



Review Energy Plan Annually

An energy plan should be treated as a living document that can be continually supplemented and passed down to new community stakeholders on an ongoing basis. To that end, a community should annually review progress made towards implementing the actions and meeting the goals described in the plan and update it as needed. This strategy outlines how a community, its energy volunteers, and municipal staff can establish an annual process to review and update the energy plan, evaluate action taken, document achievements, and identify new opportunities and goals for municipal, residential, and commercial sectors.

Program Implementation Steps

An annual review should include documentation of a community's clean energy effort, evaluation of its effectiveness, and public celebration of the results. It should also involve updating the energy plan and planning for future actions.

1. Conduct Annual Review.

This review should culminate in an annual Clean Energy Report that serves as a written record of the community's clean energy work. The report documents the specific actions adopted over the past year, as well as the goals accomplished, and it will be uploaded annually onto the municipal clean energy website to share with the community. Include the following items in the report:

- **Energy baselines and benchmarking** – The original energy plan should have identified baseline annual energy consumption and expenditures for the municipal, residential, and commercial sectors. Use reports from the municipality's MassEnergyInsight account to benchmark municipal energy reductions. If possible, this section should also include information on the residential and commercial sectors, including participation in MassSave, utility programs, and other clean energy programs, as well as the energy savings resulting from such participation. (See Report Monthly Energy Use and Estimate Local Energy Use Baseline topics for more information on baselining.)
- **Progress** – The report should provide an overview of the community's progress implementing projects from the energy plan, as well as an assessment of whether the community is on track to achieve the goals documented in the plan. Revise the project implementation schedule at the end of every year to adjust for changes, such as timeframe, key implementers, or new projects. If there are projects that have not

advanced, discuss the challenges that have hindered the implementation and provide recommendations on how to overcome such challenges.

- **Adopted strategies and projects** – Keep a detailed record of the implementation process, so new employees, volunteers, and other municipalities can build upon this institutional knowledge. Identify all strategies from the plan that have been or are currently being implemented, with a description of each action and the resources needed. Attributes that should be considered for each action include:
 - Overview of the action
 - Goals fulfilled by the action
 - Process
 - Key implementers
 - Key contacts
 - Financing mechanisms
 - Current stage (planning, in progress, or completed)
 - Specific actions (e.g., programs, policies, projects, outreach events)
 - Short-term results
 - Projected outcomes (e.g., energy and cost savings, payback year)
- **Performance evaluation** – It is important that the review process acknowledge the effectiveness of strategies. Before each action is adopted, identify measures for it and benchmark them, returning to those measures for comparison at the end of each year. The performance evaluation section highlights both strategies that demonstrate the best outcomes and ones that demonstrate the biggest challenges. For each of the listed strategies, discuss the factors that contribute to its success or difficulties adopting it and provide recommendations for future implementations.

2. Hold Annual Public Meeting.

The annual public meeting should include municipal, residential, and commercial sectors. It is a forum for local stakeholders to share the opportunities and challenges they faced while implementing the plan. Take this opportunity to answer any questions and remind the different sectors of existing clean energy opportunities and policies. The meeting should also serve as an annual celebration to acknowledge different sectors' efforts and achievements in promoting local clean energy work. Stakeholders that should attend the meeting include:

- Utilities
- Energy service vendors
- Chamber of Commerce Board
- Municipal department heads
- Board of Selectmen
- Parents
- Teachers
- Landlords
- Local university representatives
- Business owners

3. Plan for Next Steps.

The annual review should build on the evaluation of the previous year's plan in order to identify new clean energy opportunities and plan for next steps. Establish an Energy Plan Task Force composed of local stakeholders from the municipal, residential, and commercial sectors to meet annually and plan for the upcoming year. The Task Force is responsible for identifying new goals, strategies, and implementable projects, as well as updating the plan so that it continues to provide relevant guidance for energy efforts in the community.

- **Revise Energy Plan** – With input from the annual report and annual process review, edit existing strategies. If necessary, adjust the recommended timeline for energy projects and actions.
- **Identify new goals, strategies, and implementable projects** – Take into account the scheduled project timeline, the progress of past projects, internal capacity, and availability of funding over the next year.
- **Designate key implementers for each action** – Keep in mind capacity constraints for staff and volunteers.
- **Prepare for project implementation** – Identify available resources and possible performance measures for each action. Create and distribute memos informing key implementers of the selected strategies for the upcoming year and recommendations for implementation. Update local clean energy websites to inform the community of the municipality's goals for the upcoming year.