Supporting PUBLIC Authorities to Implement Energy Efficient Policies

PUBLENEF platform – building, launching and maintenance

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Preface/Abstract

The PUBLEnEf online platform is an important and versatile never-end tools collection with a very advanced search and MatchMaking module: match needs of users with tools and good practices registered in the platform. The PUBLEnEf online platform was built and online uploaded at www.publenef-toolbox.eu in month 18, tested and corrected during M 18-20 and release as first public version M 21 (October 2017) – content upload will last for M 22-23.

Developed under by AEEPM, the PUBLEnEf online platform is significant for helping all stakeholders, local and regionaladministration elected persons and staff to find tools and good practices, developed under present project and under others project in Europe, as “readymade” solution to their need in relation with EE Directive obligations. In this way, the PUBLEnEf online platform was developed as valorization of work done on WP2, WP3 and WP5 by project partners. Updated and extensions will be conducted on a regular basis. The PUBLEnEf online platform will running and updated for at least two years after the project end.

This report offers a practical overview of the www.publenef-toolbox.eu (“Matchmaking wEEb”), online repository platform developed by the PUBLEnEf project. This includes what does the platform contain, how is it structured, how can it be accessed, how can it be used for practical purposes, and how users can contribute to the Toolbox Collection. In addition, the document summarizes the main steps taken in the design, selection and development of the Toolbox contents.

PUBLEnEf recognizes the need for preserving the tools, trainings and other materials knowledge we have gathered for future use. In most countries, because of frequent staff changes (or understaffing) the level of institutional know how is under pressure. This can reduce not only the effectiveness, but also the cost effectiveness of new public administrators. This online repository will serve as some sort of exchange where implementing bodies can download and upload the supporting tools and resources they use/need for Energy Efficiency policy planning, development, implementation of actions plan and evaluation.

The Toolkit provides, through a clean and user-friendly structure, a wealth of resources related to EE and tailored to the needs and challenges faced by each group of actors. These resources are classified in four types:

- **Library elements** to inform on EE news and events (opportunities);
- **Experts communities** on EE and closely related fields to help with guidance if they do not find a tool on this platform a tool to fit with exposed needs;
- **Good practices** to inspire and adapt to their contexts; and
- **Tools** to plan, implement, evaluate, and disseminate actions in response to their needs connected with EE Directive.

The Platform is a “never end growing collection” of tools aims to be flexible and cover a wide scope, so that users can choose and adapt the resources that fit best their needs and contexts. Most of these resources have been developed by European projects with renowned experts
in their fields and many have been uploaded to the Platform by a growing PUBLEnEf Community of Practice. Another goal of the Platform is providing the visibility and credit these efforts deserve by facilitating a quick and easy introduction and access to them. In this respect, the Platform aims to become the entry gate to the multiple initiatives related to Energy Efficiency.

The main sections of this report, listed in the Table of Contents (see next page), explain:

- The content of the Toolbox, describing the types of resources included in it (tools, inspiring practices, Experts panel, and library elements);
- The entries to access the Toolbox, providing an overview of the structure and sections of the digital platform;
- The possible uses of the Toolbox, exemplifying several of the multiple options that users have to learn, reflect, and find resources for their needs; and
- The ways of collaborating in the Community of Practice, describing how users can actively contribute to the further developing of this Tools Collection.

The annexes provide information on how the Toolbox was designed in a collaborative and inclusive way based on the detected needs of the different actors, how were the existent resources compiled and selected, and how the new resources developed by EE Communities can be added.

The PUBLEnEf toolbox has been developed step by step on previews WPs task by task. In its second, self-sustainable stage, the Toolbox will receive contributions from a growing Community of Practice. In the years to come we hope this Community will take care of continuously use, update and enrich the content to keep and enforce the PUBLEnEf consortium approach and values.
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1. Introduction

This report presents the online repository structure, which includes all tools and best practices collected and is considered necessary for the policy implementation in PUBLENEF. The project group recognizes the need for preserving the tools, trainings and other materials knowledge we have gathered for future use.

The main issue that arises that supports the need for the repository is that in most countries, because of frequent staff changes (or understaffing) the level of ‘institutional know how’ is under pressure. This can reduce not only the effectiveness, but also the cost effectiveness of new public administrators. The online repository will serve as some sort of exchange where implementing bodies can download and upload the supporting tools and resources they use / need for EE policy planning, development, implementation and evaluation.

The repository (toolbox), in the form of a digital platform would be called “Matchmaking wEEb” and it would serve as a user friendly online tool for posting problems and finding specific EE solutions /good practices for public servants (staff in public authorities dealing with EE topics). It will be a “live” tool that by its own nature will never be “finalized” in the traditional sense (since there will be always room for improvement and room for further enrichment of the quality and number of resources collected in it), so it will represent an online, centralised and growing collection of good practice methodologies and resources covering a wide range of topics relevant to local energy action. Users will be invited to add other useful tools and methodologies, to give comments, rate usefulness and evaluate the guidance material in the Toolbox. The tool will address the typical steps, as well as different actors and fields of action relevant to sustainable Energy Planning development – from setting targets to monitoring, and from financing action to engaging all stakeholders.

