STRATEGIC FRAMEWORK FOR ACTION

ENERGY EFFICIENCY ALLIANCE 3-YEAR STRATEGIC PLAN 2022-2024
Letter from Leadership

Dear Friends and Supporters:

We are excited to share with you the completed EEA Strategic Plan, which will shape the priorities and strategic focus of EEA, KEEA, and EEA-NJ over the next three years and beyond. It is the result of many months of hard work and reflection by the Board and Staff, along with the input of many industry partners and collaborators, organizations, and the expert facilitation of Insyte Partners. The plan charts an ambitious but achievable path for our future, leveraging our existing strengths and building our capacity to enhance our impact.

Why now? The energy sector is at a critical juncture, and we believe energy efficiency can catalyze into action today’s powerful combination of new technology, new funding, accelerated momentum, and lively public discourse. Our organization is also in an exciting time of growth, and further solidifying EEA’s voice as an industry expert, EEA’s leadership welcomed this opportunity to hone our role in a changing industry – and to discern what systems and structures we need to fully step into that role.

This time of change also highlighted the need for a more in-depth strategic planning process than in years past. Unlike prior policy-driven plans, we intentionally expanded our focus to address the structural, operational, and organizational needs of EEA. To shift our perspective, we needed the right partner and method, which we found in Insyte Partners and the Theory U method for transformational change. With Insyte’s guidance, we leaned into a process of deep reflection, high engagement, and letting our past be the forerunner predictor of our future. As a team, the Board and Staff began to “take apart the puzzle” to see which pieces work, which were missing, and which no longer serve the organization, rearranging them into a fresh, vibrant picture.

The result is a comprehensive Strategic Plan that provides clear direction for EEA’s future and tackled what we knew could not wait. First, we established a clear commitment to apply diversity, equity, inclusion, and energy justice lenses to all that we do. The Board and Staff recognize that achieving our goals without these elements is not true success. Second, we refreshed our Mission, Vision and Values statements to reflect that commitment. Lastly, we recognized that energy efficiency is no longer a narrow lane unto itself. This understanding is more important than ever as we double down on efficiency as the anchor for all that we do, while acknowledging that it is increasingly and critically interconnected with comprehensive solutions and energy efficiency-adjacent clean energy efforts.

Together with the Strategic Plan, these three steps enable EEA to move forward confidently, united around our guiding principles, clear in our purpose, and ready to be a driver of change. We invite you to support EEA, KEEA, and EEA-NJ as we pursue this ambitious path forward, and welcome your ongoing involvement as we implement the six Strategic Pillars presented in the pages that follow.

Sincerely,

Carolyn Sloan
Vice President, EEA Board
Chair, Strategic Planning Committee

Jeanne A. Zappa
Executive Director

Table of Contents

3 Leadership Letter
4 Who We Are and What We Do
5 Mission, Vision and Values
6 Strategic Framework for Action
8 Pillar I: Impactful, Clear Objectives, Process, and Actions on Policy
10 Pillar II: Members: Central and Involved
12 Pillar III: A Loud, Proud Voice for Energy Efficiency
14 Pillar IV: A Clear Brand Identity and Legal Structure
16 Pillar V: A Strong and Resilient Financial Model
18 Pillar VI: Exceptional Organization, Systems and People
20 Overview of the Strategic Planning Process
22 What’s Next?
13 Thanks and Who Was Involved
WHO WE ARE
AND WHAT WE DO

The EEA family of organizations champion energy efficiency as integral to a clean, just and resilient energy economy. To accomplish these objectives, we educate, partner, and advocate to collaboratively advance policy that prioritizes and increases deployment, funding and market adoption of energy efficiency – the least-cost energy resource and the fastest-growing industry in the energy sector.

The EEA grouping includes the Energy Efficiency Alliance, a 501(c)(3) organization, and two affiliated 501(c)(6) trade associations, the Keystone Energy Efficiency Alliance (KEEA) and the Energy Efficiency Alliance of New Jersey (EEA-NJ). Along with our affiliated 70+ business members, we challenge our industry to incorporate adjacent and complementary clean energy technologies. Together, our work saves energy, grows the workforce, promotes equity, and decarbonizes buildings.

