



Strategic Plan

2027-2031

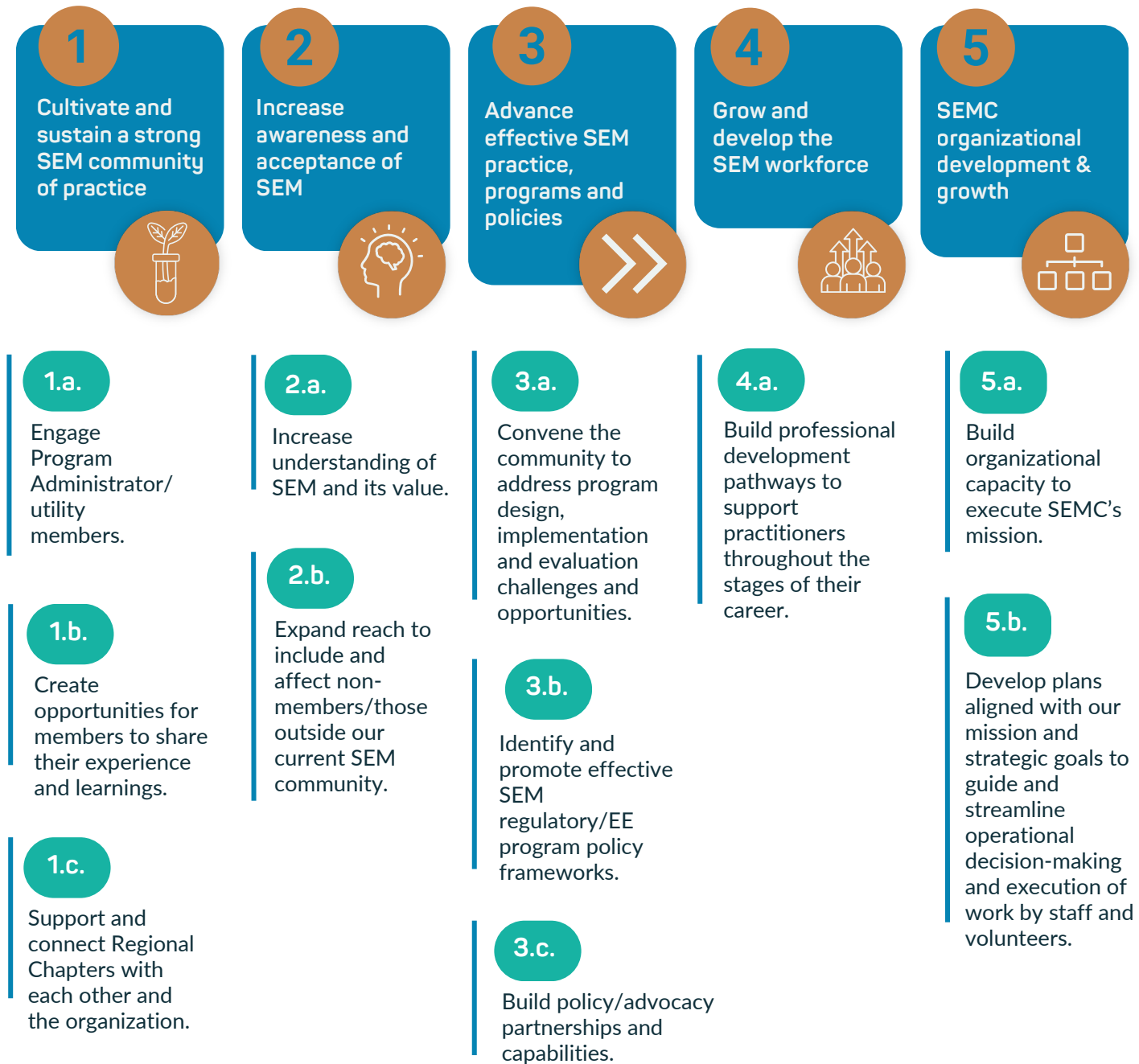
Strategic Energy Management Collaborative



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Strategic Plan at a Glance



Introduction: Purpose & Use of this Strategic Plan

This strategic plan provides a practical roadmap for advancing the Strategic Energy Management (SEM) Collaborative's mission and vision over the next three to five years. It identifies the most important priorities, guides how resources should be focused, and provides a basis for assessing progress and outcomes, so board members, staff, volunteers, members and stakeholders can align around shared impact.

