Facilitator Guide: Session 4 - T3.1 Preparation Phase

Session Information

- **Duration:** 45 minutes
- **Format:** Detailed workplan presentation
- **Presenter:** WP3 Lead (UT)
- **Slides:** 20260801*1330*WP3*Session4*T31Planning.pdf (8 slides)

Pre-Session Checklist

- [ ] Sprint calendar finalized
- [ ] Templates ready for distribution
- [ ] Shared drive structure set up
- [ ] Module leads confirmed
- [ ] First sprint meeting scheduled

Detailed Agenda

Time	Activity	Slide
0:00-5:00	T3.1 objectives	1-2
5:00-12:00	Development workflow	3
12:00-18:00	Templates overview	4
18:00-27:00	Sprint structure	5
27:00-35:00	Sprint assignments	6
35:00-40:00	Milestone calendar	7
40:00-45:00	Risk mitigation	8

Slide-by-Slide Talking Points

Slide 1: Title

- T3.1 starts immediately after kick-off
- 3-month intensive development phase

Slide 2: T3.1 Objectives

Key messages: - Develop complete materials for 5 modules - D3.1 due October 31, 2026 - Quality standards must be met

Timeline breakdown: - Aug 1-7: Setup - Aug 8-28: Sprint 1 - Aug 29 - Sep 18: Sprint 2 - Sep 19 - Oct 9: Sprint 3 - Oct 10-31: Final review, D3.1

Emphasize: "D3.1 deadline is firm - plan backwards"

Slide 3: Development Workflow

Key messages: - 4-step process: Plan, Create, Review, Finalize - Each module follows same workflow - Teams work in parallel

Estimated effort: 3-4 person-weeks per module

Slide 4: Templates

Key messages: - Templates ensure consistency - All available in shared drive - Use exactly as provided

Templates list: - Module outline - Slide deck - Case study - Assessment - Facilitator guide - Reading list

Slide 5: Sprint Structure

Key messages: - 3-week sprints - Week 1: Create - Week 2: Review - Week 3: Revise

Daily standups: 15 minutes, keep momentum

Slide 6: Sprint Assignments

Key messages: - Sprint 1: Modules 1 & 4 (foundational) - Sprint 2: Modules 2 & 5 (technical) - Sprint 3: Module 3 + final review

Rationale: Staggered to allow review capacity

Slide 7: Milestone Calendar

Key messages: - 10 key dates to track - Sprint reviews at end of each sprint - Asian feedback integrated throughout

Critical path: Kick-off -> Sprint reviews -> D3.1

Slide 8: Risk Mitigation

Key messages: - Main risks: capacity, delays, quality - Mitigation strategies in place - Early escalation is key

Escalation path: Team lead -> WP3 coordinator -> Project coordinator

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Action Items to Assign

Action	Owner	Due
Access shared drive	All EU	Aug 7
Review templates	All EU	Aug 7
Schedule team meetings	Team leads	Aug 5
Begin Module 1 outline	UT	Aug 8
Begin Module 4 outline	OU	Aug 8

Common Questions & Answers

Q: What if I can't make the sprint timeline? A: Raise immediately. Cross-team support may be available. Don't wait until deadline.

Q: How detailed should module outlines be? A: Detailed enough for peer review. Learning outcomes, topics, time allocation, assessment mapping.

Q: Can we modify templates? A: Structure must be maintained. Minor formatting adjustments OK with approval.

Post-Session Actions

1. Distribute sprint calendar
2. Share template package
3. Confirm module lead assignments
4. Set up sprint tracking
5. Schedule Sprint 1 kick-off meeting

Key Reminders

- **Daily standups:** 15 min, same time each day
- **Sprint reviews:** Full team, prepared presentations
- **Documentation:** Everything in shared drive
- **Communication:** Teams chat for quick questions

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GREEN FINANCE WP3 Kick-off Facilitator Guide, Session 4

Co-funded by the European Union. Published by the GREEN FINANCE project, an Erasmus+ Capacity Building in Higher Education action, grant agreement 101237817.

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This copy was published at https://digital-ai-finance.github.io/Green-Finance/wp3kickoff-feb2026/guides/WP3_FacilitatorGuide_Session4.pdf

The project site is https://digital-ai-finance.github.io/Green-Finance. A question about this file goes to joerg.osterrieder@utwente.nl.

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