connections;
- Development of operations management and billing systems;
- Ensuring health and safety;
- Inspections of work quality.

- **Commissioning**

- Testing of installed equipment;
- Equipping community members with skills to manage and maintain assets;
- Completing as-built documentation.



Output

By the end of this phase, the community energy initiative will have established its **legal entity**, **secured the necessary investment**, **built the required assets** to deliver its services, and **commissioned them for operation**.



Phase 4: Operation, Monitoring, Evaluation and Scaling

Overview

After commissioning, the community energy initiative shifts from ‘project delivery’ to ‘service delivery’. This phase focuses on reliable operations, robust billing and financial management, transparent communication with members, and learning from performance data so the initiative can improve, scale and inspire others.

Key focus areas of work during this phase typically include:

- billing/revenue collection and financial management;
- maintenance and performance monitoring;
- member support and communications;
- regulatory compliance and reporting;
- continuous improvement;
- preparation of new phases of business development and concepts for expanding services provided and community impact.

By the time this phase is reached, all the benefits of the hard planning and development work done so far should be realised. It is also only through sustained operations that long-term, substantive impacts and community benefits will be delivered. Community groups may benefit from ongoing support and coaching during this phase, particularly in improving operational performance and learning processes. However, these needs of each initiative are likely to be more bespoke, so there is a limit to the guidance that can be usefully included in this toolkit.





Output

Phase 4, is ongoing, and should lead to the sustained operation, service delivery, successful performance and cycles of learning that enable the initiative to succeed and keep improving over time.

3. COMMUNITY ACTIVATION AND ENGAGEMENT GUIDANCE



Community engagement is core to establishing a successful community energy project. Active involvement of local citizens, stakeholders, and community organisations from the earliest stages helps to build trust, create a sense of ownership, and align the project with local needs and values. Meaningful community activation not only increases acceptance and participation but also unlocks local knowledge, resources, and innovative ideas that are critical for the long-term viability and impact.

Below, we outline key activities that support community activation and engagement in community energy action. These activities are presented in a logical sequence, though some may need to be revisited multiple times throughout the project. In many cases, combining several activities in synergy will yield the best results.

Community Scan

This phase involves conducting research, surveys, and meetings to assess community interests, needs, and readiness.

An Initial survey of the community helps assess its readiness to engage in and lead a community energy initiative. If key stakeholders are aware of local energy issues and have taken some preliminary action, either individually or collectively, the community may be ready to use this toolkit with the advisor's support. If not, more awareness-raising and capacity-building activities are needed to prepare them for active engagement.

An engagement strategy is a useful tool for defining the why, whom, how, and when of involvement during the planning and implementation of a community energy project.

Supporting materials:

- **Community Readiness Assessment Tool:** A structured tool to assess local trust levels, leadership capacity, prior experience with collective initiatives, and potential resistance. It supports a realistic understanding of where the community stands before launching intensive engagement activities.
- **Community Energy Engagement Strategy:** A tailored strategic framework outlining engagement goals, target groups, methods, timing and key messages – developed after understanding local readiness and stakeholder dynamics.
- <https://www.socialpinpoint.com/how-to-create-a-community-engagement-report-with-examples/>**Community Energy Consultation Process:** A practical guide for organising inclusive consultations at different stages of the project, ensuring that concerns, minority views and sceptical perspectives are openly documented and addressed.



Awareness Campaigns

Awareness campaigns play a vital role in activating and fostering long-term engagement among citizens and communities in community energy initiatives.

By organising local events, interactive workshops, and targeted online forums, these campaigns create spaces for open dialogue, knowledge sharing, and trust-building. When people understand the benefits of community energy—such as lower energy costs, increased local resilience, energy independence, and environmental impact—they are more likely to shift from passive consumers to active participants. Awareness efforts help demystify technical and regulatory complexities, address concerns, and showcase successful examples from similar communities.

Informational materials tailored to local contexts—such as brochures, explainer videos, infographics, and social media content—are essential tools for reaching diverse audiences. These materials not only raise awareness but also build a shared sense of ownership and empowerment. A well-executed awareness campaign fosters a culture of collaboration, encouraging citizens to co-create energy solutions that reflect their values and needs.

Ultimately, the visibility and accessibility of these efforts are key to triggering grassroots momentum and embedding community energy into broader local development strategies.

Supporting materials:

- **Awareness Campaign Tools:** A package of practical communication materials (flyers, social media templates, sample posts, press outlines) and guidance on designing campaigns that build visibility, address common concerns, and create space for dialogue rather than one-way promotion.
- **Digital and AI Tools for Community Energy Initiatives:** A curated set of digital platforms and AI-supported methods for campaign planning, workshop facilitation, feedback analysis and reporting. These tools help structure engagement processes, analyse community input responsibly, and turn qualitative insights into actionable steps.

Activating Local Leaders

Activating local leaders is an essential step in delivering sustainable and community-driven energy transitions. Local leaders—whether formal representatives, educators, business owners, or enthusiastic residents—serve as trusted voices who inspire others through their actions and personal commitment.

By identifying, supporting, and empowering these individuals, community energy initiatives gain credibility, visibility, and momentum. Their leadership helps bridge the gap between specialised knowledge (technical, policy, business, etc.) and community values, translating complex ideas into relatable goals that resonate with local people.



A powerful tool in this process is the use of inspirational case studies and storytelling. Highlighting real-life stories of local energy champions and successful community energy projects demonstrates what is possible and provides practical pathways for action. These stories connect the transition to everyday experiences, showing that positive change is both achievable and already underway in similar contexts. By celebrating local leadership and making it visible, communities can cultivate a sense of pride, ownership, and collective responsibility, laying a strong foundation for ongoing engagement and future leadership.

Supporting materials:

- Inspirational Case Studies & Storytelling Series: A collection of motivational stories featuring local energy champions and successful CE projects to inspire local action and leadership.

Co-creation and co-production

Co-creation and co-production are essential approaches for mobilising community members and ensuring that community energy initiatives reflect local priorities, values, and capacities.

By directly involving citizens through collective visioning, co-design workshops and participatory mapping, communities transition from passive awareness to active ownership. These inclusive processes help surface local knowledge, build trust among stakeholders, and create a sense of shared responsibility. Importantly, they also help align the initiative with the community's social, economic, and environmental values and context, ensuring the results are both relevant and resilience-enhancing.

Engaging people early and meaningfully through participatory methods not only strengthens motivation but also builds the capacity and confidence needed to take the next steps. These participatory processes bring community members to a point of readiness, equipped with a clearer understanding of what a community energy initiative entails and how they can contribute.

Practical co-design guides, such as those listed in the Annex 1, offer tested tools and frameworks to support these collaborative efforts and lay the groundwork for more detailed planning and implementation.



Member engagement

Motivating a diverse range of stakeholders to join a community energy initiative is vital to its long-term success and inclusivity. Different groups—such as young people, the elderly, business owners, and local institutions—have unique motivations, concerns, and capacities. A well-crafted membership engagement strategy helps tailor messages and approaches to these diverse audiences, demonstrating that their involvement is not only welcome but also incredibly valuable.

By clearly communicating the personal, social, and economic benefits of participation, such as lower energy bills, stronger community ties, or new local opportunities, initiatives can turn passive interest into active commitment. Tools like the SHARES model offer practical guidance on segmenting stakeholders, understanding their values, and developing targeted engagement pathways.

Such approaches ensure that no group is overlooked and that participation is made accessible and meaningful. When stakeholders feel seen, heard, and valued, they are far more likely to join and stay involved, bringing new ideas, resources, and energy to the initiative. Ultimately, inclusive stakeholder motivation lays the foundation for a vibrant and resilient community-led energy transition.

Supporting materials:

- **Membership Engagement Strategy:** A practical guide for turning interest into sustained commitment, helping initiatives design gradual entry pathways, clarify rights and responsibilities, and build long-term trust through transparent communication and realistic value propositions.

Stakeholder Collaboration

Stakeholder collaboration is essential for establishing a robust support system surrounding community energy initiatives. Engaging local authorities, NGOs, businesses, and other relevant actors creates opportunities for shared resources, expertise, and influence. These stakeholders often hold key roles in policy, funding, infrastructure, or community outreach, and their active involvement can significantly boost the initiative's visibility, credibility, and impact.

Early and ongoing collaboration fosters alignment with broader local development goals and helps identify synergies that benefit both the community and the supporting organisations. Effective collaboration begins with understanding who the key stakeholders are, what they can offer, and what they stand to gain.





Tools such as the Stakeholder Mapping and Collaboration Matrix help identify roles, interests, and potential contributions, while the Stakeholder Engagement Plan provides a structured approach to outreach, coordination, and follow-through. By building transparent, mutually beneficial relationships, community energy initiatives can tap into broader networks of support, unlock new opportunities, and ensure long-term viability through shared ownership and joint action.

Supporting materials:

- Stakeholder Mapping & Engagement Plan: A structured approach to identifying key actors, analysing their interests and influence, and designing differentiated engagement strategies – particularly for high-influence stakeholders who may be cautious or sceptical.

Supporting materials are available in the Annex 2 package.



4. CAPACITY DEVELOPMENT GUIDANCE

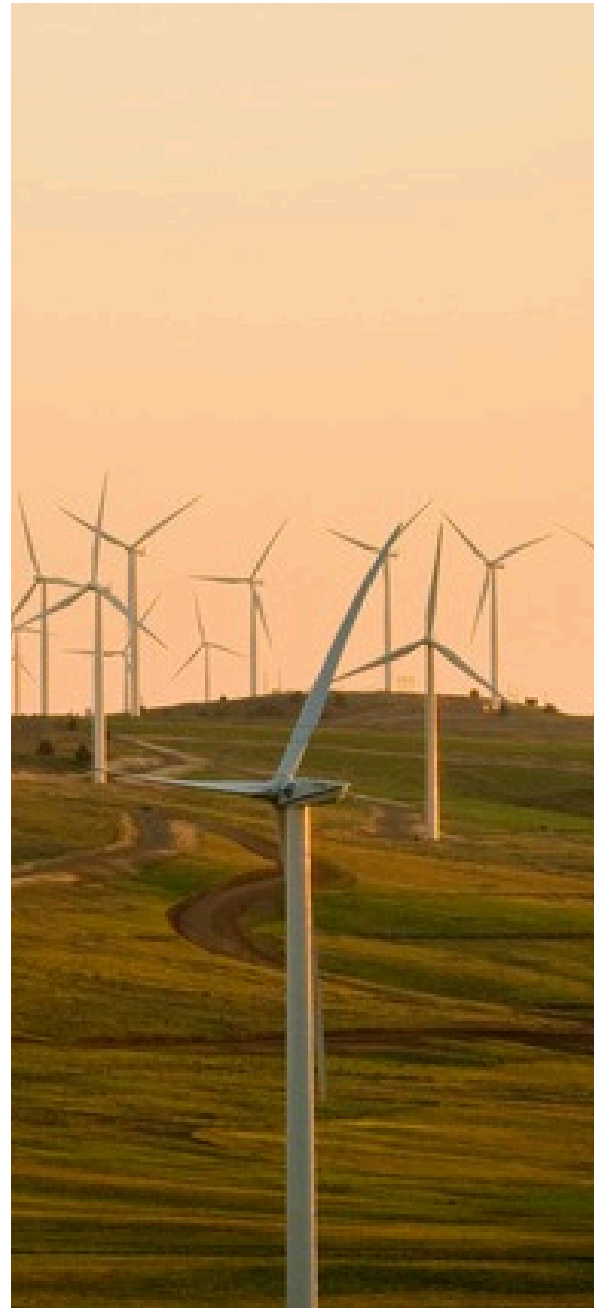
Overview

This Toolkit is intended to support and guide practitioners who advise local community groups on initiating, planning, and developing community energy initiatives.

A well-connected Community Energy Capacity Development Programme can support and strengthen this community energy development process.

This guide summarises the community energy training programme already developed through the Danube Energy Communities Accelerator (DECA) project. It is a community energy capacity development solution that you can integrate as part of your tailored advice and support for Community Energy Development, helping community leaders and citizens develop their skills and knowledge in this area.

While training and capacity development can be valuable to community groups throughout this process, they will add the most value during the Concept & Vision Shaping and Feasibility, Business, and Investment Planning phases. This is where learnings from the training programme can add the most value to these community energy projects and business shaping and planning processes.



