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Findings from the 2nd Advisory Board Meeting

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Abstract:

The second S3C Advisory and Dissemination was held in Berlin on the 10th of December, 2014. The focus of the meeting was the evaluation of the S3C tools and guidelines as well as the toolkit website.

Keyword list:

S3C Toolkit, tools and guidelines, Advisory and Dissemination Board, evaluation

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Executive Summary

The second S3C Advisory and Dissemination Board meeting was held at the VKU Forum in Berlin on the 10th of December, 2014. 14 active ADB members, two external speakers and 13 members of the S3C consortium attended the meeting.

Originally, the meeting had been planned to take place in May 2014 already. However, the idea was to have a large variety of tools and guidelines ready in a first version to present and discuss with the ADB members in order to gain from their vast experience and expertise. Due to changes in the project schedule, the meeting was thus delayed to December.

The focus of the meeting was the evaluation of the S3C tools and guidelines and the toolkit website, in order for the tools and guidelines to receive extra validation through renowned experts and practitioners beyond the testing in the active partner projects.

However, the starting point was set at two key notes of representatives of the start-up companies BEN Energy and eueco to show that consumer engagement can become a viable business case and first companies are successfully emerging.

24 of the S3C tools and guidelines were discussed and evaluated in two rounds of one-hour focus groups. The participants were asked to fill in a questionnaire for each guideline/tool containing 10 questions on general impression, readability, relevance of content and usability that could be rated on a scale from one to five.

Overall, the S3C tools and guidelines received very positive feedback. The most frequently given rating for the first question (for which “one” was the best possible rating, “five” the worst) “overall rating of the tool/guidelines” was “two” (35%), followed by “three” (31%) and “one” (16%). Additionally, a feedback report containing suggestions for improvement of the content and structure for each discussed guideline/tool resulted from the focus groups. Main suggestions for improvement included standardising the structure of the guidelines/tools as well as adding a graphic language to which indicates topics the guideline belongs to and how it is connected to the other guidelines of this topic. Together with the inputs received from the first audits of experiences in the active partner projects, the evaluation and advice from the ADB will be taken into account in the process of improving the guidelines and tools on the toolkit website.

The toolkit website also received positive feedback from the members of the ADB. After the focus groups, the discussion centered around the most important target groups of the online toolkit and which user groups could profit the most from the S3C outputs. The advice received concluded that the S3C toolkit has particular relevance as a coaching and education tool. Smaller utilities or DSOs or completely new players in the smart energy market without large marketing and product innovation divisions can receive easy-to-understand information on usually complex consumer engagement topics and get inspiration and advice on strategies, potential partners, relevant experience or service providers in the field. However, a main point of discussion was to what extent the website should include interactive features. In the discussion on the usability as well as the discussion on the dissemination strategy for the toolkit, the question emerged whether the toolkit will be effective as a standalone tool without an intermediate consultant to offer further guidance. Interactive features guiding the users through the website and assisting them in compiling relevant pieces of information could be useful.

The final S3C Advisory and Dissemination Board meeting is planned for September 2015 and will include an overall evaluation of our project through the ADB as well as a gap analysis on what remains left to do in the field of energy consumer-centered research after S3C and its sister project ADVANCED have concluded.

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1. Meeting overview

At the first S3C Advisory and Dissemination Board (ADB) meeting, it was decided that the second meeting would be held at a time when the first draft of the S3C Toolkit for end user engagement would be available. For that reason, the second meeting was held later than planned in the original Description of Work. Instead of in May 2014, the meeting was held on the 10th of December, 2014 at the VKU (German Association of Local Utilities of municipally determined infrastructure undertakings and economic enterprises) in Berlin.

Accordingly, the main focus of the meeting was gathering feedback on individual tools and guidelines as well as the S3C Toolkit as a whole from the members of the S3C Advisory Board as well as several relevant external speakers. The meeting was split into three topical parts.

In the first part, the participants were given an introduction and status report on the S3C project as well as the S3C Toolkit. Additionally, two keynote speeches from representatives from the S3C family of projects, eueco and BEN Energy, were included to render more detailed information on the successful strategies of consumer engagement the consortium found.