It will consist of a simple structure and search function (by language and alphabetical) it uses icons to present “contents” typically part of Energy Planning development process. It will be developed with the user in mind and as a comprehensive resource database available in several languages. The platform will be available to use for all public administrations wanting to post either their SOLUTION or a PROBLEM on a specific EE topic. They would also have to leave their contact and a link to materials available providing more info on the solution they suggest.

In this way, cities all over EU could easily come together and find partners for projects (knowledge emitters and receivers), solve problems and/or share/sell their own EE solutions. All the key issues addressed by the web would be connected to the EED requirements and some of the proposed topics will be:

a) Public buildings (Energy management in public buildings, Energy audits, Public building refurbishment, new codes for nZEB),

b) Energy efficiency plans – calculating savings,

c) Public procurement,

d) Financing EE measures (ESCOs, Examples of public energy service contracts), and

d) Dealing with public transport (Buses on alternative fuels, Public bicycles, Shared car systems) and others.
2. PUBLEnEf platform

The platform (http://www.publenef-toolbox.eu)

The domain of the platform will be property of the project consortium for a period of 10 years to assure project sustainability. For webhosting services, the consortium selected a Romanian based company ranked on first tree hosting company in order to secure the “value for money” service acquisition. Subsequently, the project Consortium approved proposed graphic concept and the CMS (Content Management System) under which we will develop the platform.

The PUBLEnEf platform runs under Drupal 8 (CMS). The strong points of Drupal are that:

- **Includes a lot of functionality**
  Drupal includes lot of functionalities like: advanced menu management, polls management, graphics modification tool, user’s management and much more. These functions make it possible to create simple or advanced websites, blogs, discussion boards, social networking pages, etc.

- **Variety of content types**
  Drupal is famous for allowing creating and managing many content types, like: videos, polls, user management, text, blogs, podcasts, statistics, and others.

- **Advanced users management**
  An administrator can create new user accounts and establish their permission rights. Users can be divided into groups and can be given assignments. They can be given permissions to manage parts of your website.

- **Graphics management**
  The script includes capabilities of design elements editing. Available templates and themes make for a good start. Predefined page functions configurations make it easy to create both a simple as well as more complicated page configurations.

- **Page content management**
  Drupal allows you to categorize your content through URL addresses, paths, making your own lists. This structure makes for easy management, search and reuse of the content.

- **Plug-in**
  The script has several thousands of plug-in available on its website. Since Drupal is an Open Source, you can use as well as create your own plug-in.

- **Support**
  On the Drupal homepage, there’s documentation, well developed discussion board, chat, mailing list, etc. You can find there plenty of information and help concerning management and modification of the script.

The platform was launched at www.publenef-toolbox.eu in month 20 (Thursday 5th of September 2017). The platform has been structured with a view to the needs of the target
audiences.

**Purpose of the Toolbox**

The repository (toolbox), in the form of a digital platform is called “Matchmaking wEEb” and it serve as a user friendly online toolbox for posting problems and finding specific EE solutions /good practices for public servants (staff in public authorities dealing with EE topics). It is a “live” tool that by its own nature, which can never be “finalized” in the traditional sense (since there will be always room for improvement and room for further enrichment of the quality and number of resources collected in it), so it represents an online, centralised and growing collection of good practice methodologies and resources covering a wide range of topics relevant to local energy action. Users are invited to add other useful tools and methodologies, to give comments, rate usefulness and evaluate the guidance material in the Toolbox.

The tool addresses the typical steps, as well as different actors and fields of action relevant to sustainable Energy Planning development – from setting targets to monitoring, and from financing action to engaging all stakeholders. The platform is available to use for all public administrations wanting to post either their SOLUTION or a PROBLEM on a specific EE topic. In this way, cities all over EU could easily come together and find partners for projects (knowledge emitters and receivers), solve problems and/or share/sell their own EE solutions.

All the key issues addressed by the Platform are connected to the EED requirements. Everyone can browse the tool, and staff from public authorities could log-in and post problems or good practices.
Content of the PUBLEnEf-toolbox

The Toolbox is structured around a basic unit: the resource. There are four types of resources, whose complete description is offered in the next section:

- **News and Events** to inform on EE news and events (opportunities);
- **Experts community** on EE and closely related fields to help user if no tools on this platform fit with his needs;
- **Good practices** to inspire and adapt to their contexts; and
- **Tools** to plan, implement, evaluate, and disseminate actions in response to their needs connected with EE Directive.