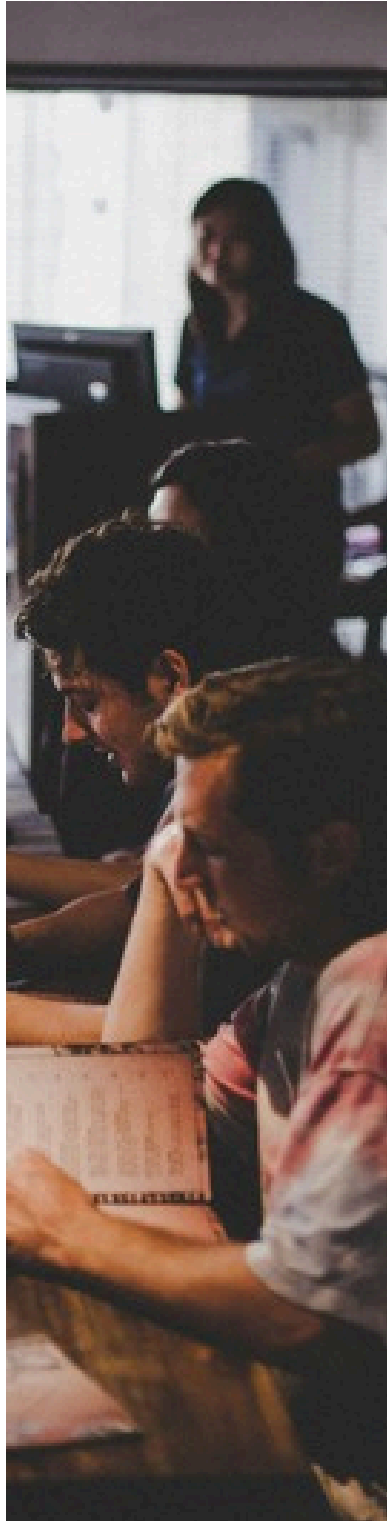
Community Energy Training Programme Design

The design of the training program covers the essentials of establishing community energy initiatives, including:

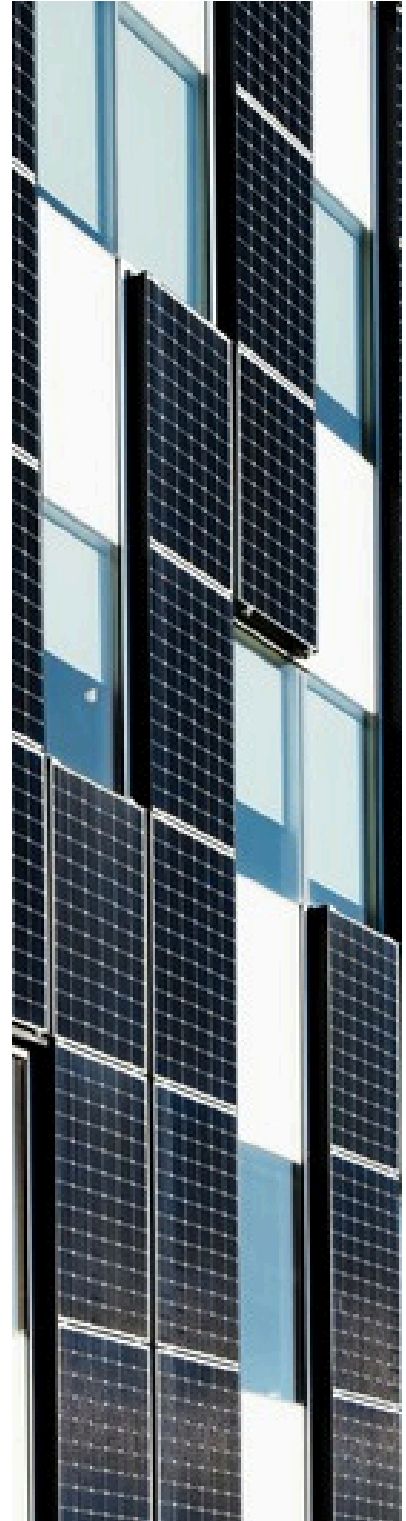
Fundamentals of community energy

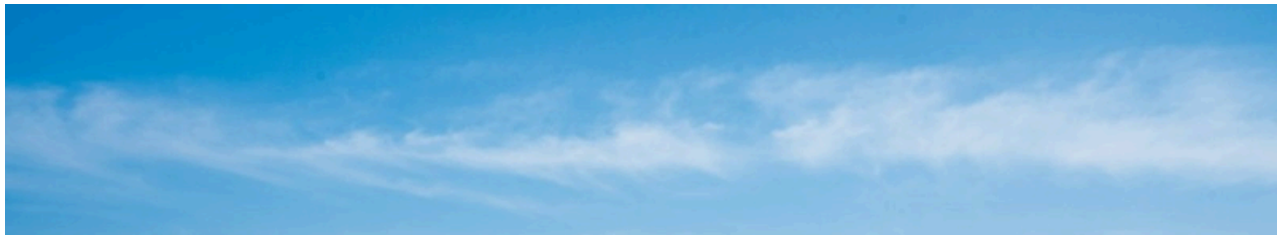


Social entrepreneurship skills



Renewable energy technologies





Two versions of the training format are available:

1.A brief introductory training – targeted to an audience of people who have some awareness of community energy/energy communities and are not yet sure if they want to take some form of action in this area. The primary audience is citizens who are inclined to take the lead on local development and, potentially, on energy action. The training is designed to provide a brief overview of key aspects of community energy and the elements required to develop a viable community energy project and business.

2. A more intensive one-day training programme - designed to take participants through the essentials of a successful community energy initiative in much more detail, and through a blended series of lectures and co-creative exercises. The target audience for the core trainings is citizens and local community leaders who are already interested in advancing a community energy initiative and feel that they need more knowledge to do this well.

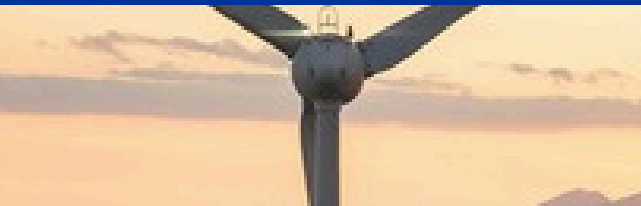
The base design of the introductory training is intended for a 90-minute session, which can be extended to 180 minutes to allow more time for presentations, discussion, and questions. This training is designed for either an online webinar or in-person training.



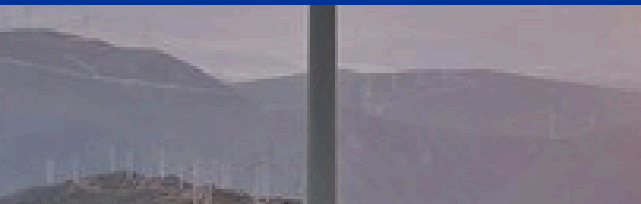
The more intensive training design is based on 6 blocks of content presentations and co-creative work. The training is designed as a one- or two-day course. However, it can also be divided into shorter modules delivered separately, depending on participants' needs. The training blocks cover the following:



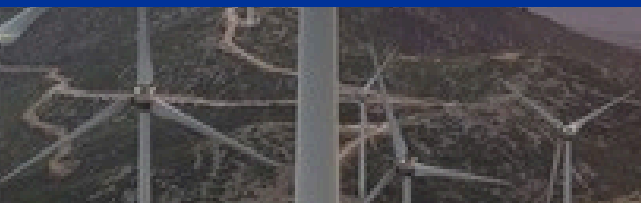
Block 1: Introduction and Foundations



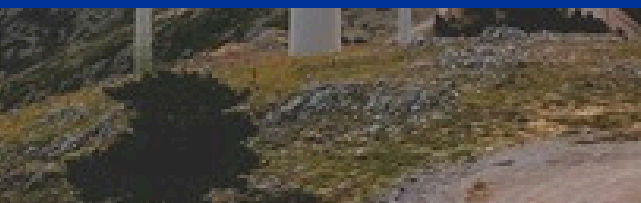
Block 2: The fundamentals of any successful community energy initiative – part 1



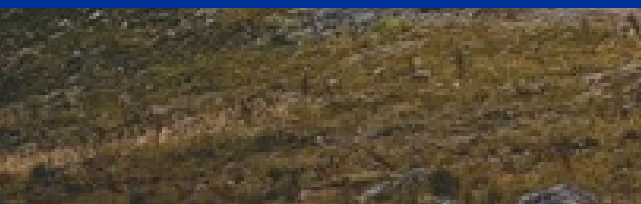
Block 3: The fundamentals of any successful community energy initiative – part 2



Block 4: Options for Community Energy Action (technical possibilities)



Block 5: Skills for putting into Practice (social entrepreneurship skills)



Block 6: Prototyping group exercise; Conclusion – Wrap Up

Deploying the Community Energy Training Programme

There is no single way to deploy the Community Energy Training Programme in alignment with the process outlined in the toolkit. However, integration with the following stages would be ideal:

- Concept & Vision Shaping;
- Feasibility, Business and Investment Planning.

The introduction training integrates with community awareness raising and engagement work. It is designed to provide a community energy overview. Thus, it can be a useful way to get people who are somewhat interested to become more interested and aware of the possibilities and what is needed to succeed. Introduction training sessions can therefore be organised online or in person, with general promotion to attract a wider pool of interested participants.

During the Concept & Vision Shaping stage, introductory training is important for building community leaders' foundational capacity and knowledge in community energy, thereby strengthening their ability to work through this stage effectively. The introduction training can also be integrated with the project-in-a-day type of workshop available in Annex 1 pack. Either way, encourage the community groups you are working with to complete the introduction training at the earliest opportunity.

The more intensive 'Core Training' sets a solid foundation for the Feasibility, Business and Investment Planning phase. If working with a larger community group, it may make sense to organise the core training for their group as they progress from the concept stage through feasibility and business planning. In this case, it might suit participants better to organise the core training as a series of 3-6 shorter modules, with 1-2 blocks per module.

The core training can also be organised as a stand-alone 1 or 2-day training course.



5. TECHNICAL CONCEPTS GUIDANCE

Overview

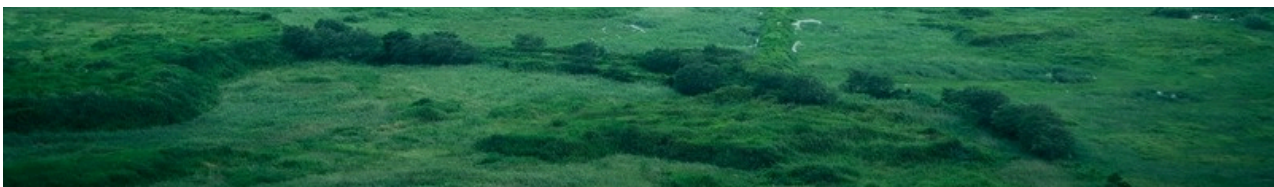
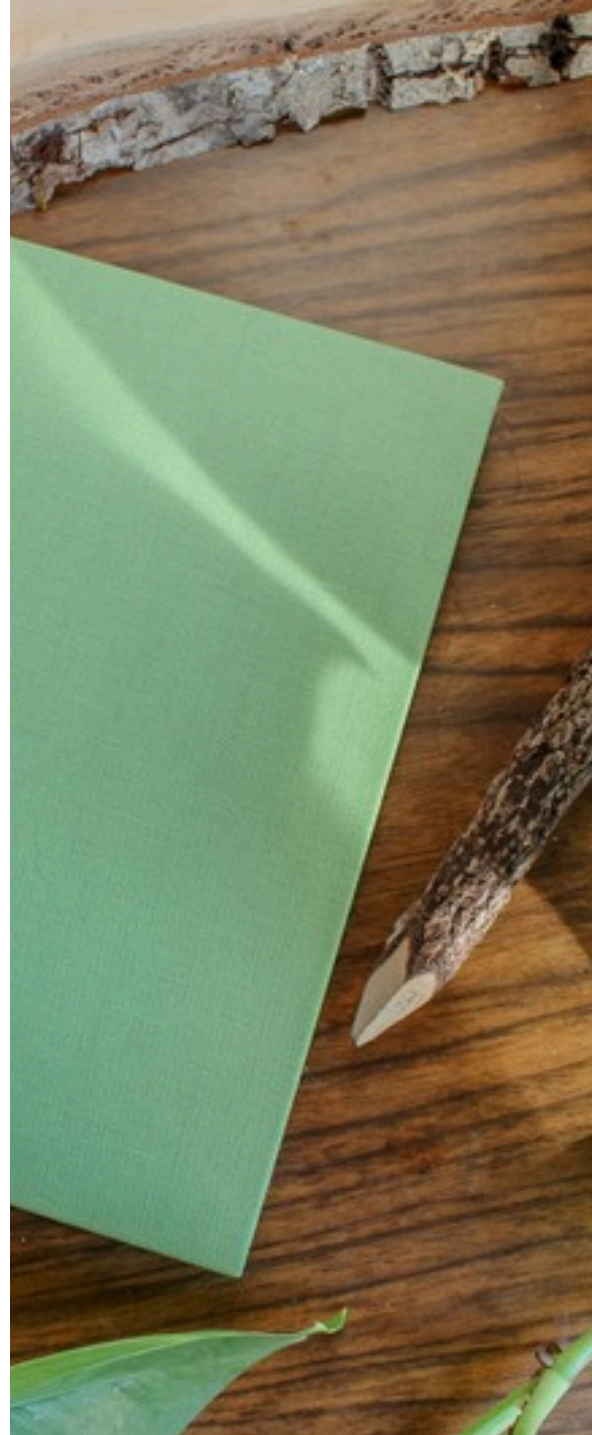
This guidance note summarises the technical concepts associated with this toolkit (Annex 3), which can be drawn upon for inspiration throughout the early phases of the community energy development process.