The Energy Efficiency Alliance — a 501(c)(3) nonprofit — works to increase energy efficiency awareness and encourage energy efficiency action. Our nonprofit work centers on two primary objectives:

- Educate Public Officials, Regulators and Other Stakeholders About Energy Efficiency Industry Matters. We strive to provide expertise in issues related to energy efficiency and help others to understand them through communications, outreach and events.
- Engage Stakeholders and the Business Community. We connect businesses to involve them in energy efficiency industry conversations about pressing issues and to stake out leadership approaches and solutions.

The Keystone Energy Efficiency Alliance and the Energy Efficiency Alliance of New Jersey are 501(c)(6) trade associations for the energy efficiency industry. Our trade association work aims to achieve the following three objectives:

- Advocate for and Advance Energy Efficiency Policy. We meet with legislators, regulators and other elected officials and their staff to advance policy actions that support jobs, dollar and energy savings, and growth of the energy efficiency industry.
- Serve our Membership. Our membership represents the diversity of our industry, from small, independent contractors to national and global clean energy economy enterprises.
- Convene Our Members To Share Best Practices. To support members we make business connections, engage in professional development, identify collective industry concerns and affirm policy positions.

Our brand new Mission, Vision, and Values Statements were adopted with great consideration of the complexities of these times, and of the unique role EEA plays in addressing those complexities. Our Strategic Framework for Action is EEA’s roadmap to achieving the vision of the future we are committed to co-creating.

As we worked through our strategic planning process, we asked fundamental questions about our organizational purpose.

Through this exploration, we landed on a strong recommitment to advancing energy efficiency, but in new ways, and increasingly paired with adjacent solutions, to meet the challenges of our ever-changing industry.

Mission
Our reason for existing
To champion efficiency as the foundation of a clean, just, and resilient energy economy.

Vision
The future we intend to help build
Energy efficiency anchors all efforts to meet our ongoing energy needs, improve health and comfort, promote energy equity, and protect our climate.

Values
The guiding principles for all we do
We support energy efficiency that grows strong local economies, helps create resilient communities and healthy buildings, addresses pressing environmental issues, and advances an equitable, just, and sustainable future.
The six pillars of the Strategic Framework and EEA’s new Mission, Vision and Values serve as a guiding force and high-level fulcrum for decision making throughout the organization’s coming three years and beyond. The Framework focuses our collective attention by inviting us into the question: “Will this action, investment or position move us in the direction of achieving our strategic goals?”

Each pillar encapsulates a core part of the framework, and each pillar is supported by a Bold Statement of Strategic Intent and accompanied by high-level strategies, action indicators, and success indicators. The Bold Statements are an expression of the vision behind that pillar, written from the perspective of the fully-realized future.
PILLAR I
IMPACTFUL, CLEAR OBJECTIVES, PROCESS, & ACTIONS ON POLICY

BOLD STATEMENT OF STRATEGIC INTENT:
EEA demonstrates focused purpose and clear objectives in its advocacy work, achieving measurable results and impact. The organization develops and deploys coherent policy principles and selects its agenda of policy actions through an established process that engages its members, staff and Board. Policy is guided by our mission, vision and values and reflects member priorities.

SUCCESS INDICATORS
How we will know that we’ve achieved our desired impact:
1. Improved energy justice, decarbonization and advancement of our energy efficiency policy priorities.
2. We make clear, measurable contributions to reducing the energy burden in our states.
3. Favorable regulatory decisions and legislation are passed, and our testimony incorporated into utility program rules.
4. Regular and sustained media coverage and social media amplification of our messages on our issues.
5. Energy justice is incorporated into our policy decision-making process.

ACTION INDICATORS
What do we commit to DO:
2. Outline clear policy actions agenda process. Directives written and dispersed for selected issues. Issue area “expert” responsibilities assigned to EEA staff members.
3. Write detailed action plans for each issue area with measures of success for achieving objectives.
4. Board and staff celebrate and prioritize energy justice and partnerships with energy justice organizations.
5. Carve out time for policy check-in discussions with the Board in quarterly meetings and Board retreats.

