



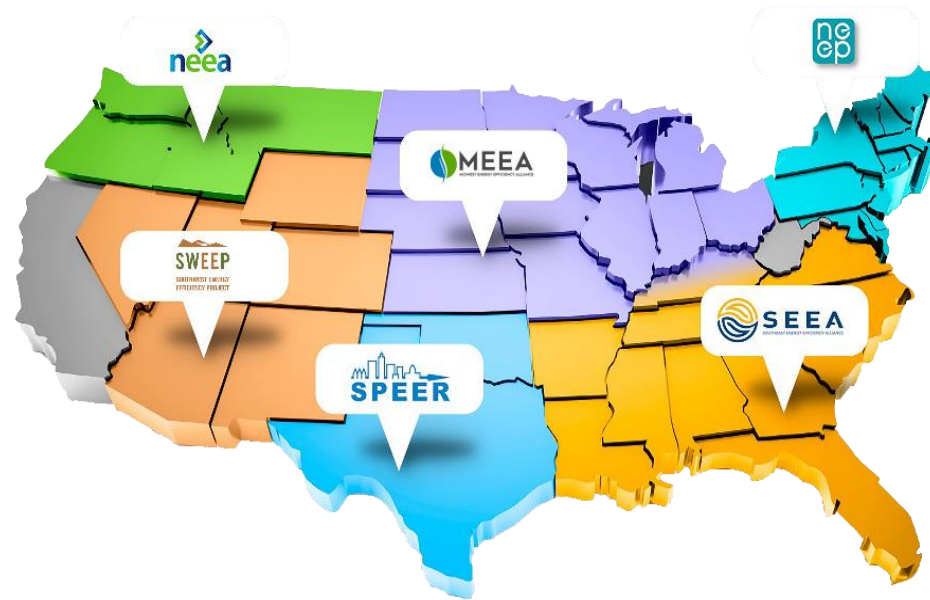
The South-central Partnership for Energy Efficiency as a Resource

STRATEGIC PLAN 2019-2022



Introduction

The South-central Partnership for Energy Efficiency as a Resource (SPEER) is one of six regional energy efficiency organizations in the US recognized by the US DOE. We strive to influence the economic prosperity of our region, improve the health and well-being of our population, and support the sustainability of our environment through the efficient use of resources.



SPEER is a 501(c)(3) nonprofit organization located in Austin, Texas. Established in 2011, SPEER serves the South-central US, including Texas and Oklahoma, which encompasses nearly 30 million people and many of the fastest growing cities in America. This region represents about 16% of the new building market, with a strong growing economy and population. Since SPEER became an independent nonprofit organization in 2014, the organization has not only grown in size, but it has matured in its operations and capacity, as well as expanded its scope of work. SPEER's membership represents a broad range of sectors involved with energy efficiency including manufacturers, architects, engineers, contractors, energy services companies (ESCOs), non-profits, local and state government, universities, utilities, software companies, energy management and consulting companies.

SPEER's work is primarily focused on programs and policies that impact the built environment, including building energy and sustainability codes, intelligent energy management, utility incentives and education programs, strengthening building and grid resilience, electric markets, energy efficiency financing, distributed energy generation, water conservation, transportation programs, equity promotion, and more. We strive to increase visibility for energy efficiency and empower leaders in the private and public sectors to advance policies, programs, products, services, and technologies which will increase energy productivity and efficiency.

Our role as a convener and trusted resource across the region is reflected in our diverse membership, which provides a much needed channel to our industry partners and enhances our ability to conduct meaningful and productive forums.



SPEER's Mission: *To accelerate the adoption of advanced building systems and energy efficient products and services in the South-central US.*

SPEER's Purpose: *To create a forum to advance the understanding and adoption of energy efficiency as a low-cost energy resource; and to design, implement, coordinate, and support regional projects to promote high energy performance and clean distributed energy in the built environment.*

SPEER'S CORE PRINCIPLES AND VALUES

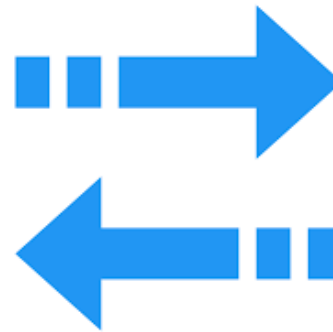
Long-term Orientation and Lasting Change



The core of our work at SPEER is the long-term support for the advancement and development of low-cost energy and water efficiency resources for the built environment. Buildings represent a large portion of our energy demand and last for many years, and provide reliable and resilient shelter that is affordable for their occupants. Our activities encourage lasting change in the energy and water efficiency

market resulting in a multitude of opportunities for our members, by accelerating demand for energy efficiency products and services.

