

COMMUNITY ENERGY STRATEGIC PLANNING

A TWO-PAGE CHEAT SHEET

This two-page cheat sheet is designed as a handy reference for stakeholders engaged in devising community energy strategic plans (CESPs) across U.S. communities. Condensed from the March 2013 publication of the Department of Energy publication called 'Guide to Community Energy Strategic Planning'¹.

The Big Idea

Promote energy improvements through enabling policies and program partnerships

Step 0. Obtain Permission to Begin

- Complete groundwork by determining:
 - Scope- focused on local government and/or community-wide
 - Resources- timeline and budget depend on the project's scope
- Share the value of a CESP and proposal with executive leadership and obtain their commitment.

Step 1. Establish and Charge a Leadership Team

→ within 1-2 months of the plan being authorized

- The CESP initiators create a leadership team who connect the necessary government offices, motivate important stakeholders, and inspire endurance to complete the plan. They should know the political structure, the community, and its issues.
 - Champion-highly visible, executive-level sponsor
 - Plan Manager- lead admin for CESP process, directs logistics
 - Leadership Team-government and local representatives who provide excellent thought leadership

Step 2. Identify and Engage Stakeholders

→ 1st leadership team task, continue throughout entire CESP

- Leadership team guides identification of stakeholders with Plan Manager facilitating and managing logistics.
- Consider working with local government's public affairs and/or communications staff to identify a wide range of stakeholders to access insights and support.
- Engage stakeholders by informing and educating, soliciting input, and/or asking for contributions.
- Plan to maximize stakeholder support at key times and collect necessary input ahead of time in preparation for necessary activities.

Step 3. Develop an Energy Vision

→ after stakeholders have been identified

- Create a statement with stakeholders that envisions the community 10-20 years in the future
- Leadership Team identifies guiding principles by listening for common input—the priorities.
- Leadership Team creates the energy vision statement which defines the scope, represents high-priority principles, allows room for change, focuses on outcomes, and inspires growth.
- Share with broader community in a highly visible way. Keep the energy vision as a primary component of the CESP development.

Step 4. Assess the Current Energy Profile

→ develop parallel to steps 1-3

- Plan Manager and Leadership Team oversee mapping out the current energy profile of the community to include the following:

¹ https://www.energy.gov/sites/prod/files/2014/05/f15/cesp_guide.pdf, Accessed July 21, 2018

- Current and projected energy use and supply data
- Inventory of existing energy-related activities, projects, programs, policies
- Define the scope of the profile. Additional data can cost more money and may not be necessary: High-level approach vs detailed approach vs mixed approach.
- Gather data, gaining input for other tasks that use energy.
- Identify valuable human and organizational resources, asking for specific contributions.
- Meet with Leadership Team and stakeholders to conduct a SWOT Analysis (strengths, weaknesses, opportunities, threats) to include in the conversation during step 5.
- Publish summary of findings and conclusions.

Step 5. Develop Energy Goals and Strategies

→ once energy profile is complete

- Create tangible and measurable near-term and long-term goals.
- Identify steps for achieving goals, leveraging stakeholder input.
- Publish goals and strategies.

Step 6. Identify and Prioritize Actions

→ simultaneous to step 5

- Create a list of actions and rank them. You'll need to:
 - Create a system to rank ideas (consider effectiveness, time-frame, feasibility).
 - Create a bank of policies, programs, and projects to consider.
 - Evaluate options against the goals and strategies.

Step 7. Put Together a Funding and Financing Strategy

→ early-perhaps around step 4

- Understand financial requirements for different types of energy actions.
- Identify potential financing and funding sources.
- Design a suite of mechanisms for proposed CESP Actions.

Step 8. Develop a Blueprint for Implementation

→ in parallel with step 9

- Explain actions and outlines for getting the tasks completed.
- Establish operational responsibilities to individuals and organizations.
- Incorporate the CESP into other planning and budgeting efforts by working with Champion to ensure the CESP can be tied into other planning efforts.

Step 9. Plan to Evaluate

→ in parallel with step 8

- Create a plan for performance measurement and reporting.
- Evaluate and report on progress regularly.
- Update the CESP when necessary to ensure best results.

Step 10. Develop, Adopt, and Publicize the CESP

- Prepare the final CESP.
- Have the CESP officially adopted.
- Publicize the adoption and kick-off of the CESP.

RESOURCES: ACEEE LEEP-C quantitative analysis tool to select appropriate energy efficiency policies, case studies, state and local toolkits

EXAMPLES: [One NYC](#) | [Sustainable DC](#) | [Community Energy Plan of Arlington, VA](#) | [Green works Philadelphia Progress Report](#)

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