In the second part, the participants were assigned to focus groups and specific tools and guidelines to discuss according to their individual area of expertise. By means of the focus groups, the consortium was able to gather feedback on individual tools and guidelines. During the meeting, two rounds of one hour long focus groups were held discussing two to four guidelines or tools each. Each group included two members of the S3C consortium as moderator and note-taker as well as two to four ADB members or external participants. The participants of each focus group received the relevant guidelines and tools in advance to the meeting to facilitate meaningful feedback.

In the third part of the day, the focus was on the S3C Toolkit as a whole, particularly on the usability of the website and the target groups that could profit the most from using the toolkit.

The meeting concluded with a presentation of S3C's sister project ADVANCED in which the results of the recently concluded project were discussed. Lastly, Ludwig Karg from B.A.U.M. Consult wrapped up the meeting with a discussion about the next steps to take in order to disseminate the S3C Toolkit.

1.1 Participating ADB members and external experts

All in all, the second S3C ADB meeting was attended by 29 participants including 14 active ADB members, two external speakers and 13 members of the S3C consortium.

Of the present ADB members, three members were newly invited into the S3C Advisory Board due to their relevant fields of work: Toni Goeller, Sonja Schouten and Ruth Rettie.

Table 1: Present members of the S3C Advisory and Dissemination Board

Name	Organisation	Role/Background
Prof. Americo Mateus	UNIDCOM (IADE) at Lisbon University	Creativity and innovation consultant for several business companies in Portugal and Belgium, specialises in territorial branding and innovation ecosystems
Dr. Carlos Rosa	UNIDCOM (IADE) at Lisbon University	Lectures about the psycho-sociology of consumption, interested in marketing research, economy and societal issues around consumption

Name	Organisation	Role/Background
Prof. Cecilia Katzeff	Swedish Interactive Institute	Doctor of psychology, her work experience covers research as well as practical work within the design of IT from the perspective of users. Her research focuses on design and development of digital artefacts and services in behavioural change related to the use of energy in various contexts.
Gernot Hagemann	hannoverimpuls GmbH	Regional innovation management; special focus on regional energy management
Jürgen Stetter	E.ON Innovation Center Energy Intelligence	Head of E.ON Innovation Center, Energy Department, responsible for developing new economic activities and business areas at E.ON
Michael Hübner	Austrian Ministry for Transport, Innovation and Technology	Ministry representative, responsible for planning and coordination of Smart Grid programmes, coordinator of the ERA-net Plus programme, Austrian ISGAN representative
Dr. Miguel Águas	Lisboa E-Nova	Technical director and financial manager in energy-related projects
Paolo Landi	Fondazione Consumo Sostenibile	President of Adiconsum and coordinator of many EU projects on energy; member of the working group of DG Sanco on “consumers energy transparency”; member of the working group of DG Energy on “energy and vulnerable consumers”
Prof. Ruth Rettie	Kingston University	Smart Grid and Energy Efficiency trials, expert in community initiatives and raising awareness and motivation
Saskia Müller	Amsterdam Smart City	Project manager of Amsterdam Smart City initiative bringing together industry and citizen-driven energy projects in Amsterdam
Sonja Schouten – <i>Takin the place of Suzanne van Kooten who switched jobs</i>	Alliander	Strategy consultant, Sherpa at European Innovation Partnership at Smart Cities & Communities
Stella di Carlo – substituting for Marina Lombardi	Enel	Project manager, managed S3C sister project ADVANCED, involved in several other Enel Energy Efficiency and Smart Grid Initiatives
Toni Goeller	MINcom Smart Solutions GmbH	Business executive and telecommunication consultant for security, next generation services, billing, charging, payment and operations issues
Wolfgang Teubner	ICLEI – Local Governments for sustainability	Managing director of ICLEI association, development of a number of international urban development projects

To kick off the second ADB meeting two representatives from the S3C Family of Projects, Josef Baur and Dr. Tobias Graml, were invited to give key note speeches about the approaches to end user engagement applied in their companies.