Eight technical concepts were developed to cover a range of renewable energy generation and use options that can be deployed by community energy initiatives.

Each technical concept includes an overview of a community energy option (e.g. rooftop solar PV system for residential buildings), key technical considerations, high-level estimates of energy generation and GHG savings, an indicative economic breakdown, legal and regulatory considerations, case studies and further resources.

These concepts are designed to support both advisors and community groups during the:

- Concept & Vision Shaping phase - to help generate ideas about the sorts of energy actions that they could take in their community.
- Feasibility, Business and Investment Planning phase - especially in the early steps of feasibility and options assessment, and as part of business modelling when different service models and value propositions to users are being considered.



This set of concepts builds on the general action concepts outlined in the training programme (see previous guidance section). They provide a broader basis of technical considerations, indicative costs, and potential applicability. The technical concepts include:

1. Solar PV for a Public Facility building;
2. Solar PV for a Multi-Apartment Building;
3. Solar PV system where energy will be provided to 'energy community' members through a local network;
4. 1MW Wind Turbine;
5. Heat pump system for a Multi-Apartment Building;
6. Biomass district energy system for a mix of public utility and residential buildings;
7. Direct district cooling system for buildings using a local cold-water source;
8. Deep retrofit of a typical 60s apartment building;
9. Greywater Heat Recovery System for a Multi-Apartment Building.

The package of technical concepts is available in Annex 3.



ANNEX 1: METHODOLOGY GUIDES / TEMPLATES

The following guides cover further tools and methods that support the methodology.

1. Concept and Vision Tools
 - a. Community Energy Project in Day Workshop Guide
2. Feasibility Tools
 - a. Community Energy Options Assessment template
 - b. Community Energy Feasibility Assessment Report Template
3. Governance Tools
 - a. Community Energy Governance Planning Canvas
4. Business and Investment Planning Tools
 - a. Community Energy Business Model Canvassing Guide
 - b. Community Energy Business Plan template (including the investment plan)

INTRODUCTION

A Business Model Canvas is an important tool that a community group can use to help shape its business ideas in a practical form. A business model canvas helps to focus

business developers on the services they will provide, who will be served by (and thus pay for) these services, and what the business needs to have in place to deliver the services.

There are various versions of these canvases available. In the following, we list some that are especially relevant for business model canvassing for community energy projects and can be used by advisors to help community groups answer key business development questions, which will underpin their business plan development.

BMC TOOLS FOR COMMUNITIES

1. SHARES Business Model Canvas FOR COMMUNITY ENERGY PROJECTS

The SHARES project Business Model Canvas offers a practical canvassing method tailored to the needs of community energy initiatives.

Canvas for Project concepts – explanation



What is the goal? Benefit of the project Describe the goal and the benefits of your energy project. What should it offer its members, clients or society as a whole? Which services does it offer and to whom?			Who should participate? Co-owners Cooperative projects can be implemented by different co-owners. These can be private individuals or companies, clubs and other organisations. Is local, regional, national or international cooperation planned? Should only certain professions or groups or qualifications be permitted? Should all customers or partners also be able to become co-owners? Should only the energy community become the owner? Describe here who should become co-owners of the project.
How can you achieve this goal? Key activities Specify how and with which activities you can achieve this goal. These activities can include measures in the following fields: cooperation with service and equipment providers, procurement, marketing, deployment, communication, organisation, legislative and financing. Describe the most important activities and next steps that are necessary to implement the project.	What do you need to achieve the goal? Key resources and capacities To successfully achieve the project's goal, you should define what you need. This can include, for example, financial resources, expertise, land property, management capacity, or technical skills. Name and describe the important resources or required capacities for your project.	How do you reach members / customers? Marketing and communication How should the services be offered and sold? Communication with members and customers is also particularly important for the success of the project. How should this be reached? Please list here which sales and communication channels you want to use to address members and customers.	Who is the main target group? Customers Depending on the project, the services can also be offered to customers who are not co-owners. Please list here which customer groups should be addressed in addition to the co-owners and who should pay for the energy generated in the project.
What are the expected earnings? Yield What are the different sources of income? How much are the co-owners, customers and/or partners willing to pay for the products or services? What revenue do you want to generate? Will the income cover the costs? What pricing model do you use (fixed price or variable according to usage)?			Which external stakeholders/actors do you need? Partners To successfully implement the key activities of the project, other partners are often needed in addition to the co-owners, e.g.: suppliers, experts (e.g., start-up consultants, legal advisors, technical advisors), network partners (e.g., mayors, farmers, role models), financing partners (e.g., sponsors), service partners (e.g. craftsmen, tenants). Please list here which partners are important.
What are the expected costs? Expenses What are the main costs for the key activities or for the provision of key resources and capacities? What type of costs are incurred and how much are they? What capital is required? What personal effort is involved in developing and running the project (e.g., voluntary work)?			

1. Social Business Model Canvas

The Social Business Model Canvas is inspired by the Business Model Canvas but tailored to create a business model for a social enterprise. Unlike traditional businesses prioritising profit, social businesses focus on creating a positive impact for their beneficiaries. To reflect this, the tool incorporates additional elements essential to building a social business model.

The Social Business Model Canvas consists of 13 building blocks, and compared to the traditional Business Model Canvas, it includes several key adaptations:

- Customer Segment Differentiation: The "Segments" block is split into beneficiaries and customers. This acknowledges that beneficiaries of the social impact often do not pay but are central to the business model.

- Value Proposition Expansion includes three elements:
 - Social Value Proposition (what social impact is created),
 - Customer Value Proposition (what value is offered to paying customers), and
 - Impact Measures (how the impact is tracked and evaluated).
- Type of Intervention: This block identifies the product or service that delivers the intended value and impact.
- Key Actors: Besides partners, the canvas highlights key stakeholders who are, or should be, involved in implementing the program.
- Surplus Allocation: This component outlines how profits will be reinvested to further the social mission.

Social Business Model Canvas



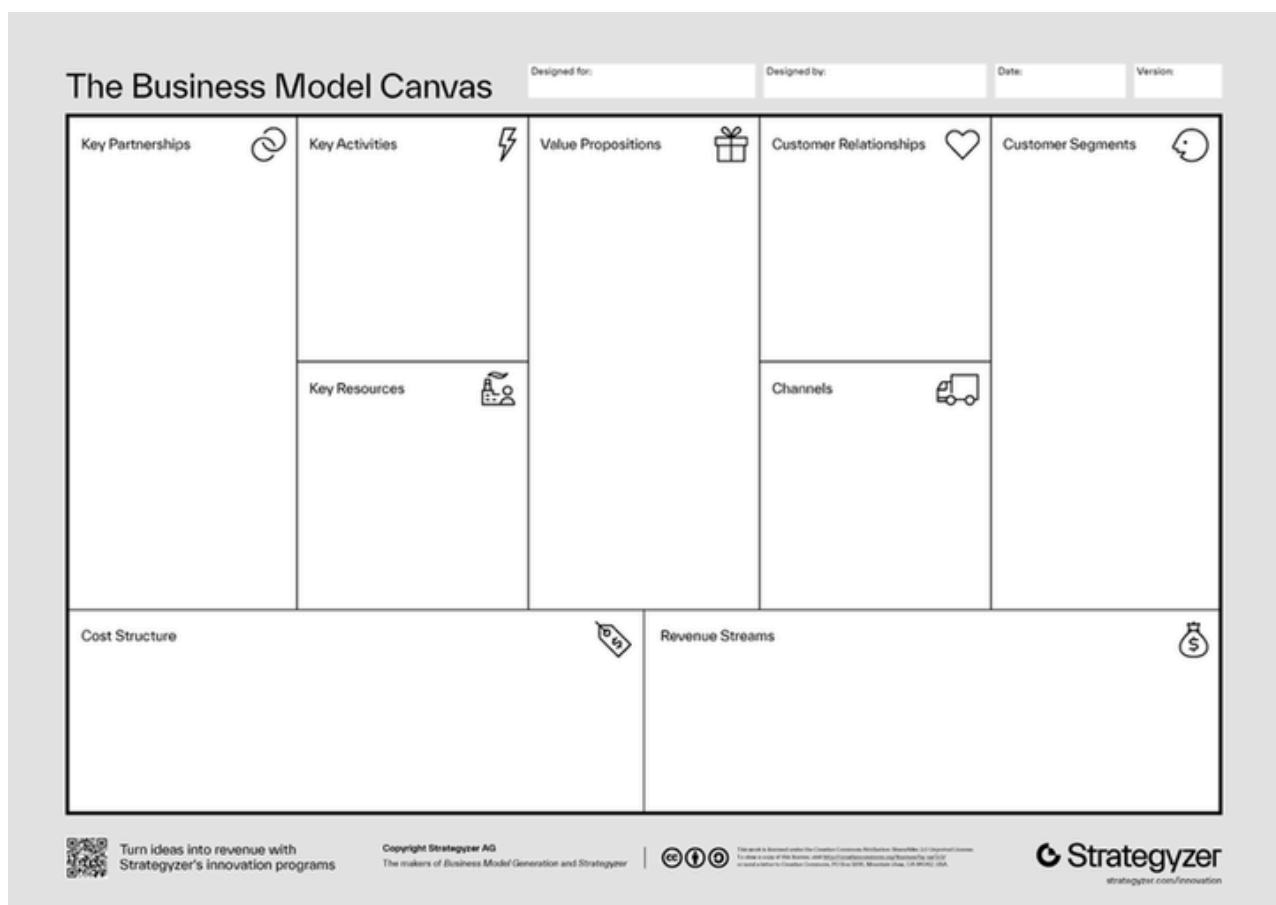
Key Resources <i>What resources will you need to run your activities? People, finance, access?</i>	Key Activities <i>What programme and non-programme activities will your organisation be carrying out?</i>	Type of Intervention <i>What is the format of your intervention? Is it a workshop? A service? A product?</i>	Segments Beneficiary ----- Customer	Value Proposition Social Value Proposition ----- Impact Measures <i>How will you show that you are creating social impact?</i> ----- Customer Value Proposition
		Partners + Key Stakeholders <i>Who are the essential groups you will need to involve to deliver your programme? Do you need special access or permissions?</i>		
Cost Structure <i>What are your biggest expenditure areas? How do they change as you scale up?</i>		Surplus <i>Where do you plan to invest your profits?</i>		

Inspired by The Business Model Canvas

As mentioned, the above social and community energy business canvases are derived from the design and elements of this classic 'for profit' Business Model Canvas, of which each element can be considered as follows:

- Key Partnerships - Who are the essential partners your business needs to work with?
- Key Activities - What activities are needed for success?
- Key Resources - What resources are needed to operate?
- Value Proposition - What benefits does the business provide to customers?
- Customer Segments - Who benefits from the business services?
- Customer Relationships - How will we engage customers?
- Channels - How will we reach customers?
- Cost Structure - What are the major expenses?
- Revenue Streams - How will the business generate income?

A version of the Classic General Business Model Canvas Template is available:



Because this classic canvas tends to focus the business developer on simply providing services/value directly to specific customers, it tends to miss the more nuanced mix of stakeholders and beneficiaries that a social business needs to succeed. This is why more tailored canvases, such as the Social Business Model Canvas, are better suited to supporting business model planning for a community energy enterprise.

For planning a more complex endeavour with multiple services, it is better to think about a canvas for each line of service. Otherwise, it can become too complex on paper.

E-LAND Business Model Innovation Tool for Energy Communities

The E-LAND business model Innovator Tool provides a package of 25 business model patterns for energy communities that have proven successful for early mover companies and projects. The tool provides implementation references to business models of energy communities, system operators and seasonal storage for inspiration. The pattern can be combined and tailored to the local context in a framework.



BUSINESS MODEL CANVAS WORKSHOP GUIDE

This section outlines the workshop design for co-creating a Business Model Canvas for a community energy project.

The objective is to collaboratively develop a Business Model Canvas (BMC) for a community energy enterprise, ensuring the community group's co-participation in shaping key aspects, including the service model and value proposition, resource plans, partnerships, customer identification, and financing/revenue options.

To help with this, you can use one or more business model canvassing tools mentioned earlier.

The main outcome of this process should be a co-designed business model for a community energy enterprise and improved participant understanding of where to focus their efforts to further develop the project.

Workshop Design:

1. Welcome & Introduction (15 min)

- Welcome participants and introduce the Business Model Canvas (BMC) framework that you have selected.
- Explain its relevance to community energy projects.
- Overview of the workshop structure.

2. Beneficiaries and value proposition (30 min)

- Group Discussion: Divide participants into smaller groups.

Ask each group to discuss who they would map as the key customers/beneficiaries of the enterprise, and what value proposition this enterprise should offer to these customers/beneficiaries.

A common tool to help with this piece of the canvas is asking participants to focus on how they understand that 'pain' points for customers/beneficiaries, and how those customers/beneficiaries will 'gain' from the services provided.

Bring groups together to share what they have discussed and work toward aligning an initial version of the customer/beneficiary segments and value proposition on a common canvas (e.g., a poster or a digital collaboration board).