STRATEGIES
How we do it:
1. Develop and deploy clear policy principles. Review all policies through a diversity, equity and inclusion-informed energy justice lens.
2. Establish an agreed-upon, documented internal policy agenda process to regularly select and prioritize specific issue areas, desired outcomes, key actions, and next steps for staff, the policy committee, and membership input.
3. Craft brief policy issue “directives” for each EEA-selected policy that articulate our position, our desired objectives/outcomes, our role in achieving the stated objectives, our policy action plan, and risks or opportunities for EEA members.
4. Establish mechanisms for monitoring market intelligence and sharing across the internal EEA team and among members.
5. Collaborate with groups that help us achieve our policy goals and promote our values, especially groups with more “ears to the ground” on topics important to energy efficiency, like energy justice.
**PILLAR II**

**MEMBERS: CENTRAL AND INVOLVED**

---

**SUCCESS INDICATORS**

How we will know that we’ve achieved our desired impact:

1. We see increase diversity among our membership and can demonstrate support of historically marginalized voices in our industry.
2. Member retention improves year over year.
3. KEEA and EEA-NJ achieve member satisfaction rates of 80% or greater.
4. 75% of members engage in at least one way over the course of a year, including through sharing success stories, attending events, or participating in policy discussions or calls to action.

---

**ACTION INDICATORS**

What do we commit to DO:

1. Clearly demonstrate a meaningful value proposition for members.
2. Create a recruitment/growth plan to achieve a diverse and balanced set of members.
3. Establish improved member resources and engagement systems.
4. Offer tangible benefit to those who have historically been relegated to the margins of our industry; facilitating connections across the industry, offering resources to support shared responses to RFP’s, and incorporating a dues offset for qualified members working in energy justice.

---

**STRATEGIES**

How we do it:

1. Consider, articulate and underscore the benefit of membership in all that we do. Clearly define membership-only services and specify resources provided to non-members.
2. Align our recruiting and growth plan with our policy principles, priorities, objectives and values.
3. Identify and take action to redress the gaps faced by historically marginalized voices in our industry by making room at the table for MWDBE (minority-, women-, disadvantaged persons-owned business enterprises) businesses and intentionally highlighting these firms’ success stories.

---

BOLD STATEMENT OF STRATEGIC INTENT:

KEEA and EEA-NJ members are central to the organization family; their business voice, input and guidance influence the shape of policy and advocacy work. Members and potential members understand the value proposition for membership in a way that fosters new and continued investment in EEA. Members are provided opportunities to share their stories and expertise in a way that serves both members and the organization as a whole.

---

4. Change the conversations so energy justice is not a peripheral issue. Communicate clear and consistent energy justice values and expectations of our membership to “walk the walk.”

5. Define scope and tiers of relationships with: utilities, contractors/distributors, renewables, large energy users like hospitals, educational institutions, etc. Establish an affiliate class of members.

6. Build robust systems to engage members more deeply, including topic-based working groups, online members-only portal, RFP ‘matching’ with contractors, MWDBE supplier lists, technical expert circles, opportunities to tell their energy efficiency stories, and more.
PILLAR III
A LOUD, PROUD VOICE FOR ENERGY EFFICIENCY

SUCCESS INDICATORS
How we will know that we’ve achieved our desired impact:

1. Members, partners and allies come to us to build content and support messaging on the successes, opportunities and benefits of energy efficiency.

2. People engage with our materials across communication channels and reshare them with their networks to advance their work.

3. Members, partners and allies cite our storytelling as a direct contributor to successful elements of their work, positively impacting their policy advocacy, their market share, and their brand.

ACTION INDICATORS
What do we commit to DO:

1. Share EE stories in various formats (case study, etc.) each quarter.

2. Establish standard systems to feed the storytelling pipeline to enable production.

3. Create standard checklists, documents, templates to facilitate policy support.

4. Hold internal storytelling meetings, particularly connecting storytelling to our policy objectives.

BOLD STATEMENT OF STRATEGIC INTENT:
EEA excels at both telling the compelling story of energy efficiency’s importance and serving as a platform for members to amplify shared priorities and tell their own success stories. Our storytelling work is an integral part of our policy efforts and influences key decision-makers. The organization’s visibility is elevated and respect grows for the organization across the ecosystem.