### 2.1.1.1 The basic unit: the resource

Each resource is presented through a resource page, which gives a brief overview of the resource (title, author, format, content summary, URL to access the original resource, etc.). The purpose of these resource pages is two-fold:

- Providing the basic information to allow users quickly decide whether a given resource is valuable for their purposes;
- Offering visibility and quick access to the actual resource, redirecting users towards the original URL where such resource can be found.

The following subsections provide a more detailed description of the nature of each type of resource. For information on how to upload resources, check the section

### 2.1.1.2 Types of resources

Each resource is described by several fields: the taxonomy of the resource. For each type of resource there are certain fields that are mandatory to be able to upload a resource (see section *Uploading and editing resources*), while others are optional and can be filled only if the owner of the resource considers they offer and added value to the resource description. This taxonomy is different for each type of resource and is fully described in [Annex IV. Taxonomy of the resources](#).

Each resource is tagged according to the contents introduced in each field of its taxonomy. This tagging is key element to identify individually each resource and plays a critical role in searching resources through the Toolbox (see section *Search engine*). The tags of a given resource are always visible in the resource page and the update/modification information.

### 2.1.1.3 News and Events

The library compiles all sorts of relevant resources, news and events or other opportunities (trainings, webinars, etc). The format of a library element page is shown in *Figure 2*. 
2.1.1.4 Experts Community (Ask Expert)

The Experts’ Community is formed with totally of registered users, with declared fields of expertise connected with EE Directive themes, which give their accord to be listed as expert and ready to act as guide for user to find solutions at those need do not match with registered tools on this Platform. To ask solution from experts the user must be registered user.
2.1.1.5 **Inspiring Practice**

Inspiring practices are examples of Good Practices (Cases) collected by PUBLEnEf partners during the project period or uploaded by user. For more information on the selection of the set of inspiring practices originally uploaded by PUBLEnEf partners check the section Compilation and selection process in Annex.

As shown in Figure 4, the resource page of an inspiring practice offers the basic information provided for other resources (name, summary, stakeholders involved, policy agendas and societal challenges tackled, etc.) plus a description of how the practice fulfils the process dimensions of EE Directive, the outcomes of the practice, and the lessons learnt in the practice and those that are transferrable to other practices and contexts.
2.1.1.6 Tool

Tools are intended to help users implement specific actions on a particular topic, such as designing and putting in practice an EE Action, selecting a participatory method to conduct an activity, or deciding in which open repository should be published the data and results of a project. To fulfill this aim, the resource page of a tool (Figure 5) provides both the standard basic information (name, summary, stakeholders involved, policy agendas and societal challenges tackled, etc.) plus details on the practical aspects that must be considered (such as budget, trained staff, equipment, timeframe, complexity of the tool, adaptability to other contexts, tips, caveats, etc.), and the strengths and opportunities detected when using the tool.

Among the diverse categories defined for a tool can be found: methodological tools, guidelines to apply a specific concept or approach, training tools such as courses or materials, certification standards, evaluation tools, dedicated portals, communication tools or catalogues that collect a series of related tools, etc.
Covenant capaCITY SEAP training tool

Figure 5. Example of tool resource page
3. How to use the PUBLEnEf platform

How to access the PUBLEnEf-toolbox

The structure of the www.publenef-toolbox.eu tries to address the five main challenges detected during its design:

- The complexity of the EE Directive, comprising process dimensions, outcomes, and EE policy agendas;
- The vast amount of resources compiled (as of May 2017, nearly 200);
- The variety of actors from different groups that should serve;
- The heterogeneous backgrounds of these actors, from newcomers to experts;
- The diverse challenges these actors face in their daily work, and for which the Toolbox should offer an aid.

3.1.1.1 Structure of the PUBLEnEf-Toolbox: entry gates

Given this complexity and multiplicity of contents, users, and potential applications, the Platform www.publenef-toolbox.eu offers nine entry gates (see Figure 6):

- Home page: offers a first contact with the contents of the Platform, and redirects users to the other entry gates;
- MatchMaking wEEb (very advance Search engine): the focal point of the Platform, actually a very advance multi-criteria search engine allows a detailed search and match needs expressed by user with Tools and resources of the Platform with multiple criteria and keywords;
- Lear from Best Practices: for advance users searching example of implementation of action plans and replication models;
- How-To use this Platform guidelines: help users understand how they can access resources of the Toolbox;
- About PUBLEnEf project landing pages: with short introduction to works done by the project consortium and redirection to the project website for those interested in project works;
- EE themes landing pages: provide a soft landing for newcomers, introducing EE Directive topics tailored to the group of actors that the user belongs;
- Self-selection tools (surf of all tools collection): for advance user’s own professional practice and expertise searching for specific tool by keywords;
- News and Events: offer training opportunities, resources for designing customized training, channels to access Community of Practice (blog, forum, events), and dissemination materials to advocate on EE for those more familiarized with this concept;
- Ask Expert: channels to access Community of Practice, community of registered users, experts ready to act as guide for user to find solutions at those need do not match with registered tools on this Platform.

