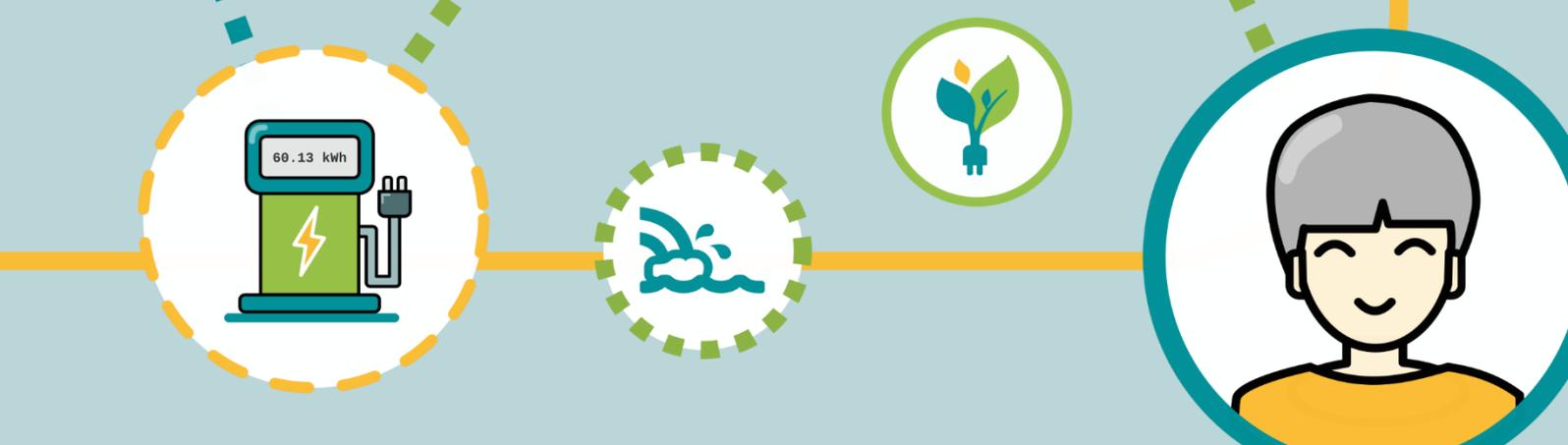


**Guide to creating
renewable energy communities
using a participative approach**





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GUIDE TO CREATING RENEWABLE ENERGY COMMUNITIES USING A PARTICIPATIVE APPROACH



**Cofinanciado por
la Unión Europea**

The compilation of this guide has been co-funded by the European Union's Horizon 2020 research and innovation programme under grant agreement no. 952930. However, the opinions and results in this document are the responsibility of the author, Goener; the Commission is not responsible for any use that may be made of the information it contains.

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1. INTRODUCTION

The aim of this guide is to **help you create a Renewable Energy Community (REC)** in your area and contains information, practical tips and tools. However, it does not address in depth all the steps and aspects involved in the process of creating an REC, as this is not its purpose; **it has a different goal: to introduce a comprehensive participative approach.**

Why do we focus on participation? Because **participation defines the “way to go about”** these processes. Participation thus provides strategies and resources to enable the **people in the community to become proactively involved in improving their environment and their lives**, on equal terms, focusing both on the outcome and on their experience of the process. It is therefore necessary to be aware of shared problems and interests, although not enough. For it to be real participation, **it is also necessary that people are able to make decisions** on the issues where they would like to make a difference.

Therefore, this guide contains the most important factors to bear in mind with regard to participation when creating an REC. However, it should always be taken into account that this is a tool to be used with a degree of flexibility and as a source of inspiration - a tool which seeks not to standardise these processes, but rather the opposite. Therefore, it must be kept in mind that **all the aspects of the process have to be in line with the possible options and local situation**, as well as participation.

The guide aims to be as helpful as possible for the people and communities all around the Basque Country and, indeed, beyond its borders. Let's embark on our journey!

This guide consists of three main sections: the **first contains the guiding framework for this guide** to creating an REC, in which the importance of participation is highlighted; the **second describes the four steps of the REC creation process**, with participation as the focal point, and also includes the role of the external support that may help on along the way; and, lastly, the **third section includes materials** and resources that may be helpful to you.

2. REFERENCE FRAMEWORK

Before we address the key aspects involved in creating Renewable Energy Communities, we believe it is necessary to establish a reference framework on which we will base ourselves for the creation process.

2.1. Renewable Energy Communities (RECs)

Where have we come from? Where are we heading?

In 2018 and 2019, the European Commission launched **two directives** relating to the energy sector. These documents **highlight the need to accelerate the energy transition** and point to **the role of Energy Communities**, among other things, in making it possible. The directives define **Renewable Energy Communities** (those proposed in this guide and defined in the 2018 directive) and **Citizen Energy Communities** (not proposed in this guide, although they can play a supportive role in the REC creation process). Thanks to local initiatives, top-down policies are being brought to life, through projects undertaken with a bottom-up approach. In order to increase this momentum, the European Commission is keen to promote, boost and strengthen existing and future Energy Community initiatives.

However, we do not have to look far to **discover and realise how important collective initiatives are**. We just need to look back in time to see, for example, how important the '*auzolan*' (joint community work) and neighbourhood assemblies have been, as regards both specific needs or work and organising people. Although models and conditions have been evolving over time, the European proposals and those deeply rooted practices essentially pursue the same goal – **using local resources, to focus on what is beneficial to the community**, This is regardless of whether they relate to public roadways, forests, buildings, water or, in this case, energy. In that respect, it can be said that the criteria which are coming from the top are a recognition of specific ways of working and organisations that are familiar to us, which come from a grass-roots level, since **in order to know where we are heading, we have to understand from where we have come**.

Although these traditional ways must be adapted to meet current needs and conditions, the importance of using local resources still stands, whether the resources are natural, technological, economic or, as in this case, human. If we want to have a clear understanding of where we are heading, we have to pay particular attention to the latter resource, and this takes on particular importance in these times of crisis. There are many types of crisis, and those most relevant at the current time relate to the climate, the economy, care and health. However, more will come on top of these and **it will become increasingly necessary to address sovereignty through a local approach (even more so in the case of the energy and raw materials crisis)**.

This situation **highlights the need for resilience**, following the logic of local consumption of local and seasonal products, made by citizens for citizens. In the case of energy, renewable sources are those which fit most closely with this logic, whereas **in the case of the type of energy organisation, the closest match is that of Renewable Energy Communities**. Combining the two will therefore make it possible to provide society with a greater ability to respond suitably and fairly to the different situations, **where their community-based nature is essential for strong social resilience**. Goiener has achieved its current circumstances thanks to community and putting into practice the aforementioned values, and it aims to continue along that path, among other things, thanks to this guide, in order to boost the implementation of local initiatives through empowering the general public and other stakeholders, supporting them on the complex journey along the energy route.

What is an REC?

A Renewable Energy Community is a **legal entity¹ with capacity to act**, whose primary purpose is to promote **the development of solutions based on renewable energy**, and always with a **local, participative, open and non-discriminatory approach**. Its main goals will be to provide **economic, social community and environmental benefits** for the community itself and for the local area in which it operates. **Financial returns will be held irrelevant or will not be prioritised** over the other benefits.

Why choose an REC?

Because **energy is a cross-cutting "need"**, and **we want to transform the models of society's relational structure** by using it as a "tool": we want it to become fairer, supportive, environmentally friendly and empowered.

Because we consider energy to be a basic commodity that all people should obtain on equal terms, but in a sustainable manner.

¹ **IIDMA**, after studying the European directives and comparing them with the characteristics of all of the Spanish legal entities, came to the conclusion that an REC should be an association or cooperative

The fact is that, **as it represents a relatively large challenge, we have to do it together**, because we believe that all people and organisations, regardless of their motivation or interest, can and should do it in unison.

What is a REC for?

- **Reducing energy consumption** and at the same time improving our quality of life.
- **Cutting our energy bills**, taking steps to improve awareness and efficiency, using renewable energy, etc.
- **Promoting energy sovereignty**, where we are making the decisions, not big companies in other countries.
- **Fostering greater social cohesion**, through joint and equal self-management.
- **Boosting the local economy**, because we are a business activity, and **reducing the economic circuit**; we thus put particular effort towards having the energy resources used remain in their place of origin.

2.2. Community and participation

The idea of community has been gaining ground and becoming increasingly present over the last few years, both in discourse and in practice, but the complexity of the term itself makes agreeing on a single definition of community difficult. **When we talk about community, we are traditionally referring to the bonds of trust and the interaction between people in a neighbourhood, village or residents' association.** Therefore, within that meaning of community, there are elements shared to a great extent by many authors based on the definition from Marco Marchioni (2004):

- Territory (limited physical area).
- Interactions between the village or town and its inhabitants (people, organisations, etc.).
- Resources.
- Demands: needs of the community, wishes, problems, relevant issues, etc.
- Participation: instruments, bodies, the processes in place for participation by the citizens in a specific community.