STRATEGIES
How we do it:

1. Tell the broad story of energy efficiency in the market in a way that is both compelling and provides added value to members and to the ecosystem.

2. Prioritize the audiences for our energy efficiency stories and understand how best to frame the narrative for each, with particular focus paid to framing and targeting audiences for energy justice stories to maximize impact.

3. Prioritize the opportunity for members to share their stories through case studies, speaking opportunities, and more. Amplify stories and profile member organizations by re-sharing their content and accomplishments on social media and other communications platforms.

4. Treat members’ energy efficiency stories as our key assets. Capitalize on conversations with members to tell their stories in creative ways across multiple communication channels.

5. Regularly secure funding to support this work.
PILLAR IV
CLEAR BRAND IDENTITY AND LEGAL STRUCTURE

BOLD STATEMENT OF STRATEGIC INTENT:
The educational (501(c)3) and trade association (501(c)6) functions are clearly understood among our stakeholders. Members, Board, staff, stakeholders, policymakers and funders use standardized language and unified, engaging branding to talk about the family organization. Our internal structure limits duplication and conflict, keeps legally restricted activities separate, and allows distinctive NJ and PA activities with possibilities for expansion. The visibility of the organization as a whole is elevated and respect grows for it across the ecosystem.

SUCCESS INDICATORS
How we will know that we’ve achieved our desired impact:
1. The corporate structure supports the reality of the way we work.
2. Members and outside stakeholders, especially funders, express more clarity and less confusion about the organization’s structure.
3. Funders have confidence in our organizational structure and policies.

ACTION INDICATORS
What do we commit to DO:
1. Finalize streamlined corporate restructuring in year 1 of the strategic plan.
2. Circulate communication materials that clarify the structure and branding to all internal and external audiences so that they clearly understand the organization and its purpose and vision.
3. Establish Memorandums of Understanding (MOUs) between organizations to clarify relationships.
4. Create content assets to share across platforms that communicate the structure of nonprofit (c)(3) and trade association (c)(6) organizations.

STRATEGIES
How we do it:
1. Clarify legal structure to reduce confusion, reconcile operating challenges, and streamline unnecessary internal practices and guidance on lobbying.
2. Unify the brand identity by adopting branding and administrative practices that are consistent with corporate structure.
3. Establish clear language that explains our various organizational functions and the strategic value of each.
4. Launch our “refreshed” identity with clear purpose and intention, including a celebration of our energy justice focus.
PILLAR V
A STRONG AND RESILIENT FINANCIAL MODEL

SUCCESS INDICATORS
How we will know that we’ve achieved our desired impact:

1. EEA’s revenue mix is more diversified, with no more than 40% coming from a single source. EEA attracts more individual donors, corporate supporters and other contributions.
2. The organization increases the portion of its total revenue that is unrestricted, while maintaining current (or greater) overall budget.
3. The organization builds relationships with and increases its donations from a broader mix of philanthropic organizations and other funders.
4. We measure and demonstrate year-to-year growth in investments/endowment.

BOLD STATEMENT OF STRATEGIC INTENT:
We have a strong and resilient financial model that helps us achieve our goals. We have expanded and diversified our membership, resulting in dues representing a larger portion of overall revenue. We have broadened our other fundraising sources and remain flexible enough to take on high-priority, specially funded projects when the opportunity presents. Our growing endowment, funded by donations and unrestricted surplus, is placed in investments that contribute to the new energy economy. We have clear, transparent procedures for financial management and legal compliance.

ACTION INDICATORS
What do we commit to DO:

1. Create an enhanced membership structure that offers more membership options through an affiliate class. (See Pillar #2).
2. Draft written plans to grow and diversify revenue sources.
3. Establish an endowment account or strategy to generate recurring investment income.
4. Submit joint grant proposals with community groups.