One of the main challenges remaining for end user engagement is to build viable business models around the new products and services emerging in the field and based on the insights into different roles end-users can have in a smart energy system. BEN Energy and eueco have each developed a white label product which is sold together with the services of personalising it and running the platform to utilities, companies etc. The BEN Energy platform addresses the Smart Consumer dimension and sensitises users for their energy behaviour, Smart Meter rollouts and other topics while gathering more detailed data for a better, personalised products to be developed by the utilities. On the eueco platform, the Smart Citizen takes center stage. Their white label platform enables financing and crowd-funding processes in the energy field on a regional level. If a community would like to fund renewable energy sources or energy management systems, they can open a project for their citizens who finance and co-own the technical equipment, while being constantly informed about the progress.

Table 2: Invited external speakers

Name	Organisation	Role/ Background
Josef Baur	eueco	Co-CEO eueco, an IT-platform enabling citizen engagement and citizen financing of community energy projects
Dr. Tobias Graml	BEN Energy	Co-founder and CTO of BEN Energy, offering a business model for utilities using social norms to make energy efficiency fun

1.2 Agenda and introductory speeches

The detailed agenda for the second S3C ADB meeting is listed in Table 3 below.

Table 3: Agenda of the second S3C Advisory and Dissemination Board meeting

Time	Theme	Format	Presenter
09:30	<i>Coffee and Welcome</i>		
09:45	Formal welcome	presentation	Ludwig Karg (B.A.U.M. Consult)
10:05	Keynote Speeches - How to make a Business of the Smart Consumer and Smart Customer - eueco and BEN Energy	presentation	Josef Baur (eueco); Tobias Graml (BEN Energy)
10:45	S3C - Introduction to the Toolkit for end user engagement	presentation	Erik Laes (VITO)
11:00	Reviewing and Improving the S3C guidelines and tools	focus group	all participants
12:00	<i>Lunch</i>		
13:00	Reviewing and Improving the S3C guidelines and tools	focus group	all participants

Time	Theme	Format	Presenter
14:00	Preparation of discussion of results (preparing excel charts, getting the results of all groups integrated in one presentation) - meanwhile first little coffee break for participants		moderators and note-takers
14:15	Outcome of the focus groups and required action	discussion	focus group representatives
14:45	<i>Coffee Break</i>		
15:00	The S3C Toolkit website - Usability	discussion	all participants; Moderation: Matthijs Uyterlinde (ECN)
15:45	ADVANCED - Results from S3C's sister project	discussion	Stella di Carlo (Enel)
16:00	Wrap-up session and next steps including dissemination strategy for toolkit	presentation and discussion afterwards	Ludwig Karg (B.A.U.M. Consult)
16:30	<i>End of ADB meeting</i>		

2. Feedback on the S3C tools and guidelines from the focus groups

During the focus groups, the participants were asked to fill in a short questionnaire to evaluate the individual tools and guidelines. The questionnaire asked for a rating on a scale of one to five on the topics general impression, readability, relevance of content and usability. The questionnaire contained a total of 10 questions.

During the focus groups, 23 different S3C tools and guidelines out of the current 33 tools and guidelines were evaluated and a total of 74 questionnaires were filled in during ADB meeting. A table detailing the focus group participants and evaluated guidelines/tools can be found in Annex 1: Focus groups and evaluated guidelines/tools.

1. Overall rating for this guideline/tool (1= very good; 5= not good at all)



Figure 1: Results of the guideline/tool evaluation questionnaire; Question 1

Figure 1 describes the overall rating from all filled in questionnaires during the second S3C ADB meeting. Participants were asked to rate the tools and guidelines on a scale from one to five, with one being the best possible grade. The most frequently given grade for the overall rating of the individual S3C tools and guidelines was “two” (35%). Followed by “three” (31%) and “one” (16%). Thus, the S3C tools and guidelines received an overall positive rating from the members of the ADB.

The rating of the guidelines and tools was more mixed regarding the practicability of the tool and guidelines and the adaptability for activities and decision-making processes of utilities. This rating was also reflected in the general discussion as one of the general points of criticism was that the main target group as well as the intent of the guidelines were often not clear. Several of

the guidelines are, at this point, still written to address pilot projects rather than utilities. Furthermore, it was criticised that while some of the tools and guidelines offered a lot of practical advice, others constitute a theoretical topical introduction rather than a practical guideline instead. The combined results from the evaluation questionnaire for all guidelines and tools can be viewed in Annex 3: Results from the evaluation questionnaire.