Going into more depth in this area, if we look at the definition of community involvement, we must take into account the following three aspects (Morales, E. & Rebollo, O., 2014):

- **Involving the entire community, with all its diversity**; leaving nobody out of the collective processes and paying particular attention to vulnerable groups.
- **Empowering people** (individuals and groups) as a result of the process of assuming responsibilities on an individual and collective basis.
- Improving standards of living, creating new opportunities and **building spaces for people to share that meet their needs**, always taking into account the standards of living and the heritage we will be leaving for future generations.

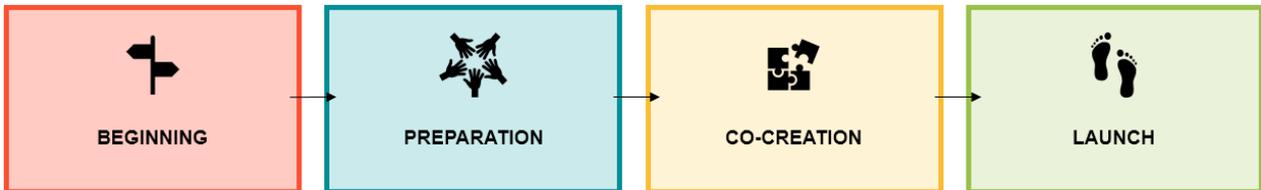
In this guide, we will focus on local processes and make the most of the opportunities they offer us. In fact, acting on a local level makes it easier for us to build relationships based on trust and cooperation, as well as offering a closer look at the situation of the local social fabric and the networks that comprise it. One of the features that characterise the members involved in this type of process is that there is a specific group of people who share a need, problem or interest and who live in the same local community, actively attempting to identify these needs, problems or shared interests, make decisions and establish mechanisms to respond to them. However, it is contrary to reason to think that a community is a homogeneous group of people and interests; instead, we must keep in mind that **a community should be a reflection of the complex nature of society and it will be very important to manage diversity and power relationships.**

WHY BEGIN THE PROCESS OF CREATING AN REC? THERE ARE MANY REASONS

- Because energy is a fundamental right.
- Because by fostering renewable energy, we will be contributing to reducing the use of fossil energies.
- Because we will be creating an opportunity to address the climate crisis.
- Because we will be fostering a model of responsible and sustainable consumption
- Because we will provide local resources and solutions.
- Because we will be able to promote initiatives to fight energy poverty.
- Because we will ensure participation by the community.
- Because we will build it together, taking into account everybody's needs and interests .
- Because we will enable citizens to become empowered in terms of energy and participation.
- Because we will demonstrate that there are "other ways of doing things", by placing people at the centre.

3. STEPS TO CREATE AN REC

We propose that the process to create a Renewable Energy Community should be carried out in four steps, from the initial idea or request to create an REC until there is an REC up and running on its own.



When moving through each stage of the process, it must be borne in mind that each stage takes time – **we have to take it step by step, by defining sound foundations**, building the community itself and setting the project in motion.

Another factor to take into account is that although we have portrayed it as a linear process, **the procedure for creating an REC involves constant checking**. This means constantly moving one or more steps forwards and backwards to make sure we are on the right track **and have not forgotten anything or anyone along the way**.

Before we begin the explanations, it seems a good idea to underline that **the REC system is a living and complex system** and that although the people involved in it possess a great deal of knowledge and great willingness, **an outside perspective and external assistance is often needed**. External expertise can offer us:

- With regard to participation:

Tools, techniques and resources, provided for the group, to develop personal skills.

Strategies and an outside perspective on how to overcome the stumbling blocks to achieving our goals or in our relationships.

Support for individual and collective growth in a climate of trust and collaboration.

- In the technical aspects:

Support in identifying the opportunities and local resources.

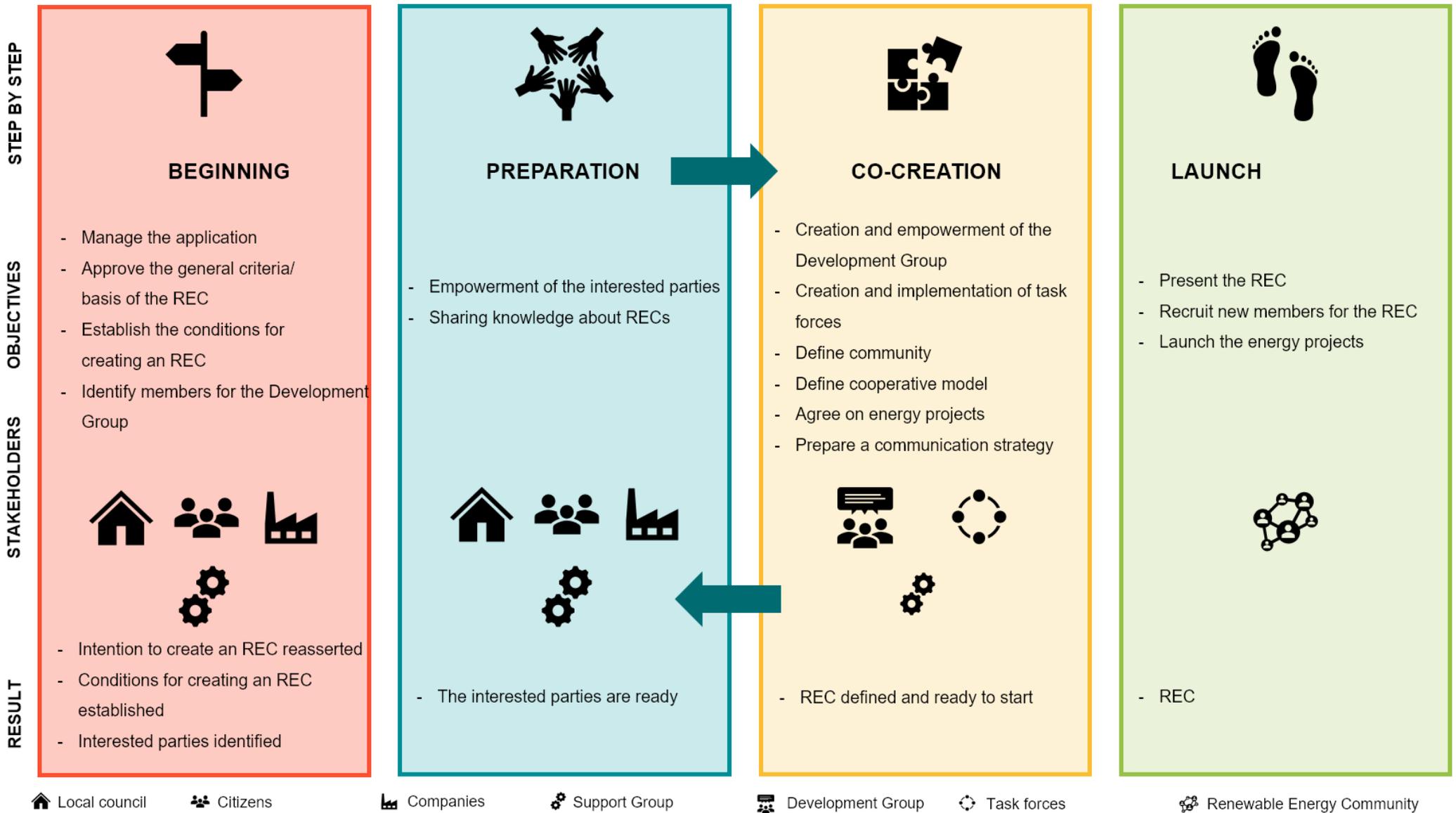
Suitable resources for studying the technical and economic viability when selecting and developing projects based on renewable energy sources, as well as providing services associated with reducing all types of energy consumption

- In the legal arena:

Tips on the process of defining the legal entity created by the REC: different organisational models, governance, governance documents (e.g. articles of association), funding, etc.

Therefore, when creating an REC, it may be advisable to have help from Goener or another supporting entity to help the community to meet its diverse needs and ease its way.

In any case, **we must be aware that this help can be relied upon in one or all the areas where it is needed, that its goal is to empower the community** and that from the very beginning the desire is to leave the leading role to the community (“From support to cooperation”).



3.1. BEGINNING

How we start is decisive to future success, so it is necessary to tackle it calmly and attentively.

At this point, we should **analyse the scope of an REC and the basic conditions for creating one**, using a community-centric approach.

A process of this type can emerge from a number of different channels (town councils, local collectives, etc.), but in this initial phase, the **party who has shown interest will set up a Support Group** with the actors who will be supporting the process (if so decided). The Support Group will take on responsibility for checking and **monitoring compliance with the conditions for activating the process**. Therefore, the duration of the Support Group's existence will depend on the local process.

In any case, before beginning the creation of an REC project, we need to know exactly **what an REC is and what it is not**.

It WILL be an REC...	It WILL NOT be an REC...
<ul style="list-style-type: none"> • When the organisation uses a significantly self-managing approach and is pluralistic. 	<ul style="list-style-type: none"> • When effective control is not in the hands of the people participating in it. When diversity is not a value.
<ul style="list-style-type: none"> • When the organisation uses a significantly self-managing approach and is pluralistic. 	<ul style="list-style-type: none"> • When it is attempting to solve a single energy problem.
<ul style="list-style-type: none"> • When it seeks comprehensive energy adaptation taking into account local renewable resources. 	<ul style="list-style-type: none"> • When right from the start it is not inclusive or sustainability is partial – for example, the technology is not "neutral".
<ul style="list-style-type: none"> • When sustainable renewable projects and services are promoted and these are equitable and inclusive. 	<ul style="list-style-type: none"> • When priority is given to short-term economic benefits and financial returns, when the sole question is "How much will I save?".
<ul style="list-style-type: none"> • When it seeks comprehensive energy adaptation taking into account local renewable resources. 	<ul style="list-style-type: none"> • When it does not dovetail with other local situations and aspects.