STRATEGIES
How we do it:

1. Grow our membership revenue through strengthened member offerings, enhanced membership value with designated member-only benefits at different levels, and robust recruitment practices. Diversify other revenue sources to develop a balanced portfolio of restricted and unrestricted sources. Increase the pool of values-aligned philanthropic funds. Revisit current policy against accepting government funds, and grow individual giving donations and annual fundraising programs.
2. Build an endowment through individual donations and unrestricted surplus. Build necessary infrastructure to support the management of the endowment, including policies for additions to and withdrawals from endowment. Develop an investment strategy that reflects our values.
3. Collaborate with community groups through joint grant proposals.
4. Strengthen financial operations across the organization through improving our systems, policies, and procedures to provide a strong foundation for the effectiveness of our work as an organization.
PILLAR VI
EXCEPTIONAL ORGANIZATION, SYSTEMS AND PEOPLE

STRATEGIES
How we do it:

1. Integrate a diversity, equity and inclusion lens across our whole organization (staff, Board, membership and services). Leverage the diversity, equity and inclusion inherent in our mission in all that we do.

2. Be the industry experts for our member states. Cultivate, capture and institutionalize industry knowledge and expertise among staff. Prioritize interpreting “wonky” industry and policy language for our varied audiences and purposes.

3. Establish common Board and staff understanding of energy justice stance through conversation, training, and commitment to shared understanding.

SUCCESS INDICATORS
How we will know that we’ve achieved our desired impact:

1. Staff are topical experts and lean on organizational systems and processes with nimbleness and ease.
2. EEA is a go-to organization for guidance on energy efficiency in NJ and PA.
3. All financial and legal matters comply with best industry practices.
4. The organization achieves a higher percentage of BIPOC and/or other diverse populations on Board and staff.
5. Track and increase percentage of member businesses that identify as MWDBE (minority-, women-, disadvantaged persons-owned business enterprises).
6. Board, staff, and members employ a shared vocabulary for advancing energy justice.
7. EEA is known as a ‘great place to work’ with an engaged, highly competent, and well-respected staff and Board.

ACTION INDICATORS
What do we commit to DO:

1. Implement a strong Diversity, Equity, and Inclusion Plan.
2. Establish professional development plans for staff individually and collectively.
3. Create and implement robust administrative, operational and financial systems, including those related to onboarding staff and Board, an active CRM system, a robust budget process, Board committee charters and a policy decision-making framework that is regularly applied.
4. Track critical performance metrics and deliver high-level dashboard summaries of progress.

BOLD STATEMENT OF STRATEGIC INTENT:
EEA is a high-performing nonprofit organization using best-in-class business practices and cultivating exceptional capacity in its staff and Board members. The organization lives its values and aligns its work around its mission.
In August 2021, the EEA staff and the Board together initiated a five-month strategic planning journey to ask ourselves the pivotal question of what the future might hold for our organization. Given the rapid pace of change in our complicated world, and to explore the unique position EEA should occupy within our ecosystem, our strategic planning process required wide engagement and breakthrough thinking. We aimed to “learn from the future” while it is emerging, as opposed to downloading old mental models of the past. To that aim, we engaged Insyte Partners and designed our strategic planning process around the Presencing Institute’s Theory U, an awareness-based framework for change. Theory U posits that tapping the wisdom of the head, heart and hand creates the conditions for transformative change.

At our first of three intensive, in-person sessions, the Vision Team (the entire EEA staff and Board) named the key trends and driving forces impacting the future of EEA using a Mind Map. A partial list includes electrification, energy efficiency jobs for all and the need to diversify funding, all undergirded by the pressing reality of climate change.

We then collectively explored our critical questions through two Listening Forums among EEA members, more than 15 Dialogue Interviews with key thought leaders and Learning Journeys to other industry organizations to explore our trickiest questions (See “Who Was Involved” on Back Cover). All of those conversations yielded key insights into EEA’s future.

"Strategic Framework for Action" to guide EEA’s next chapter. At our final retreat, we refined and finalized the Strategic Framework for Action and adopted a refreshed set of Mission, Vision and Values. The Framework synthesizes hours of exploration and robust discussion into an actionable plan for EEA’s future. The plan capitalizes on EEA’s unique position as both a membership organization and an industry group to advance our Mission to champion efficiency as the foundation of a clean, just, and resilient energy economy.