The plan is the result of hundreds of volunteer and staff hours dedicated to soliciting, providing and synthesizing input and feedback to create the goals and objectives that will advance the Collaborative's work. As we consider the future, we are inspired by the opportunity to serve our members and work together to continuously strive to achieve our goals. The strategic plan sets out these goals, made practical by SMART objectives and examples of specific actions that may be undertaken.

While it is crucial to establish specific goals and objectives, it is equally important to remain adaptable and open to adjustments as needed. As we navigate the energy efficiency landscape, we must be prepared to pivot and reassess our strategies in response to external factors, such as changes in policy, economic conditions, emerging technologies, or societal trends. This flexibility will help us better position our organization to address emerging issues and seize new opportunities as they arise.

The strategic plan provides a clear direction for where the organization wants to go by establishing medium and longer-term goals and objectives, while annual action planning, including the specific tasks that will be executed, resources required, and development of associated performance metrics, is typically the responsibility of staff and volunteer leaders who are responsible for implementation. By establishing and reporting against these metrics, in alignment with the strategic plan, a system of accountability will be created to ensure that progress is made towards achieving the organization's goals.

To ensure that our strategic plan remains relevant and impactful, the board, staff, and volunteer leaders must regularly review and evaluate progress. A yearly assessment, including feedback from stakeholders and data defining progress made, should be undertaken. Thoughtful analysis and continuous learning will enable agile decision-making and ultimately drive greater success.

Governance & Accountability

The board and executive leadership should use this plan as a living management and governance tool. Progress should be reviewed regularly, with a dashboard or written update showing accomplishments, barriers, resource needs, and proposed adjustments.

Annual Refresh Process

Objectives, data and budgets will be updated in the annual Action Plan and Budget approval process.

- Annual Action Plans with associated proposed budgets for the following year will be prepared by staff leadership and member volunteers with responsibility for implementation of programs, other member services and organizational development.
- The Board will review and approve annual action plans, including any proposed budgets and adjustments to objectives or metrics/ indicators used to track progress (completed before end of Q4).

Next Steps

1 Action Planning

Translate the strategy into annual work plans with clear actions/tasks, owners, resources required, timelines, and dependencies.



Actions/
Tasks



Owners



Resources
Required



Timelines



Dependencies

Connect the strategic plan to:



Budgeting &
Contracting



Staffing/
Volunteer
Resources



Board
Agendas



Fundraising



Communications



Events



Program
Operations

Responsible

Executive Director; Volunteer leaders / Committee Chairs

Accountable

Board of Directors

Consulted

Board Finance Committee; Board Officers and At-Large Directors;
Volunteers; Contractors/Consultants

Informed

Members

2 Progress Reviews and Annual Updates

Schedule and execute regular progress reviews and annual updates.



Responsible

Executive Director; Volunteer leaders / Chair of Board Strategic Planning Committee

Accountable

Board of Directors

Consulted

Staff / Volunteer leaders

Informed

Members



Mission, Vision & Values

MISSION

Advance Strategic Energy Management (SEM) by connecting people, sharing knowledge, and strengthening the SEM community.

The SEM Collaborative convenes our members to accelerate the adoption and advancement of SEM programs and practices. We provide leadership and support to the SEM community to collaboratively explore emerging opportunities and develop practical, innovative solutions to implementation, technical, market, and policy challenges.

