Module 4

Roadmap development
4. Roadmap development

Before we start our training, please find the keys below to our interactive PDF:
Learning objectives

After identifying the potential energy efficiency opportunities, an implementation roadmap helps provide a clear plan to achieve program targets while creating transparency for stakeholders to track progress and key milestones.

At the end of this module, you should have a high-level overview of the following best practices:
• Build an implementation roadmap to achieve energy goals.
• Conduct an impact analysis to spot potential benefits.
• Create a focused implementation strategy to establish a work plan for each energy efficiency measure.
• Prioritize projects based on established criteria.
• Develop timelines to provide regular updates, identify crucial paths, and anticipate long lead times.
• Prepare a rough order of magnitude budget to showcase potential savings.
• Establish interim savings milestones to track short-term progress.

Once you complete this module, you’ll have the following modules left:
4. Roadmap development

Terms to know

**Impact analysis**: A study that informs a program roadmap by cataloging potential benefits of identified opportunities, setting expectations for what can be achieved, and driving prioritization.

**Rough order of magnitude (ROM) budget plan**: A preliminary budget that helps outline estimated projected costs to assist with strategy development.
Roadmap development overview
An effective roadmap development provides a clear and achievable plan to meet program objectives and targets.

Conduct an impact analysis to inform the program roadmap by cataloging potential benefits of identified opportunities, setting expectations for what can be achieved, and driving prioritization.

Prepare an implementation strategy to define distinct work streams and establish detailed task plans for each stream.

Prioritize projects based on defined criteria for your organization.

Develop timelines for implementation specific to each work stream, aligning expected savings with objectives and targets.

Prepare a rough order of magnitude (ROM) budget that shows both expected outlays and savings.

Establish interim savings milestones to track short-term progress, assess the effectiveness of distinct work streams, and stay on track with long-term objectives.
Impact analysis

Impact analyses inform a program roadmap by cataloging potential benefits of identified opportunities, setting expectations for what can be achieved, and driving prioritization.
4. Roadmap development

Focused implementation strategy

An effective implementation strategy organizes energy efficiency (EE) opportunities into discrete work streams and establishes a clear work plan for each stream.

1. **Organize catalogued opportunities** into discrete work streams.
   
   **Sample work streams:**
   
   - LED installation
   - HVAC upgrades
   - Operating SOPs
   - Set point optimization
   - EE trainings

   For each work stream:
   
   - Prepare a detailed task plan.
   - Outline overall work stream roles and responsibilities.
   - Identify dependencies and potential barriers to implementation.
   - Confirm available budget and implementation resources.
   - Assess capacity of implementation team and stakeholders.
   - Identify additional resource and support needs.

2. **Communicate the draft strategy** to EE leadership team and work stream stakeholders, revise based on feedback, and share updated version.

3. **Revisit and update the strategy** on a recurring basis.
Project prioritization

Prioritizing energy efficiency projects and initiatives based on established criteria and available resources is a key step to achieving goals and optimizing performance.

1. **Establish criteria for prioritization.** Look past first cost. Consider overall EE program objectives and targets, as well as interim milestones and business group or region/site-specific targets.

2. **Seek input on priorities.** From facility management (FM) teams and business group leads.

3. **Consider prioritizing projects with immediate impact.** That contribute to EE program targets and generate savings to invest in future EE projects.

4. **Identify synergistic opportunities.** That are best implemented in tandem.

5. **Iterate on priorities on a regular cadence.** Revisit catalogued projects at least annually (quarterly or more frequent is recommended) and adjust priorities.
4. Roadmap development

Implementation timeline

Build timelines into work stream task plans based on project prioritization outcomes and input from FM teams and business group leads.

1. **Set up a timeline document** that allows for regular updates and simple visualization of time frames by work stream, such as a Gantt chart.

2. **Identify critical path(s), dependencies, and long lead time items** and schedule accordingly to mitigate barriers and optimize sequencing. Incorporate time for tasks that can introduce delays such as vendor research, selection, contracting, and site team scheduling.

3. **Coordinate with FM teams and business group leads to confirm viable time frames** based on capacity, upcoming projects, and other considerations.

4. **Align implementation timelines with expected budget availability** and confirm viability with budget holders.

5. **Include project closeout and training tasks** in the implementation timeline as a best practice.

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**Sample simplified monthly Gantt chart**

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<thead>
<tr>
<th>Task</th>
<th>Responsible POC</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
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**ROM budget plan**

Prepare a rough order of magnitude (ROM) budget plan based on the outcomes of project prioritization and timeline development.

1. **Prepare a budget plan** that displays expected budget resources and outlays over time based on known funding resources, project timelines, and expected project costs.

2. **Categorize spending based on previously established categories** to communicate resource allocation to EE program leadership.

3. **Reiterate the business case** by displaying all relevant outlays and expected savings over time—again going beyond first cost.

4. **Review the plan with budget holders** and make adjustments as needed.

5. **Update the budget plan on a regular cadence** and as new information is received.

Similar to a focused implementation strategy, the ROM budget plan should be treated as a living document.

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Interim savings milestones

Interim savings milestones provide a method to track short-term progress, assess the effectiveness of EE work streams, and stay on track with long-term objectives.

1. Use baseline data, project impact estimates, and implementation timelines to establish interim savings milestones.

2. Tie interim savings milestones to specific work streams, sites, and projects where feasible to facilitate monitoring of distinct efforts.

3. Document assumptions, dependencies, and potential challenges associated with each milestone.

4. Communicate proposed milestones to leadership and implementation teams and revised as needed based on feedback provided.

5. Define an approach to assess performance against milestones.

6. Use milestones as opportunities to discuss challenges, lessons learned, and best practices.

7. Recognize milestone achievement and the efforts of implementation teams.

Sample interim savings milestones

- Reduce portfolio energy intensity by 2 percent each year through 2030.
- Complete lighting upgrades at 10 targeted sites by CY 2022 to achieve an annual energy use reduction of $2.5 million kWh.
- Reduce absolute energy use in Midwest retail stores by 5 percent by 2023.
- Reduce energy use in owned buildings by 1-2 percent in FY 2022 through development and implementation of EE trainings.
- Reduce HQ building energy costs by 10 percent in CY 2024, compared to a CY 2021 baseline, through building controls upgrade and optimization.
Congratulations! You’ve completed Module 4: Roadmap development

This module provided best practices on how to build an implementation roadmap to help achieve energy goals. Key takeaways:

- Conduct an impact analysis by cataloging potential benefits, setting expectations, and driving prioritization.
- Create a focused implementation strategy by organizing energy efficiency measures into discrete work streams.
- Prioritize projects based on feedback from teams, ROI metrics, and other established criteria.
- Build timelines into work stream task plans to identify crucial paths.
- Prepare a rough order of magnitude budget to set an initial budget and categorize spending.
- Use baseline data, project impact estimates, and implementation timelines to establish interim savings milestones.

The following module will provide a high level overview of how to frame and develop business cases by showcasing examples and explaining the various investment metrics that can be used to evaluate the costs of implementing a new energy efficiency measure.

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<th>Module 4</th>
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<tr>
<td>Getting started with energy management</td>
<td>Stakeholder engagement</td>
<td>Opportunity identification</td>
<td>Roadmap development</td>
<td>Business case development</td>
<td>Energy efficiency in action</td>
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