The top menu (Figure 6), always visible, provides a direct navigation route to all the entry gates. The bottom section offer access to Ask Expert gate, help and most recent Queries and inform users on legal and disclaimer. The next subsections describe in more detail each of the entry gates.
Figure 6. Main entry gate, top menu (top), the home page and bottom section of the Platform

3.1.1.2 Home page

The home page of the Platform www.publenef-toolbox.eu (Figure 7) provides a glimpse on the different contents included in it:
- **Field no.1** (top left black): the gate for login/register users, administrative gate and upload new content;
- **Field no.2** (top right black): access to social media and professional community;
- **Field no.3** (main menu-green): access to all resources pages of the Platform:
  - MatchMaking wEEb
  - EE tools collection
  - EE best practices
  - EE themes
  - News&Events
  - About PUBLEnEf project
  - Search on this website
- **Field no.4**: access to video tutorials and help *How to use this Platform*;
- **Field no.5**: MatchMaking wEEb (very advance Search engine): the focal point of the Platform, actually a very advance multi-criteria search engine;
- **Field no.6**: Latest News & Upcoming events;
- **Field no.7**: Learn from Best Practices (the most recent added Best Practice – entry gate to BP library);
- **Field no.8**: EE themes (explore EE Directive topics);
- **Field no.9**: tribute to the PUBLEnEf project team;
- **Field no.10**: Ask an Expert gate;
- **Field no.11**: Legal & Disclaimer;
- **Field no.12**: gate to Help and Q&A.

All fields are gates to resources landing pages. Both in the home page and in the landing pages (see next sections) users are always accompanied by Top and Main menu and Bottom section which provide quick access to the different contents of these pages.
Figure 7. Home page of the Platform
3.1.1.3 MatchMaking wEEb

As a more customizable entry gate, users who do not need further guidance to navigate the Toolbox can access its full content through the MatchMaking wEEb (advance search engine) to find the resources they need. This engine has several functionalities to allow tailored-made searches:

- **Type of search** (looking for resources or users of the Community of Practice);
- **Basic search filters** (type of resource, stakeholder group, and policy agenda);
- **Advanced search filters** (level of expertise, EE challenge, language, and category within each type of resource);
- **Semantic search** (to introduce one or multiple keywords chosen by the user—or a simple description of his EE challenges);
- **Sorting options to display results** (by date of the last modification of the resource, by relevance in terms of the search options, by popularity according to the Community of Practice rating, by alphabetical order).

![Figure 8. Matchmaking wEEb entry gate](image-url)
3.1.1.4  Learn from Best Practices

More than 50 Good Practices were identified by PUBLEEnEf Consortium and those are the status for never end growing GP Library.
### 3.1.1.5 How-To use this Platform guidelines

Tutorials on how to use this platform are available on the home page.

![Video tutorial help - how to use this platform](image)

**Figure 10. Video tutorial help - how to use this platform**

### 3.1.1.6 EE themes landing pages

For beginner users a EE topics resources page is available.

![Explore Energy Efficiency topics entry gate](image)

**Figure 11. Explore Energy Efficiency topics entry gate**
3.1.1.7 **Self-selection tools**

Users who do not need further guidance to navigate the Toolbox can surf its full content through the EE toolbox to find the resources they need. With a range of dedicated keywords tools collection is available to all advance users.

![Figure 12. Advance users entry gate - explore this collection](image-url)
3.1.1.8  Community of practice

All registered users have option to be part of the PUBLEnEf Community of practice and can upload tools; raise questions or give answers for all members and users.
Every registered user has to provide a minimum of information on the user profile.
4. Contribute to PUBLEnEf platform

How to contribute to PUBLEnEf toolbox content

Only registered users can contribute to the content of the platform. Membership and contribution to the platform content is subject of the platform administrator mediation.

4.1.1.1 Login to platform

New user

![Create new user account](image)

Figure 15. Create new user account (with option to be listed as expert EE)

Manage user account
You have just used your one-time login link. It is no longer necessary to use this link to log in.

Email address

A valid email address. All emails from the system will be sent to this address. The email address is:

Password

Password strength: Fair

Confirm password

Passwords match: yes

Recommendations to make your password stronger:
- Make it at least 12 characters

To change the current user password, enter the new password in both fields.

Figure 16. Manage your profile/account/user
4.1.1.2 Propose content

Registered user can propose content for the platform thru a dedicated form connected with typology of the content (detailed on Annex).

![Add content](image)

Figure 18. Registered users have the rights to propose content

4.1.1.3 Become member of the Community of Practice
To be part of the Experts Panel user have to give their formal agreement to be listed as PUBLEnEf expert. Still this is subject of the platform administrator mediation (see rights and permissions).
5. Administrate the PUBLEEnEf platform

How to administrate the PUBLEEnEf toolbox

Drupal as CMS have very powerful and flexible back side administration section.

Access to this section is on the Home page top-left corner.