VISION

Broad adoption of SEM improves the economic and environmental sustainability and resilience of businesses and society.

SEM practices provide a foundational toolset for energy users to manage their energy use and costs by continuously improving their operational efficiency. SEM evolves and expands to effectively embed energy efficiency and other energy management strategies in all types of organizations.

VALUES

Community

We are an engaged SEM community of practice where professional SEM practitioners and stakeholders gather to share learning, inspire new ideas, solve problems, and support each other.

We are a kind, welcoming community that values and nurtures our relationships with each other. We enthusiastically and respectfully include people from all backgrounds and levels of experience.

Continuous Improvement

We are dedicated to the continuous improvement of SEM programs and practices.

We examine our assumptions, consider new ideas, and evolve. We apply creativity and rigor to drive practical, actionable innovation and increased impact.

Stewardship

We take responsibility for the long-term health and sustainability of both the SEM Collaborative and the SEM profession. We make decisions that serve not only today's members and priorities, but also strengthen the organization, its relationships, and its impact on future practitioners.

We nurture member engagement, develop future leaders, maintain organizational knowledge, and reliably and thoughtfully manage financial and volunteer resources to ensure that the Collaborative remains relevant and valuable as the industry evolves.

Guiding Principles

These familiar principles and operating guidelines surfaced in planning sessions with leadership and community input processes. They underlie the foundation of the goals and objectives that follow. Applicable guiding principles should be considered and addressed when planning and implementing specific Actions to meet the Collaborative's goals.

PRACTICE WHAT WE PREACH

Our own strategies and operations should mirror the SEM principles we promote: goal-setting, continuous improvement, and evidence-based practice.

MEET PEOPLE WHERE THEY ARE

We design for flexibility, accommodating differences in participant experience, capacity, and need rather than a one-size-fits-all approach.

CONVENE PRACTITIONERS TO LEARN FROM EACH OTHER

Peer-to-peer exchange is our core mechanism for impact, better equipping individuals and lifting the field's collective capability.

MINIMIZE THE BURDEN OF PARTICIPATION

Members' time is limited and valuable. Activities should return more value than the time invested.

HOLD OURSELVES ACCOUNTABLE

We report progress against our goals regularly and revisit them on a defined cycle, so the strategic plan stays a living commitment rather than a shelf document.

BUILD CAPACITY AND OPTIONALITY FOR THE FUTURE

We take measured steps toward growth, using SMART Objectives to size each step to what we can realistically resource and deliver.

BUILD REACH THROUGH OUR MEMBERS

We equip practitioners to be SEM's advocates, expanding our reach without expanding our own operational load.

GROUND POSITIONS IN EVIDENCE AND PARTNER RATHER THAN DUPLICATE

We rely on credible research and coordinate with peer organizations where they already do good work, preserving capacity for what only we can do.

GOALS, OBJECTIVES & POTENTIAL ACTIONS

The goals, objectives and potential actions listed below are the synthesized outputs of multiple strategic planning input processes held with org leadership, members and the broader SEM community in May – August, 2026 (see Appendix 2).

These key elements of the five-year strategic plan are:

1

Goals: our three to five most important strategic priorities in the medium-long term. They are broad, visionary, high-level aspirations that provide direction by defining our long-term aims.

1.a.

Objectives: actionable, measurable steps that define how our goals are achieved within a set timeframe. SMART Objectives specify the near- or mid-term outcomes sought to make progress towards goals and track success.

POTENTIAL ACTIONS

Potential Actions: examples of specific work/ tasks that may be undertaken to achieve Objectives. Unlike Goals and Objectives, potential Actions listed below are documented but not formally adopted in this 5-year strategic plan. To support nimbleness and responsiveness to changing circumstances or lessons learned over time, an Action Planning process is executed annually by staff and volunteer leaders, subject to Board review and approval.

Appendix 1 Glossary contains more detailed definitions of the strategic plan elements and should be referenced to better understand how these planning terms are being used in this document.