3. Identifying Other Key BMC Components (20 min)

- Group Discussion: Divide participants into new, smaller groups.

Assign each group one or two of the other specific BMC sections (e.g. Key Partners, Activities, Channels, Revenue Streams).

Provide guiding questions to help define each section.

Encourage participants to use sticky notes, flipcharts, or a digital collaboration board.

4. Developing the Canvas (30 min)

- Each group presents their findings.
- Facilitator consolidates inputs into a draft Business Model Canvas, and helps to identify potential clashes or inconsistencies.
- Community members provide feedback and refinements.

The co-created canvas will not be perfect, but it should provide participants with insights into where they agree, where they disagree, and where they need to do more work, discussion, and planning to reach a consistent, logical model.

5. Action Planning (15 min)

- Define next steps for finalising the business model. How will participants keep working on it? Who will take the lead?
- Assign responsibilities for further research or funding applications.

ANNEX 1: COMMUNITY ENERGY BUSINESS PLANS

Template

Background (to be removed)

This template is designed to help with the preparation of the Feasibility, Business and Investment Planning of community energy initiatives. Guidance on this process is set out in 'phase 2' of the Methodology for Community Energy Development in the Community Energy Project Pipelines Toolkit. This template is provided as an appendix to the toolkit.

The Feasibility, Business, and Investment Planning phase of community energy development will ultimately produce detailed business plans for community energy initiatives, preparing them for investment raising and implementation.

Workshop Outcomes

A result of such a workshop can be an initial Community Energy Business Model Canvas, reflecting community consensus on key value propositions, services, and 'customers' they aim to serve, along with actionable next steps for further business model development by the community group.

The business plan needs to cover:

- Forming the team
- Feasibility Assessments
- Business Modelling
- Investment Planning
- Organisation Forming
- Governance Planning

Business planning is often approached iteratively, depending on the initiative's complexity. This template is designed to flex to multiple iterations, starting with less detailed and moving to a more detailed plan, following the same structure.

A further template for feasibility reports is also attached to the toolkit. The produced feasibility reports can be appended to the completed business plan.

Community Energy Business Plan

Initiative Name

Version

Date:

Prepared by:

(Initiative leaders)

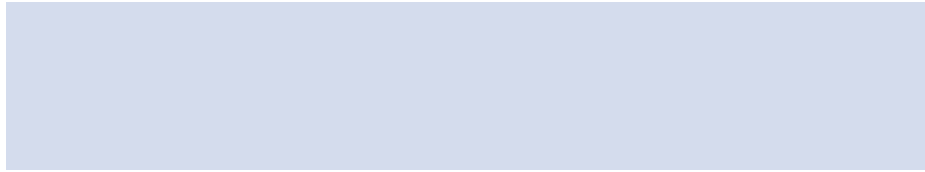
1. Summary

This is a business plan for

(Community energy initiative Name)

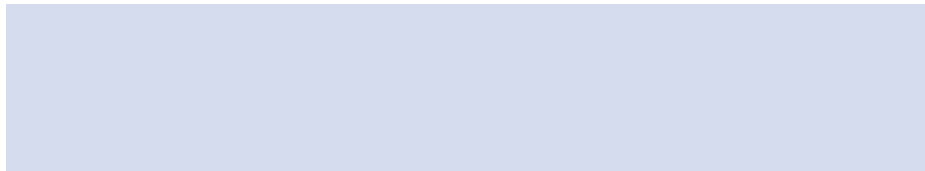
Through this initiative, our vision is that...

Provide a short summary of the vision for the initiative from section 2.1



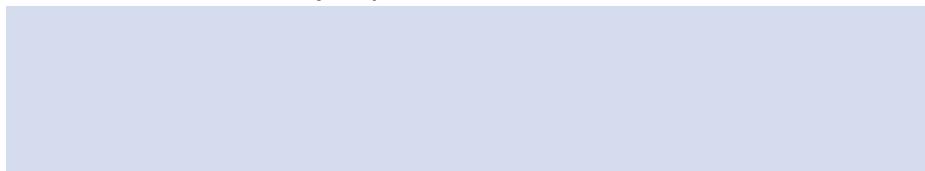
Therefore, we aim to:

Provide a short summary of the objectives from section 2.2



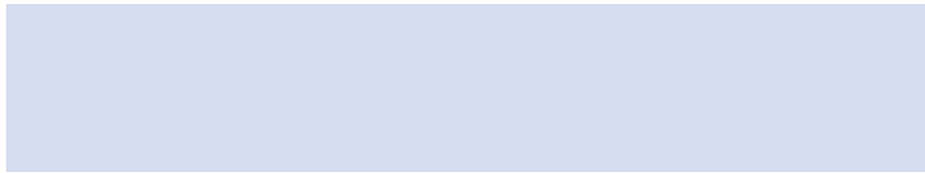
Having considered the feasibility of different options, we have decided to deliver these core services:

Provide a short summary of planned services from section 3



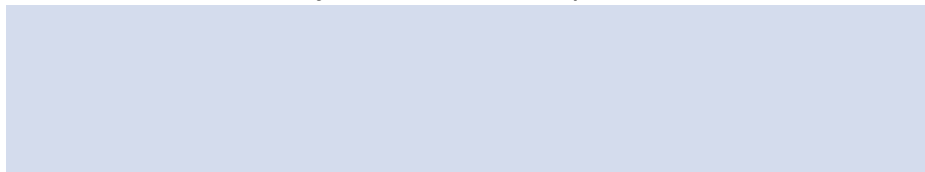
To deliver these core services, we first need to implement the following development projects:

Provide a short summary of the development projects from section 3



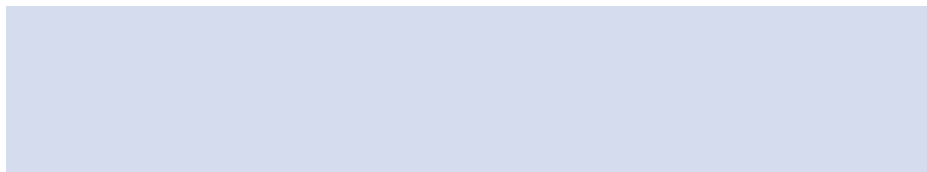
To deliver these projects and our core services, we plan to raise the following investment:

Provide a short summary of the investment plan from section 4

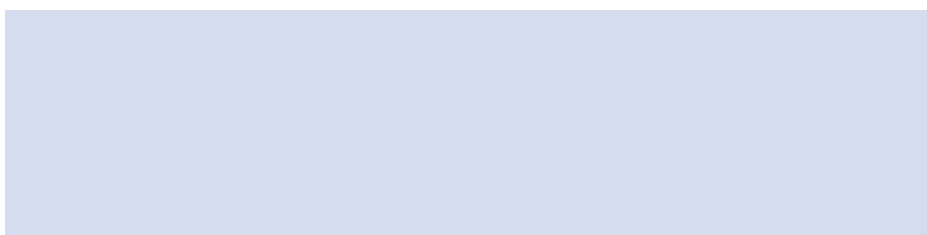


We have identified and planned to mitigate the following key risks to the success of this enterprise:

Provide a short list of key risks identified (section 5)

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Further details on how we plan to establish the governance, team and legal form of the enterprise are outlined in section 6.

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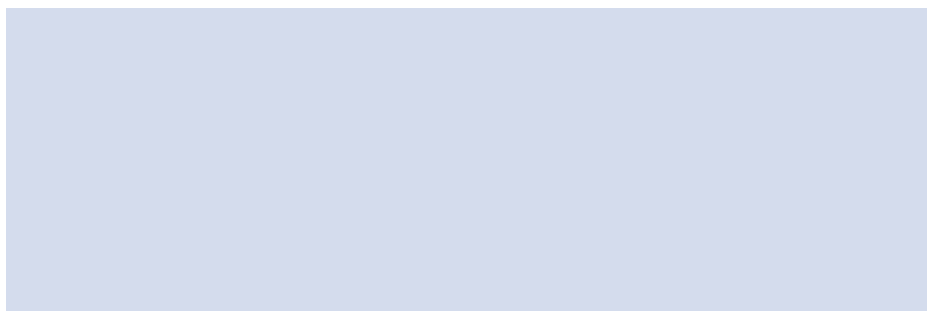
2. Vision and objectives

2.1 Vision

What is the vision that has been decided on for the initiative?

What is the primary social purpose of the initiative that lies behind this vision, and therefore what social benefits are targeted?

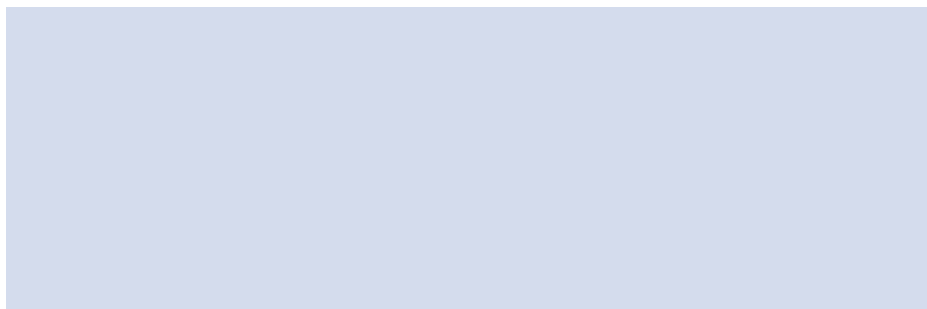
You may want to highlight the issues/improvements in the local energy system that this vision targets.

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2.2 Objectives

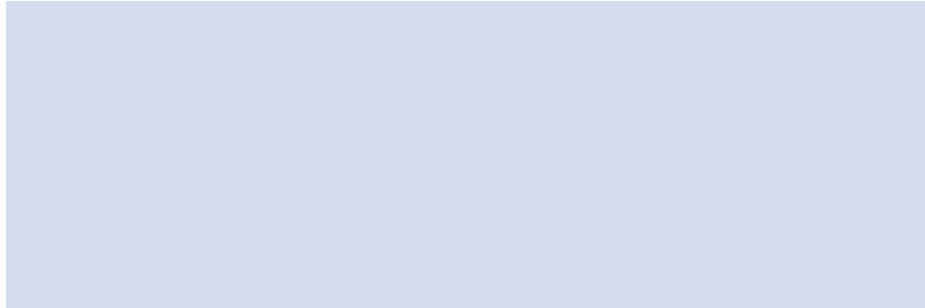
What are the objectives set for the initiative, in pursuit of the vision?

Objectives should be specific, measurable, ambitious, achievable, relevant and time-bound. Don't let the timeframe for objectives be too far into the future.

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3. Service plan

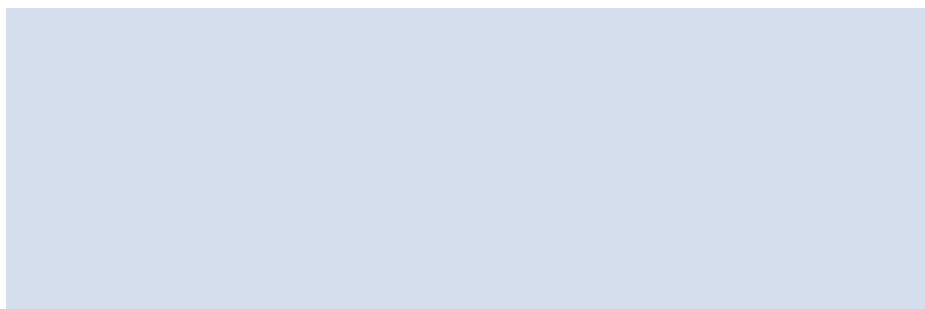
The enterprise service plan should be derived from feasibility assessments and business service modelling. Completed Business Model Canvas and feasibility assessment reports can be attached to this plan as appendices.



3.1 Target customers

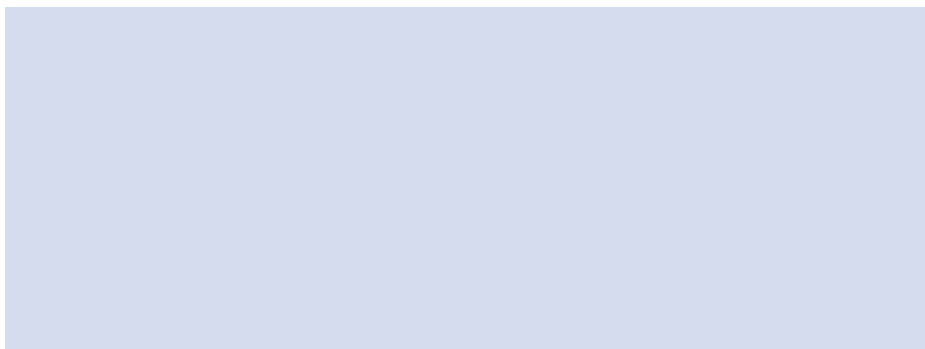
Who are the primary customers for the enterprise? How will they benefit directly? How were these customers prioritised?

