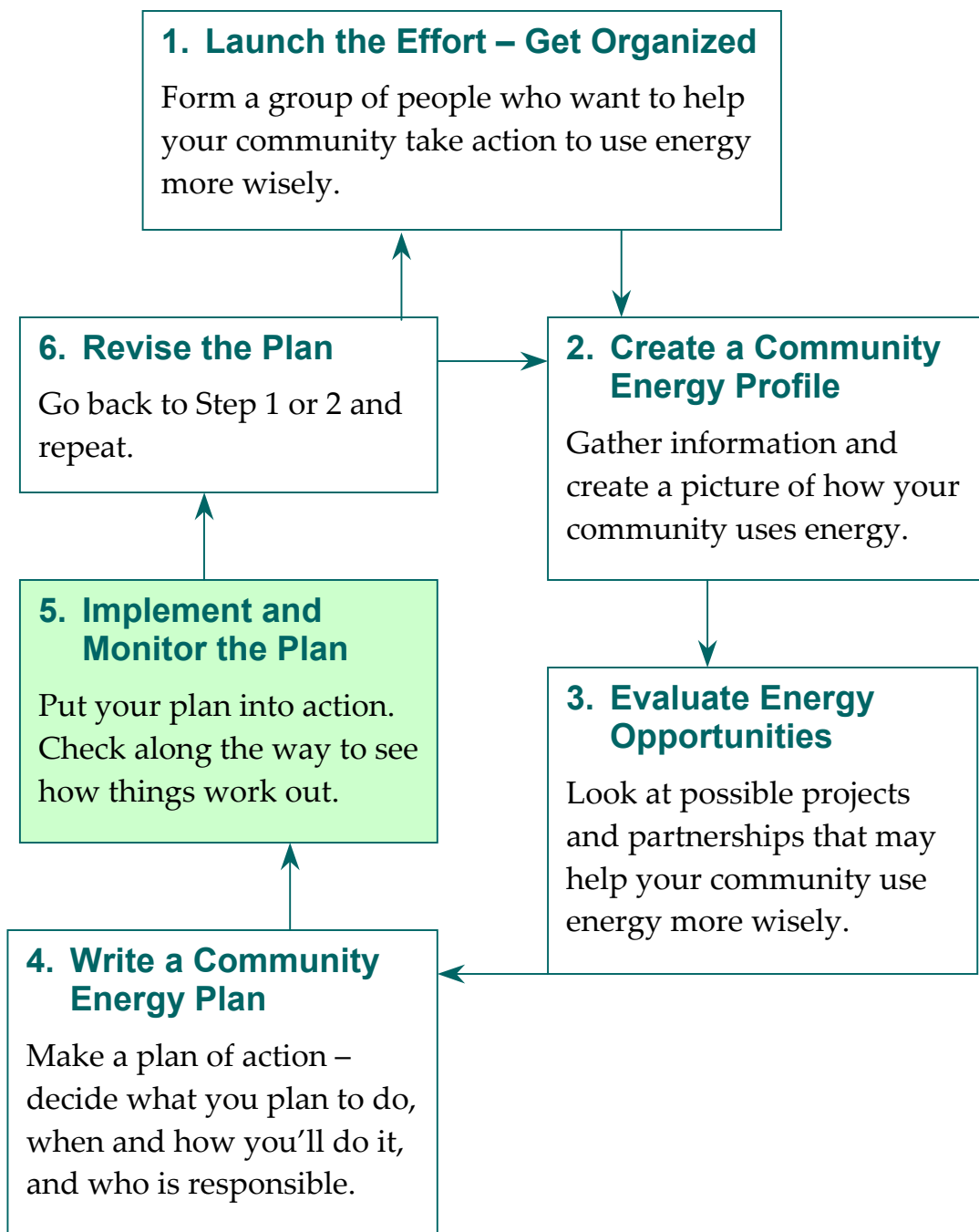


## Step 5 of the 6-step Community Energy Planning Process





## Contents Step 5:

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### Implement and Monitor the Plan

This is step 5 in the community energy planning process. This section of the toolkit has guidelines and practical information to help communities put the plan into action and keep track of what happens along the way.