Against this backdrop, **having clarified** what an REC is and confirmed what we want, **we must establish which conditions must be met in order to create an REC**.

3.1.1. Conditions for creating an REC

In order to achieve a sound and viable REC, **a number of prerequisites** must be fulfilled, consisting of:

- A. Identifying and attracting the key stakeholders.
- B. Determining their willingness to work in the community.
- C. Gauging strengths, and anticipating and analysing resources.

All are important from the participative point of view, but we will concentrate particularly on the first two, as the goal is to create a pluralistic and engaged REC.

A) **Identifying and attracting the key actors, and determining their willingness to work in the community.**

We want the REC to be as **diverse and broad a community as possible** so as to always keep on track. Therefore, significant efforts will have to be made to bring a variety of different people and actors into the initiative, because we are all essential.

Key stakeholders: Who are we?

- **The general public:** citizens of different ages, genders, origins, with different experiences, areas of expertise, etc., who are committed to renewable energy, to generating power locally and to prioritising mechanisms for solidarity.
- **Local actors**, associations, residents' associations, etc.
- **Local councils** or public administrations.
- **Local businesses**, whether or not they are renewable energy based, but which are committed to renewable energy and believe in the strength of community.

Why is involvement by local councils important when developing these initiatives?

The European directives state that in order to achieve a just transition to renewable energy, energy communities need to have local councils participate in them and support their creation.

Because a local council can facilitate aspects such as technical resources (materials, spaces, communication channels, etc.), economic resources (subsidies, allowances, etc.) and human resources (support, advice, etc.).



The European directives emphasise this, so as to achieve a just transition as regards renewable energy. Directives [2018/2001](#) and [2019/94](#) dictate the need for municipalities to participate and collaborate in creating these communities.

Based on the mission of the renewables community, and taking into account **Agenda 21**, the state National Integrated Energy and Climate Plan (**PNIEC**), the **Basque Country Sustainability Act**, the **Covenant of Mayors**, the **Draft Regional Law (Ley Foral) on Climate Change and Energy Transition for Navarre** and other targets which are being set, municipalities deem it essential to achieve these goals.



Generating energy locally limits any benefits being drained from the country and avoids transference to non-renewable energy.

Based on the principle of equality and equity, it fosters citizen participation.



Compared to the situations of uncertainty occurring in the current global environment (which in the future we will have to face in our local regions), it promotes resilience by creating community-based capabilities.

It enables the **integration of people in vulnerable situations into the renewables community**; instead of mechanisms based on welfare, mechanisms based on solidarity can be established.



If the local authority collaborates with and participates in Energy Communities, these gain more credibility.

However, **being a key stakeholder does not necessarily imply that they all have the same task**, although all the stakeholders are necessary. The aforementioned stakeholders must contribute their knowledge about the issue to be worked on, be consistent with the values of the REC and ensure active participation. That is, we have to convey our commitment, willingness and solidarity.

Who are the key stakeholders? In order to answer this question, we have a suggested methodology entitled “Stakeholder Matrix” in section “4. Materials”.

The next step will be to approach these stakeholders, and we have a number of different strategies and channels for this purpose:

- *Informational meetings*

What is an REC? Why set one up? What are our wants? What needs are there? What are the options? How do we put forward the proposal? Where? When? Who?, and so on. We will also answer many other questions at the meetings, in addition to the invitation to participate in the REC's Development Group.

These informational meetings can be called through the strategies we have defined in the stakeholder matrix, such as via the local council's communication channels, by sending information to homes, through special communication campaigns, etc.

What to focus on during the informational meetings:

- We should highlight that involving the people who are members of the community is crucial and that any and every one of them, in their particular roles and with their experiences, can support the process. In short, we must always maintain a people-oriented and public interest perspective, and therefore we have to raise awareness about how important it is to build on the common ground between different stakeholders.
- The topics to be addressed may not be familiar to certain people, but we will underline that the more diverse the community participating in the project, the richer the project.
- We must explain that there will be assistance and training about the path to be followed. And, if possible, we will suggest a date for the initial meeting of the preparatory phase.

- *Building bridges.*

In addition to holding the informational meeting, it is a good idea for us above all to reach out to individuals and actors who did not or were unable to attend the meeting; in this case, we are seeking a direct relationship, as one relationship leads us to another.

B) Gauging strength, anticipating and analysing resources.

Beyond the desire to create an REC, there has to be commitment, as well as familiarity with different aspects. We have the latter point covered, as **in the section entitled “Preparation” we look more deeply**

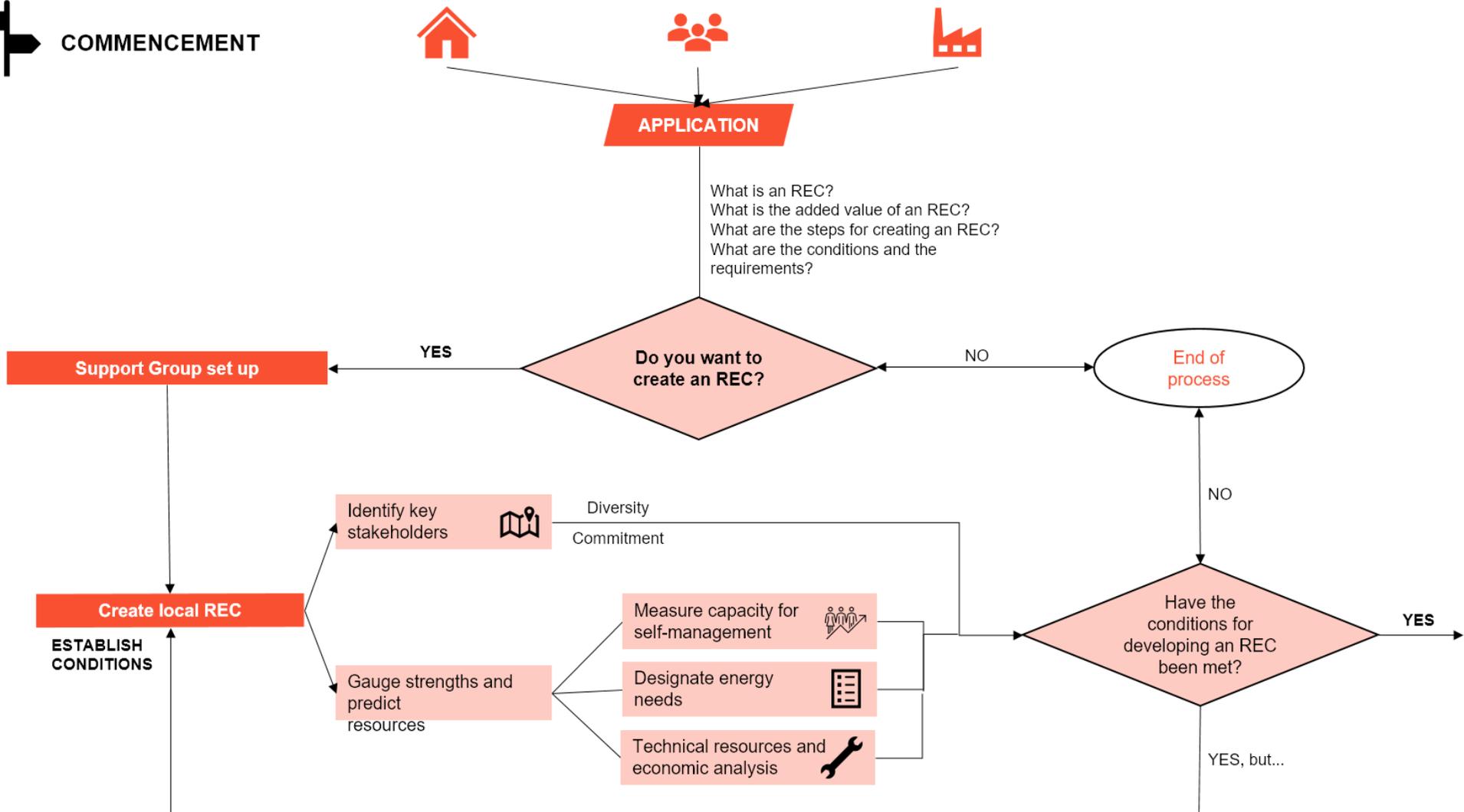
into the technical and participation-oriented know-how. Commitment grows as trust deepens, but being aware that we are at the initial stages, we should be honest and ask ourselves the following questions: **Do we have strength enough to carry out on our own the REC creation process? If that is not the case, will we need any help?** Do we have sufficient resources? If they are not sufficient, how can we obtain them?

