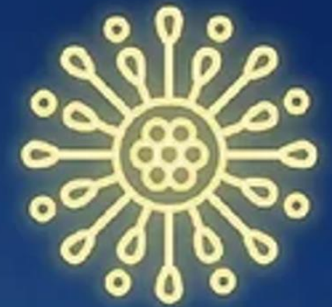


COMMUNITY RESILIENCE AND RELIABLE ENERGY FOR *Venus Bay & Tarwin Lower*



COMMUNITY ENERGY

Toolkit

July 2023

With thanks for funding provided by:



A Toolkit for communities wanting to adopt, adapt or replicate the process and outcomes used in the *Venus Bay and Tarwin Lower Community Energy Feasibility Study and Action Plan.*

Introduction

The 12-month Venus Bay and Tarwin Lower community resilience and reliable energy feasibility study began in July 2022 and concluded in July 2023. It built on previous community knowledge and effort and has provided a strong foundation for the ongoing resilience and reliable energy journey for Venus Bay and Tarwin Lower. A team of partners supported the Venus Bay and Tarwin Lower Community to lead the study and produce a Community Action Plan.

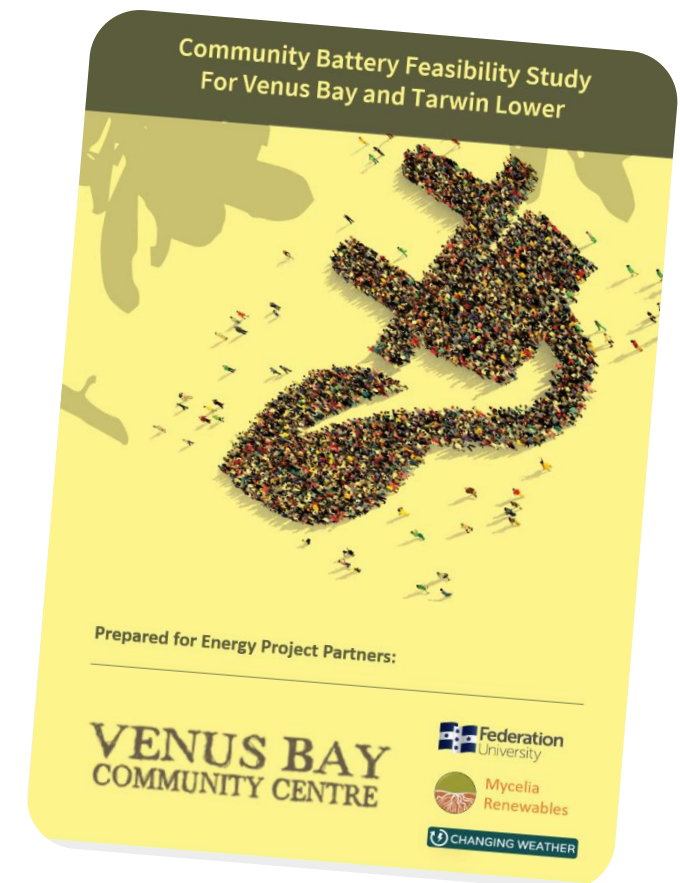
Along the way many useful processes, tools and insights were developed. It is the desire of the Venus Bay and Tarwin Lower Community and partners to share these in ways that can inspire and support other communities to undertake their own successful community resilience and reliable energy journeys.

Whilst the study in Venus Bay and Tarwin Lower focussed mainly on energy, the impact of the work for strengthening community resilience

through this medium has and will continue to be significant. So much of our lives are now dependent on energy, as recorded through community input to the study, highlighting that when energy supply fails our resilience is diminished.

Increasing the reliability of energy is therefore a critical element of resilience. We would go so far as to say that engaging communities in designing, owning and managing reliable energy is an excellent way of strengthening and sustaining community connection, developing new and vital knowledge and skills and creating new job, enterprise and community wealth building opportunities.

In a nutshell, the benefits and value of a focus on community energy extend far and wide and capturing a percentage of local spend in local communities will have a multiplier effect that will reverberate for many years to come. Vital years where change and challenges will confront us all.



How to use this toolkit

The toolkit is made up of documents, templates and examples and our advice for using them. Each component is described in brief below and the artefacts themselves or templates for your use can be found on the [Venus Bay Community Centre \(VBCC\) website](#) or in the downloadable zip file on the [final reports page](#). This file was created to share the various tools and templates and, hopefully, save you time if you are embarking on a similar project.