#### **Implement the plan .....5**

Create a project implementation team.....5

#### **Monitor the plan .....6**

Monitoring each project .....8

Worksheet 5-1: Template to monitor energy plan projects,  
with definitions .....9

Worksheet 5-2: Blank template to monitor energy plan  
projects .....10

Monitoring the energy plan .....11

Tips to successfully monitor the energy plan.....11

Communicate your progress with the community.....12

#### **When you complete the projects.....13**

#### **Appendix 5-A: Step 5 Worksheets**



## **Implement the plan**

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Your community energy plan identifies the projects you intend to carry out during a certain period of time. The local government supports the energy plan. Now you're ready to go to work.

The community energy committee oversees the energy plan. For each project, the committee may decide to create a project implementation team.

### **Create a project implementation team**

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A project implementation team helps put the plan into action. The purpose of the team is to oversee the project. The team includes people with knowledge and skills related to the project.

The implementation team may include one or more members of the energy planning committee. The energy planning committee needs to regularly communicate with each implementation team. If the implementation team includes one or more members of the energy planning committee, the team can use that person as the liaison. Otherwise identify another person and a process to regularly report to the energy committee.

Each project may include one or more of the following:

- Pre-feasibility study
- Feasibility study
- Engineering design
- Construction

A pre-feasibility study is when you learn things to help decide if you want to do a feasibility study. For example, if you're interested in run-of-river hydro you learn general things about run-of-river hydro and decide what sites might be good to look at more closely.

A feasibility study is when you learn things to find out if something is possible. For example, to do a feasibility study for a run-of-river hydro project, you pick one or more sites you think might be good. You measure things such as water flow and the height of a waterfall over a year or more.

Engineering design is when you draw up technical plans to carry out a project, figure out potential capital costs and energy savings, and identify how long it takes to pay back the investment.

Construction is when you actually build a project.

Depending on the project, members of the implementation team need knowledge and skills in various areas. The energy committee may decide to change the people on the implementation team as the project proceeds through various stages, to ensure they have the knowledge and skills they need to complete the project successfully.

## Monitor the plan

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The energy committee needs to monitor each project to find out if it had the desired results. They also need to monitor the overall energy plan to evaluate if and how the energy plan helps them move towards their vision and general targets.

Monitoring gives the energy committee information they may need to meet funding requirements. Check with any funders you

received money from – many identify specific information you need to report to them.

As you monitor your projects and the energy plan, gather information that's useful to the energy committee and the community. Use information from monitoring to share your progress and successes with your community.

Identify a regular schedule to monitor the energy plan and its projects. For example, gather information and prepare a progress report once a year. Use what you learn along the way to change things so they work better.

In general, monitoring helps the energy plan be more effective and better meet the needs of your community. In the end, monitoring helps your community use less energy and save money.

Monitoring helps you:

- Make good decisions about how to design and deliver the energy plan, and how to spend your limited financial resources.
- Plan all stages of the energy plan and the projects.
- Gather important information to make ongoing improvements. Be flexible and open to change. Many things can affect the progress of the energy plan and its projects. Gather information so you can adjust things along the way, so things work better in the end.
- Define at the very beginning of the energy plan and each project how you intend to monitor it.

## **Monitoring each project**

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The action plan identifies each project and the tasks or actions that need to be done to complete each project, for the time period of this energy plan. The work plan identifies a schedule to complete the tasks or actions and who is responsible to carry out the work.

To monitor each project, the implementation team and the energy committee need to gather information to answer questions such as:

- Did we complete the tasks or actions for each project?  
Why or why not?
- Is the project complete? If yes, how do we know it's complete? If no, what other tasks or actions do we need to do to complete the project?
- What results do we see, to know that we completed the tasks or actions for each project?
- Did we stick to the timing and schedule? Why or why not?
- What things went well with the tasks or actions for each project? Think about human resources, finances, other resources, schedule and timing, process, communication, etc.
- Did the project stay on budget? Why or why not?
- What things do we need to change, to help things be more effective and efficient in the future?

To help answer some these questions, the Toolkit provides a worksheet with a modeling template. Worksheet 5-1: shows the template with definitions about what to include in each part of the template. Worksheet 5-2: is a blank template.



## Worksheet 5-1: Template to monitor energy plan projects, with definitions

**Vision:** The community energy committee's vision.

**General targets:** The community energy committee's general targets.

**Project:** The name of the project, as identified in the action plan.

**Example:** Do a feasibility study of run-of-river hydro.

Tasks or actions	Results expected from each task	Indicators
The list of tasks you plan to carry out, to complete the project, as identified in the action plan.	The end results you expect from each task. An increase of something positive or a decrease of something negative.	Things you measure to describe results of each task. Indicators tell you what effects each task has on results of the project as a whole.
<b>Example of one task:</b> Measure water flow and drop at chosen location.	<b>Example:</b> More information about whether the chosen location is suitable.	<b>Example:</b> Number and frequency of measurements we took over one year.

