



D: Monitor and follow up your results

This chapter is primarily relevant for you, if you have the role of a Trusted Partner and have initiated activities for your local energy collective.

The purpose of this chapter is to provide guidance in relation to how to monitor and follow up the results from the activities of the collective. The reasons for monitoring and following up results of the collective as whole may be that:

- You have set an ambition for the collective, which should be monitored and reported back to the group.
- Concrete results and successful outcomes are a powerful tool that can be communicated and disseminated (within and outside the collective) to create and maintain motivation for participating SMEs and other stakeholders (see Section C.1).
- You need to show verifiable results for the funding agency to fulfill reporting obligations (if relevant).
- Monitoring and following up the results and outcomes of your efforts are essential to developing and improving your own work and the services you offer the SMEs.

The essential steps needed to monitor an energy collective are described in the process illustrated in Figure 1, where each box corresponds to one section of this chapter.

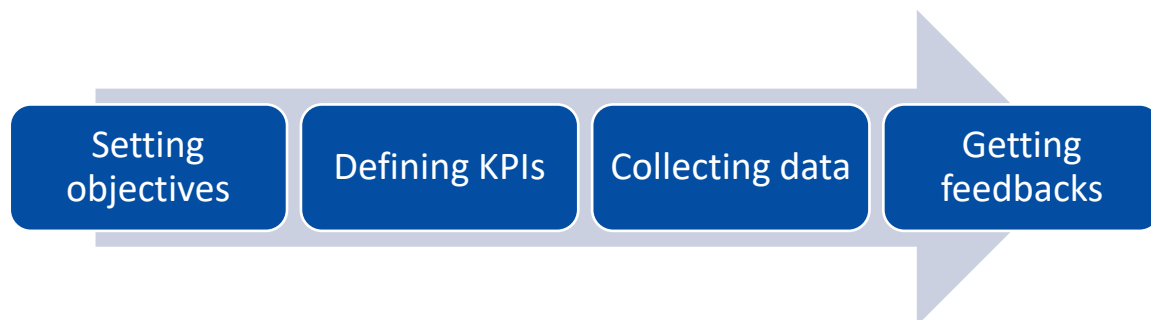


Figure 1. Process of monitoring the results.



D.1 Steps of monitoring and follow up

Short description	You set and formulate the objectives of your local energy collective, define Key Performance Indicators to monitor those objectives and collect the data needed. The final step is to get and provide feedback on the impact of actions.
Tools provided	—

This section describes the different steps of monitoring and following up the work in the local SME energy collective.

D.1.1 Setting objectives

To evaluate the results of the work in the local energy collective (in order to learn from experiences, use successful results for continued motivation, and fulfil reporting obligations), it is necessary to relate the progress to well-defined objectives. For these reasons, it is important to set the frame of monitoring (what, what time, where, ...) and well defined objectives already at the beginning.

As described in Section B2 (Setting your Ambition), the impact ambition of your local SME energy collective depends on the specific situation and context. It might be set independently or in cooperation with the SMEs, but should of course relate to the needs identified upstream.

The impact ambition of the energy collective can be intangible (i.e. not giving an exact value) and set to be achieved over a long period. Therefore, it may be necessary to break it down into several more specific objectives, which can be monitored and followed-up on a regular basis. Objectives are the specific actions and measurable steps that you need to take to achieve a certain goal, such as that defined by your impact ambition. In order to have a good basis for monitoring, it is important to state your objectives clearly. You can use the SMART-Method to do this (see Figure 2).



Figure 2. SMART Method to define objectives.



Notably, the ambition or goals of the collective may not necessarily be related to energy efficiency, but intrinsically (also) related to becoming carbon neutral or improving the image of the business park. The more concrete objectives are, however, usually expressed in energy terms. Examples of objectives can be:

- Define and jointly implement energy management for at least xx% of participating SMEs by the end of the year.
- Organized xx workshops focusing on implementing an energy audit in xx% of the participating SMEs by the end of the year.
- Cover xx% of the available roof surface of the business park with photovoltaic panels by 2025.

D.1.2 Defining KPIs (Key Performance Indicators)

Once the objectives have been defined, you should be able to define and monitor Key Performance Indicators (KPIs). Depending on the focus of your energy collective, KPIs could include, for example:

- Number of companies participating in the energy collective
- Number of collective workshops organized
- Number of networking activities and number of participants
- Number of energy audits carried out/ planned
- Number of SMEs monitoring their energy consumption
- Number of energy efficiency measures implemented since the initiative started
- Number of SME helped with finding funding
- Total energy consumption of the energy collective
- kWh final/primary energy saved per year
- t CO₂-eq emissions saved per year

For many of the KPIs, you will be able to fairly simply keep track of the development yourself, for instance, by keeping a log-book of activities you have organised for/on behalf of the energy collective. For other KPIs, the data will have to be collected from the SMEs. This means that the individual SMEs will have to monitor different parameters. This is, however, only one of the reasons for individual SMEs to monitor their energy efficiency work (see Section E.13).

D.1.3 Collecting quantitative energy data from the SMEs

Data collection should be adapted to the objectives set and the time frame and will depend on the type of data to be collected. A minimum of data collection "mid-term" is necessary to check whether you are "on track" or whether additional measures need to be taken. For example, for the objective "Carry out an energy audit for 50% of the SMEs in the collective by the end of the year": if only 10% have carried out or planned an audit in September, it will be necessary to "readjust" and investigate the reasons for the potential delay.



The amount or quality of data that you will be collecting will depend mainly on investment (in time) and maturity of SMEs in terms of energy. Preparing the companies in advance by sending them a data collection template or a process to clarify what type of data will be needed and the frequency of collection will surely simplify the approach. To collect this data, you may also need to support the companies with developing their own energy monitoring along the same principles (see also Section E.13).

D.1.4 Getting and providing feedbacks

The monitoring can also include a more qualitative part, allowing you to evaluate the approach chosen with your SMEs, whether the included activities meet their needs, whether certain needs could still be met by an activity of the collective, whether the proposed tools are useful and easy to use, to check which benefits the SMEs see from participating in a collective, and so on. When motivating the SMEs to participate in the collective, you have already collected some information about their motivation and probably their maturity towards energy efficiency. The collection of feedback can contribute to evaluating the impacts of all activities and measures taken. This type of data collection could be done either during site visits, as part of a meeting of the collective, or could take the form of a short survey sent every 6 months or on a yearly basis. The results could then be discussed collectively, possibly with a view to re-adjusting the offer for SMEs (see also Section C.1.1).

A final monitoring element will include a regular (at least annually) check-up on the development of all KPIs. Results can be used for following up on the collective's own objectives and ambition, for reporting, for providing feedback to the SMEs and for improving your own work. To be able to use the results as a basis for communication and dissemination, it is also useful to develop ways to visualize them.