Appendix 4 lists multiple additional ideas for action that were harvested in planning input processes. Some of these address a next level of detail for potential Actions listed below. Both this list and applicable ideas in Appendix 4 should be considered by those doing detailed planning for implementation.

**1**

GOAL 1

Cultivate and sustain a strong SEM community of practice

1.a.

Engage Program Administrator/ utility members.

POTENTIAL ACTIONS

- Create PA-specific networking opportunities & content.
- Recruit at least two PA members to join the Board of Directors.

1.b.

Create opportunities for members to share their experience and learnings.

POTENTIAL ACTIONS

- Mentorships/ Clearinghouse for Peer Subject Matter Experts (SMEs)
- Refine/ improve SEMC working groups governance, administration and support.

1.c.

Support and connect Regional Chapters with each other and the organization.

POTENTIAL ACTIONS

- Continue & improve organizational support, documentation and tools for Regional Chapters.
- Encourage/ facilitate cross-chapter collaboration.
- Explore expansion of the Chapter network to regions currently without Chapters.

**2**

GOAL 2

Increase awareness and acceptance of SEM

2.a.

Increase understanding of SEM and its value.

POTENTIAL ACTIONS

- Clarify and consistently use SEMC's preferred simple definition of SEM in all org communications.
- Gather/develop and disseminate information about the effectiveness and value of SEM.

2.b.

Expand reach to engage and influence non-members and those outside our current SEM community.

POTENTIAL ACTIONS

- Include non-members in SEMC programming: resume open webinars and access to most website content.
- Partner with other EE orgs and present at their events.
- Create slide templates, graphics and/or other collateral re: SEM basics & SEMC org to support members in their outreach/ presentations.



GOAL 3

Advance effective SEM practices, programs and policies

3.a.

Convene the community to address program design, implementation, and evaluation challenges and opportunities.

POTENTIAL ACTIONS

- Form working groups for peer learning/ collaboration on solution development for key topics.
- Produce a multi-day, live SEM Summit conference with time for deeper group thinking and development of actionable recommendations.

3.b.

Identify & promote effective SEM regulatory/ EE program policy frameworks.

POTENTIAL ACTIONS

- Provide relevant information & outreach to regulators/ NARUC.

3.c.

Build policy/ advocacy partnerships & capabilities.

POTENTIAL ACTIONS

- Develop and execute stakeholder engagement strategy with other EE orgs re: policy/ regulatory intervention.
- Monitor relevant policy trends & developments.
- Provide information to members about relevant policy & regulatory developments and recommend actions.



4

GOAL 4

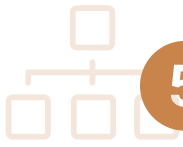
Grow and develop the SEM workforce.

4.a.

Build clear professional development pathway to support members entering the SEM workforce and practitioners throughout all stages of their career from new to the field to seasoned professionals.

POTENTIAL ACTIONS

- Establish priority and timing of SEMC professional development offerings by scoping/ planning each including preparing schedule, resource and revenue projections associated with development & implementation of these major projects.
- TBD: Development of (specific) educational, training & certification resources/ initiatives.
- TBD: Implementation of (specific) educational, training & certification efforts.



5

GOAL 5

SEMC organizational development and growth

5.a.

Build organizational capacity to execute SEMC's mission.

POTENTIAL ACTIONS

- Engage, develop and support active volunteers.
- Execute efforts to transition event attendees into members/ volunteers, with strategies to convert.
- Procure professional services contractor(s) to plan, project manage & deliver high priority, risky, labor-intensive actions/projects.

5.b.

Develop plans aligned with org mission and strategic goals to guide and streamline operational decision-making and execution of work by staff and volunteers.

POTENTIAL ACTIONS

- Develop a growth and marketing strategy to address who we want to engage/ reach, why and outline how it will be executed.
- Develop and implement a plan to increase our resources/ revenue, including increasing membership.
- Convert Chapter engagement into prospective/ new organizational members.



