

# Blueprint 1 How-To Guide: Energy Planning

## Introduction

The Energy Efficiency and Conservation Block Grant (EECBG) Program Blueprints are model projects and programs that EECBG participants can pursue, covering a range of areas in energy planning, energy efficiency, renewable energy, transportation electrification, clean energy finance, and workforce development. Each Blueprint outlines several high-level key activities, which are suggested steps participants can take as they pursue the Blueprint.

The Blueprint How-To Guides go into further detail, providing more granular steps, recommendations, and resources within each key activity. The How-To Guides are designed to support practitioners as they move from planning to implementing their EECBG projects and programs. By using these documents, communities can quickly identify where they need to start, where they need to go next to make progress, and how they can leverage existing resources to get ahead.

## Key Terms in this Document

- **Community/Stakeholder engagement:** An ongoing and iterative process of working collaboratively with community members in all aspects of decision-making, to address the true needs and goals of those people.
- **Energy baseline:** Energy use for a typical calendar year. Tracking energy use against the baseline can help you understand the impact of your energy plan.

*Key terms continue in the text box on the next page.*

### KEY ACTIVITY CHECKLIST: BLUEPRINT 1

1. **Stakeholder Engagement, Education, and Outreach**
  - ☒ Form your energy planning project team
  - ☒ Map out organizational and community stakeholders
  - ☒ Create and define input and feedback opportunities
2. **Energy Data Collection to Establish a Baseline**
  - ☒ Pick a year to begin tracking energy use
  - ☒ Gather, organize and analyze energy data
3. **Develop an Energy Vision, Goals, and Strategies**
  - ☒ Determine a vision for your community's energy future and set long-term goals
  - ☒ Identify and prioritize near-term strategies
4. **Write, Adopt, and Publicize the Plan**
  - ☒ Develop a draft and final energy plan, incorporating stakeholder input and feedback
  - ☒ Propose the plan for formal adoption
  - ☒ Share the plan with the community and begin initiating its strategies

## Key Activities



### KEY ACTIVITY 1: STAKEHOLDER ENGAGEMENT, EDUCATION, AND OUTREACH

➤ **Goal:** Gain support and participation from an array of stakeholders to guide plan development.

#### *Step 1: Form your energy planning project team*

**How? Follow the checklist:**

- ❑ **Identify team members who can support the internal development and implementation of your community energy plan.** Often, there will be a core team that guides the project and additional support staff that provide relevant data and materials that inform the plan and engagement activities. Members of the project team will likely be instrumental in implementing the plan, so as you identify champions, project management, and support staff, consider what areas of expertise, knowledge, and technical skills are desired.
  - Use the DOE position description templates to help identify and recruit qualified team members: [Building Your Energy Team](#).
- ❑ **Fill in gaps and increase team capacity by bringing in external expertise and support.** This can include consultants, fellowships, or support programs. Determine whether you need full-time or part-time and on-site or off-site support.

#### *Step 2: Identify and engage stakeholders*

**How? Follow the checklist:**

- ❑ **Map out organizational and community stakeholders.** Identify who they are, what type of expertise or perspective they can provide, what type(s) of input and involvement they could offer, when to request input within the planning process, and when and how you'll provide updates.
  - When considering the desired types of input and involvement for stakeholders, frameworks such as the [Spectrum of Public Participation](#) from the International Association for Public Participation (IAP2) can provide useful distinctions.
  - Define stakeholder expectations and the types of engagement opportunities you offer.
  - Community stakeholders may include local utilities, community-based organizations, advocacy groups, residents of key neighborhoods, business owners, and more.

### KEY TERMS CONTINUED

- **Energy burden:** The percentage of gross household income spent on energy costs.
- **Energy data:** Quantitative and qualitative statistics as to how your community uses energy, the sources of energy (e.g., fossil fuels or renewables for electricity generation), and associated impacts such as greenhouse gas emissions produced.
- **Energy plan:** A strategic energy plan is a long-term roadmap to focus and guide efforts and actions toward a defined energy vision. Plans catalog existing energy consumption, sources, users, articulate goals, develop strategies and actions to meet the goals, and identify resources needed to ensure effective completion of these strategies.

### Step 3: Engage stakeholders – create and define input and feedback opportunities

#### How? Follow the checklist:

- ☐ **Gather stakeholder input.** Invite input as your plan is being developed and seek feedback on a draft and final draft plan before proposing it for adoption. Tailor the type of engagement opportunities you offer by stakeholder group and type of input (see Step 2, above). Activities could include creating a review panel, holding a virtual meeting, asking for public comment, forming a steering or advisory committee, or sharing a draft for comment with key stakeholders.