Who else will benefit as indirect 'customers



3.2 Value proposition and impacts

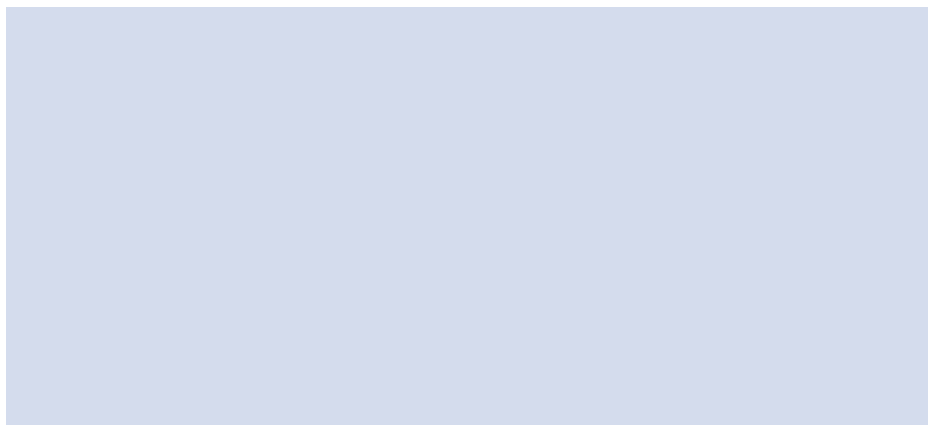
What is the value proposition that has been identified for the enterprise to deliver to its identified customer groups? How does this map back to the vision and objectives?



Planned services

What are the services that have been planned for the initiative to deliver the planned value proposition to the customers?

These planned services should be the combined result of service model development and feasibility assessments to check that the planned services are viable. In this section, stick to describing the planned services that will be the basis of the enterprise.

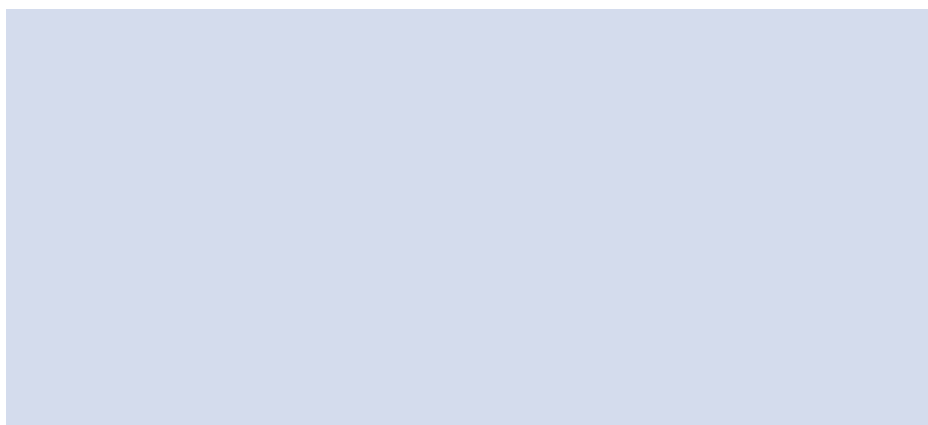


3.3. Development projects

Summarise the development projects that are needed to establish the venture and deliver the planned services. ie. what needs to be built and established first?

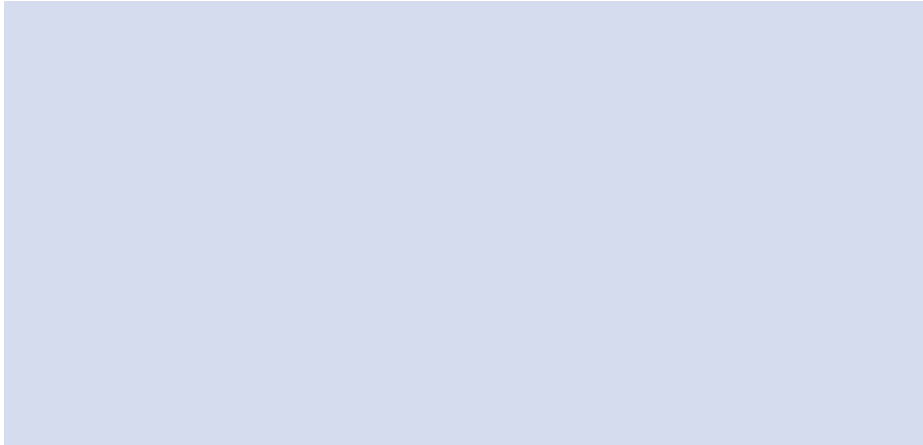
The scope of these projects should be clear, informed by feasibility assessments and service planning. You may also want to summarise the results/process of the feasibility assessments in a section here.

Set out an appropriate level of detail on scope, timeframe, budget and risks for these development projects, commensurate with the details of the business plan. How will the projects and delivery be structured, procured and managed?



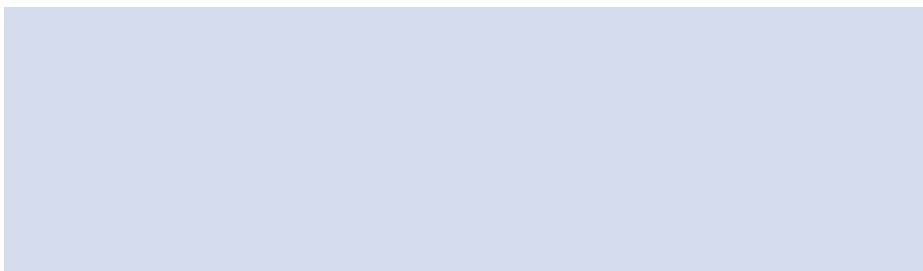
4. Investment Plan

Figures for most of these sections will come from the feasibility assessment report and financial modelling, so just provide a brief summary here in a form that fits with the rest of the plan. Focus at the end on the strategy identified for blending an appropriate mix of investment sources.



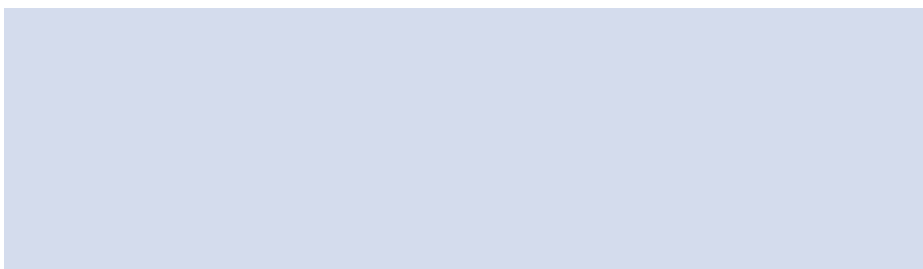
4.1 Capital costs

Summarise the estimated capital investment needed to realise the development projects set out in the previous section.



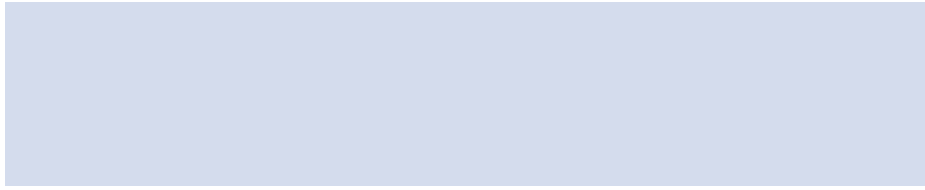
4.2 Projected operating costs

Summarise the projected annual operating costs for the planned services.



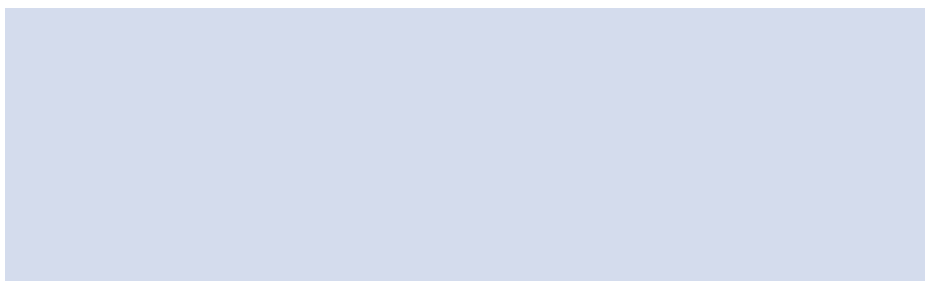
4.3 Revenue projections

Summarise the projected annual revenues from the planned services.



Investment Required

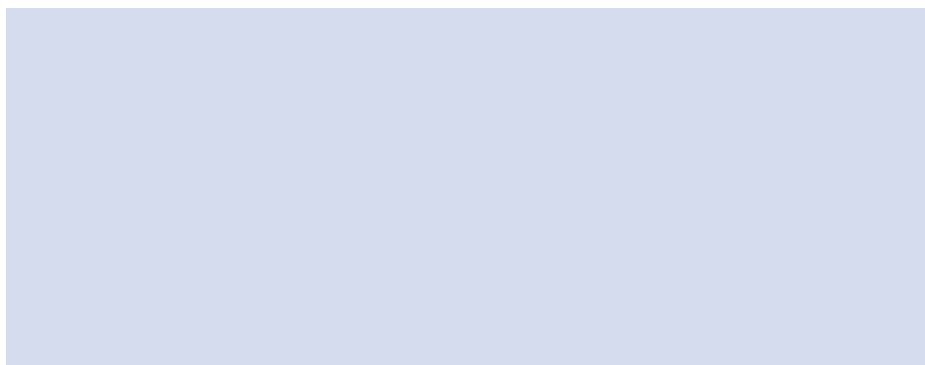
Describe the projected investment that is needed to meet the required capital investment, and any operating costs that are not covered by revenues.



4.4 Investment raising plan

Describe your plan for raising the needed investment. Which blend of investment sources will you target, through what strategy? What returns have you assessed that can be offered to different groups of investors?

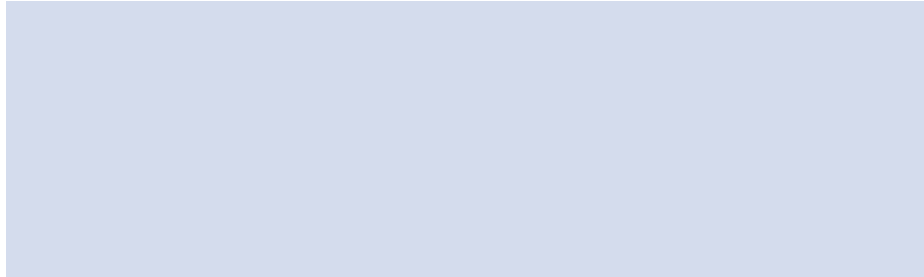
How does this investment plan map to the value proposition for different customer groups that you have identified? I.e., how will these investors recognise and reward the value generated?



5. Risks

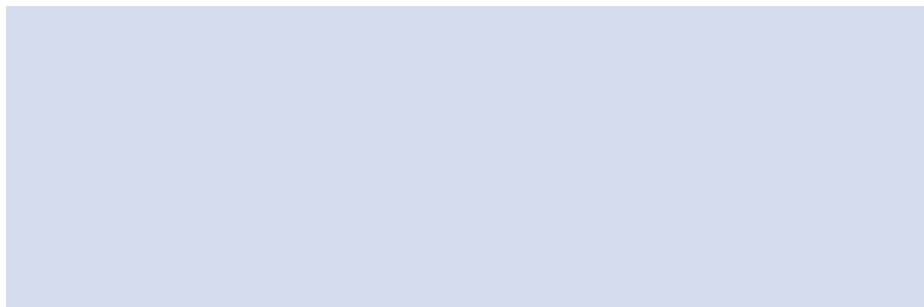
5.1 Risk assessment

Describe the assessment of key risks facing the initiative



5.2 Risk mitigation plan

Describe how the assessed risks will be mitigated or managed.

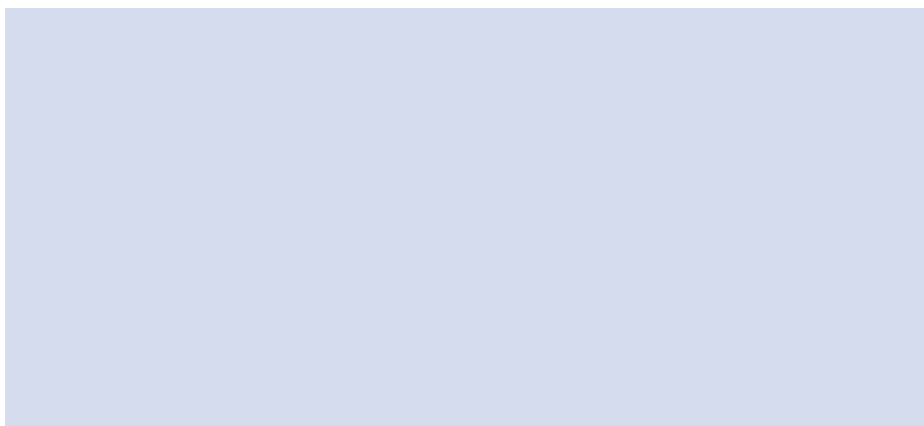


6. Organisation

6.1 Governance

Describe how governance of the initiative is designed. What are the roles in the governance group, and who fills them? (Consider attaching brief profiles of the people on the governance group as an additional appendix).

