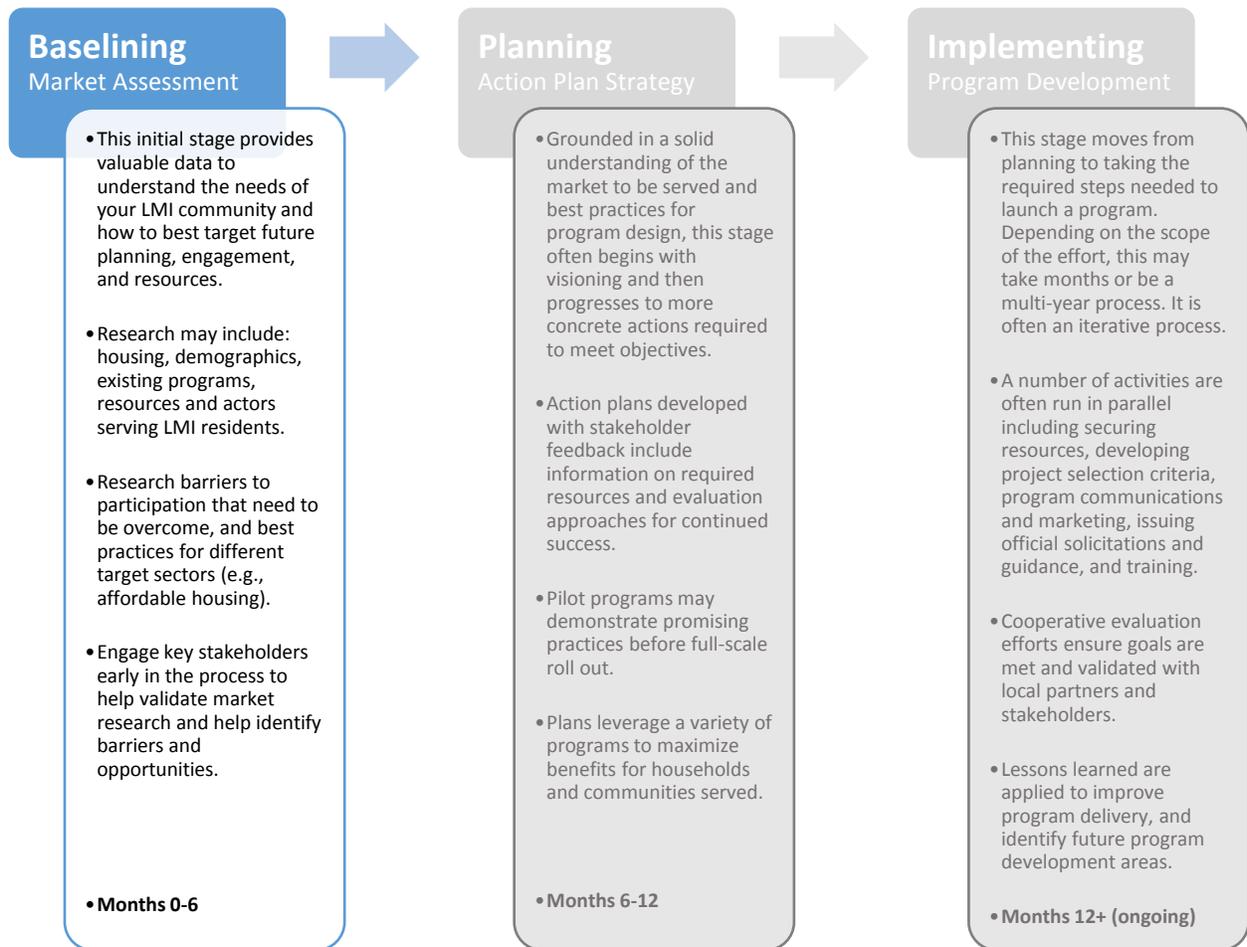## Introduction

The U.S. Department of Energy Better Buildings Clean Energy for Low Income Communities Accelerator aims to lower energy bills in low to moderate income communities through expanded installation of energy efficiency and distributed renewables. Upon joining the Accelerator, partners committed to developing Action Plans after a year. As shown in the diagram below, baselining is a useful approach to informing your planning efforts, and should involve input from a broad range of stakeholders. The following guide was developed by DOE to assist partners with baselining, and identifying needs and gaps to address in action plans.