5.1.1.1 Manage membership

![Figure 20. Manage users' rights and permissions](image)

5.1.1.2 Manage content

![Figure 21. Manage toolbox content / review/ publish/ mediate Q&A](image)
5.1.1.3 Manage Taxonomy

![Taxonomy](image)

**Figure 22. Manage the backbone of the toolbox platform/taxonomy the main instrument of EE MatchMaking**

Taxonomy is the most powerful tools of this platform as is considered as the backbone of the very advance search engine we developed.
6. Sustainability of the PUBLEnEf platform

The Platform is a “never end growing collection” of tools aims to be flexible and cover a wide scope, so that users can choose and adapt the resources that fit best their needs and contexts.

Most of these resources have been developed by European projects with renowned experts in their fields and many have been uploaded to the Platform by a growing PUBLEnEf Community of Practice.

Another goal of the Platform is providing the visibility and credit these efforts deserve by facilitating a quick and easy introduction and access to them. In this respect, the Platform aims to become the entry gate to the multiple initiatives related to Energy Efficiency.

The platform’s advanced search engine and particularly the Community of Practice developed under this project are the main premises for future projects to ensure the sustainability of the project and this online toolbox. In its second, self-sustainable stage, the Toolbox will receive contributions from a growing Community of Practice. In the years to come we hope this Community will take care of continuously use, update and enrich the content to keep and enforce the PULSEnEf consortium approach and values.
7 Conclusions

Scope

This report relates to Task 5.3 – “Building, launching and maintenance of the PUBLENEF platform” (Task leader AEEPM). The PUBLENEF toolbox website is a part of work package 5 – “Gathering and preparing tools and resources” (WP leader: JIN). The objective of this work package is to provide an inventory of existing tools, protocols, templates, guidelines/guidebooks, software, presentations and other materials that can be easily modified to be used in other countries/regions to support the implementation of the (T3.2) roadmaps.

Overview

Based on consultation with PUBLENEF project partners and users, the PUBLENEF toolbox website has been designed, developed, and implemented; http://www.publenef-toolbox.eu.

Design

Prior to the development phase, a benchmark of similar websites projects has been made to gather helpful ideas to optimize the selection of the information to be highlighted, its presentation and its spatial organization.

The key functionality for the PUBLENEF toolbox website was agreed at the Consortium meeting. The website was designed in alignment with the PUBLENEF project logo and banner, ensure attractiveness to users and provide easy access to information on the site. There is a top and bottom navigation and Quick Links section on the home page to allow easy navigation around the site.

Website Structure

The content of the website is based on both, non-confidential information contained in the Description of Work Packages and on information provided by each partner of the project. The site is loaded with initial content that will be developed further by the AEEPM and PUBLENEF project partners as more information becomes available.

Web Accessibility

AEEPM team, the PUBLENEF toolbox website developer, is committed to making its Web site accessible. The PUBLENEF project website complies with the World Wide Web Code of Practice and is W3C Accessibility compliant. We aim to ensure that people with disabilities can perceive, understand, navigate, interact with, and contribute to our website.
Review and Evaluation

The [www.publenef-toolbox.eu](http://www.publenef-toolbox.eu) website is constantly promoted to stakeholders and the public through the agreed project dissemination channels. To assess how effective the website is in reaching stakeholders, it will use standard web traffic analysis tool [Google Analytics] to track the number of visitors and similar metrics over the life of the project. The website will be continually reviewed and updated throughout the duration of the project and minimum 2 years after project time life.

Conclusion

The [www.publenef-toolbox.eu](http://www.publenef-toolbox.eu) website has been designed developed and launched and is a live and operational environment. The content will continue to develop throughout the project life and minimum 2 years after project time life.
Annex I. Design of the PUBLEnEf toolbox

This annex summarizes the main processes and decisions taken in conceptualizing and designing the PUBLEnEf toolbox.

Background analysis

A toolkit must be useful and intuitive to its users. In the case of this Toolbox, it was aimed to serve a variety of actors’ groups facing very different challenges. To achieve these goals we conducted a background analysis consisting of two processes:

i) A review of existing resources, toolkits, and portals for EE and related topics;

ii) A consultation on the obstacles and needs of each group of stakeholders.

Review of existing efforts

During the first year of the project, the PUBLEnEf Consortium compiled and reviewed a significant number of resources, toolkits, and digital platforms dealing with diverse aspects of EE. This process led to the following conclusions:

- There is a lack of resources and portals that cover EE directive needs as a whole and connect all its components.
- There are multiple resources, toolkits, projects, portals and online communities related to some aspects of EE, most developed by renowned experts in their own fields.
- Most of them have reduced visibility and/or activity, especially
  - Outside their very specific field;
  - Once funding ends;
  - When collaboration among users is purely digital.

These findings, together with the needs and constraints of the potential users described in next section, helped us decide the Guiding principles.