We spent a day together synthesizing these insights and key learnings, ultimately crafting a draft. The Mind Map, in its cacophony of trendlines, woke everyone up to the complexity of the environment EEA is operating in and provided context for our strategic questions, including: "In this complex scenario, what role are we positioned to play and what is needed to align our organizational systems and structures to step into that role?"
More than anything, we are making the voice of business heard. Going forward, expect even more amplification of business voices to underscore the economic value of energy efficiency—delivering results for customers, growth for businesses, and jobs for workers.

At EEA, KEEA, and EEA-NJ, we know it’s no time for hesitation as our market rockets forward. We’ll be there with it, anticipating members’ needs and seizing this “golden opportunity” for advocacy.

The strategic planning process also brought into sharp relief the importance of nurturing the wellbeing of our organization internally so that we can be fortified as the work continues. We are prioritizing incorporating energy justice and diversity, equity, and inclusion throughout each of our six strategic pillars. We are dedicated to attracting and cultivating exceptional staff and Board members. And we are recommitting to financial resilience so that we can innovate and pivot to best meet the needs of our industry.

Our ability to thrive and deliver for our stakeholders hinges on the strength of our own foundation, and our staff, Board, and organizational systems are the base of that foundation. “EEA by the Numbers” for 2022 will measure success related to internal goals as well as our external impact for members and across the industry.

As we continue to champion energy efficiency as the foundation of a clean, just, and resilient energy economy, we are attuned to the constant evolution intrinsic to this field.

We are poised to meet the moment through convening conversations and supporting policy action across issue areas, all to advance the ball towards our shared equitable, just, and sustainable future.
THANKS... AND THE TEAM INVOLVED

Special thanks to the indefatigable Planning Team, who worked shoulder-to-shoulder with Insyte to help shape the planning process and hold the work on behalf of the Vision Team between retreats: Carolyn Sloan, Strategic Planning Team Chair, and Board Members Jon Hacker, John Augustino, and Baird Brown, with Executive Director Jeaneen Zappa.

EEA 2021 STAFF
Jeaneen Zappa, Executive Director
Mary Jacobson, Development Manager
John Kolesnik, Policy Counsel
Leann Leiter, Director of Policy & Research
Katie Thompson, Communications & Events Manager
John Young, Business Engagement Manager

EEA 2021 BOARD
Kathy Greely, Performance Systems Development EEA Board President
Lloyd Kass, Franklin Energy Vice President
Ben Adams, MaGrann Secretary
Kyle Haddock, CLEAResult Treasurer
Carolyn Sloan, Oracle Strategic Planning Team Chair
John Augustino, Honeywell
Baird Brown, eco(n) Law
Tanuj Deora, Uplight
Andy Frank, Sealed
Jon Hacker, Daikin
Mike Newman, CMC Energy Services
Renwick Paige, Energy Infrastructure Partners

OUR “SENSING” PARTNERS: Thank you to the EEA member organizations who shared time and expertise with us as we sought to better understand the trends and driving forces affecting EEA and the energy industry and get insight into some of our most critical questions. Thank you to our colleagues who engaged with the strategic planning process in Learning Journeys and Dialogue Interviews, providing invaluable input in our strategic journey.


Dialogue Interviews: Matt Barron (Heinz Endowments), Paul Roth (Energy Foundation), Dan Cross-Call (formerly at the Rocky Mountain Institute), Winn Costantini (Green Building United and HERE4CJ Coalition), Joe Nunley (Performance Systems Development), and Kerry Meade (Northeast EE Council).

ENERGY EFFICIENCY ALLIANCE
www.energyefficiencyalliance.org
info@energyefficiencyalliance.org
215.792.2101
614 S. 4th St. #307
Philadelphia, PA 19147

INSYTE PARTNERS, www.insytepartners.com
Liz Alperin Solms, Principal
Marie McCormick, Principal
Emma Erwin, Project Manager