This document provides a guide so we discuss the toolkit components under the following headings, and match these to the filing system within the zip file:

1. Planning
2. Governance and Project Management
3. Communications and Engagement
4. Workshops
5. Community Action Plan and Next Steps

Throughout the text below there are also hyperlinks directly to documents published on the Venus Bay Community Centre website

- [Community energy page](#)
- [Bulletins and links](#)
- [Final reports](#)

The rest of this guide is laid out using these same headings and the descriptions include some lessons learned from the Project Team's perspective.

As a useful starting point, you may wish to read the [Community Energy Action Plan](#), as it provides an overview of the whole journey and brief descriptions of all that it entailed.

Ok, let's go!



1

Planning

Documents in this section

The [original Project Plan and grant application](#)

Word template for writing a project plan

Sample budget spreadsheet

Produce a short project summary

The aim is to create a short, 1-2 page, accessible document that summarises community aspirations, what's already happened or underway and what the proposed next steps are, so you can be proactive with your engagement.

Producing this document could also enable:

- Reflection on your journey so far and what's next to do
- Keeping the community up-to-date with progress
- Identification of the partnerships and resources you might need to create or generate, at each stage
- Share this with prospective partners
- Keep it updated, everything you write will be useful

Create a detailed Project Plan

Our Project Plan was integral to shaping our partnerships and securing funding. It was designed to:

- Pull together the why, what, how and when of the proposal in detail
- Enable a process of creating the plan that is valuable for partners to develop and refine the proposal together.

Lessons learned

- Sometimes feasibility studies and project plans provide good stand alone documents and can be re-used, in part or in full – everything you write should have many uses
- Be sure about GST – your project partners might have a different GST status
- In-kind support helps a project along but in hindsight we should have budgeted more for material costs associated with good communications – we needed cash for these.
- We used our graphics a lot. We should have put more in the budget for generating these because they helped people notice the project and everything came across as professional.
- We ended up with a Launch, an extra workshop 2, a business session, and an extra workshop 5 that were not included in the original budget, so include contingency funding for these potential extras.

2

Governance and Project Management

Documents in this section

Graphic designed Governance arrangements (Original versions are in the [Project Plan](#))

[Terms of Reference](#)

Agenda template (turn agenda into minutes by note taking in the RH column)

Our Governance Arrangements

Draft governance arrangements for the Feasibility Study and a process for establishing these were developed through the planning phase and included in the Project Plan. We created an Accountability Group, which was a small sub-committee of the VBCC Board with a purpose of overseeing project management and financial acquittal. It worked closely with the Project Team.

A larger group of community members, partners and stakeholders formed the Advisory Group that had the purpose of peer learning, reflecting and advising on the delivery of the project and helping shape any adaptations we had to make along the way.

The partners who produced the Project Plan formed the Project Team which was expanded when the economics contractor was added. This Team was formalised when the Feasibility Study funding was confirmed, with contracts and payment schedules created to support this partnership. The tools developed to enable the governance groups, the Project Team and each of their processes included a diagram of governance arrangements, terms of reference and scheduling.