SMART OBJECTIVES: EXAMPLE METRICS AND TARGETS

The table below provides a starting point and example of the metrics that will be set, tracked and reported to assess progress against adopted Objectives in this strategic plan. This table of Metrics/ KPIs and specific Targets will be reconsidered and updated annually as part of the annual Action Planning process.

OBJECTIVE	METRIC / KPI (Example)	TARGET (Example)
1.a. Engage Program Administrator (PA) / Utility Members	- Number of PA members on SEMC Board & in other visible org member leader roles. - Percentage of PAs in SEMC events and initiatives.	- Two (2) PA Board members added by Q2 2027 - Four (4) new PA volunteers/presenters recruited by Q4 2027 20% of SEMC attendees/participants are PAs by Q1 2028
1.b. Create opportunities for members to share their expertise	Working Group Leads & Participants, SEM Summit attendees, and Members' satisfaction with sharing of expertise that occurred.	>90% satisfied by end of 2027
1.c. Develop & connect Regional Chapters with each other and the organization	- Chapter officer satisfaction with collaboration with SEMC org and with other Chapters. - Number and type of programs/resources/practices shared between Chapters. - Number of Chapter members/participants. - Attendance at Chapter events.	>90% satisfied by end of 2027 - At least one shared program/resource/practice adopted across Chapters annually - Chapters should set their own targets annually
2.a. Increase understanding of SEM and its value	- Inclusion of consistent, simple, clear definition/ description of "SEM" in Collaborative communications and events. - Relevant information about the value and effectiveness of SEM or SEM programs reaches appropriate audiences.	- Adopted description of "SEM" incorporated as standard language on website, event materials, presentation templates by June 2027. - Three targeted audiences receive relevant new information about the value and effectiveness of SEM or SEM programs by June 2029.

2.b. Expand reach to include and affect non-members/those outside our current SEM community	• Number of (valid) non-member orgs and contacts in SEMC email/ newsletter lists. • Number of non-member orgs and attendees at SEMC and Chapter events. • Number of outreach activities or presentations targeting non-SEM audiences/ attendees.	• >90% satisfied by end of 2027
3.a. Convene the community to address program design, implementation and evaluation challenges	• Number of Active Working Groups (WGs) • Reach and Impact of Working Group Efforts	• Form two (2) new WGs to work on strategic topics by March 2028 • All active WGs produce and disseminate their findings/ work to the community or beyond annually, by December 2028
3.b. Identify & promote effective SEM regulatory/EE program policy frameworks	• Relevant information collected, compiled, analyzed, & findings published. • Outreach/ Information disseminated to NARUC, regulatory agencies, other policy/ planning stakeholders.	• One (1) research project complete/published by December 2028 • Information provided to > 50 regulators/ stakeholders by December 2029
3.c. Build policy/ advocacy partnerships & capabilities	• Communication channels established for rapid policy coordination with EE/energy partner organizations. • Policy monitoring surfaces useful information that is relevant to SEMC and its members and actionable. • Policy information/ recommendations provided to members are easy/ appropriate for them to take action on. • Members and Partners take action based on SEMC recommendations/ support.	• Three (3) Partner organizations engaged by December 2027 • Policy monitoring processes established/ documented and being implemented by Q2 2028 • Member satisfaction with SEMC policy info/ advocacy efforts > 90% by December 2028 • 10 Members or Partners take action due to information or recommendations provided by SEMC by March 2029