Users’ obstacles and needs

To understand how to best serve the interests of all actors, one of the cornerstones of this Toolbox was the consultation to all stakeholders’ groups on the needs, opportunities, and constraints in implementing EE Directive. The methodology of this process can be found in Compilation of good practices report and Compilation of needs assessment report.

Toolbox benchmarking

In addition to the previous analysis, we conducted a benchmarking of digital platforms and online toolbox to detect strengths and weaknesses to have in mind when designing this Toolbox. Given the large number of digital toolkits available online we focused on some of the most commonly referred within the community, many related to public engagement, but trying to cover most aspects of the toolbox concept.
<table>
<thead>
<tr>
<th>Name</th>
<th>Type of content</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>GenPort</td>
<td>Portal on gender and science resources</td>
<td><a href="http://www.genderportal.eu/">http://www.genderportal.eu/</a></td>
</tr>
<tr>
<td>Action Catalogue</td>
<td>Toolkit of participatory methods</td>
<td><a href="http://actioncatalogue.eu/">http://actioncatalogue.eu/</a></td>
</tr>
<tr>
<td>Community-Campus Partnerships for Health</td>
<td>Toolkit of community-based participatory Research</td>
<td><a href="https://ccph.memberclicks.net/">https://ccph.memberclicks.net/</a></td>
</tr>
<tr>
<td>GAP2 Methodological Toolbox</td>
<td>Toolkit of participatory methods</td>
<td><a href="http://gap2.eu/methodological-toolbox/">http://gap2.eu/methodological-toolbox/</a></td>
</tr>
<tr>
<td>National Co-coordinating Centre for Public Engagement</td>
<td>Portal on public engagement</td>
<td><a href="https://www.publicengagement.ac.uk/">https://www.publicengagement.ac.uk/</a></td>
</tr>
<tr>
<td>Open Access Button</td>
<td>Portal for requesting open access publications</td>
<td><a href="https://openaccessbutton.org/">https://openaccessbutton.org/</a></td>
</tr>
<tr>
<td>Participation Compass</td>
<td>Toolkit of participatory methods</td>
<td><a href="http://participationcompass.org/">http://participationcompass.org/</a></td>
</tr>
<tr>
<td>EE in buildings</td>
<td>Toolkit of Energy Efficiency on buildings</td>
<td><a href="http://www.buildup.eu">http://www.buildup.eu</a></td>
</tr>
<tr>
<td>Living Knowledge Toolbox</td>
<td>Toolkit of science shop resources</td>
<td><a href="http://www.livingknowledge.org/resources/toolbox/">http://www.livingknowledge.org/resources/toolbox/</a></td>
</tr>
</tbody>
</table>

Table 1. Toolbox benchmarking

Designing steps

The results of the background analysis described before clearly showed that, in order to build a Toolbox on EE, there was a wealth of existing resources to build upon. Therefore, in parallel to the design of the Toolbox -explained in this section- we decided to:

- Release a first version of the Toolbox (v1.0) containing a selection of those existing resources considered to be of most use for EE;
- Contact all past and running EU project asking for review and contributions.

Guiding principles

Based on the findings described in the Background analysis section, as a first step we established a series of guiding principles to design the Toolbox:

- Move beyond the online repository platform: nothing is perfect
- Avoid duplicating efforts and sum forces whenever possible.
- Provide an umbrella, alive portal that:
  - Introduces and informs all actors into EE topics and all its facets;
  - Takes on board existing partial efforts and resources;
  - Increases the visibility and accessibility of these existing efforts;
  - Facilitates quick scanning of resources through simple, friendly summaries;
  - Addresses needs of both beginners and practitioners;
  - Organizes resources according to problems faced by different users;
- Promotes dialogue across all actors to foster the use of resources;
- Build a strong engine to Match needs with existing tools.
  - Build a self-sustainable Community of Practice, both through
    - Face-to-face meetings (with different projects and events), and
  - An online collaborative platform linked to the Toolbox formed by all registered users.

**Vision, mission, and values**

In a second step, to further define the scope of the Toolbox we conducted a workshop within the Consortium where representatives of each group of stakeholders were asked about the vision, mission, and values of the platform to be developed. These concepts were defined as:

- Vision: a statement about the desired state, where the Toolbox has to go;
- Mission: a statement about the core purpose, why the Toolbox exists;
- Values: a statement -extracted from the vision and mission- that delineates how the Toolbox is intended to behave and interact.