#### What to consider:

- **Engage a diverse array of stakeholders.** Your team may include individual community stakeholders, representatives of regional or community organizations, and colleagues within your organization who can help guide the planning process.
- **Consider stakeholder perspective.** Your goal is to engage stakeholders who can provide input, opinions, and insight on issues that matter most to the community.
- **Stakeholders can increase project impact.** Stakeholder engagement can ensure the plan is human-focused and impactful for constituents.



#### KEY ACTIVITY 1 RESOURCES

[Building your Energy Team](#)

[Formulating a Stakeholder Engagement Plan](#)

[Designing Equity-Focused Stakeholder Engagement to Inform State Energy Office Programs and Policies \(NASEO\)](#)



#### KEY ACTIVITY 2: ENERGY DATA COLLECTION TO ESTABLISH A BASELINE

- **Goal: Understand how your community uses energy and its energy sources.**

### Step 1: Pick a year to begin tracking and comparing energy use to

#### How? Follow the checklist:

- ☐ **Select a baseline year.** Select a calendar year (e.g., 2005, 2015, 2018) that you will collect energy data for and will use as your comparison point for future years' data. This will be your baseline year.
- ☐ **Set baseline boundaries.** Define the boundaries for your baseline (e.g., geographic location, building types, sectors).

#### What to consider:

- **Align your baseline year with other plans.** It can be helpful to identify a year that aligns with other dates or plans important to your community (e.g., comprehensive plan, state plan, transportation plan). If your community has or intends to adopt climate or greenhouse gas (GHG) emissions reductions goals, select a baseline year that meets those standards. By aligning dates, it will be easier to communicate how your plan can integrate, complement, and inform these other organization and community goals.
- **Use a baseline year with a lot of available data.** Data availability will determine what years could be your baseline year. Try to select a year further in the past and collect data for subsequent years at the same time. You can use this to develop a baseline and comparison years to show trends.



#### KEY ACTIVITY 2 RESOURCES

[SLOPE tool data viewer](#)

[City Energy: From Data to Decisions](#)

## Step 2: Gather, organize, and analyze community energy data

### How? Follow the checklist:

- ❑ **Gather community energy data.** Develop an understanding of your community's energy use, including identifying its energy sources. If you have climate and GHG emissions goals, energy is an important part of the larger data set you will need to collect.
  - Use the [State and Local Planning for Energy \(SLOPE\)](#) platform to view and gather local data on renewables, efficiency, and transportation, or to compare scenarios regarding energy use, cost, and emissions at the county and state levels.
  - Utility companies may also be able to provide community- or jurisdiction-wide data. Some utilities have established data sharing protocols while others may be able to respond to data requests.

### What to consider:

- **Use complete data years.** Each data year should include at least 12 consecutive months of energy data (energy used and cost) by energy source for buildings, transportation, or other selected sectors.
- **Leverage internal expertise when requesting utility data.** When requesting and collecting data from utilities, ask within your organization (e.g., your facilities or general services department) if there is an account manager or customer representative assigned to your organization's accounts. If so, they may be able to help your team understand how the utility organizes its data (by month, sector, jurisdictional boundary, etc.) and be able to facilitate or inform your data request for community data. **Tip:** There can be concerns about sharing data for individual accounts. Requesting *aggregate data* – meaning data that combines many individual data points into one number, for example, the total energy use for all commercial accounts – is a common practice.
- **Build goals off your baseline year.** Developing a baseline is the first step for setting energy goals, as it allows you to understand where you're starting from. Once you know where you currently stand, your organization can set goals and identify trackable metrics.



## KEY ACTIVITY 3: DEVELOP AN ENERGY VISION, GOALS, AND STRATEGIES

- **Goal:** Develop an energy future vision with long-term goals and aligned strategies your community can begin pursuing in the near-term.

## Step 1: Determine a vision for your community's energy future and long-term goals

### How? Follow the checklist:

- ❑ **Identify community energy trends.** Working from the energy use data you developed in Key Activity 2 and using tools like the [SLOPE Scenario Planner](#) and [Low-Income Energy Affordability Data \(LEAD\) Tool](#), identify community energy trends and consider future scenarios, such as:
  - Costs and amount of energy use per person or per household.
  - Low-income households face a disproportionately higher energy burden (source: [DOE Low-Income Community Energy Solutions](#)). Compare energy data and impacts between areas in your community; are they similar or are there significant differences?
  - Energy data analyses should overlay socioeconomic, environmental, and other indicators to inform equity priorities and alignment with federal Justice40 goals.