Complementary Approach



SPEER's work complements and supports our members' programs and activities, and the activities of our members often support our work. We truly recognize the importance of the relationship with our members and other various organizations in our region. We

strive to create collaboration and relationships with those organizations interested in the advancement of knowledge, best practices and adoption of energy efficiency as a low-cost energy resource, to leverage funding and resources to increase impacts. We will develop a coordinated effort with those stakeholders that engage the local programs in a way that will maximize energy and water efficiency in the South-central region.

Accountability



SPEER takes professional responsibility for our decisions and our actions, and therefore our results. We strive to set clear goals and set measurable standards for success as an organization. We define expectations, roles and responsibilities and collaborate with others to accomplish our mission and purpose. *SPEER engages with funders, clearly defining and delivering value and creating effective channels of communication to maximize our outcomes.* We proactively work with our members and other stakeholders to seek and exchange ideas, seek input and share information. As an organization that is member-driven by design, this level of accountability is incredibly important to the sustainability of the organization.

Continuous Improvement and Operational Efficiency

SPEER's employees share a strong commitment to transparency and improvement that creates an organization with accelerated learning and improvement in our work. We are accountable to our members and funders and we ensure excellent workmanship, and report measureable success. Our processes are thorough and we commit to using best practices in management, development, delivery and evaluation of programs, contractor management, and budget and expenditure controls. We provide a high level of visibility to all our organizational assets assuring members and funders that an investment in our regional organization is in their best interest. We stay committed to improving our organization, the structure, the process and the timeliness of all decision making.

Integrity through Collaboration



We strive to be the regional “trusted source” for energy efficiency information and resources. As an organization and as individuals, our staff and management perform with reliability and honesty. Our board of directors oversee our investment at the highest level and collaborate with staff to ensure that the work SPEER is doing supports the mission and purpose of the organization. We value the input of our members, regional stakeholders and funders in shaping the work we do and believe that this level of two-way collaboration is necessary to the success of SPEER.

WHAT GUIDES OUR WORK?

New Ideas Encourage Growth

As a regional energy efficiency organization, we are committed to advancing our work within the region through new ideas and approaches, and we refuse to accept the status quo. While considering progress in our mission, we take calculated and informed risks to provide new ideas, improved solutions, and valuable resources that increase the potential savings associated with new opportunities. We welcome change, and will respond as evolving mission and purposed related opportunities are identified. Our strategies focus on developing long-term adoption of cost-effective energy efficiency resources and energy market transformation through education and collaboration. We strive to accomplish lasting change through education and outreach, sharing best practices, promoting compliance with energy codes and creating cooperative marketing materials to capitalize on efficiency opportunities.

Regional Collaboration



SPEER provides thought leadership in the unique markets of Texas and Oklahoma through an educational approach. We accomplish our mission through collaboration with stakeholders to capture regional resources and intelligence, develop innovative policies, and provide workforce development and technical assistance. A coordinated and collaborative diverse group of stakeholders must be engaged and empowered to make significant change. Stakeholders working with SPEER and networking with each other include regional and national universities, research organizations, manufacturers, energy service companies, local governments, utilities, building industry professionals, consumers and advocates.

Regional Intelligence

SPEER works to identify trends, opportunities and challenges that shape energy efficiency in the region. Our knowledge includes regional practices, such as the rate of market transformation, building construction and management practices, energy efficient product adoption, economic development and our unique political and regulatory environment. We develop areas of original research, which build on this knowledge to provide useful information for public benefit. By driving regional adoption of efficient practices and policies, we accelerate the development of a clean energy economy in Texas and Oklahoma.

Developing the Regional Workforce

SPEER works to provide, training and related resources to builders, code officials, architects, and engineers, building operators, local governments and others to develop and support a skilled and trained workforce. SPEER works to provide access to training programs and resources where we discover the need, to all building industry sectors. With this support, we strive to elevate the quality and integrity of the industry professionals who provide energy and water efficiency services.



Overcoming Market Confusion

We overcome market confusion through the development of publicly available educational and technical resources. SPEER works with state energy offices, public service commissions, cities, advocates, industry groups, utilities and others to deploy these resources, so that we engage the largest share of market participants with a singular message. SPEER provides technical assistance to encourage best practices in building science, energy market policy, efficiency financing, building operation and management and local government operations.

Cultivating Energy Efficiency Investments in the Region



We recognize that the “first cost” is a significant barrier for building owners to invest in energy efficiency, especially in low income, multifamily housing and small businesses. We support financial incentives that encourage early adoption of new technologies and market transformation of building practices, and reduce cost to end users. We are committed to assist stakeholders in the development and promotion of new strategies for financing that improve access to energy efficient facilities, products and services. We provide resources for policy makers and building owners to understand the cost/benefit of energy efficiency and the return on investment it provides, in new construction or when retrofitting existing buildings.