<table>
<thead>
<tr>
<th>Toolbox content</th>
<th>Inventory existing tools developed by other projects</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cluster the information per stakeholder group</td>
</tr>
<tr>
<td></td>
<td>Interactive site that keeps descriptive and narrative contents</td>
</tr>
<tr>
<td></td>
<td>Users’ evaluation than to an expert-based one. Build a dedicated engine to Match needs with tools.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community of Practice</th>
<th>Notoriety through open access</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Focus on not-advanced users</td>
</tr>
<tr>
<td></td>
<td>Networking capabilities to initiate new projects</td>
</tr>
<tr>
<td></td>
<td>Possibility to share experiences</td>
</tr>
<tr>
<td></td>
<td>Proactive participation through sharing tools and practices</td>
</tr>
<tr>
<td></td>
<td>Slight tendency towards a EE Tools resource approval</td>
</tr>
<tr>
<td></td>
<td>Visibility of members for the rest of users</td>
</tr>
<tr>
<td></td>
<td>Slight tendency to promote reward recognition of active members</td>
</tr>
<tr>
<td></td>
<td>Gather reflections from all users -regardless of their stakeholder group- in a single place (Q&amp;A section)</td>
</tr>
</tbody>
</table>

**Table 2. Vision, Mission and values of toolbox**

**Functionality**

The fifth and last step in the design of the Toolbox consisted on defining the main functionalities and associated navigation model of the platform. To do so, a second benchmark exercise was performed with several sites and service providers that offer their solutions in terms of functionalities. Then an “address and prioritize” exercise was carried out to match the vision, mission, and values identified before with the preferred functionalities detected in the benchmarking. Finally, assuming that it would not be possible to implement all the identified functionalities, they were prioritized and trimmed through a collaborative reflection process.
| **Home page**       | Simple and easy to understand  
|                    | Entry points by stakeholder and policy agenda |
| **Landing pages**   | Tailored information  
|                    | Tailored version of the Toolkit contents |
| **Search engine**   | User-centered menu Visual  
|                    | display of results  
|                    | Very advance search engine as MatchMaking tools |
| **Resource page**   | Detailed information by tabs Tag-related content  
|                    | Download resource option  
|                    | Link to original URL of the resource Access to discussion thread in Forum Shareable through social media |
| **Resource upload form** | Simple, inviting, guided process  
|                    | Different levels of information (mandatory and optional)  
|                    | Different level of permissions and rights for users |
| **Register + Login** | Simple process |
| **User profile**    | Different levels of information (mandatory and optional)  
|                    | Customizable features |

Table 3. Toolbox functionalities

After a final iteration with the whole Consortium, these functionalities were used to define a development plan of the Toolbox. This plan included several beta-tests before the public release of the [www.publenef-toolbox.eu v1.0](http://www.publenef-toolbox.eu) -both within the Consortium and with external experts-, as well as the allocation of additional resources to include the feedback from users in the [www.publenef-toolbox.eu v2.0](http://www.publenef-toolbox.eu).
Annex II. Development of the resources for PUBLEnEf platform

The PUBLEnEf platform (version 1.0) includes existent resources created by other initiatives or projects collected under WP 2. This annex explains how the resources were identified, adapted, and prepared for the PUBLEnEf platform needs.

1.1 Identification
From the analysis under Task 2.1 and Task 2.2 obstacles and needs and the feedback received from external users and experts while designing the Platform, practical conclusions emerged in terms of developing this tools collection and MatchMaking mechanism:

- PUBLEnEf recognizes the need for preserving the tools, trainings and other materials knowledge we have gathered for future use.
- In most countries, as a result of frequent staff changes (or understaffing) the level of ‘institutional know how’ is under pressure.
- This online repository will serve as some sort of exchange where implementing bodies can download and upload the supporting tools and resources they use / need for Energy Efficiency policy planning, development, implementation of actions Plan and evaluation.

The Toolkit provides, through a clean and user-friendly structure, a wealth of resources related to EE and tailored to the needs and challenges faced by each group of actors. These resources are classified in four types:

- **Library elements** to inform on EE news and events (opportunities);
- **Experts’ communities** on EE and closely related fields to help with guidance if they do not find on this platform a tool to fit with exposed needs;
- **Good practices** to inspire and adapt to their contexts; and
- **Tools** to plan, implement, evaluate, and disseminate actions in response to their needs connected with EE Directive.

1.2 Conceptualization and development

**Introductory resources**
To overcome the current lack of understanding of EE tools among all actors, we decided to produce the following introductory resources to introduce subjects separately to each group of stakeholders and to describe the policy agendas simultaneously to all actors:

- Landing pages;
- Videos;
- Slide presentations;
- Others help pages and Q&A page.

**Implementation resources**
To complement the introductory resources and the existent ones, the Consortium conducted a gap analysis to identify which existent resources were most urgently needed to adapt for upload it on to platform.