4.a. Build clear professional development pathway to support practitioners throughout the stages of their career	• Prioritization determined and plan established for development and implementation of specific professional development offerings. • TBD: Other specific metrics/ KPIs and timing are dependent on prioritization/ plans for professional development services/ offerings pursued.	• Professional Development offerings prioritization/plan presented, and 2027 budget approved by Board by Q1 2027 • TBD
5.a Build organizational capacity to execute SEMC's mission	• # of active volunteers in: ◦ programmatic or operational functions/ committees ◦ actively participating in or leading working groups ◦ leading/ contributing in regional chapters • Volunteer satisfaction • # of member orgs • Qualified consultant(s) contracted to support/ deliver implementation of key strategic actions/ projects	• Increase # of active volunteers by 10% by Dec 2027, and 5% annually for next 4 years • Volunteer satisfaction > 95% by December 2027 • See membership grow annually from 2028-2031 • Procurement and execution of one new professional services contract by September 2027; second by September 2028
5.b Develop plans aligned with org mission and strategic goals to guide and streamline operational decision-making and execution of work by staff and volunteers	• Communications, Events and Membership Committees/ functions use Growth & Marketing Plan to inform/ guide their work. • A 3-5 year revenue growth plan identifies, weighs, and recommends multiple viable approaches to increase organizational revenue. • TBD: implementation of (specific) revenue growth effort(s) yield increases in revenue and capacity to achieve our goals.	• Marketing Plan complete by end of Q1 2027 • Revenue/ Membership Growth Plan complete by May 2027. Approved by Board by July 2027 • TBD

APPENDICES

Supporting context, process and ideas

1. Glossary of Strategic Plan Elements
2. The Strategic Planning Process
3. Tools of the Trade: How We Work to Achieve Goals
4. Detailed Ideas & Topics Harvested



1. Glossary of Strategic Plan Elements

Mission: For what unique purpose does the SEMC exist? Our mission statement answers this question by concisely stating our core purpose, who we serve, and what we do. It, along with our vision and values, advises us on our objectives, priorities, and other decision-making, while distinguishing us from other organizations.

Vision: What is the Collaborative's ideal future state for our industry and beyond? What world are we aspiring to create? The Vision states the dream.

Values: Our core values are the deeply embedded, non-negotiable principles that form the foundation of our behavior, decision-making, and culture. They define "how" we operate to meet our mission and achieve our vision, acting as a north star for staff and the board while building trust with our members. Core values are durable and long-lasting.

Guiding Principles: These familiar design principles and operating guidelines surfaced in planning sessions with leadership and in community input processes. They carry forward what has been learned by the SEM community over many years of collaboration and reflect current circumstances with cross-cutting ramifications. They underlie the foundation of the goals and objectives that follow. Applicable guiding principles should be considered and addressed when planning and implementing specific Actions to meet the Collaborative's Goals.

Goals: Goals are our three to five most important strategic priorities in the medium-long term. They are broad, visionary, high-level aspirations that define our aims (the "what" and the "why"). They are consistent with our mission and values and lead us toward our vision.

Objectives: Objectives are actionable, measurable steps that define how our goals are achieved within a set timeframe. Goals provide direction, while SMART Objectives specify the near- and mid-term outcomes sought to make progress and track success. What makes them SMART is that they are described as Specific, Measurable, Achievable, Relevant, Time-bound.

Actions: Actions are examples of specific work/ tasks that may be undertaken to achieve Objectives. An Annual Action Planning process is executed by staff and volunteer leaders, subject to Board review and approval. The Annual Action Plan translates the strategy into annual work plans with clear actions/ tasks to achieve progress on Objectives and Goals, including owners, resources required, timelines, and dependencies. This process connects the strategic plan to budgeting and contracting, staffing/ volunteer resource requirements, board agendas, fundraising, communications, events and program operations.

2. The Strategic Planning Process

The Strategic Planning Committee

The Board's Strategic Planning Committee was formed in March 2026 and began its work in April 2026. The committee was chaired by Kim Crossman (Board President), and included Pam Birkel (Board Treasurer), Kati Harper (Director at Large) and Krystal Marx (Executive Director). The strategic planning committee diligently planned and executed the project, adhering to a rigorous schedule to prepare and present this strategic plan to the Board in time to inform and guide 2027 work planning and budgeting processes.