- ❑ **Prepare shareable energy trend analyses.** Prepare and format information on data trends, community impacts, and scenarios to include in your plan and incorporate in discussions with your project team and stakeholder engagements. Provide examples of energy trends and data from neighboring or peer communities, or even state and national data, to provide additional context.
- ❑ **Collaborate on the community vision.** Engage community and organizational stakeholders to collect input and inform a community energy vision and long-term goals. Work with your project team to develop specific questions for the engagement opportunities and then to assess and summarize the responses. Plan to document these activities and results in your plan, and to share with stakeholders as follow up.
- ❑ **Establish metrics for your plan.** Identify which metrics could be used to track the progress and impact of your plan. Common community-wide energy metrics include:
  - Energy consumption (BTUs or kWh), by sector or per capita
  - Percentage of total energy consumed that comes from renewable resources
  - Number of stakeholders engaged
  - Number of electric vehicle registrations
  - Number of electric vehicle chargers installed
  - Number of clean jobs created

## JUSTICE AND EQUITY

By seeking input from stakeholders across the community and intentionally tailoring engagement opportunities to involve disadvantaged communities and groups that face participation barriers, equitable outcomes can be better identified, prioritized, and incorporated into future



## KEY ACTIVITY 3 RESOURCES

[SLOPE Tool Scenario Planner \(NREL\)](#)

[Low-Income Energy Affordability Data \(LEAD\) Tool \(DOE\)](#)

### What to consider:

- **Leverage stakeholder engagement opportunities to gather insight.** Seek out reactions and responses to the data and approach presented. What concerns or preferences are expressed? What community values are represented? Are solutions or desired outcomes suggested?
- **Link achievable goals with trackable metrics.** Goals should be tangible and measurable. Associated metrics should be trackable, available, transparent, and comparable to your baseline.

### Step 2: Identify and prioritize near-term strategies

#### How? Follow the checklist:

- ❑ **Develop near-term energy strategies.** For each goal developed in Step 1 (above), identify strategies to pursue within the next 3-5 years that would make progress toward the community energy vision.
  - Gather ideas and examples from other communities' plans. One case study to explore is the [Knoxville, TN: Designing a Comprehensive Energy Plan \(DOE\)](#). A list of other energy planning case studies can be found here: [City Energy: From Data to Decisions](#).
  - Engage stakeholders to seek feedback and input on ideas and recommendations for potential strategies. It is important to be clear with stakeholders about what type of input you are requesting (see Key Activity 1), how their input will be used to develop the plan, and then next steps such as sharing the outcomes of this engagement phase.
  - It is common for specific project ideas to be identified during engagement and strategy development. Keep note of these ideas and potential implementation partners. Multiple

project ideas with similarities of focus or outcome can be captured under a single near-term strategy that can later be pursued through project implementation.

- Develop your strategies to be specific about the types of actions and outcomes they are targeting, and if applicable, what parts of the community they will focus on.



## KEY ACTIVITY 4: WRITE, ADOPT, AND PUBLICIZE PLAN

- **Goals:** Produce a community energy plan that will guide projects and programs to achieve the energy vision and goals; Use promotion of the plan to educate and engage the community.

### Step 1: Prepare and write your plan

**How? Follow the checklist:**

- ☐ **Establish the plan narrative.** Summarize the development process, stakeholder engagement, and data analysis, and demonstrate how these informed the energy vision and final plan. Make sure the plan sets a long-term goal and explains strategies, milestones, and steps to achieve it.
- ☐ **Don't shy away from detail.** Some energy plans incorporate a greater level of detail and are also implementation plans that outline responsibilities, timelines, funding, and metrics to track progress. Include as many of the following items as you can in the plan:
  - Long-term goals and your community's energy future vision
  - Near-term strategies as a pathway for achieving your goals
  - Responsible parties and focus areas within the community
  - Timelines
  - Financing and funding strategy
  - Metrics for tracking progress



### KEY ACTIVITY 4 RESOURCES

[Guide to Community  
Energy Strategic Planning](#)

### Step 2: Present your plan to a governing body for formal adoption

**How? Follow the checklist:**

- ☐ **Present your plan for feedback and adoption.** Present your plan to your community's governing body for formal adoption. Solicit comment on your final plan from internal review and stakeholders prior to the adoption vote. It can be helpful to first present the plan as part of a governing body work session to allow for discussion and questions without the expectation for an immediate vote.

### Step 3: Publicize your plan to share it with the broader community

**How? Follow the checklist:**

- ☐ **Share your plan with the community.** Working with your project team and stakeholder network, publicize your plan to share it with the broader community and begin promoting the near-term strategies it includes. Use this opportunity to begin generating interest, feedback, and participation on the strategies and announce projects or programs that will be implemented based on the plan.

**What to consider:**

- **Determine the best avenue to market your plan.** Investigate various avenues for publicizing your plan, including, but not limited to, social media, newsletters, talk radio shows, blog posts, newspaper columns, and town halls.