Baselining
Market Assessment

- This initial stage provides valuable data to understand the needs of your LMI community and how to best target future planning, engagement, and resources.

- Research may include: housing, demographics, existing programs, resources and actors serving LMI residents.

- Research barriers to participation that need to be overcome, and best practices for different target sectors (e.g., affordable housing).

- Engage key stakeholders early in the process to help validate market research and help identify barriers and opportunities.

- **Months 0-6**

Planning
Action Plan Strategy

- Grounded in a solid understanding of the market to be served and best practices for program design, this stage often begins with visioning and then progresses to more concrete actions required to meet objectives.

- Action plans developed with stakeholder feedback include information on required resources and evaluation approaches for continued success.

- Pilot programs may demonstrate promising practices before full-scale roll out.

- Plans leverage a variety of programs to maximize benefits for households and communities served.

- **Months 6-12**

Implementing
Program Development

- This stage moves from planning to taking the required steps needed to launch a program. Depending on the scope of the effort, this may take months or be a multi-year process. It is often an iterative process.

- A number of activities are often run in parallel including securing resources, developing project selection criteria, program communications and marketing, issuing official solicitations and guidance, and training.

- Cooperative evaluation efforts ensure goals are met and validated with local partners and stakeholders.

- Lessons learned are applied to improve program delivery, and identify future program development areas.

- **Months 12+ (ongoing)**

How to Use this Guide

Below is a list of questions to consider in your baseline assessment for low to moderate income (LMI) community energy efficiency (EE), renewables, and other services programs. Note that the language below is meant to serve as a prompt to assist your assessment. Partners may choose to use the questions as a guide or answer directly. In addition, this assessment should be informed by your stakeholder workgroup. Please refer to the Program Catalog for assistance with mapping available programs.

POLICIES	**DESCRIBE YOUR POLICY ENVIRONMENT:** • What are the key clean energy state or local policies or incentives that currently exist? • What are the policies that enable EE in LMI communities? • What are the policies that enable solar in LMI communities? • What are the policies that enable other types of services for LMI communities? • (For above questions, it's useful to break-out e.g., single-family, multifamily, manufactured homes, renters/owners, other).
MARKET & DEMOGRAPHICS	**DESCRIBE THE LMI EE, SOLAR, AND SERVICES MARKET AND DEMOGRAPHICS:** • How is LMI defined in your organization? • What is the estimated number of LMI households participating in EE programs relative to your overall LMI community? • What is the estimated number of LMI households participating in solar programs relative to your overall LMI community? • What are some key insights that you can draw about your LMI community (e.g. renter v. owner, building type, etc.) from your data profile? • Given the market demographics provided in your data profile, which segments of your LMI community most need to be addressed? • What barriers would prevent LMI households from participating in an EE programs (e.g., outreach, workforce, funding, financing, and technical)? • What barriers would prevent for LMI households from participating in a solar program (e.g., outreach, workforce, funding, financing, and technical)? • What is the estimated number of LMI households relative to the overall population that needs health & safety repairs prior to EE and/or solar?
FINANCING	**DESCRIBE LMI FINANCING:** • Is financing for EE currently available for your LMI community? How does or does it not reach your target LMI community? • Is financing for solar currently available for your LMI community? How does or does it not reach your target LMI community? • In which sectors could financing support the uptake for EE in LMI communities? • In which sectors could financing support the uptake for solar in LMI communities? • What existing funding exists to remediate home, health, and safety issues? • Are there financial institutions or other lending institutions that have a social mission in your community?
PROGRAMS	**DESCRIBE PROGRAMS FOR LMI HOUSEHOLDS:** • Identify EE programs for LMI households: • Identify solar programs for LMI households: • Identify other programs and services for LMI households: • What gaps exist in EE programs for LMI households? • What gaps exist in solar programs for LMI households?