We provide a summary below of **the minimum factors required:**

- **Coordination.** Among the members of the Support Group and those in the Development Group: calls, minutes, filing of documentation, information management, etc.
- **Guarantees for participation.** As the people in the Support Group (at first) and the members of the Development Group (later on) gradually become empowered, certain elements will gradually need to be defined (the purpose of the meetings, arrangement of the sessions, approach based on the topics to be discussed, dynamics and material, and so on) and, of course, efforts will need to be made to look after the group.
- **Technical and economic resources.** The people belonging to the Support Group must be familiar with local energy needs and assess the current energy and technological resources in place at a municipal or regional level. Next we will analyse how we can bring these two aspects together and will prepare a forecast of the technical and economic resources needed, such as subsidies, hiring, etc.
- **Legal formalities.** Between all of those of us who are participating in the Development Group, we must set up an organisation. We have to analyse its feasibility and not just that of the projects; we will have to decide the rules of the game and to do that we need people who are experts on the matter.

Therefore, **once we have verified the need for an REC and identified the interested parties, we will then check what conditions need to be met to create an REC** and will move on to the next step.

COMMENCEMENT



3.2. PREPARATION

Human development and the empowering of society is geared towards creating a sound social fabric; **training can help people bolster their skills, knowledge, confidence, vision and proactiveness.**

The **main goal of this phase will therefore be to empower citizens** and/or relevant stakeholders and, even if indirectly, will serve to make them more familiar with the project.

However, and depending on the local situation and that of the people participating in it, this preparatory phase can be implemented at the same time as the co-creation phase. From a participation perspective, we believe that the most appropriate option would be to provide general, open training first of all. Then, once a similar, basic grounding has been achieved, during the co-creation phase their empowerment and decision-making capacity as a Development Group should be fostered.

The preparation phase is divided into two major segments: a **technical** segment and a segment on **participation**. The number and duration, etc., of the training sessions will be determined according to the resources and circumstances of each location.

Therefore, **we recommend opening and extending this training phase to all interested parties.**

Now we will explain the content and reasons why work will be done on the technical and participative aspects:

3.2.1. Technical aspects

It is expected that the content will be divided between **four sessions**, but some flexibility may be possible depending on needs, initial starting point, number of participants, etc. In this way, we are going to highlight the necessary information, so as to enable decision making.

What is an REC and what options does it offer?

An REC makes it possible to do, cooperatively and as a local community, what each of us is unable to do on our own, as well as to move forwards towards a just energy transition. **This session will work on what RECs are and what they are for, from a general perspective**, so that everyone can discover what their mission, vision, etc., can be.

What type of projects can be developed?

The following table lays out the technology, the project types and the services that can be provided. It is a good idea in this session to have a general picture of the local resources.

SERVICE - PURPOSE		SOLAR		WIND	HYDRO	BIOMASS		
		PV	Thermal	Mini	Mini	Forestry	Agricultural	Waste (biogas)
Self-consumption	Individual	Project	Project	Project	Project	Project	Project	Project
	Shared	Project	Project	Project	Project	Project	Project	Project
Energy Production	Electrical	Project	Not applicable	Project	Project	Not applicable	Not applicable	Project
	Thermal (heating, cooling)	Not applicable	Project	Not applicable	Not applicable	Project	Project	Project
Services, advice	Renovations (partial, extensive, comprehensive)	This is not related to the energy source, but when carrying out improvements, only renewable energy will be used						
	Efficiency	Unrelated to the energy source						
	Training and information	Unrelated to the energy source						
Recharging Point (Electric Vehicle)		Project	Not applicable	Project	Project	Not applicable	Not applicable	Not applicable
Shared Vehicle (Car Sharing)		Project	Not applicable	Project	Project	Not applicable	Not applicable	Not applicable
Aggregator of demand		Not applicable						
Trading	Electricity	Only if the electricity is from renewable sources						
	Gas	Not applicable						
	Heating/Cooling	Not applicable	Project	Not applicable	Not applicable	Project	Project	Project

- Project
- Service
- Not applicable

How does the electricity market work?

The electricity market is divided into generation, transmission, distribution and commercialisation. Electricity transmission and distribution companies are regulated and are not specific activities for an REC; generation and commercialisation, however, can be done by anybody, as they are deregulated (self-consumption is not included because self-consumption is not billed). The excess from a self-consumption system is considered to be generation, as it will be used as energy by the corresponding supply company. In this third session, we will explain about this and other aspects.

What is the governance model for cooperatives?

It is suggested that the governance structure for an REC should be a cooperative formed by three types of members. In this session, we will cover the subject of participating in a cooperative: how, who, power, decision options, etc. Most of the members' power will be in the hands of the **consumer members**, which will include the general public, tradespeople and association, and, in some cases, small enterprises. Other types of members are **workers, service providers, partners** (especially suitable for local councils) and investors.

3.2.2. Aspects relating to participation

In this preparatory phase, **we must highlight how important participation is** and the benefits for individuals and the local community. Thus, and from the participative perspective, we will address the following topics:

- **Understanding expectations:** being aware of the expectations of each of the members of the group is essential, which means revealing beliefs or wishes about what is going to happen in the future. Carrying out this exercise in the initial meetings will be key, so that if expectations are not realistic, they can be adjusted as soon as possible and frustration can be avoided.
- **Group cohesion:** this element is very important in enabling a group to work efficiently. The main benefits of a highly cohesive team are that each team member works in a more coordinated way with the rest, with higher levels of satisfaction and an enhanced ability to adapt to unexpected circumstances.

There are many tools and methodologies for working on group cohesion, but some important factors to consider are:

- **Shared leadership:** groups with shared leadership display greater cohesiveness than those without. This does not mean there should not be leadership within the group, but rather that the decisions will be taken by consensus and there will be space for exchanging opinions and joint construction. Leadership has to go hand-in-hand with responsibility; good leaders make sure that things get done, ensure that the people who join the team feel comfortable and are in charge of giving everyone a voice.
- **Flexibility:** if the group has an enhanced level of adaptive capacity and flexibility, it will adapt to the circumstances and needs of each of its members and accept different levels of involvement.
- **Communication:** another important factor in order to improve the cohesiveness of the group involves communication, clarity and transparency in the spaces where debates are held and decisions adopted.
- **Ongoing assessment:** another element that improves group cohesion is ongoing assessment, on an individual and group basis. Ending each session with a post-meeting assessment makes it possible to take remedial action to improve in the future.
- **Composition of the group:** the essence or driver of any project is the people, so it will be important to take a moment to reflect on the composition of the group: Who is in the group? Is there anyone missing? In order to answer these questions, it is important to spend time looking into the know-how, motivation and skills of the team members. This is even more the case if we are aiming for team diversity, as commonly members of the most vulnerable groups (women, migrants, young people, etc.)

are not involved at the beginning, when the group is formed; therefore, strategies will have to be implemented to include them.

- **Organising meetings:** meetings are an essential part of working as a team, but in order for them to be effective they should not be based on improvisation. Being clear about what tasks need to be done before, during and after the meetings is crucial for making sure all the participants have a satisfying and fruitful experience. Therefore, some aspects to consider are: timely calling of meetings, drafting of minutes and recording responsibility for tasks, drafting the agenda for the meeting ahead of time, defining the expected duration of the meeting and complying with the specified time limitation, comfortable conditions in the meeting venue, etc.