After filling in the questionnaire, the individual guidelines and tools were discussed in detail in the focus groups and the feedback was recorded in a prepared reporting format. Resulting from this discussion process, a feedback report including suggestions for improvement was produced for each of the 23 discussed guidelines/tools.

Apart from the feedback referring directly to individual guidelines or tools, overall feedback on the S3C guidelines and tools was discussed during and after the focus groups. One of the main points of advice from the S3C Advisory Board was to increase the standardisation of the structure of the tools and guidelines, e.g. by striving for guidelines of comparable length, by including a do's and don'ts section in each guideline, etc.

Also, an additional first paragraph summarizing the content and indicating the target group of the guideline was suggested by several participants. The readability of the tools and guidelines could be improved by adding more visual elements, e.g. graphics, consistent indicative colouring, timelines, info-boxes, etc. as well as by reducing the academic language and orientation of some of the guidelines. One key feature that the participants thought would be highly beneficial to include the guidelines, is a "landscape" that indicates to which topics the guideline belongs and how it is connected to the other guidelines of this topic.

Additionally, some members of the ADB suggested that guidelines/tools should include a disclaimer referring to the fact that the guidelines do not provide solutions that can be implemented universally, but are constrained by many factors, e.g. local circumstances, etc. In addition, it could be made clear for each guideline/tool which steps and actions can be performed by implementing the guideline or tool and what the constraints of this individual guideline/tool are.

Overall, the link between the guidelines and tools needs to be improved. When read individually and out of context, users might get the impression that implementing one or two guidelines constitutes an efficient end user engagement strategy. However, it has to be made clear that the goal is for companies and projects to shift their whole focus towards a long-term end user engagement and that the guidelines and tools are mainly steps in the right direction, enabling and coaching for a change process and reorientation. Thus, each guideline/ tool should be put in the right context and include a section on which guidelines/tools should be read additionally as well as a list of the most relevant literature references.

3. Feedback on the usability of the S3C Toolkit website

After the focus groups, the discussion was moved to the S3C Toolkit website that was launched in August 2014 at: <http://www.smartgrid-engagement-toolkit.eu/>. The toolkit website contains the current versions of the S3C tools and guidelines. The tools and guidelines can be accessed via three different gateways titled: Products & Services, Project Organization and Topics.

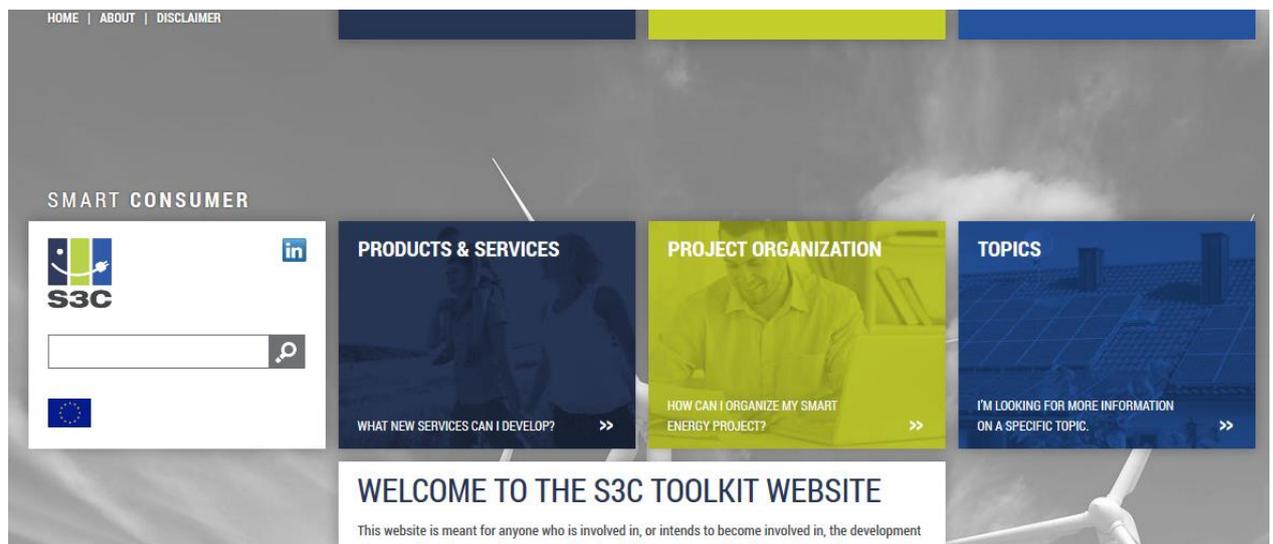


Figure 2: Homepage of the S3C Toolkit for end user engagement website (status: 01-12-15)