As a newly independent nonprofit organization as of Q4 2025, this is the first multi-year strategic plan developed to guide the SEM Collaborative's work. As a first step, the committee considered the purpose and scope of the planning effort and determined that there was first a need to establish foundational elements such as the organization's Mission, Vision and Values, and then to identify what the organization should set out to accomplish over the next 3-5 years (Goals and Objectives). The committee aligned around these plan elements by developing a glossary of terms (Appendix 1), and planned the leadership, member and community information and input gathering processes that would be executed to develop them. Board feedback was sought on the purpose, scope and schedule of strategic planning, and the Board was kept updated on the progress of the planning effort throughout the 6-month period.

Leadership, Member and Community Input Processes

Board Sessions on Mission, Vision and Values.

Board members were engaged in two facilitated sessions in May 2026. Prior to the first session, Board members received the glossary of terms defining Mission, Vision and Values, and a set of questions seeking their independent written responses. Verbatim responses to these questions were collected, synthesized and shared prior to meeting to provide a starting point and anchor for the discussion.

- Mission: For what unique purpose does the SEMC exist? Who do we serve and what do we do?
- Vision: What is the Collaborative's ideal future state for our industry and beyond? What world are we aspiring to create?
- Values: What are the 3-7 non-negotiable principles (core values) that define how we behave and work in this organization? How do these values directly influence our ability to achieve our mission?

Following the sessions, the committee synthesized written responses with session notes and transcripts to develop draft Mission, Vision, and Values statements. Board members provided feedback on the content and style of these, which the committee considered and incorporated to finalize these core plan elements.

Member Interviews.

The committee held interviews with SEMC members. A structured interview process including a scripted interview guide were developed and used to promote consistency and support rapid compilation and analysis of information gathered. The questions addressed in the interviews were:

#	Focus	Question
Q1	Market landscape	What's the most significant change you've seen in the SEM landscape in the last few years?
Q2	Threats and opportunities	What's the biggest threat to SEM's long-term viability -- and what gives you the most optimism?
Q3	Field needs and scope	What does the SEM community need most right now that it doesn't currently have -- and where is energy being spent that isn't moving the needle?
Q4	SEMC value and ecosystem fit	What do you rely on SEMC for, and where does it fit alongside the other organizations you work with?
Q5	SEMC strengths and gaps	When you think about what SEMC does well, and where it falls short -- what stands out?

Out of the 25 member orgs targeted for interviews, 18 were completed in early June. Additionally, Board and Leadership Circle Members who would be participating in an upcoming leadership planning retreat responded to a survey request asking them to provide written responses to the questions, which was incorporated into the interview data set. Ultimately, 31 out of 40 total members provided input on the interview questions.

The member input gathered was compiled and analyzed. The analysis surfaced valuable insights about member priorities, including the alignment of member experiences with the draft Mission, Vision and Values statements and a situational analysis of the organization's internal strengths and weaknesses and external opportunities and threats (SWOT) to support development of Goals and Objectives.

Leadership Planning Retreat.

The Board, Executive Director and our first Leadership Circle Member gathered in multiple virtual half-day meetings in late June focused on surfacing potential Goals and Objectives. The analysis from member interviews provided the starting point and anchor for ideation in group processes. Discussions focused on what opportunities or challenges would be most important for the Collaborative to address to achieve our Mission and what the org should do about these things over the next 3-5 years. Input gathered in the Leadership Retreat sessions was compiled and synthesized to develop a rough draft of Goals and Objectives.

SEM Summit Interactive Session.