Meeting schedules and process

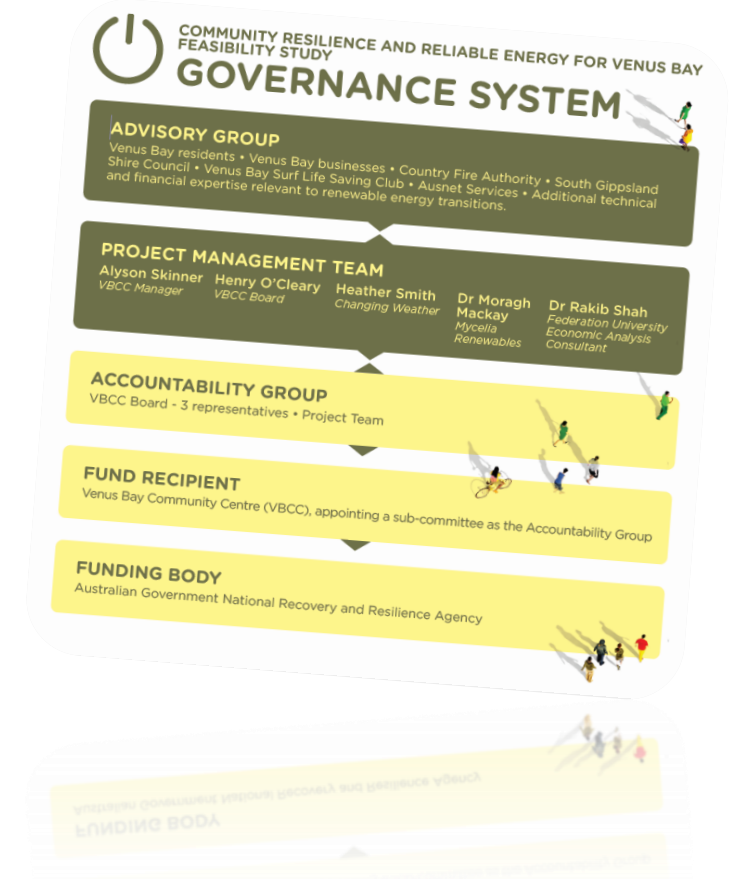
- We set the schedule of meetings for both groups in advance for the whole year
- The initial schedule was set during communications planning. A schedule with milestone reporting and key decisions was produced by the project manager and harmonised with the meeting schedule to align with key decisions and reporting deadlines.
- The Accountability Group met for 30 mins with project team before each Advisory group meeting. The Accountability Group Chair also sat on the Project Team and attended all their meetings. They also caught up regularly and were provided with regular updates from the Project Team. The Accountability Group in turn updated the VBCC Board. Two members of the Accountability Group also sat on the Advisory Group.
- The Advisory Group met for 2hrs – initially every 2 months but moved to monthly by third meeting, which worked better. Most of the project team attended and reported on their actions and deliverables.

Meeting schedules and process (continued)

- Project Team meetings started fortnightly and went to weekly about three months in. We sometimes cancelled if there was nothing to advance. We created a sub-team very early on, to focus on communications and engagement.
- Communications and engagement meetings were needed weekly with longer and extra sessions at times with the full Project Team to plan and evaluate the workshops.
- A Dropbox folder was used to share all files across the whole project team. A subfolder provided access to relevant documents for Advisory and Accountability Group members.
- Project and comms team notes were taken during the meeting in a rolling log on Dropbox (most of the time) with action items emailed immediately after the meeting.

Lessons learned

- Most meetings were online to enable greater participation and flexibility, although we acknowledge face-to-face helps people get to know each other better.
- We had some members who consistently attended and others who came sometimes. We probably needed to be more flexible in the timing of meetings to enable more people to attend.
- The collaborative planning and evaluation with the Advisory Group was excellent for deepening the learning of both the Project Team and Advisory Group members.
- Much of the energy analysis was developed slowly and the Project Team knew more than the governance groups and community participants, so decision making was an constantly evolving process. We learnt a lot about how to translate energy information and we developed engaging ways for community to connect with this information, so that they were empowered to make decisions about the actions that now sit in the Community Plan.



3

Communications and Engagement

Documents in this section

Communications Plan template

Bookmark for key dates (graphically designed)

Sample graphics for advertising workshops

Brochure for markets and PO Boxes

Eight [Bulletins](#) sent approximately monthly

Survey Questions and sign up forms

Communications Plan

Within the first month of the Study starting, we created a separate Communications and Engagement Plan that identified:

- Different community audiences and stakeholders
- Key messages appropriate to each of these groups and for use by the Advisory and Accountability Group to help them talk with others about the Study.
- Methods and regularity of communications and who in our team was responsible.

Communication materials

We produced the following artefacts that were used throughout the Study:

- Flyers, a bookmark and a brochure that were all valuable giveaways at markets, workshops and meetings. We paid 25c per brochure to add a copy to local post boxes.
- [Monthly Bulletins](#) with articles on topics related to the themes covered at each workshop, sent to a mailing list developed for the project and growing throughout the period as more people attended events.

- [Harvest Reports](#) on the process and contributions of each Workshop
- [Website](#) and [articles](#) in the local 'Matter of Fact' Newsletter
- Social media posts on VBCC [Facebook Page](#) and Tarwin Lower /Venus Bay [Community Voice](#)

We drew on the services of Jennine at [Red Mullet Creative](#), a Graphic Designer who developed our overarching style, branding and colour palette. Jennine designed all our plans and reports.

We also engaged [Angharad Neal-Williams](#), an illustrator who recorded workshop discussions and produced complementary artwork to increase accessibility of the complex information and help with community sense making.