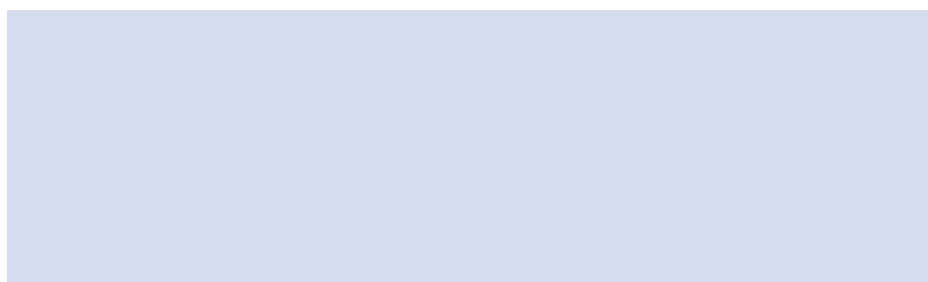
How are governance processes planned? (Consider having statutes / Terms of Reference for the governance group available to support investment raising, and/or include them as an annex).



6.2 Roles and team members

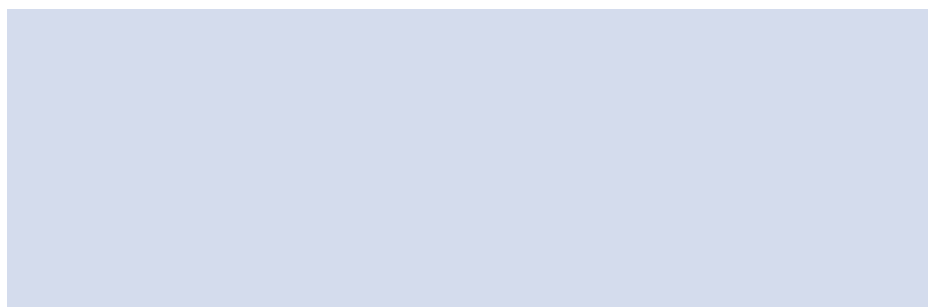
Summarise the team that you have designed and put in place for the initiative, and describe each role in the team. Include a diagram illustrating how roles map to individuals. Clearly note any resourcing gaps that still depend on securing funding to fill the required roles on the team.

You may wish to attach team members' profiles as an appendix. Investors will be interested to know who the people behind the initiative are.



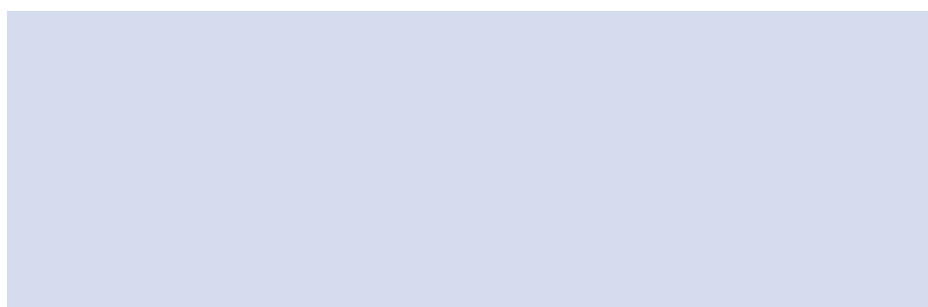
6.3 Team Management

Summarise how the team is managed and the links to the governance group.



6.4 Legal form

Describe the legal form selected for the enterprise, and why this has been chosen.



7. Annexes

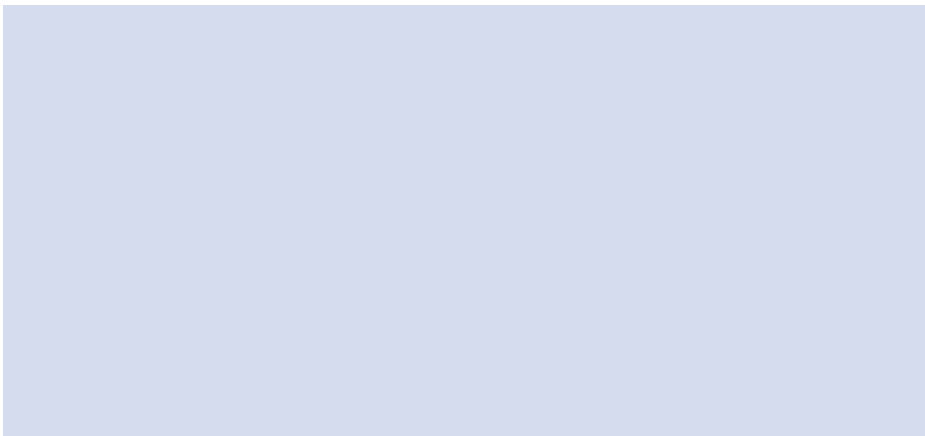
7.1 Feasibility assessment reports

List of attached Feasibility Assessment Reports



7.2 Business Model Canvas

Attach a copy of the business model canvas, if appropriate.



ANNEX 1: COMMUNITY ENERGY FEASIBILITY ASSESSMENT

Report template

Background (to be removed)

This template is designed to help with the preparation of the Feasibility, Business and Investment Planning of community energy initiatives. Guidance on this process is set out in 'phase 2' of the Methodology for Community Energy Development in the Community Energy Project Pipelines Toolkit (especially the section on Feasibility Assessments). This template is provided as an appendix to the toolkit.

The Feasibility, Business, and Investment Planning phase of community energy development will ultimately produce detailed business plans for community energy initiatives, preparing them for investment raising and implementation.

This template is designed for feasibility reports on specific options for delivering the planned business services.

The produced feasibility reports can be appended to the completed business plan.

Community Energy Feasibility Assessment

Initiative Name

Version

Date:

Prepared by:

(Initiative leaders)

1. Summary

This report summarises the results of a feasibility assessment for...

Provide a short summary of the development option/venture being assessed. What would it involve?

This was identified as a potential option for delivering on the vision and objectives for

_____ (Initiative Name).

Provide a short summary of how this venture would deliver on vision and objectives for the initiative.

Our conclusions from this feasibility assessment are that:

Provide a short summary of the feasibility results in bullet point form

Therefore, we conclude that...

Provide a short summary of the conclusion on whether the feasibility assessment shows that this is the right thing for the initiative to undertake, or not.

2. Technical Feasibility Assessment

Cover in this section whether the project works technically in the local context

2.1 Technical Overview

Elaborate on what would be done, and the different technical components required.

2.2 Energy Resources

Are energy sources available and reliable (e.g. sunshine hours, waste heat, wind or water flows)? Summarise the results of any resource assessments undertaken.

2.3 Site

Is there a suitable site/location?

2.4 Connectivity

Can users of the produced energy services be linked as customers? What is required in terms of grid/network connections? Can these be achieved at a fair price?

2.5 Permitting

Are planning and permitting requirements likely to be manageable?

2.6 Delivery capacity

Are there local technology providers/installers/operators to deliver and manage technical aspects of the assets/initiative?

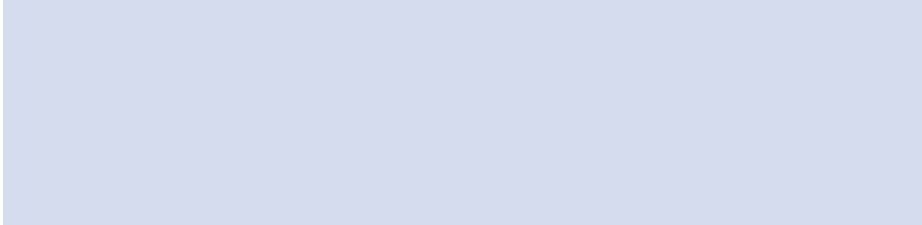
2.7 Risks

What key risks face the success of the initiative?

3. Benefits and impacts

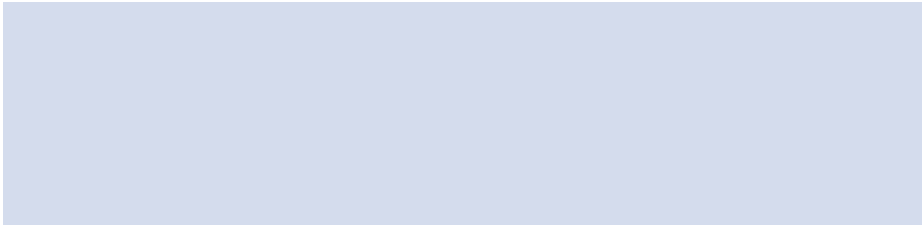
3.1 Target customers

Who are the primary customers/users? How will they benefit directly?



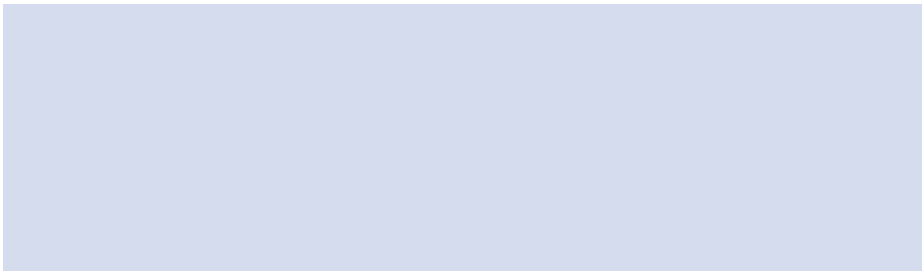
3.2 Social benefits

What are the assessed social benefits to customers/users? How does this link to the value proposition that has been identified as part of business service planning?



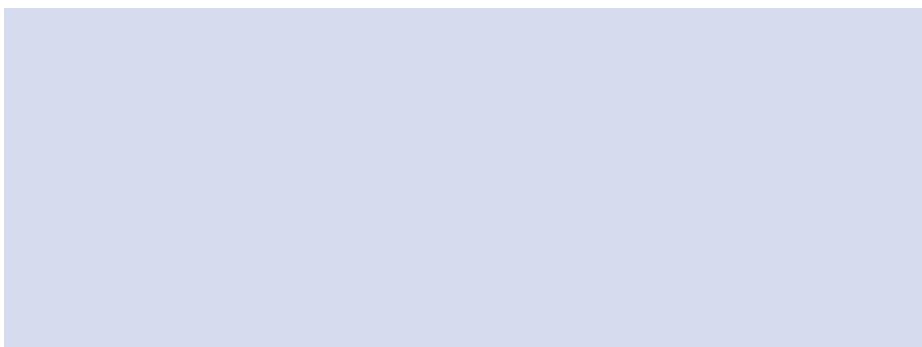
3.3 Ecological/climate benefits

What are the assessed Ecological/Climate Benefits of the initiative?



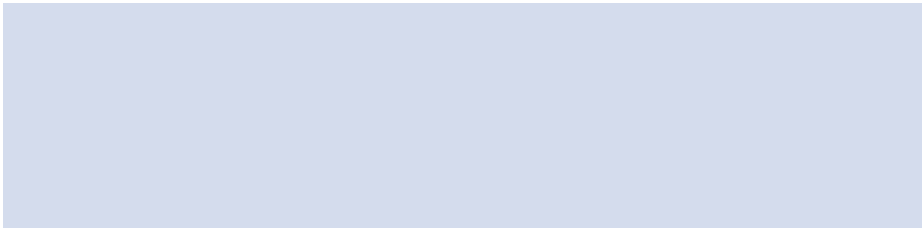
3.4 Economic benefits

Summarise economic/financial benefits. These should come from the results outlined in the financial modelling section below.



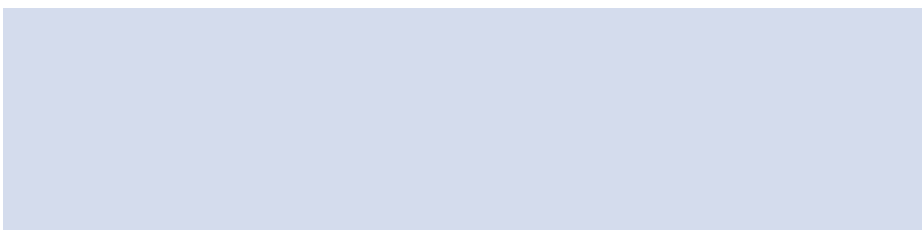
3.5 Negative impacts

Are there any negative impacts of the project/initiative?



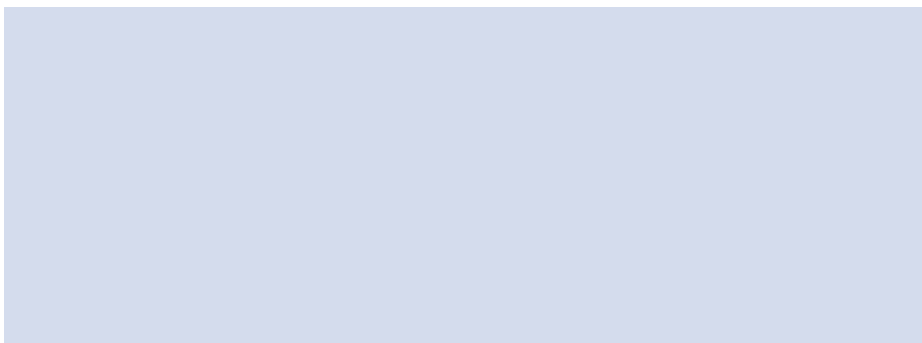
3.6 Equity

Are expected impacts and benefits equitably distributed in the community?