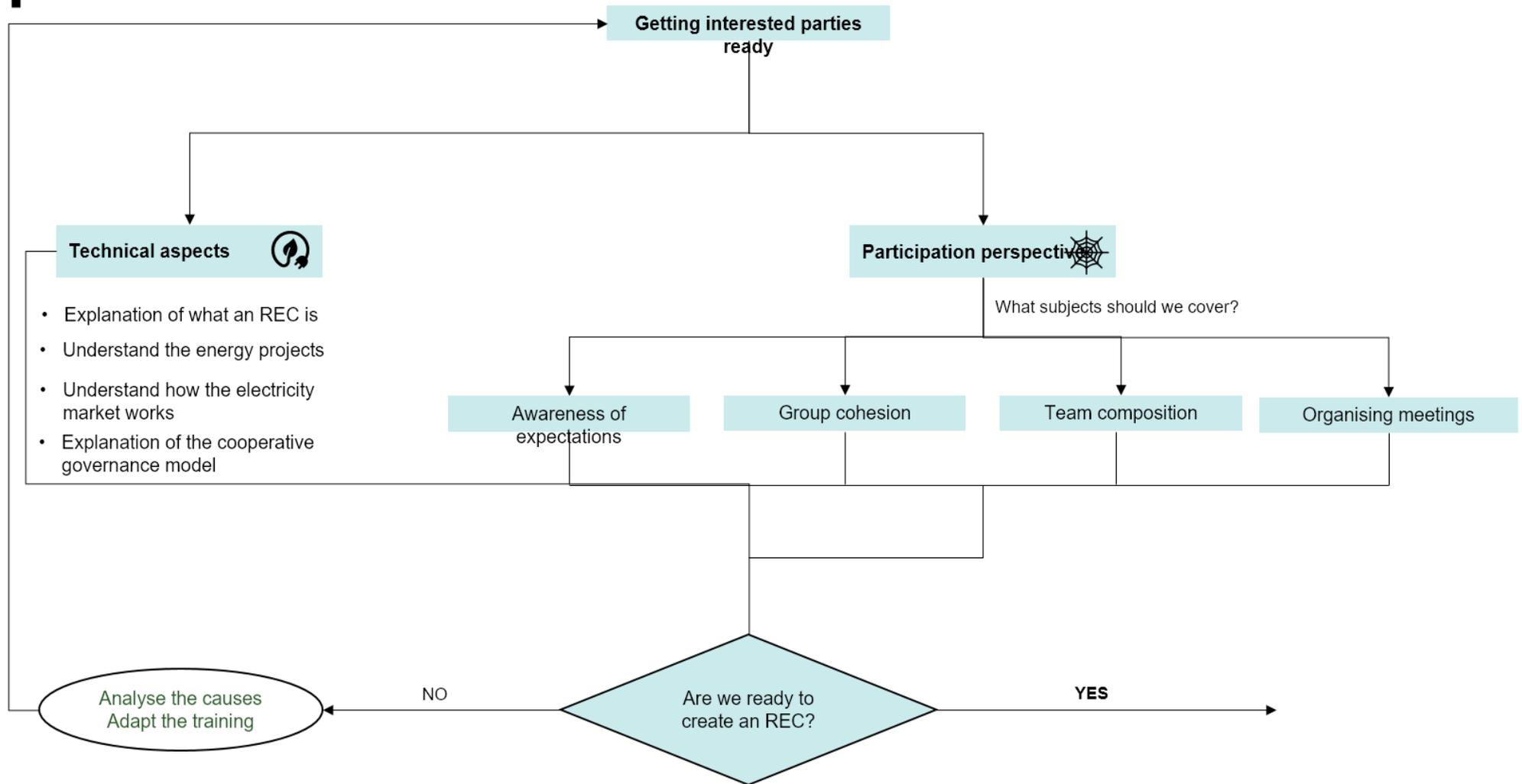
Tools for organising meetings: the meeting plan Available in the “Materials” section.

IN SHORT, HOW CAN WE ACHIEVE A STRONG AND EFFECTIVE TEAM?

- By taking the time needed to build trust among team members.
- By understanding the expectations of each member of the team and adjusting them to the goals of the REC.
- By finding the right pace for team meetings and ensuring that meetings run smoothly and do not drag on forever.
- By remembering that all the members of the team have other, outside wants and obligations (such as education, paid employment, care and leisure) and adapting to such situations.
- By using different dynamics and resources, which are particularly important to strengthen people's perception, to foster teamwork, to impact the collective environment, etc.
- By not forgetting that we are different and we need to manage diversity.
- By ensuring that minutes are taken of each meeting and are shared. And by following up the commitments that have been made.
- By planning fun activities and celebrating achievements.



PREPARATION



3.3. CO-CREATION

Up until this point, the Support Group has been in charge of establishing the conditions and monitoring to ensure the process is moving ahead as it should, but **from now on it is advisable to progressively start integrating these tasks into the roles of a larger group: the Development Group**. The process may be incremental, and therefore at some points it is possible that both of the groups (the Support Group and the Development Group) will be active at the same time, but little by little and in a natural manner we should incorporate these functions into those of the Development Group.

In addition, the **Development Group must evaluate whether to create specific task forces for certain areas, as from the time it deems it appropriate**. This will be decided based on the strength of the group, although we recommend that the task of considering whether to activate these working groups be carried out from the beginning of this phase.

3.3.1. Creating the Development Group

The Development Group is key in the process of creating an REC. This group will be made up of actors, people and institutions interested in working on developing the process. It will be in charge of setting the process in motion and ensuring it progresses properly, of preparing and creating the right conditions and of coordinating all the actions of the process.

The make-up of the group will differ depending on the local situation, but normally **there are certain aspects we must always consider**. Among these aspects, we highlight:

- **Composition:** the group should be made up of between eight and 20 people, depending on the size of the locality and the opportunities it holds. The aim is for it to be a diverse group and a point of contact between different people. Therefore, particular attention will be paid to respecting work-life balance and managing its size, effectiveness and diversity.
- **Agreeing on how the group will operate:** frequency of meetings, format (remote/on-site), methodology, etc. Create a ten-point guide which covers all the above, but is flexible and open.

Agreeing on linguistic criteria according to the local socio-linguistic situation

It is important to be clear on certain linguistic criteria governing managing languages, to manage their use. Here is one example.

Main criterion:

- Each person can use whatever language they wish.

But always while considering...

- We do not all have the same level of knowledge of languages.
- It is important to feel comfortable and not to force anyone to use another language.
- It is important not to miss any information and ensure communication.

If all the members of the group agree with these criteria, a solution will have to be found in each case regarding managing languages: using whispered interpreting (translating into the listener's ear), forming groups based on language, summarising what is being said, etc.

- **Defining responsibilities:** it is advisable to list the tasks and establish who will be in charge of carrying them out. Initially, the greatest weight should be assumed by the members of the Support Group, but as the joint creation process progresses, the work should be gradually shared out among the members of the Development Group, provided this is possible and bearing in mind the needs and interests of each person. Therefore, **we must pay attention and devote the necessary time to hand over the tasks, work and information.**

It will of course be important to **build solid relationships of trust between the people** in the Development Group in order to for them to support each other and progressively take on leading the project. Thus, it will be essential to devote some time to understanding the motivations of each participant and what each person likes, which in turn will enable better distribution of the tasks and work. The moment to put into practice the knowledge gained during the preparation phase from the point of view of participation has arrived. See section 3.2.2.

The methodology for addressing expectations is in section "4. Materials".

3.3.2. Creating an REC

We will begin to create the REC considering four major aspects:

A) Defining the community

In the processes relating to local development, **community is extremely important**, as it is neighbouring networks which reinforce local identity and participation in grassroots projects. It is well known that interaction between neighbourhoods, people known to each other and collectives multiply the potential of the human capital and **the challenge is to use this strength to the benefit of a shared goal.**

Therefore, in order to achieve a **strong and effective community** we have to consider the following aspects.

a) Setting out a clear, shared vision and goals. At this point, we should define the specific goals of the REC and the values at its core, based on the group's expectations with regard to the REC. Earlier, we spoke about the **general mission** of an REC, but during this phase it will be key to determine the **specific objectives** of the local REC and define a **system of values** or framework that is consistent with those objectives.

b) Defining how it will be organised and run in accordance with the characteristics of the group. We have to define and decide, between all of us, how we are going to organise ourselves. A well-planned organisational structure serves to guide our efforts towards the goals and to ensure that all the members of the community are moving in the same direction. A consolidated organisational structure aids coordination, can help to balance power relationships, establishes decision-making spaces and facilitates communication, etc.

However, even when the approach to organisation and running has been defined, we will have to **pay particular attention to non-formal structures** that may arise in the group, that is, to the network of relationships that spring up outside the agreed organisational structure, to decision-making spaces, etc.

In fact, in some cases, they may be beneficial but in most cases they can upset the balance of the power relationships and trigger conflict.

c) Establishing procedures to manage the information. An agreement will have to be reached on how we are going to manage the information and know-how inside the REC and on the REC's internal communication resources.

d) Defining guidelines on welcoming new members. It is important to have a defined practice for welcoming new members, because we all like it when we arrive somewhere new and are greeted with open arms. Thus, and with the aim of giving the same reception to all potential members who approach us, we will have to agree on the characteristics of that welcome: explaining the vision and goals of the REC, presenting its structure and how it operates, and offering a space for us to find out their interests, needs and so forth. Giving them a warm welcome will help us in encouraging potential new members to join the REC process as early on as possible and in making them feel they belong in the community.

e) Designing spaces for group connection and cohesion. It is vital to dedicate a space to relationships and care between the members of the community if we really want the REC to stand the test of time. Therefore, every day emphasis will have to be placed on the cohesiveness of the group, ranging from devoting time to this at meetings and working sessions, to determining from time to time the satisfaction levels of the members of the community, to celebrating the progress and successes achieved as a community.

Relationship and group cohesion dynamics in section "4. Materials".

f) Agreeing mechanisms for assessment. It is important to assess whether the anticipated targets are achieved or not, that is, whether what was envisaged is being fulfilled, as well as reviewing, at a day-to-day level, meetings, the work dynamics of the different task forces, etc.

How will we do this?

Even though the definition of the community should be reached between all the participants in the Development Group, the initial aspects can be discussed and a consensus reached by the extended group. Therefore, **our suggestion is to create a "Community and Communication Task Force"**. The members of this task force will be in charge of looking after the community and extending the network of relationships.

To be highlighted

- Participation in the Development Group will always be open, and therefore attention will be paid to welcoming new members: presentations, where we are, creating the conditions so they feel comfortable, etc.
- Not losing sight of taking care of each other. Team work requires us to take care of each other, which will create a climate of trust and will be a prerequisite for acting efficiently. Heed must be paid to the emotional aspects and we should not feel afraid to tackle any conflicts that may arise on a day-to-day basis.
- Regularly analysing the group's satisfaction levels and providing a channel for celebrations and informal spaces.

B) Selecting energy projects

The time has come to select the projects that the community will develop. To do this, first of all we will have to fill in the **map of potential projects** based on the opportunities available in the municipality and to set priorities among the various options. The main criterion for this will be the viability of the projects.