Task 2.1, Task 2.2, Task 3.1, Task 5.1 and Task 5.2 prepare all the content for starting of the platform. Further development with the users contribution will enrich the content and transform the platform in to a live tool and to a never end collection of expertise.
### Annex III. Taxonomy of the resources

<table>
<thead>
<tr>
<th>TOOL</th>
<th>FIELD NAME</th>
<th>FIELD DESCRIPTION</th>
<th>MANDATORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>#</td>
<td>TITLE</td>
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</tr>
<tr>
<td>1</td>
<td>ILLUSTRATION</td>
<td>Tools logo or related pictures (less than 2 MB, allowed pnf;gif;jpg;jpeg; between 600x400 and 1800x1800 pixels)</td>
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</tr>
<tr>
<td>2</td>
<td>DESCRIPTION</td>
<td>Tool description: summary of purpose, type of tool, context to be applied, main features, etc.</td>
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</tr>
<tr>
<td>3</td>
<td>KEYWORDS</td>
<td>Keywords that can be used to describe the tool</td>
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</tr>
<tr>
<td>4</td>
<td>TOOL LOGO</td>
<td>Tools logo (less than 2 MB, allowed pnf;gif;jpg;jpeg; smaller than 500x500 pixels)</td>
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</tr>
<tr>
<td>5</td>
<td>TOOL WEBSITE LINK</td>
<td>External URL where the tool can be found</td>
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</tr>
<tr>
<td>7</td>
<td>ACRONYM</td>
<td>Short name of the tool</td>
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</tr>
<tr>
<td>8</td>
<td>AUTHOR</td>
<td>Author(s) and or institution(s) who developed the tool</td>
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</tr>
<tr>
<td>9</td>
<td>COUNTRY DEVELOPED</td>
<td>Country where the tool has been developed</td>
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</tr>
<tr>
<td>10</td>
<td>COUNTRY USED</td>
<td>Country where the tool is in use</td>
<td>yes</td>
</tr>
<tr>
<td>11</td>
<td>GEOGRAPHIC COVERAGE</td>
<td>Scale of application of the resource: local / regional / national / international / global</td>
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</tr>
<tr>
<td>12</td>
<td>DATE OF PRODUCTION</td>
<td>Date when the tool has been released</td>
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</tr>
<tr>
<td>13</td>
<td>LANGUAGE</td>
<td>Language of the resource</td>
<td>yes</td>
</tr>
<tr>
<td>14</td>
<td>CONDITION OF ACCESS</td>
<td>Open / Open (login required) / Restricted/ Price</td>
<td>yes</td>
</tr>
<tr>
<td>15</td>
<td>NUMBER OF USERS</td>
<td>Number of users</td>
<td>no</td>
</tr>
<tr>
<td>16</td>
<td>FORMAT</td>
<td>Digital format of the tool for download: Access / App / DB / DOC / eBook / Excel / Image / Online / PDF / Print / Software / Video / Word</td>
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</tr>
<tr>
<td>17</td>
<td>PRACTICALITIES</td>
<td>Practical aspects to consider when using the tool</td>
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</tr>
<tr>
<td>18</td>
<td>NUMBER OF USERS</td>
<td>Number of users</td>
<td>no</td>
</tr>
<tr>
<td>19</td>
<td>EXPERTISE REQUIRED</td>
<td>Expertise required</td>
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</tr>
<tr>
<td>20</td>
<td>INPUT OF THE TOOL</td>
<td>Input of the tool</td>
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</tr>
<tr>
<td>21</td>
<td>OUTPUT OF THE TOOL</td>
<td>Output of the tool</td>
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<tr>
<td>22</td>
<td>STRENGTHS</td>
<td>Strengths</td>
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</tr>
<tr>
<td>23</td>
<td>WEAKNESSES</td>
<td>Weaknesses</td>
<td>no</td>
</tr>
<tr>
<td>24</td>
<td>VALIDATION/TESTING INFORMATION</td>
<td>Validation/testing information</td>
<td>no</td>
</tr>
<tr>
<td>25</td>
<td>COMPUTER PLATFORM</td>
<td>Computer platform</td>
<td>no</td>
</tr>
<tr>
<td>26</td>
<td>PUBLISHER</td>
<td>Reference(s) or link(s) where the tool is further described or that complement the information provided in the previous link</td>
<td>yes</td>
</tr>
<tr>
<td>27</td>
<td>CONTACT</td>
<td>Person/institution of reference and e-mail</td>
<td>yes</td>
</tr>
<tr>
<td>28</td>
<td>EE THEMES</td>
<td>Policy Agenda(s) considered by or related to the tool (all that apply) EE Directive</td>
<td>yes</td>
</tr>
<tr>
<td>29</td>
<td>TARGET GROUP</td>
<td>Stakeholder(s) involved or who can use the tool (all that apply): CSO / EDU / IND / POL / RES</td>
<td>yes</td>
</tr>
<tr>
<td>30</td>
<td>CHALLENGE</td>
<td>EE challenge(s) needs tackled by the tool or where the tool can be applied</td>
<td>yes</td>
</tr>
<tr>
<td>31</td>
<td>TRANSFERABILITY</td>
<td>Relative amount of expertise that the tool requires for replicate in different community</td>
<td>yes</td>
</tr>
<tr>
<td>32</td>
<td>ADDITIONAL</td>
<td>Add new file documents related to tool</td>
<td>no</td>
</tr>
</tbody>
</table>

*Table 4. Taxonomy of the PUBLEnEf toolbox*