The participants of the second ABD meeting received the web-link to the toolkit website in advance to the meeting. Additionally, a short introduction to the website's structure and features was given by the S3C consortium partners Koen Straver and Matthijs Uyterlinde (ECN). After that, the participants voiced their opinions on the usability of the S3C Toolkit website in a moderated discussion.

One of the main points of discussion was the fact that usability depends strongly on the actual user group. It was mentioned that the "typical utility representative" does not exist. Some of the larger utilities have their own R&D-departments that are highly skilled on innovation, whereas smaller utility companies depend stronger on publicly available research and information. Several participants mentioned that the toolkit will most likely be of interest to utilities or organizations just starting out on the topic of end user engagement. And since within utility companies, employees fulfill a diversity of roles and have various responsibilities. Thus, developing a website that is equally usable for e.g. a managing director and a project manager might prove difficult. Furthermore, it was discussed whether using the S3C corporate design as well as "S3C wording" was detrimental to the usability of the website, especially once the project term terminates. It was suggested that the attractiveness of the website could further be improved by adding a feature that is updated constantly in order to give the website a more up-to-date and "living" appearance.

Also, several participants voiced the opinion that the toolkit lacks interactive features. At its current status, the website resembles library rather than an interactive website. Another point of critique was that interlinking the different guidelines and topics via hyperlinks might be a less than optimal solution as it encourages users to "jump" between topics and guidelines rather than reading them systematically and within the context. It was recommended to add an FAQ to the website and the idea to include "landmarks" in the beginning of the guideline to clarify which step of which topic area the user is reading was revisited.

During the discussion on usability, it was suggested to offer an online course based on the content of the Toolkit, so that users would be guided through the toolkit systematically. The amount of information packed in the S3C Toolkit website can be daunting at first. An online course could alleviate the inhibitions of new users to look into new topics. However, concerns were voiced that such an online training course can only be effective if the website is updated beyond the S3C project term. Subsequently, the participants suggested that a website might not be the only way such a course could be offered, e.g. a course could be developed and offered as an "end user engagement certification" to customers.

All in all, the website received positive feedback from the members of the ADB, especially as an effective coaching and education tool. However, the benefits of different interactive features

such as an online course, an FAQ, a rating function or a storytelling approach will be assessed to increase the website's attractiveness.

4. Feedback on the dissemination strategy for the S3C Toolkit

Before the end of the meeting, the participants were asked to take part in a moderated discussion on how the S3C consortium could effectively disseminate the S3C Toolkit to the relevant target groups.

As in the discussion on the usability of the website, it was suggested that offering an "end user engagement certification" might be an effective marketing tool for the tools and guidelines. Furthermore, gaining utilities as a customer for the toolkit might prove difficult since utilities often tend to outsource and buy services to engage their customers. Yet, in that case, the S3C Toolkit can be a helpful guidance to what kind of services a utility should be looking for.

Furthermore, it was recommended to frame the toolkit in a different context. Since avoiding mistakes can be a powerful incentive, it might help to frame more towards e.g. "The 50 not to do's when implementing a smart grid".

Several participants suggested that, in addition to practitioners at utilities and policy makers at ministries and municipalities, consumer organization as well as universities and schools can be potential users of the S3C Toolkit. However, in many cases, the toolkit is not likely to be effective as a standalone knowledge base. Users of the S3C Toolkit might well appreciate to receive support from external consultants with a background in end user engagement.

Additionally, an effective marketing strategy for the S3C Toolkit would be to offer packages of tools and guidelines tailored to the customer's specific needs. This strategy is currently being followed in the engagement of the project's active partners. It was suggested that a consultant approaching potential customers with the right package of tools and guidelines would be more effective than providing the tools and guidelines on a website without further guidance.