Energy projects

- Electricity generation projects based on photovoltaic solar technology, wind technology, hydro-electric technology, etc.
 - Heat generation/distribution projects (heating/cooling).
 - Offering an advisory service to increase the savings and energy efficiency of the community.
- Promoting audits of contracts, efficient consumption and self-consumption in the fight against energy poverty.
- Offering alternatives for sustainable transportation and mobility.
- Promoting renewable power generation projects that offer better energy prices to community members.

How will we do this?

All the members of the Development Group will participate in proposing energy projects. When proposing energy projects, **the “Energy Project Task Force” assesses their viability**: that is, first of all the various energy project options are analysed by the task force; next the results of the viability study are shared with the Development Group, and decisions are made by the Development Group.

All the members of the Development Group will participate in proposing energy projects. When going about proposing energy projects, it is the “Energy Project Task Force” which performs the viability analysis: that is, several different projects are proposed and the task force analyses their viability. The aspects to be taken into consideration will be at least their technical and economic viability, urgency, environmental impact which may be generated and social impact. There is no single methodology which measures all types of instruments. Instead we will have to look for the most appropriate case. However, in order to predict social impact, it will be useful if a framework of values has been built. Next, the result of this analysis must be shared with the Development Group and this body must make the decisions.

C) Defining the cooperative model

In this phase, we must also take into account governance and the legal aspect. Therefore, first of all we must recommend the legal form of a cooperative as the best legal form for an REC, with all its implications: main characteristics, bodies, types of member and weight, etc.

In general, we must explain the structure and the general outline of the organisation so that decisions can be taken about this. At the same time, the viability of the REC as a whole will be analysed.

How will we do this?

Creating a cooperative is complex, and therefore, although the main details of the cooperative will be addressed and decided by the Development Group, we propose that a **“Legal/Administrative Task Force”** be created to work on the more technical and complex aspects.

These include preparing the governance documents for the cooperative and thinking about the associated bodies, the type of members and the envisaged sources of funding. All this will define the community governance model. Work must also be done on the economic viability of the community in order for it to stand the test of time.

Why choose a cooperative structure?

- Because this type of organisation is a perfect fit for the criteria of the European directives.
- Because the organisation to be created is going to have a medium/high level of complexity and because cooperatives adapt very well to these types of situation with their values, laws and designs. Although initially the cooperative model seems too complicated, in the medium term the rules for cooperatives facilitate the processes, the internal workings and relationships.
- Because right from the start, participation by local public entities is guaranteed without hindrance.
- Because the cooperative spirit and life is being encouraged in many areas, not just as regards energy. With the aim of fostering cohesiveness, the values promoted by cooperatives are being spread at a local level.
- Because it defines and describes the types of members and their role in the community.
- Because it makes it necessary to describe the rights, obligations and interaction between the members (participating individuals and entities).
- Because it establishes the management, governance and supervisory bodies, as well as their authority, the way they function and the distribution of powers of each of them.
- Because from an economic perspective it determines the conditions for the contributions (recoverable for members), the types of fees, the possible funding methods, the possible options for profit or loss, and the creation and operation of social funds.
- Because the cooperative has an obligation to provide ongoing training on cooperative matters, through the creation of compulsory educational funds.
- Because all these aspects are laid down in the governance documents. Once it has been set up, the governance documents may undergo slight amendments during the life of the cooperative, and can be extended or developed even further through secondary documents (such as the System of Internal Rules and Regulations).

D) Drafting of the communication strategy

The final step in the “Co-creation” section will be to agree how we are going to publicise the REC and how we are going to recruit new members. Therefore, we need to design a communication strategy:

- What is the goal? What do we want to achieve?
- Who do we want to reach? Who is our audience?
- What strategy will we use to achieve it? What communication activities do we foresee?
- What message are we going to give? What is the REC going to be called? And what image shall we give it?
- How do we plan? When and in which order are we going to do it?

We must find the answer to these and other questions both for the presentation and for the recruitment campaign planned for the launch phase.

Recommendations for inclusive communication

Pay attention to use of languages.

Use of images:

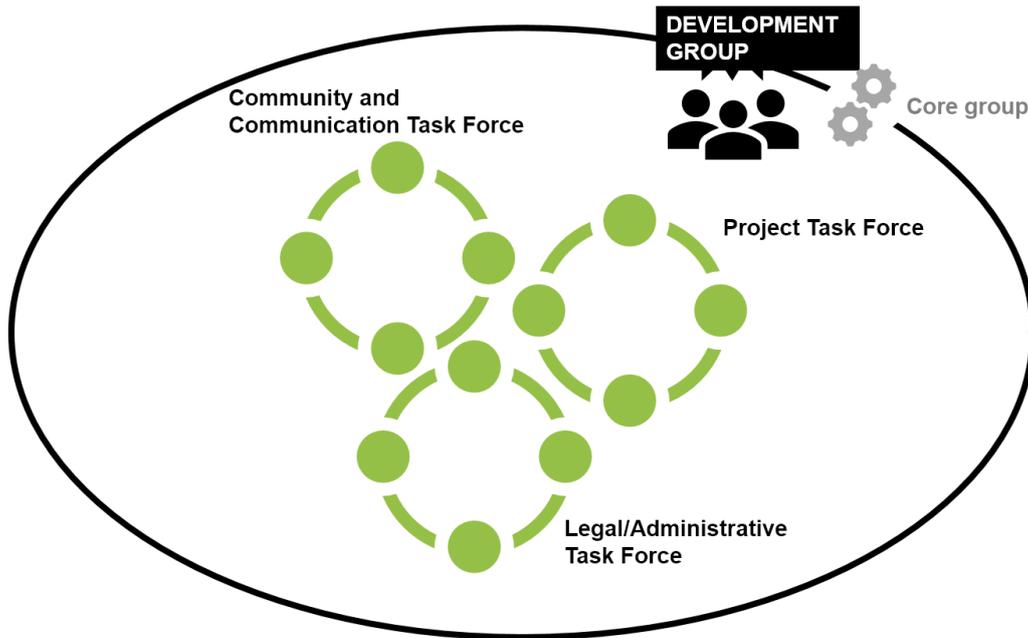
- Show the diversity of the different people.
- Raise the visibility of different types of women.
- Portray women as active protagonists of community life.
- Show in terms of equality the relationships between women and men.
- Pay attention to the perspective from which the photos are taken.

The following guide giving practical tips for communications from the perspective of gender, created by REAS Euskadi and Pikara Magazine, goes into this subject in more depth: **Claves prácticas para poner en marcha formas de comunicación con perspectiva de género.**

3.3.3. Creating task forces

As mentioned at the beginning of this section, the Development Group will be responsible for creating the REC, but in order to share out the work and make it more efficient, as of a certain point it may be advisable to carry out work through task forces.

Based on our experience, we suggest setting up at least three task forces:



Each issue will be dealt with in the corresponding task force, although we must not forget that the main decision making will take place at the meetings of the Development Group, while the task forces will be places for discussions and proposals.

In addition, it must be taken into account that the composition of the task forces should be balanced, and the framework for interaction with the Development Group must be defined in advance.

By way of summary, the characteristics of each task force are given below:

Community and Communication Task Force	<p>This task force will focus on looking after the community and communicating through our networks of relationships. It will determine how the community functions, the channels for constantly expanding its networks and the communication strategy.</p>
Energy Project Task Force	<p>The main purpose of this task force will be to propose different projects and analyse their viability. Some of the aspects to be considered: technical and economic viability, urgency and the environmental and social impact which may be generated. There is no single methodology which measures all types of impact. Instead we will have to look for the most appropriate one in each case. However, in order to predict social impact, it will be useful if a framework of values has been built.</p>
Legal/Administrative Task Force	<p>This task force is tasked with the aspects to be dealt with in setting up the cooperative. These include preparing the governing documentation for the cooperative and thinking about the associated bodies, the type of members and the sources of funding which will be included in it. All this will define the community's governance model. Work must also be done on the economic viability of the community in order for it to stand the test of time.</p>