Community presence

In addition to all of the above we:

- Attended the local Tarwin Lower Community Market to engage people who hadn't yet or weren't able to make the workshops.

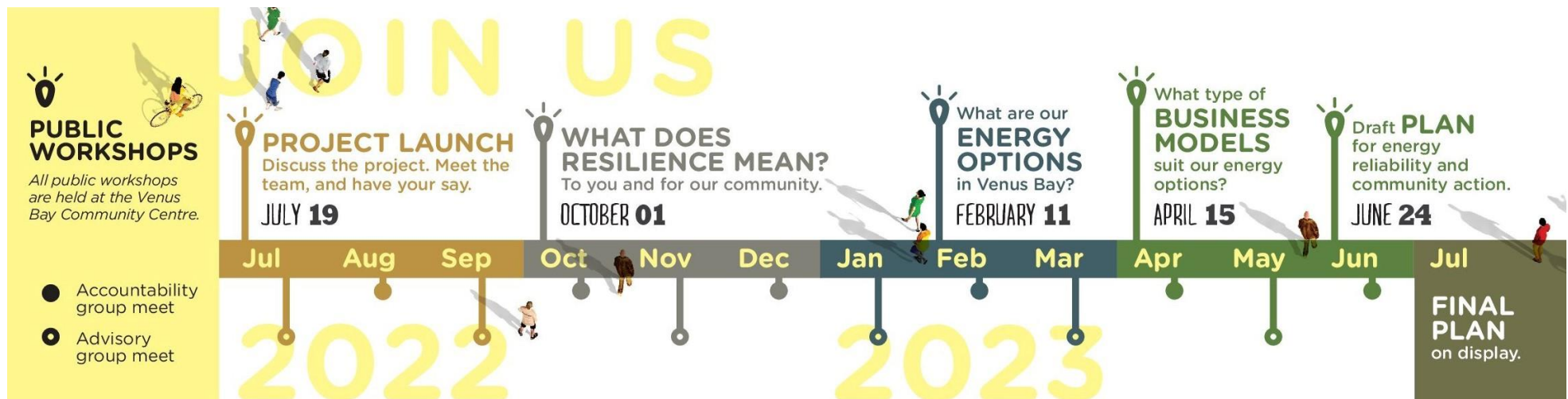
Community presence (continued)

- Hosted a Speed-date an Energy Expert to enable people to ask their specific questions about renewable energy, either for their homes or businesses or just out of interest.
- Gathered additional input from the broader community to boost data sources through two Surveys.
- We conducted many additional meetings with local business owners, community organisation members and various stakeholders and partners to discuss specific aspects of the study, relevant to their interests or operations.

Lessons learned

- It was really valuable to have multiple and diverse ways of communicating about and engaging people in the Study.
- The stakeholder analysis in the Communications plan helped with engaging business owners and community organisations in contributing data to energy analysis and extrapolating on this for our whole community modelling.

- You need to make time and hold space for people to hear about your project, get their heads around what it means and find an entry point that aligns with their interests. Providing this in the lead up, during and after is critical – don't underestimate the effort and time needed to build momentum in the community.



4

Workshops

Documents in this section

Sample workshop plan based on Workshop 1

Summary agendas from all 5 workshops

Slide decks for each of the workshops & launch

Four Harvest Reports (workshops 1-4)

Sample network maps

Resilience Framework and instructions

Understanding energy criticality exercise

Energy Options template

How does a microgrid work? Recording

Case studies – three legal forms for groups

Draft Action Plan tables for discussion

Workshops and key events

We planned for four workshops and ended up with:

- A launch that doubled as a project introduction and first engagement opportunity
- Five main workshops, with Workshop #2 being offered on two occasions to engage community organisations and people from Tarwin Lower that resulted in expanded the Study to include Tarwin Lower
- Workshop #3 and #4 were reworked because energy data critical to informing energy modelling and energy choices that was anticipated for Workshop #2 wasn't available in time.
- Workshop #5 was additional and focussed on sharing the draft Community Plan and acting as a segue between the Study and establishing new governance and project management arrangements for implementing the Community Plan.