SPEER'S PARTNERS

To assist SPEER in understanding the needs of the region and to navigate the landscape of energy efficiency in the South-central US, we as an organization engage with our board of directors, members, funders, and other stakeholders to identify regional priorities and align our resources based on that need. SPEER maintains a continuous communication with our stakeholders, members and funders to inform each of our strategic direction and long-term plans. Our key stakeholders and partners in the South-central region include:

Business Community

SPEER works with an expanding network of regional businesses that provide energy and water saving products and services to building owners, communities and local governments. We engage with the financial community to support the development of diverse and innovative energy efficiency financing products and services in the South-central US. This network helps to expand SPEER's knowledge and resources and assists in creating a strategic direction, and in turn, SPEER works within the region to remove barriers and create growing market opportunities.

Non-Governmental Organizational Community

SPEER works closely with professional associations, research organizations, and environmental advocacy groups to develop strategies to advance policies that expand the energy efficiency and clean energy market in our region. Due to SPEER's unique role in the market, we increasingly coordinate the efforts of state based, regional and national NGO's on collaborative projects. These collaborative efforts leverage the knowledge and experience of these organizations to encourage stronger platforms that support change.

State and Local Governments

We work collaboratively with cities and other jurisdictions in our region to provide opportunities to share information in an effort to expand the adoption and coordination of various efficiency initiatives and resources. This forum provides state and local governments with connections with other cities and government entities, creating a collaborative network to share information on energy efficiency initiatives and resources.

Utilities

Our region includes unique markets, which present unique challenges, including a combination of utility deregulation, vertically integrated utilities, and cooperative utilities. The successful implementation of competitive, market based or "deregulated" energy providers in Texas is paving the way for emerging technologies in energy management and grid responsive buildings and systems. SPEER works to understand and share best practices and strategies with utility companies throughout the region for the successful and effective deployment of energy efficiency incentive and educational programs, which encourage early adoption of new technologies and building development and operation practices to various building sectors.

FOCUS AREAS

SPEER has developed a variety of programs to reach decision makers within the building sector to drive efficiency as a resource. These programs are organized into four major focus areas:

Focus Area #1: Building Cross-Sector Leadership

SPEER engages with leaders at the state and local level to encourage and coordinate their efforts and accelerate the adoption of effective energy efficiency policies and practices. We support local leaders by encouraging voluntary participation in initiatives where they can “lead by example” or set tangible goals to cultivate and deploy energy and water efficient investments.

Through our outreach and collaborative efforts, we seek to develop the leadership of those who value efficiency as a resource. Governmental, business and community leaders recognize efficiency as a way to be responsible stewards of tax dollars, creating economic development of this growing industry, create local jobs and ensuring a healthy and vibrant community for all.

Focus Area #2: Reduce Building Energy and Water Use

Both Texas and Oklahoma have ample potential to achieve cost effective efficiency in existing buildings and new construction, and set trends in the nations building industry. Public and private efforts underway to address this potential are enhanced by SPEER’s consistent coordination, information transfer and support. SPEER provides a context and a shared vision in the region, and by doing so, we multiply the impact of the many successful initiatives, bring in new participants, and elevate the surrounding conditions and circumstances affecting growth and development.

Educating a skilled workforce will continue to ensure that the newly adopted policies, technologies, and business practices result in increased productivity of the construction industry, and efficient performance of buildings which improves operational affordability to end users. These efficient buildings will reduce overall reliance on energy and water resources and improve resilience of the grid.

Focus Area #3: Advance Innovative Energy Policies

SPEER and its members understand the relationship between efficiency investment and public policy. Our industry partners and diverse stakeholders participate in broad discussions to consider future policy direction, to drive the evolution of the utility programs, and to support the industry, while recognizing the growing influence of renewable and distributed energy resources. We utilize the confluence of interest by our partners, and their collective knowledge to educate stakeholders and advocate for change.

In Texas, the independent electric grid, managed by ERCOT, also provides a unique opportunity to explore progressive policies that engage buildings to support reliability of the grid. We encourage policies that enable energy efficiency to contribute as a least-cost resource to reduce energy use, particularly our weather sensitive peak loads.

A significant portion of Texas remains in non-attainment with the Clean Air Act. We are experiencing more frequent and intense weather events in the region, and we must address these health and safety issues with innovative solutions. These solutions include resilient building design and grid responsive buildings, reducing air pollution and greenhouse gas emissions, reduced water consumption and incorporating clean energy generation. We will continue to take action to improve the health and welfare of our population.

Focus Area #4: Convene and Elevate Our Network

One of SPEER's most vital roles is to bring people together and create a community of interests and common goals. We continue to host the annual SPEER Member Workshop to provide our membership with the opportunity to network and engage directly with staff to provide input on the direction of the organization.