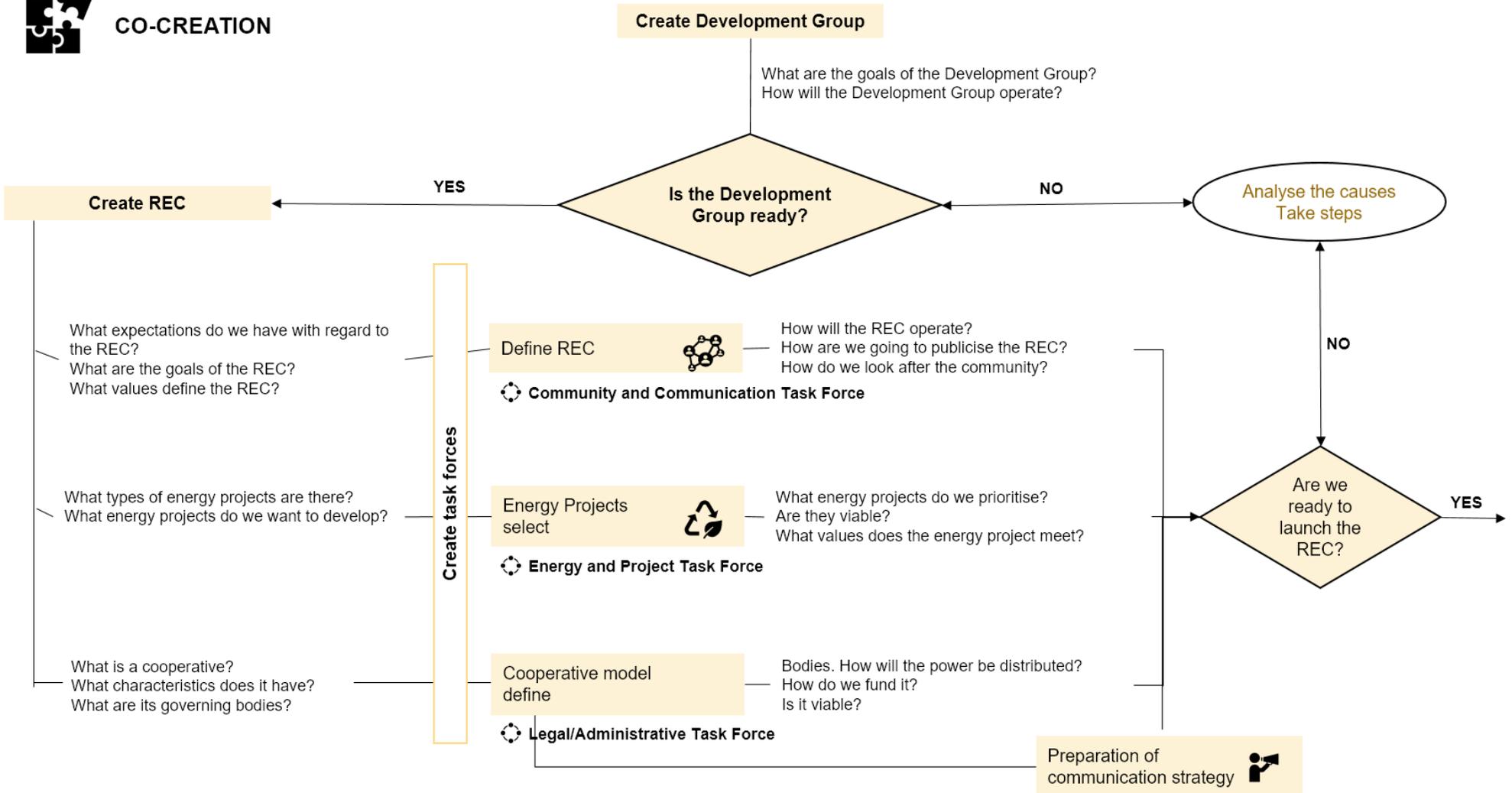
Proposed methodology for fostering teamwork and defining the organisational structure available in section "4. Materials".

Therefore, in summary, to consider the co-creation phase complete, we must have:

- **Set up the Development Group and its three task forces** (or their functions), which are up and running on their own.
- **Defined the characteristics** of the Renewable Energy Community.
- Defined **what the first energy project is going to be**.
- Agreed on the characteristics of the cooperative and **prepared the formalities to set it up**.
- Prepared **the communication strategy**.



CO-CREATION



3.4. LAUNCH

The time has come to introduce and launch the jointly created REC! **We suggest holding an introductory event that is consistent with local realities and dynamics**, taking into account the agreed communication strategy.

During the presentation, we must clarify what an REC is and why we want to create one. We will have to explain what the process of creating it has been like and how we have done it, highlighting how it is being built in a participative way and the commitment from all the members of the community. And we will naturally have to share the aspirations and priorities from this point on and underline that now is the time to include new members.

In this way, we will have to activate all the mechanisms for launching the REC:

- Develop a communication plan.
- Take steps to register as a cooperative.
- Take the necessary steps to launch the energy project or projects.
- Activate procedures to welcome new members.
- Tend spaces to foster the proper organisation and smooth running of the community.

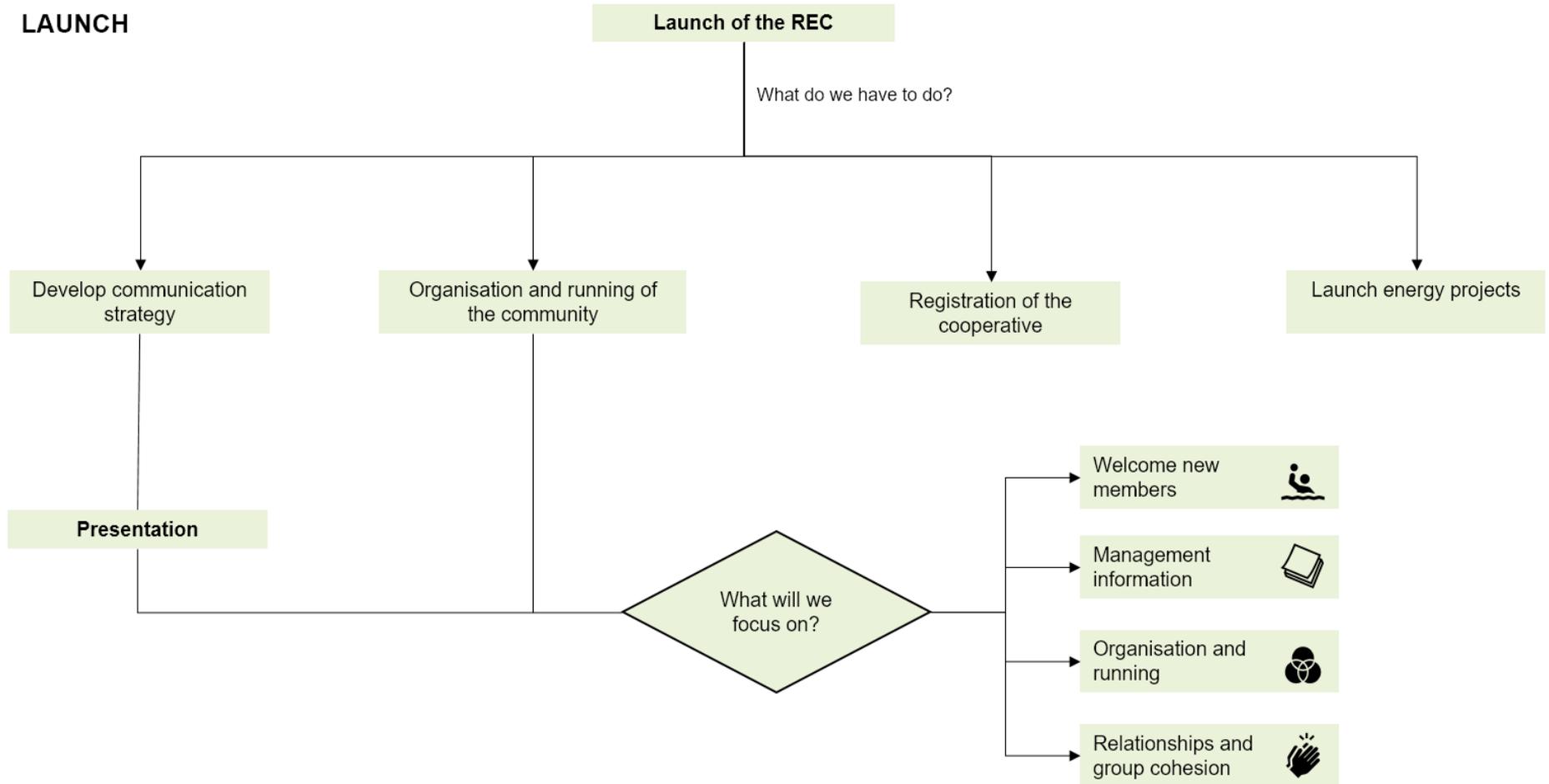
And, of course, the recommendation is to maintain the "ways of doing things" that have been learnt, been applied and worked well. However, and as an REC is a living system, we cannot forget that we will meet difficulties and obstacles. There may be conflicts inside the REC, administrative barriers, problems with permits, lack of funding, etc. In these circumstances, our intention must be to stand firm and in each case seek out different solutions among the members of the REC.

Therefore, during the initial steps of an REC it will be necessary to implement all the machinery tailored to the local circumstances. There are many aspects to be taken into account, but as we stated in the introduction to this guide, from the perspective of participation, **the priority will be to place people at the centre and pay attention both to their experience of the process and to the outcome.**

Let's embark on our journey!



LAUNCH



4. MATERIALS

In this section, we include a number of materials that may be useful when creating an REC, that is, methodologies that may be of interest in the organisation and smooth running of the community and which strengthen the relationships between people and their collaboration, have an impact on the atmosphere in the group and foster thought on a number of subjects.

The choice of one technique or another will depend on the desired goal.

A tool and four different techniques are provided below.

- 4.1. **Stakeholder matrix:** a technique for identifying stakeholders.
- 4.2. **Meeting plan:** a tool for **preparing meetings**.
- 4.3. Why are we here? A technique for **working with expectations**.
- 4.4. Who were we? Who are we? And who will we become? A technique to enable team members to **get to know each other**.
- 4.5. Teamwork and organisational structures: A technique to **define and review the structure and organisation of a task force**.