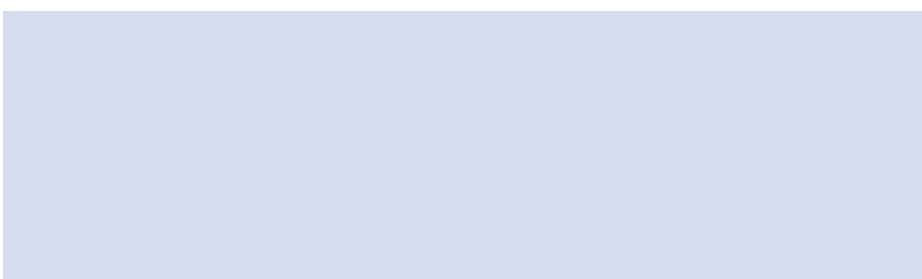
4. Financial Assessment

Summarise the results of financial modelling prepared as part of the feasibility study to help determine the financial viability of the initiative.



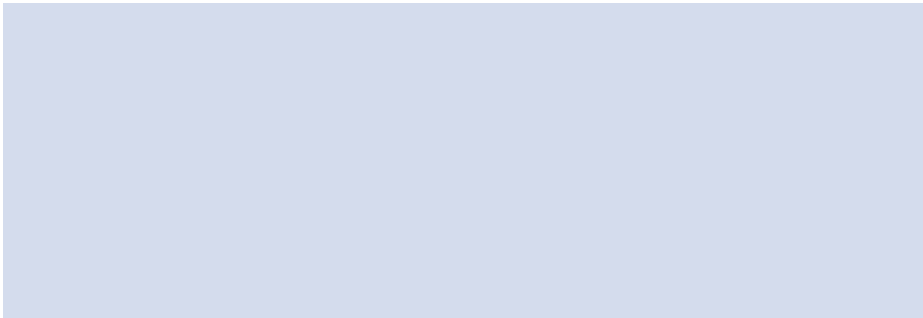
4.1 Capital Costs

Summarise the estimated capital investment that will be needed for implementation



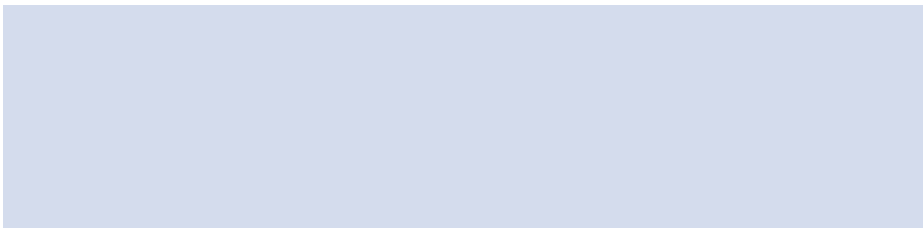
4.2 Projected Operating Costs

Summarise the projected annual operating costs



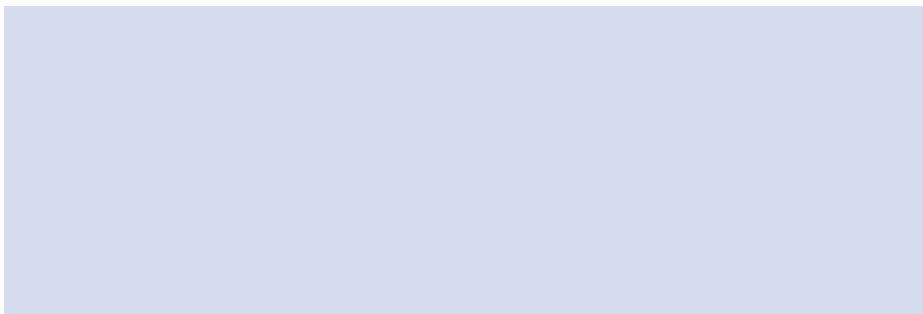
4.3 Revenue projections

Summarise the projected annual revenues.



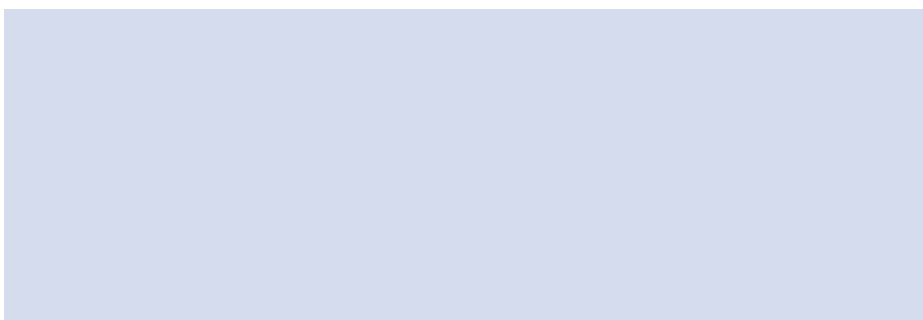
4.4 Scenarios

Summarise the scenarios developed and modelled for costs and revenues, being clear on how key assumptions/factors have been varied and subjected to sensitivity testing.



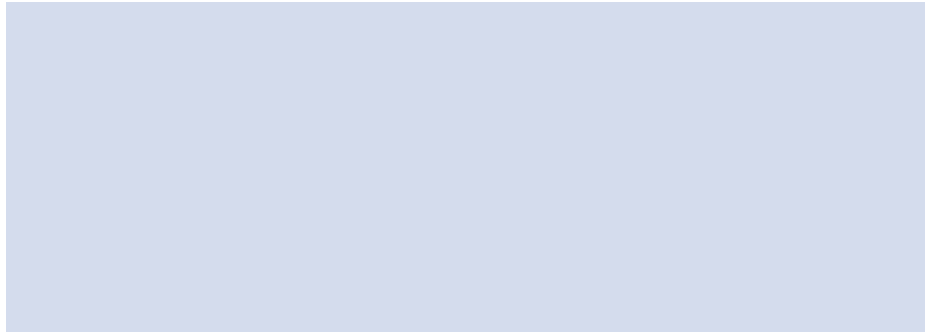
4.5 Results and returns

Summarise the results and projected returns resulting from the modelling, including different scenarios.



4.6 Investment options

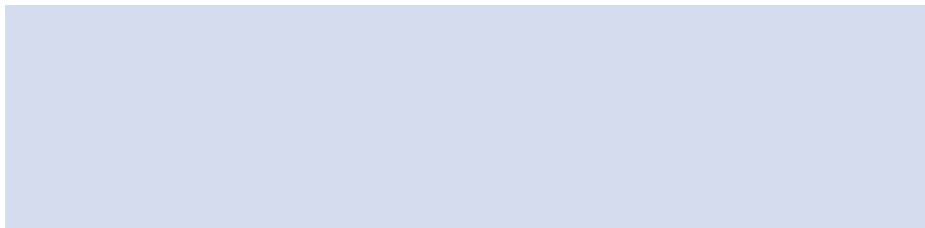
Summarise the investment that is needed to enable the initiative, and possible investment options given the different scenarios of potential returns to investors that have been tested.



5. Annexes

5.1 Designs

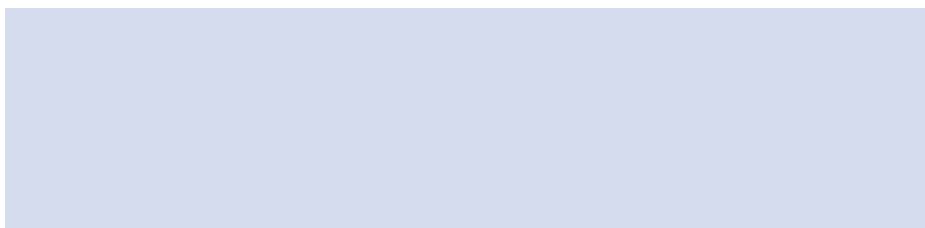
Attach any developed designs that support the feasibility assessment.



5.2 Assessments

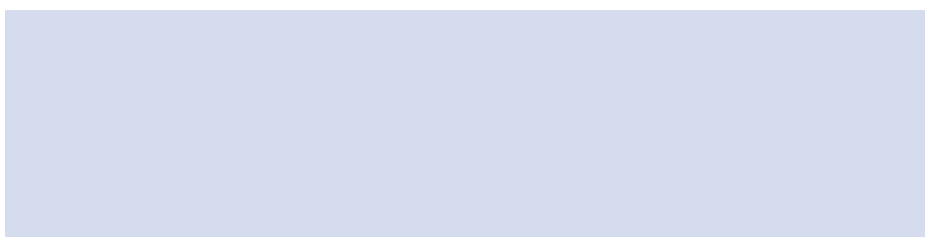
Attach any developed social/environmental impact assessments that support the feasibility assessment.

Attach any technical assessments that support the feasibility assessment.



5.3 Financial model

You may attach an extract of the financial model to illustrate its structure.



ANNEX 1: COMMUNITY ACTIVATION & ENGAGEMENT GUIDANCE

Intro

This canvas is designed as a practical tool for advisors working with community groups to support the development of a governance plan. It provides a solid foundation for facilitating workshops and discussions on the key governance aspects of a community energy project.

Getting started

- To start, provide some baseline information about the community-driven initiative:
 - Purpose of the governance plan - Why are we developing this governance plan, and what key values and goals will guide our energy initiative?
 - Overview of the community energy initiative (e.g., solar PV, wind, district heating) - What type of energy initiative are we launching, and what are its core features?
- Key governance goals and values (e.g., equity, sustainability, participation) - What governance principles are most important for the success of this initiative? Consider the seven International Cooperative Alliance Principles (ICA) commonly used for successful community energy initiatives (even if the final legal form is not cooperative).

Governance Planning Canvas

Below is a Governance Model Canvas you can use to design the governance plan for your community energy initiative. Like business model canvases, it is split into 10 parts, each encompassing an important element of a well-designed governance plan.

Facilitation Tip: Use the questions outlined in this canvas to prompt discussion among stakeholders. Encourage examples, debate, and consensus-building. Record key points into the canvas spaces (e.g. via post-it notes or into a digital canvas if available)

By using this canvas collaboratively, your community group can ensure that all critical governance issues are addressed early and thoughtfully. The outcome is a clear, transparent, and agreed-upon governance structure that supports long-term trust, accountability, and the successful operation of your community energy initiative.

<p>1 Vision, Mission, and Objectives</p> <p>Vision: Long-term goals of the initiative. What is our ideal energy future? What impact in the community energy space do we want to achieve?</p> <p>Mission: Core purpose and intended impact What is our purpose, and how do we serve our community?</p> <p>Strategic objectives: Environmental, social, and economic goals. What specific outcomes do we want to achieve across key areas?</p>	<p>2 Membership & Participation</p> <p>Who can become a member? (e.g. residents, businesses, NGO's, municipalities)</p> <p>Rights and responsibilities of members - What rights and duties come with membership?</p> <p>Inclusivity and engagement strategies (youth, vulnerable groups, etc.) - How do we ensure broad and equitable participation?</p>	<p>3 Decision-Making Processes</p> <p>Types of decisions (strategic, operational, financial) - What kinds of decisions must be made, and at what levels?</p> <p>Decision-making mechanisms (e.g., consensus, voting, delegation) - How will we make and document decisions?</p> <p>Meeting protocols and frequency - How often will we meet, and how will meetings be structured?</p> <p>Dispute resolution mechanism - What process will we use to resolve conflicts or disagreements?</p>	<p>4 Partnerships and Stakeholder Engagement</p> <p>Roles of external stakeholders (e.g., municipalities, utilities, NGOs) - Who are our key external stakeholders, and what roles do they play?</p> <p>Partnership principles and agreements - What principles should guide our partnerships?</p> <p>Communication and coordination strategy - How will we coordinate and communicate with partners effectively?</p>	<p>5 Organisational Structure</p> <p>Legal entity (e.g., cooperative, non-profit, company) - What legal form best supports our mission and allows inclusive participation?</p> <p>Key bodies - Which bodies or groups will carry out governance and operations? How do we clearly define responsibilities to avoid overlap or gaps?</p> <p>General Assembly (members/community owners) - What decisions are reserved for the General Assembly?</p> <p>Board of Directors / Management Committee - What is the Board's role in strategic oversight and accountability?</p> <p>Operational team / Staff - Who will manage daily operations and project delivery?</p> <p>Advisory Board (optional) - How can we bring external expertise to support our mission?</p> <p>Conflict of interest policy - How will we identify and manage potential conflicts of interest?</p>
<p>8 Legal and Regulatory Compliance</p> <p>Relevant laws and regulations - What laws and regulations apply to our activities?</p> <p>Licenses and permits - What legal authorisations do we need?</p> <p>Data protection and cybersecurity policies - How do we protect data and ensure digital security?</p>	<p>9 Annexes</p> <p>Terms of reference for governance bodies - What are the roles and responsibilities of each governance body?</p> <p>Sample bylaws or statutes - What legal documents define how our organisation functions?</p> <p>Membership form - What information do we need from new members?</p> <p>Annual meeting schedule template - How can we plan and structure our regular meetings?</p> <p>Code of conduct or ethics - What values and behaviours do we expect from all members?</p>	<p>10 Sustainability and Scaling Strategy</p> <p>Long-term governance resilience (succession planning, leadership training) - How will we ensure that leadership and governance are sustainable over time?</p> <p>Capacity building for members - How will we strengthen their skills and knowledge?</p> <p>Plans for growth, replication, or regional cooperation - What is our plan for expanding or replicating the initiative in other areas?</p>		

ANNEX 1: COMMUNITY ENERGY PROJECT IN A DAY WORKSHOP GUIDE

Introduction & Purpose

The "Project in a Day" workshop method offers a dynamic, participatory approach to advancing community energy initiatives during the visioning and concept design stage.