In general, the wording of the tools and guidelines as well as the website needs to be considered carefully. Using key words is crucial in order to optimize the website for search engines.

5. Next steps and outlook

A short review of the second S3C ADB meeting including the presentation held at the event has been published at the S3C project website:

<http://www.s3c-project.eu/News/63/SecondAdvisoryandDisseminationBoardmeetingheldinBerlin.html>.

The next steps will be to continue collecting feedback on the tools and guidelines from our active partners. The collected feedback from the active partners and the ADB members will be used to improve the S3C guidelines structurally as well as content-wise. Also, additional features for the Toolkit website to increase its interactive character and explain the interrelation of the different tools and guidelines will be further investigated.

The third ADB meeting is planned for September 2015, near the date of the S3C final conference. The S3C consortium will use the final ADB meeting as an opportunity to have the project appraised by experts from the field in order to receive advice for improvement for following projects. Furthermore, the final meeting will include a gap analysis discussion on the area of energy user centred research. It will be important to note, which steps have been made by S3C and its sister project ADVANCED and which focus areas and research questions remain open to be answered by follow-up projects, once the work in S3C has concluded.

Annex 1: Focus groups and evaluated guidelines/tools

Focus group	Participants	Discussed guidelines (G)/tools(T)
1A	Cecilia Katzeff, Carlos Pedros Marques, Pieter Valkering, Maria Thomtén	G: Competition and Social Comparison G: End user feedback G: Goal Setting component as an incentive
1B	Ruth Rettie, Wolfgang Teubner, Matthijs Uyterlinde, Philipp Reiß	G: Community Support G: Energy consultants and face2face support G: Getting to know your target group
1C	Saskia Müller, Gernot Hagemann, Miguel Águas, Ludwig Karg, Jure Vindisar	G: Potential allies on the regional level G Stakeholder Coalitions T: Training installers
1D	Carlos Rosa, Américo Mateus, Stella Di Carlo, Koen Straver, Janina Schneiker	G: Co-creation T: Enact 2020 Workshop T: Postcard from the future
1E	Sonja Schouten, Michael Hübner, Jürgen Stetter, Erik Laes, Gregor Cerne	G: Privacy and data security G: Setting up price use mechanisms
1F	Toni Göller, Paolo Landi, Kerstin Niemeier, Simone Maggiore	G: Goal setting component as an incentive G: Non-monetary incentives
2A	Cecilia Katzeff, Michael Hübner, Saskia Müller, Matthijs Uyterlinde, Simone Maggiore	G: Co-creation G+T: Segmentation
2B	Stella Di Carlo, Toni Göller, Ludwig Karg, Jure Vindisar	G: Design of the renewable energy integration G: Monitoring functionalities G: Smart appliances
2C	Miguel Águas, Jürgen Stetter, Wolfgang Teubner, Philipp Reiß, Maria Thomtén	G: Gamification G: Goal setting component as an incentive G: Setting up a fake tariff
2D	Ruth Rettie, Américo Mateus, Tobias Graml, Pieter Valkering, Janina Schneiker	G+T: Segmentation G: Storytelling
2E	Sonja Schouten, Carlos Pedro Marques, Gernot Hagemann, Erik Laes, Kerstin Niemeier	G: Community Support G: Getting to know your target group G: Potential allies on the regional level
2F	Carlos Rosa, Paolo Landi, Koen Straver, Gregor Cerne	G: Energy Consultants and face2face support G: Stakeholder Coalitions

Annex 2: Evaluation Questionnaire for the S3C tools and guidelines

Guideline/tool :

General impression

1. Overall rating for this guideline/tool (*1= very good; 5= not good at all*)

<input type="checkbox"/>				
1	2	3	4	5

Readability

2. Readability of the guideline/tool (*1= very well-written; 5= not easy to read at all*)

<input type="checkbox"/>				
1	2	3	4	5

3. Length of the guideline/tool (*1= too long; 5= too short*)

<input type="checkbox"/>				
1	2	3	4	5

4. Structure of the guideline/tool (*1= very well-structured; 5= not structured enough*)

<input type="checkbox"/>				
1	2	3	4	5

Relevance of the content

5. Scope of the guideline/tool (*1= too much detail; 5= superficial, not enough detail*)

<input type="checkbox"/>				
1	2	3	4	5

6. Complexity of the content of the guideline/tool (*1= very easily understandable; 5= too complex*)

<input type="checkbox"/>				
1	2	3	4	5

7. Relevance of the theoretical background (*1= very relevant; 5= not relevant at all*)

<input type="checkbox"/>				
1	2	3	4	5

8. Relevance of the presented best practice examples

(*1= very good and relevant examples; 5= very poor or too few examples*)