Tools and Materials

Tools and materials we developed and used to support workshops included:

- A workshop facilitation plan developed by members of the project team in the weeks before the workshop.
- Slide decks which are also used to create the Harvest report after each workshop and our milestone reporting for the funder were built on these too. The slide decks include information critical to informing the activities of each workshop.
- In later workshops, you'll notice how much we used the images produced by our workshop illustrator to communicate complex and inter-related ideas.
- Additional activity information sheets for each table. At times we prepared a large A1 hand drawn sheet for each table.
- We produced local information and maps about the electricity network, energy use on different feeders but these were less well used.
- All the usual sticky notes, dots and pens. A whiteboard to record results when tables shared information to the whole group.

Workshop 1 - Resilience

What does resilience mean to us and how are we connected?

We worked with the resilience framework we had developed and mapped key community assets. This map was printed as A1 and used extensively throughout the rest of the project and in additional engagement opportunities like the local markets.

As an individual exercise, everyone filled in the energy criticality form and we collated results.

You can see how the resilience framework informed all the workshops in the [final resilience framework report](#).

The Social Network analysis method is written up in [Workshop #1 Harvest report](#)

Workshop 2 – Energy Options

What are our energy options?

This workshop focused on exploring the technical options available and deepening everyone's understanding about how a microgrid might work at different scales – individual sites, small clusters and large cluster.

The second exercise was a community values exploration which provided rich insights into what everyone expects from energy. It is written up in [Workshop #2 Harvest Report](#).

Workshop 3 – Energy Options

Exploring our energy pathways and locations.

Five energy pathways exercise. To develop the pathways, the project team first defined them and created visuals using Miro online. We discussed the hurdles and steps within each pathway. This work provided the skeleton for the workshop which ensured plenty of learning and pathway development by community members. The Energy pathways exercise is described in [Workshop #3 Harvest Report](#).

An introduction to Community Wealth Building as our chosen economic analysis tool is also described in the Workshop #3 slide deck and Harvest Report.

Workshop 4 – Economy and Wealth

Economic and community wealth building analysis.

We presented different business types and discussed how they might suit our needs and interests and help us create community wealth, described and analysed in the slide deck and [Workshop #4 Harvest Report](#).

Workshop 5 – Action Plan

– We've got this!

We watched [the film](#) together which was a wonderful celebration of all the work that had occurred.

We presented the Draft governance arrangements.

We presented and then discussed using the [World Café method](#) the [Community Action Plan](#) with Community Action Plan tables printed large on every table.

Lessons learned

- We co-designed the workshops as a team and all played a role in developing information and materials to inform workshop activities.
- Workshops were facilitated in line with the principles and practices framed by the Mycelia Community-centred Design Model and the Mycelia Co-design Framework
- We wanted to make the workshops not too long and super engaging to keep people's attention, however, made Workshops #3 and #4 longer because there was just too much content to get through
- Participants were happy to work in small groups for the first half of workshops but preferred to discuss matters as a whole group in the second half, to be able to hear everyone's views.
- The launch was a really excellent idea, was well attended and engaged many people who were then involved in the whole journey.
- Advisory group meetings before and after workshops were really valuable for testing and refining workshop designs and content and for collaborative evaluation and Harvest Report design after each Workshop. This

collective sense making helped everyone with how we understood the results of the workshop and with communicating these results further at, for example, market stalls, in stakeholder meetings and in community conversations.



4

Community Action Plan and Next Steps

Documents in this section

[Community Plan for Community Energy](#)

[Draft Action Plan tables](#)

[Final Milestone report](#)

[Resilience framework report](#)

[Technical Report](#)

[Economic Report](#)

[Battery Feasibility Study](#)

Action Planning

So, back to the Community Energy Action Plan, which is where you hopefully started. The Community Energy Action Plan covers our whole journey and presents the main strategies that represent the suggested way forward.

The Community Energy Action Plan is also backed by action planning tables that provide greater detail around specific actions that were proposed at the time of drafting the Community Energy Action Plan.

The Way Forward

- A Co-ordinating Group and Working Groups for each Pathway are the proposed arrangements for facilitating action and further research and resourcing to support plan implementation.
- Action planning tables can be found in the zip file but please note these are likely to be updated and modified as the Working Groups for each pathway begin implementation.
- We also produced a series of supplementary reports that provide detailed energy and economic analysis and a community battery

feasibility study. These are all on the website.

- [Technical analysis](#)
- [Economic analysis](#)
- [Community battery Feasibility Study](#)

Please always feel like you can contact us to discuss any part of this toolkit and how we developed and used the various methods and information. Contact details are on the [VBCC website](#).

Good luck with your community energy journey!

Full list of Toolkit contents

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VENUS BAY COMMUNITY CENTRE