The method fosters rapid co-creation of a shared vision, practical ideas, and early-stage project concepts by bringing together local stakeholders (residents, community groups, organisations, municipal representatives, and other interested parties). Its time-bound, focused structure encourages collaboration, creativity, and actionable thinking within a single day, making it especially valuable for communities seeking to build momentum and ownership around energy transition goals.

The approach ensures that the resulting concepts are rooted in local needs, capacities, and aspirations, laying a good foundation for long-term success and acceptance of community energy projects.

This type of workshop usually takes one full day (but can also be compressed into 4 hours). Ideally, it brings together 10-20 interested people to co-develop a shared vision, identify energy priorities, and define a draft context-specific community energy project concept with actionable next steps.

The following outlines a proposed structure for the "Community Energy Project in a Day" workshop, with details on delivering each of the five main activities.

Activity	Objective
Welcome & context setting	Align on goals and introduce participants
Community Energy Mapping	Identify energy needs, challenges, and opportunities
Visioning Exercise	Co-create a shared vision for energy transition
Break and networking	
Solution sprint	Develop a project concept and key actions
Commitments and next step	Define responsibilities, secure commitments

WORKSHOP DESIGN

1. Welcome & context setting

This part aims to set the stage and align participants with the purpose of the session.

Activities:

- Welcome by the organiser or local authority.
- Workshop Overview: Explain the process and expected outcomes.
- Icebreaker exercise; For example: "One-Word Energy Future" – Each participant shares one word that describes their ideal energy future. Responses can be collected on a digital board or sticky notes.

Materials: Flipchart or Miro board (or similar) for collecting responses

The outcome of this activity is to get an insight into the shared values and aims for the community energy future.

2. Community energy mapping

The objective is to identify key community energy priorities, barriers, and opportunities.

Activities:

- Forming Breakout Groups (4-5 participants per group).
- Each group maps out (on paper, or digitally):

- Current energy challenges (e.g., high costs, reliance on fossil fuels).
- Potential renewable energy opportunities (solar, wind, hydro, efficiency projects).
- Barriers to implementation (funding, regulations, public engagement).
- Group Presentations (10 min total): Each group shares key insights.

Facilitation tip: Some guiding questions for the discussions can be prepared in advance. Useful self-assessment questions to identify barriers to community energy can be found [HERE](#). Encourage examples, debate, and diverse input.

Materials: Large paper sheets & markers OR digital whiteboard (e.g. Miro).

The outcome of this activity is a Community Energy Map that highlights priorities and gaps.

3. Visioning Exercise – "Our Energy Future"

This part aims to co-create a shared vision of the community's energy future.

Activities:

- Introduce a prompt for group work: e.g. "It's 2035, and our community is energy independent, having clean, reliable and affordable energy. What does it look like?"

- Small Group Discussion where participants brainstorm answers
- Visual Representation:
- Groups create a mini vision board using sticky notes, drawings, or digital tools.
- Include 3-5 key characteristics of their energy future.
- Sharing Round: Groups present their visions.

Materials: Flipcharts, whiteboard, markers, sticky notes, or digital boards

The outcome of this activity could be a Community Energy Manifesto summarising **shared vision**, objectives, values and ambitions.

4. Solution Sprint – Actionable Steps

The objective is to develop concrete steps to launch community energy projects.

Activities:

- Idea Generation: Participants identify key energy project ideas in alignment with the vision. Examples include: Community solar, small-scale district heating, and EV charging with solar.
- Breakout Groups - Each group picks one project idea and defines:
 - What problem does it solve?
 - Key stakeholders needed (e.g., municipality, businesses, citizens).
 - Governance model
 - Funding & resources required
 - First three action steps
- Quick Presentations – Each group shares their plan

Facilitation tip: Some guiding questions for the breakout group discussions can be prepared beforehand.

The facilitator can also suggest some project ideas that participants didn't think of (see Technical Concepts Annex 3 pack for various technical options) and could be a good fit in that community. Overall, debate and diverse input should be encouraged.

Materials: Project Planning Template

(physical worksheets or digital Miro board).

The outcome of this section is a basic project concept with clear next steps.

5. Commitment & Next Steps

The final objective of this workshop is to secure commitments and define follow-up actions.

Activities:

- Dot Voting: Participants vote on the top 2-3 priority actions to focus on.
- Personal Commitment:
- Each participant writes one action they will take (e.g., join a working group, seek funding).
- Defining Next Steps:
 - When will the next meeting be?
 - Who will lead the gathering of local input?
- Closing Remarks: Summary & motivation to continue the work.

Materials: Sticky dots or digital polling tool, Commitment Cards (paper or Google Form).

The outcome of the last section is a commitment from some participants to join a follow-up working group, a follow-up timeline, and a prioritised list of local actions to be completed before the next meeting.

6. Additional methods

Some additional useful methods that can be deployed during such a workshop in the early stages of project development (Concept and Vision Shaping Phase) are:

- **Stakeholder Mapping Exercise** – Identify key actors (citizens, municipalities, NGOs, SMEs) and map their roles and relationships with the desired vision/initiative.

This should result in a **Stakeholders map**. Tools like Miro or Canva can help create stakeholder maps and define roles and relationships.

- **Skill & Knowledge Assessment** – Identify community members' expertise and interests to define participation opportunities.

This should result in an **Asset Map** that captures local resources, skills and knowledge. This can be a good resource for later development of the specific project plan.

7. Conducting the workshop online

It is possible to organise the Project in a Day workshop online.

In the Annex 2 document - Digital and AI Tools for Community Energy Initiatives, you will find an overview of digital and AI tools that can support Community energy mapping, vision co-creation and solution sprint.

ANNEX 1: COMMUNITY ENERGY PROJECT OPTIONS ASSESSMENT TEMPLATE

Introduction & Purpose

This template provides criteria for assessing the most suitable and/or preferred option for a community energy project. The criteria span technical, social, environmental, financial, and regulatory dimensions.

Each criterion helps the community understand how well an energy option aligns with its specific circumstances, assets, values, and capacities.

At the end of this document, a suggested scoring approach is provided, complemented by the Options Comparison Matrix to determine the best project fit for the community's needs and context.

The following outlines the criteria, along with questions to help score and assess options.

Criteria for the project

Technical feasibility

Can we build and run this system using our available infrastructure and skills?

- Site suitability (e.g. solar potential, wind resource, land availability)
- Grid connection potential (capacity, distance to grid)
- System reliability and maturity (proven technology vs. experimental)
- Maintenance and operational requirements

Financial viability

Can we afford this option, and does it offer good value over time?

- Capital costs (CAPEX) – upfront investment required
- Operating costs (OPEX) – long-term maintenance, staffing, fuel (if any)
- Revenue potential – feed-in tariffs, energy sales, cost savings
- Return on investment (ROI) and payback period
- Availability of grants, loans, or subsidies

Environmental impact

Does this option significantly contribute to climate and environmental goals?

- Carbon savings compared to current energy sources
- Impact on local ecosystems or land use (e.g. biodiversity, noise)
- Pollution or emissions (especially for bioenergy)
- Circularity or recyclability of materials used

Social acceptance and community fit

Is this a solution that enough community members will embrace and support over the long term?

- Community support or resistance to the technology
- Alignment with local values and identity (e.g. tradition, landscape)
- Local job creation or volunteer opportunities
- Equity and inclusion – does it benefit all community members?

Ownership and governance potential

Can we own and manage this in a way that builds local capacity and empowerment?

- Suitability for community ownership or a cooperative model
- The level of control and decision-making the community would retain

Regulatory and Planning Fit

Are there any legal obstacles or policy supports that would affect this option?

- Compliance with local, regional, and national laws
- Likelihood of obtaining necessary permits
- Supportive policies or known barriers

Scalability and Replicability

Does this option offer long-term flexibility and wider benefits?

- Can the project grow if demand or capacity increases?
- Can the model be reused in nearby communities or sectors?

Timeline for Implementation

When can we start benefiting from this solution?

- Speed of deployment – how quickly can benefits be realised?
- Planning and permitting complexity
- Dependency on external approvals or partnerships

Resilience and Adaptability

Will this project help us adapt to future uncertainties?

- Ability to withstand climate impacts (e.g. storms, heatwaves)
- Modularity – can it be expanded, upgraded, or repaired easily?
- Energy independence and reliability

Suggested scoring approach

Criterion	Description	Scoring Guide (1=low, 5=high)
Technical Feasibility	Suitability of site, grid connection, system reliability, and operational complexity	1=Not feasible, 5=Fully feasible
Financial Viability	Costs, revenue potential, ROI, and funding availability	1=Very costly/low return, 5=Affordable/high return
Environmental Impact	Carbon savings, environmental protection, and pollution control	1=Negative impact, 5=Strong positive impact
Social Acceptance and Community Fit	Community support, job creation, and inclusivity	1=Low support, 5=High community fit
Ownership and Governance Potential	Ownership model, decision-making, and transparency	1 = Not suitable for community ownership, 5=Highly suitable
Regulatory and Planning Fit	Legal compliance and planning feasibility	1=Major barriers, 5=Fully compliant and supported
Scalability and Replicability	Ability to scale or replicate the project	1=Not scalable, 5=Easily scalable
Timeline for Implementation	Time needed to realise benefits and start operations	1=Long delays, 5=Quick implementation
Resilience and Adaptability	Resilience to climate events and flexibility to adapt	1=Not resilient, 5=Highly resilient

If needed, an additional score-pondering mechanism can be implemented.

Options Comparison Matrix

	Technical Feasibility	Financial Viability	Environmental Impact	Social Acceptance and Community Fit	Ownership and Governance Potential	Regulatory and Planning Fit	Scalability and Replicability	Timeline for Implementation	Resilience and Adaptability
Option A									
Option B									
Option C									

ANNEX 2: COMMUNITY ENERGY GOVERNANCE PLANNING CANVAS

This Annex package contains supporting materials for community awareness raising, activation planning, and monitoring. The tools are designed to follow the natural development of a community energy initiative — from inspiration and initial reflection to structured engagement and long-term membership. They work best when used progressively: starting with building motivation and understanding local readiness, then mapping stakeholders and consulting the community, and finally moving toward broader communication and sustained commitment.

It includes:

1. Inspirational Case Studies and Storytelling Series – When you need inspiration and credibility at the very beginning, to show that community energy works in real life – even where scepticism and barriers existed.
2. Community Readiness Assessment Tool – When an idea emerges, and you want to understand how prepared your community is, including levels of trust, motivation and potential resistance.
3. Stakeholder Mapping & Engagement Plan – When you need to identify key actors, assess their influence and interests, and plan tailored engagement strategies – especially for sceptical or high-influence stakeholders.
4. Community Energy Consultation Process – When you are ready to open structured dialogue, gather diverse perspectives, and address concerns transparently at key stages of the project.
5. Community Energy Engagement Strategy – When you want to design a coherent, long-term approach to engagement, defining goals, target groups and methods based on your local context.
6. Awareness Campaign Tools – When you aim to reach a broader audience, communicate clearly about community energy, and build visibility and interest through targeted campaigns.
7. Membership Engagement Strategy – When you want to turn interest into sustained commitment, guiding people from initial curiosity to formal membership and active participation.
8. Digital and AI Tools for Community Energy Initiatives – When you want practical digital support for planning co-creation and outreach.

ANNEX 3: TECHNICAL CONCEPTS

The following technical concepts support the toolkit:

1. Solar PV for a Public Facility Building
2. Solar PV for a Multi-Apartment Building
3. Solar PV system where energy will be provided to 'energy community' members through a local network.
4. 1MW Wind Turbine
5. Heat pump system for a Multi-Apartment Building
6. Biomass district energy system for a mix of public utility and residential buildings.
7. Direct district cooling system for buildings using a local cold-water source
8. Deep retrofit of a typical 60s apartment building.
9. Greywater Heat Recovery System for a Multi-Apartment Building