<input type="checkbox"/>				
1	2	3	4	5

Usability

9. Practical applicability of the guideline/tool

(*1= I could use this guideline without any adaptation; 5= I would need professional support*)

<input type="checkbox"/>				
1	2	3	4	5

10. Adaptability for activities and decision making processes of utilities (*1= very good; 5= not good at all*)

<input type="checkbox"/>				
1	2	3	4	5

Annex 3: Results from the evaluation questionnaire



Figure 3: Readability of the guideline/tool (1= very well-written; 5= not easy to read at all)



Figure 4: Length of the guideline/tool (1=too long; 5= too short)

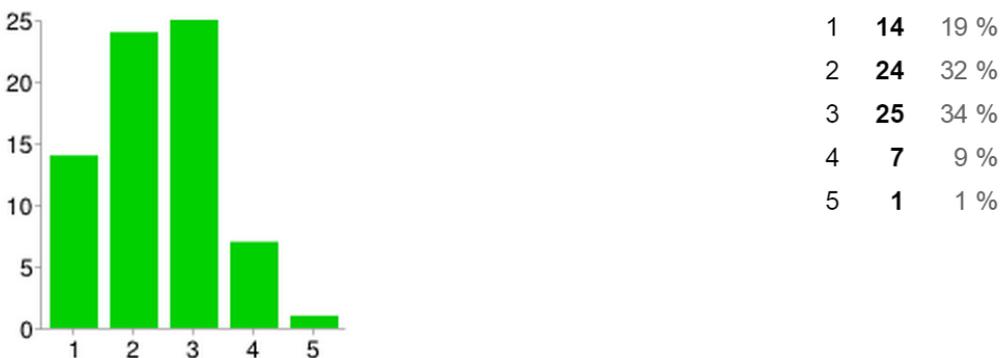


Figure 5: Structure of the guideline/tool (1= very well-structured; 5= not structured enough)



Figure 6: Scope of the guideline/tool (1= too much detail; 5= not enough detail)



Figure 7: Complexity of the content of the guideline/tool (1= very easily understandable; 5= too complex)



Figure 8: Relevance of the theoretical background (1= very relevant; 5= not relevant at all)



Figure 9: Relevance of the presented best practice examples (1= very good and relevant examples; 5= very poor or too few examples)



Figure 10: Practical applicability of the guideline/tool (1= I could use this guideline without any adaptation; 5= I would need professional support)

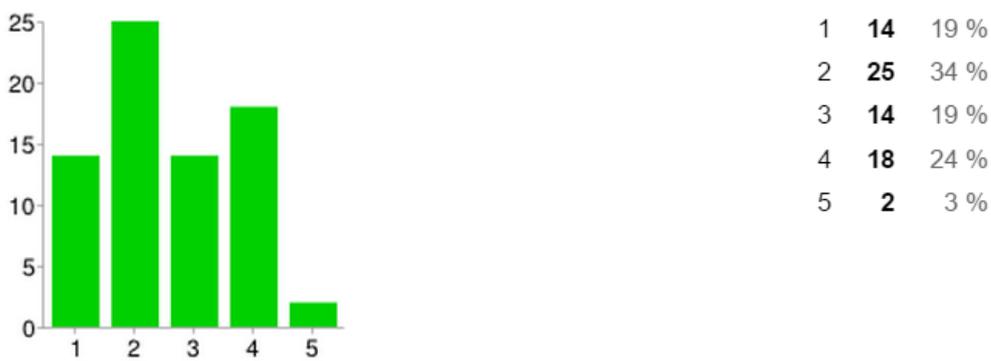


Figure 11: Adaptability for activities and decision making processes of utilities (1= very good; 5= not good at all)