Moreover, the document [Eraldaketa-prozesuak. Zer, zertarako, nork, nola...](#) (by Elhuyar Aholkularitza and Nicola Foroni) provides a list of around 80 techniques, grouped together in accordance with the desired goal:

- Techniques for analysis, consideration and understanding of the process.
- Methodologies for working on cross-cutting themes and ambiance.
- Techniques for the creation and cohesion of the group.
- Techniques for splitting into small groups.
- Assessment techniques.

Although the priority is to know what we are going to use the methodology for, it is important that when preparing the exercise we take a close look at the group: the motivation and keenness to take part of the participants; the number of members, etc. The potential or limits of the space or classroom will also have to be considered as a factor.

All these techniques tend to be very useful for structuring the group and if we start trying them out little by little and using them in the Development Group meetings for the REC, we will be gradually introducing them into the day-to-day routine and seeing their value.

4.1. Stakeholder matrix

METHODOLOGY	STAKEHOLDER MATRIX
Goal	<p>The stakeholder matrix is a technique which makes it possible to identify the people, actors, organisations, etc., who in this case are considered to be key for the creation and launch of the REC.</p>
Description of the method	<ol style="list-style-type: none"> We will start by defining the sphere of influence of the REC, that is, if we are going to take into consideration the neighbourhood, the municipality, the region, etc. An agreement will also be reached about the characteristics that stakeholders of the REC must fulfil, such as: <ul style="list-style-type: none"> Information, knowledge and expertise on renewable energy. Know-how concerning how to develop energy projects and provision of resources. If energy poverty affects them directly. Interest or potential as regards energy issues. If they are working from the point of view of the community. Etc. Later, we will identify individuals, actors, institutions, etc., and to do this we will carry out a brainstorming exercise with the goal of including all the stakeholders that each participant is aware of. Once the list of stakeholders has been drawn up, we will write each individual name on a post-it and place them on the following matrix: <div data-bbox="414 1153 1061 1568" style="text-align: center;">  </div> <p>By way of example, we can place them based on the community perspective and on their influence.</p> Because, depending on where they are plotted on the matrix, this will give us insights for setting priorities when offering invitations to participate in the REC, and it will help us define which strategy we should apply depending on the type of stakeholder.
Material	<p>Blank sheets of paper, large sheets of paper, post-its, ballpoint pens, markers, etc.</p>

4.2. Meeting plan

Meetings are an essential part of working as a team, but in order for them to be effective they should not be improvised. Therefore, it is important to plan them in advance: what objective we are going to meet, the resources we need, time management factors and who is in charge of which part of the meeting. A meeting plan is a very useful tool.

SUBJECT	OBJECTIVE	PROCEDURE	RESOURCES	TIME	PERSON RESPONSIBLE
What are we going to do in this time?	What is the goal?	What procedures and working dynamics will we use to work on the topic and achieve our goal?	What resources and materials do we need?	How much time will we devote to this topic?	Who will be in charge of the work and leadership?
Introduction	We will explain the objective and approach for the meeting.				
Ambiance	In order to begin the meeting, we suggest using a technique to create the right mood. It can have different goals, such as getting to know the group or fostering trust within the group, etc.				
Work	We will begin work on the agreed elements. The issues can be worked on using different methodologies and dynamics. It is advisable to alternate between them – that is, in the group as a whole, in smaller groups, working in pairs or individually – and even alternate between using simpler then more complex methods.				
Assessment	It is a good idea to end meetings with a post-meeting assessment; in this way, we will be able to identify what we have done well and which aspects could be improved. This can be done through an individual round or by using a number of different methods.				
End	We will end by explaining the next steps and thanking everyone at the meeting.				

4.3. Why are we here?

METHODOLOGY	WHY ARE WE HERE?				
Goal	To know the expectations, motivations and needs of the people who are participating in the REC.				
Description of the method	<p>1. First of all, we will do some individual work. Each participant will be given four cards and must answer the following questions:</p> <table border="1" data-bbox="587 636 1174 922"> <tr> <td data-bbox="587 636 1174 698">What has motivated me to participate in an REC?</td> </tr> <tr> <td data-bbox="587 698 1174 761">What am I hoping for? What are my expectations?</td> </tr> <tr> <td data-bbox="587 761 1174 860">What do I need to feel at ease in my participation in the REC?</td> </tr> <tr> <td data-bbox="587 860 1174 922">What can I offer the REC?</td> </tr> </table> <p>2. Once each person has answered the four questions individually, we will share their responses.</p> <ul style="list-style-type: none"> • What has motivated me to participate in an REC? <p>Each person will read out their answer and we will put it up on the board (on the wall, etc.). We will place similar answers together and continue until we have put up everyone's answers.</p> <p>Once we have gathered all the answers, we will have a general read-through to see whether all the members of the team have similar motivations, and so on.</p> <p>With the other three questions, we will use the same system:</p> <ul style="list-style-type: none"> • What am I hoping for? What are my expectations? <p>If the expectations of the team members are far from those offered by the REC creation process, we need to remind them that this is an REC and explain its scope.</p> <ul style="list-style-type: none"> • What do I need to feel at ease in my participation in the REC? <p>Here, we will compile the needs of the team members. If any of these needs are not taken into account in the REC creation process, we will have to look into the option of taking steps to fulfil them.</p> <ul style="list-style-type: none"> • What can I offer the REC? <p>Through this question, we are going to discover the potential of each member of the group, what they can help with, for example, when setting up task forces.</p>	What has motivated me to participate in an REC?	What am I hoping for? What are my expectations?	What do I need to feel at ease in my participation in the REC?	What can I offer the REC?
What has motivated me to participate in an REC?					
What am I hoping for? What are my expectations?					
What do I need to feel at ease in my participation in the REC?					
What can I offer the REC?					
Material	Blank sheets of paper, cards (post-its), ballpoint pens, markers, etc.				

4.4. Who were we? Who are we? And who will we become?

When starting a meeting, a work session or a specific space, it is important to know how the group is and how its members are feeling.

To this end, we have a number of different options: from answering the question “How are you feeling?” to using more complex methods.

METHODOLOGY	WHO WERE WE? WHO ARE WE? AND WHO WILL WE BECOME?
Goal	To get to know each other and find out how we are feeling.
Description of the method	<ol style="list-style-type: none"> 1. We will provide each group member with a blank sheet, which will then be divided into three parts. In the sections, we draw: <ul style="list-style-type: none"> • 1st part = past. What past event, positive or negative, has helped you become how you are today? • 2nd part = present. What makes you happy today? How are you? • 3rd part = future. How do you imagine yourself in 10 years' time? <p>Once all three sections each contain a drawing, we will cut them out.</p> <ol style="list-style-type: none"> 2. Next, we will get up and walk around the room in silence to see the pictures drawn by the other members. After moving around for a minute, we will partner up with the person beside us and explain what we drew. <p>In total, we will do this in three rounds: first, the past; next, the present; and, finally, the future.</p> <p>It may be of interest to exchange drawings.</p> <ol style="list-style-type: none"> 3. To end, and with the whole group together, we will ask how everyone felt doing this technique and what we want to share about what we discussed with our partner.
Material	Blank sheets of paper, ballpoint pens, markers, paints, etc.

4.5. Teamwork and organisational structures

METHODOLOGY	TEAMWORK AND STRUCTURES
Goal	To define the group's organisational structure. We can also analyse what the relationships between the group's members are like.
Description of the method	<ol style="list-style-type: none"> 1. First of all, we will sketch out the different structures that will make up the REC (Development Group, task forces, Support Group, etc.) on a large sheet of paper. 2. Then, using a marker pen, we will draw on the sheet what the relationships and information flows between the different structures should be like. We will use a solid line if constant contact is necessary and a dotted line if the flow of information is not so important. 3. We will then identify the actors and people who make up the REC. And each member will draw themselves in a circle. 4. Each member will place their circle within the REC structures they want to be involved in. 5. Once the organisational structures and relationship and information flows for the REC have been drawn and the members have been placed on the drawing, we will stop to reflect on them. <p>Some questions that may help us are:</p> <ul style="list-style-type: none"> • Are the way it is organised and the structure appropriate for the mission of the REC? • Have we got enough members to achieve the objectives of the REC? Is there anyone missing? • Do any of the structures need to be more balanced? • Do we have access to all the relevant information we need? • Do we need to implement any kind of rota system? • What is the decision point? Who will participate in the decision? • Etc. <ol style="list-style-type: none"> 6. To address the queries and weaknesses revealed over the course of our reflection process, we will look for solutions from among all the members of the REC.
Material	Large sheets of paper, blank sheets of paper, ballpoint pens, markers, paints, scissors, etc.

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Main bibliographic references and useful reading:

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6. ACKNOWLEDGEMENTS

This guide has been created as part of the BECoop project (<https://www.becoop-project.eu/>). For this guide, we have received co-funding through the European Union's Horizon 2020 research and innovation programme under grant agreement no. 952930.



This guide was created by Goiener between 10/2021 and 10/2022
with the collaboration of Elhuyar.



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