We also continue to host the annual conference, the SPEER Clean Energy Exchange, which engages with the broader community of stakeholders and industry partners to learn from each other on various topics that are relevant at that time. The purpose of the Summit is to raise awareness of issues, share knowledge and identify needs. We achieve this through offering a unique format, primarily composed of interactive breakout sessions, where all attendees are invited to actively participate in dialogue around key interest areas rather than passively listening to a presentation.

SPEER also coordinates with numerous national organizations, creating a stakeholder network that reaches allied industries, the business community, other non-profit resources, financial investors, and educational institutions. The SPEER website and social media outlets are instrumental in reaching consumers and end-users, as well as advocates and businesses in energy efficiency.

RISK & OUR ORGANIZATION

Risk

It is important to recognize that there are inherent risks in all non-profit organizations. How an organization works to mitigate those risks is very important to their success. SPEER's accomplishments greatly depend on many factors in a very complex and changing environment, that could affect SPEER's ability to achieve its strategic goals and in the end our mission. The most notable is the loss of funding in any area of SPEER's work. To alleviate this risk, SPEER staff work collaboratively with the board of directors and the membership by clearly defining and delivering value to all funders and by creating and maintaining effective channels of communication to maximize our efforts.

Organization

We are accountable to our Board of Directors, members and funders, as we strive to implement cost-effective programs and provide education and training at the lowest possible cost. Our organizational budget assures our members and funders that their investment is both valued and in their best interest. We are committed to best practices in the development, staffing, and budget and expenditure controls.

The Board of Directors is the governing body of SPEER, which has the authority and is responsible for the supervision, control and direction of the organization. All member representatives are eligible to serve as a member of the Board of Directors. A director shall be the names representatives of the member business or organization.



The Board of Directors consists of seventeen people. Each board member shall be designated from one of the follow groups, with the remaining seats filled by members at-large, but not all designated seats must be filled for the board to conduct business.

1. Academicians and Researchers
2. Builders Contractors and Developers
3. Engineers, Architects and Consultants
4. Utilities and Retail Electric Providers
5. Municipal Owned Utilities and Electric Coops
6. Building Operators and Owners
7. Energy Service Companies
8. Manufacturers, Distributors, and Retailers of Building Products
9. Non-Profit Organizations
10. State and Local Governments and Agencies of State and Local Governments



2018 Board of Directors

Debbie Kimberly, Chair, Austin Energy

Ryan Bloom, Vice Chair, WSP

Chris Pasch, Treasurer, CLEAResult

Lloyd Kass, Secretary, Lime Energy

Frank Forrest, Past Chair, Carlisle HVAC

Steve Saunders, TexEnergy

Brian Bowen, FirstFuel

Cyrus Reed, Sierra Club

Al D'Andrea, Air Conditioner Contractors of America

David Claridge, Energy Systems Laboratory, Texas A&M University

Farshad Shahsavary, Texas Facilities Commission

Michael Jewell, Environmental Defense Fund

Hayley Cunningham, Texas Gas Service

Charlene Heydinger, Texas PACE Authority

Steve Stelzer, City of Houston

Rene Burger, Signify

Doug Kirkley, Entegral Solutions

Funding

The support for SPEER's work originates from a combination of federal funding, state funding, competitive grants, and private foundations, as well as membership dues. This diversity enables us to leverage funding and expertise to achieve our goals and expand our reach. We would like to thank the U.S. Department of Energy, Texas State Energy Conservation Office (SECO), Energy Foundation, Heising Simons Foundation, Meadows Foundation, MacArthur Foundation, Funders Network, Mitchell Foundation, the North American Insulation Manufacturers Association (NAIMA), National Association of State Energy Officials (NASEO), and all of our member companies for supporting our efforts to achieve our mission and increase energy efficiency in one of the fastest growing regions in the U.S. We invite businesses, foundations, non-profit organizations, public entities, and anyone with an interest in and a passion for increasing energy and water efficiency to join us in fulfilling our mission and purpose.



CONCLUSION

SPEER has experienced exceptional growth and is positioned to continue to grow in the coming years. Since 2011, SPEER has become a thriving organization, with the support of our members, funders, industry leaders, and local stakeholders. SPEER has increased the awareness of energy efficiency, encouraged greater investment in efficiency, and strengthened efficiency policies to create a better environment for efficiency as a resource. We appreciate the challenges specific to this region, knowing there is much more that can be done. Our three-year Strategic Plan is to continue to boost the regions energy productivity by accelerating the adoption of advanced building systems and energy efficient products and services in the South-central U.S. We embrace this opportunity to advance energy efficiency as a primary driver of an economically vibrant, energy secure, and environmentally healthy region.

Join our growing list of member companies today! For more information visit us at eepartnership.org

Become part of the regional energy efficiency organization for Texas and Oklahoma

Our members benefit greatly from partnership in SPEER's collaborative network and shape the vision, message, and activities of the only organization specifically focused on growing markets for energy efficient technologies, products and services in this region.