

Purpose of this Guide

This document provides guidance on how to complete the Action Plan Template related to developing a low-income energy affordability program. Tips to keep in mind when completing each component of the Action Plan Template are provided below, along with examples.

Program Mission Statement (Declaration of an organization's core purpose):

- A Good Mission Statement provides a vision for where you want to be in the future.
- **Do:** Begin with a broad statement like, "Imagine a world in which..." or "Make it easier for..."
- **Don't:** Get bogged down in the details or the actions that will be required to achieve the vision.
- **Examples:** "Make it easier for low-income residents to take full advantage of the shift to clean energy through a variety of initiatives."
 "To increase accessibility and uptake of energy efficiency and renewable generation source installations in low- and moderate-income communities."
 "Increase low-income access to clean energy and expand investment in disadvantaged communities to continue economic growth and strengthen resilience."
 "Build wealth in low-income neighborhoods by developing, promoting, and supporting diverse local businesses."

Low-income Community Definition & Eligibility:

- Define the community by neighborhood or resident income level. Define income relative to local area median and/or other measures or vulnerable population characteristics.
- **Do:** Specify what the state or local area median income is and what percent of each you are using.
- **Do:** Specify the percent of the federal poverty level you are using in your program.
- **Don't:** Express poverty as generically below the federal poverty threshold without providing more detail.
- **Examples:** "Residences below 200% federal poverty level"
 "Moderate income is <100% area median income. We define <80% area median income as "affordable." Low income is defined as 200% of federal poverty level or 60% state median income."

Measures of Program Success (# homes weatherized, #solar installations, \$ savings):

- Add measures and metrics that determine the success of the program.
- **Do:** Add quantitative metrics
- **Don't:** Create objective measures
- **Examples:** "The monetary savings from implementing energy efficiency measures into a low-income home."
 "The number of homes weatherized within one year."

Program Type (Example: Low-income single family weatherization):

- Describe the program type.
- **Do:** Specify which type of housing, technologies, and selection criteria (e.g., savings-to-investment ratio).
- **Examples:** "Low-income Multifamily." "Whole Building" "Lighting and Efficiency Kits"

Objective #: Title

Objective Summary (Include target issue and audience):

- This identifies what the activity aims to accomplish. It should explain: Who, What, Where, Why, When and How about each objective.
- **Do:** Tie the Objectives to the program and mission.
- **Do:** If you identify timing, provide reason(s) for the timing.
- **Examples:** “Partner with County and local public housing authority to roll out weatherization with solar program”
“Build the city’s solar economy through bulk buying, consumer protections, municipal government support, job training and subsidy for low- and moderate-income households.”

Key Partners and Roles (Name/role/point of contact):

- Please note, this may not be possible to express until after the action step for the objective has started.
- **Don’t:** Provide only the type of organizations you wish to partner with, without providing the name of the organization.
- **Don’t:** Say only the name of the organization without explaining the role of the organization.
- **Do:** Say the name of the organizations and their role.
- **Examples:** “Family Independence Initiative: Connects head of household with resources to help them achieve economic mobility and self-sufficiency”

Action Steps to Reach Objective

- This identifies the critical actions that will be needed to successfully meet objectives. While it may seem ambiguous, there will be times when it is necessary that the action step's purpose is to explore an idea.
- **Do:** Say what you will do and when.
- **Don't:** If the objective is job creation, provide details that don't pertain to the activity.
- **Examples:**
 1. Create pilot program guidelines (December 31, 2017)
 2. Contract(s) and MOU(s) (January 15, 2018)
 3. Identify potential project sites (February 1, 2018)
 4. Secure landlord participation and agreement in place (April 1, 2018)
 5. PV Installation begins (May 1, 2018)

Action Step	Date Start and End	Resources Needed	Resource Provider	Status	Success Indicators
<p>List the number or name of the action step provided above.</p> <p>Examples: "Task 1.1" "Create pilot program guidelines."</p>	<p>Define when the action step will start and end</p> <p>Do: Create a realistic timeframe Don't: Set start/end dates that are not achievable.</p> <p>Examples: "The first action step will start on 12/4/18 and will be completed on 2/7/19."</p>	<p>Demonstrate the quality of your stakeholder feedback and include details on what is needed.</p> <p>Do: Seek input from stakeholders and partners.</p> <p>Examples: "Ongoing technical assistance, vendor evaluation support, key partnerships with City Licenses & Inspections and Office of Sustainability and the utility;" or "Continued data from state and federal weatherization programs" "Financing" "Funding."</p>	<p>Include details on who can provide resources or where you will seek resources.</p> <p>Do: Seek input from stakeholders and partners.</p> <p>Examples: "DOE Solar in Your Community seed and technical assistance grant."</p>	<p>Has this action step been completed?</p> <p>Do: Include where in the process this action step is.</p> <p>Example: "Completed" "In progress" "Awaiting stakeholder input."</p>	<p>Add measures that determine the success of the action step.</p> <p>Do: Add quantitative metrics.</p> <p>Don't: Create objective measures.</p> <p>Examples: "The monetary savings from implementing an energy efficiency measures into a low-income home." "The number of homes weatherized."</p>