**Results expected from the project:** The end results you expect from the project as a whole.

**Example:** Good information to help decide if we have a good site for run-of-river hydro.

**Worksheet 5-2: Blank template to monitor energy plan projects****Vision:****General targets:****Project:**

Tasks or actions	Results you expect from each task	Indicators

**Results you expect from the project:**

## **Monitoring the energy plan**

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To effectively monitor the energy plan, the energy committee needs to gather information to answer questions such as:

- Did we complete the projects we set out to do, within the timeframe of this energy plan? Why or why not?
- What results do we see from the projects in this energy plan?
- How do these results help us move towards our vision and general targets?
- What things went well with the energy plan? Think about human resources, finances, other resources, schedule and timing, process, communication, etc.
- Did we meet the budget for this energy plan? Why or why not?
- What things do we need to change, to help things be more effective and efficient in the future?

## **Tips to successfully monitor the energy plan**

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Many factors help the energy committee to develop a monitoring template, to gather the best information for monitoring, and to bring the information together and share it with the community and all stakeholders, including funders.

Here are some ideas and tips to successfully monitor the energy plan and its projects:

- **Work together:** Work with the implementation teams, the energy committee, the funders, the community, and other key stakeholders in the energy plan and its projects.

Clearly communicate what information you need and when you need it, to successfully monitor the energy plan.

- Make sure you have the human and financial resources you need. Monitoring and evaluation does not happen by itself. Identify and find resources to gather the information you need, to successfully monitor the energy plan and its projects.
- Gather useful information. Identify indicators and results that help you make good decisions.
- Be flexible and patient. Learn from your experience and change things along the way if you need to.

### Communicate your progress with the community

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The energy committee can a monitoring report to share information about progress and successes with your community. Good public information increases awareness of energy issues and inspires people to participate.

Celebrate the progress you make every year. Use project results from monitoring the energy plan to show how things changed from one year to the next.

Here are some examples of information you might have from monitoring the energy plan, to report that your community:

- Spends x fewer dollars on energy
- Uses x less fossil fuels
- Produces x less greenhouse gas emissions.
- Has x energy efficient products available in the local stores

- Renovated x buildings to make them more energy efficient
- Bought x EnergyStar appliances for community operations
- Found a good place to look into the potential for run-of-river hydro
- Etc.

Use local media, a town meeting, a newsletter or report card, a local billboard, or other method to spread the word and clearly show what changed in the past year.

Use the information to encourage others to participate. Inspire people with information about what they can do and why they should do it. Make it easy to do and hard to refuse.

## When you complete the projects

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The community energy plan you have right now contains certain projects and covers a period of time – maybe one, three, or five years. As you implement and complete the projects in this plan, you look to the future. You're ready to move to Step 6 of the energy planning process, revise the plan, and write a new energy plan with a new set of projects.



## **Appendix 5-A: Step 5 Worksheets**

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The Toolkit provides these worksheets for Step 5. Also find them on the CD that comes with the Toolkit.

- Worksheet 5-1: Template definitions to monitor energy plan projects
- Worksheet 5-2: Blank template to monitor energy plan projects





### Worksheet 5-1: Template to monitor energy plan projects, with definitions

**Vision:** The community energy committee's vision.

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**General targets:** The community energy committee's general targets.

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**Project:** The name of the project, as identified in the action plan.

**Example:** Do a feasibility study of run-of-river hydro.

Tasks or actions	Results expected from each task	Indicators
The list of tasks you plan to carry out, to complete the project, as identified in the action plan.	The end results you expect from each task. An increase of something positive or a decrease of something negative.	Things you measure to describe results of each task. Indicators tell you what effects each task has on results of the project as a whole.
<b>Example of one task:</b> Measure water flow and drop at chosen location.	<b>Example:</b> More information about whether the chosen location is suitable.	<b>Example:</b> Number and frequency of measurements we took over one year.

**Results expected from the project:** The end results you expect from the project as a whole.

**Example:** Good information to help decide if we have a good site for run-of-river hydro.

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### Worksheet 5-2: Blank template to monitor energy plan projects

**Vision:**

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**General targets:**

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**Project:**

Tasks or actions	Results you expect from each task	Indicators

**Results you expect from the project:**

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