The draft plan was presented and additional community input on draft Goals and Objectives was gathered at the SEM Summit in Pacific Grove, California on August 3, 2026. Approximately 72 people participated in the input session, including SEM practitioners from Collaborative member organizations, representatives from partner organizations such as CEE, ACEEE and Lawrence Berkeley National Lab (LBNL), and attendees from the broader EE stakeholder community, most of whom are less familiar with SEM and the work of the Collaborative. Five stations were set up around the room, with each focused on a Goal and associated Objectives. Participants were asked to consider their three highest priorities to advance SEM in the near or long term, whether these priorities were already represented in the draft plan, and if they were not, to add these ideas as sticky notes. Participants were then asked to add dots to draft goals or objectives or to new ideas that they thought were the most important or compelling.

This information was compiled and incorporated into the draft plan where appropriate. Some of the input received confirmed or reinforced elements of the draft plan, and other input raised important cross-cutting strategies for how we work together that have been incorporated into the Guiding Principles section of this plan. Many of the compelling ideas gathered at the Summit focus on specific emerging topics of interest community members would like to explore, or recommendations for programmatic or operational tactics, which nest below the level of this strategic plan's Goals, Objectives and potential Actions. These have been listed and categorized in Appendix 4. Detailed Ideas and Topics Harvested, as they should have relevance and be useful for those scoping and planning specific strategic initiatives, projects or other efforts will be undertaken to meet many of the objectives in this plan.

Volunteer Input

During the final weeks of plan development, some outreach occurred with current Member Leaders to vet the plan and discuss its application to their ongoing work in the org. Feedback or ideas received from leadership of two Regional Chapters and one Working Group has been considered and incorporated into the plan where appropriate. Other volunteers were exposed to the draft plan and provided input through other input processes described above.

Going forward, Staff and volunteer leaders will develop annual Action Plans and Budgets that are tied to the plan's Goals, Objectives and associated Metrics. These annual work planning processes and ongoing assessment of progress provide an opportunity for those responsible for implementation to justify and propose needed changes to the plan's Objectives and associated Metrics over the five-year plan period.

3. Tools of the Trade: How We Work to Achieve Goals

The SEM Collaborative currently deploys multiple well-established activities, offerings and tools to serve our members and execute our shared mission. These include:

- Live and online **events** including an annual SEM Summit conference, workshops, webinars and social events, which are produced by the Collaborative and by Regional Chapters. Collaborative events are designed to maximize peer-to-peer learning, yield active engagement by attendees, and foster community connections.
- Monthly electronic **newsletters** promote awareness and involvement in the organization's current and upcoming activities, provide relevant news and updates to the SEM Community and beyond.
- The Collaborative's **website** houses an **SEM library** including research, white papers, case studies, tools.
- **Working Group** participation offers a valuable opportunity for beginners and experts alike to learn from one another and collaborate to develop and deploy strategies and solutions for specific, pressing SEM challenges, opportunities and trends. SEMC Working Groups are open to all interested participants.
- **Regional Chapters** create a space for SEM practitioners and other stakeholders to explore local challenges and opportunities for SEM, develop solutions, and build deeper relationships with peers from their local community.
- Members of the **SEM Coaching Certification Committee** are exploring and designing a professional certificate credential for SEM Coaches.

It is expected that these valued events, resources and group structures will continue as primary "tools" the Collaborative uses to accomplish our work together over the next five years. Going forward, adoption of this Strategic Plan should provide a more consistent and strategic focus for these efforts: agendas, topics addressed, resources produced and the scope of initiatives should ideally be aligned with and contribute to achieving the Goals and Objectives established in this plan.

Research and Dissemination of SEM Information

To increase awareness and acceptance of SEM (Goal 2), to advance effective SEM practices, programs and policies (Goal 3), and to grow and develop the SEM workforce (Goal 4), the Collaborative must gather and share valuable, trustworthy information within the SEM community and beyond it. The peer-to-peer information sharing that occurs organically in real time in our Working Groups, Regional Chapters, at our events and in our communications is effective and timely to help practitioners improve. But influencing those outside of the inner circle of current SEM practitioners to expand markets or drive other broader changes will require dissemination of more targeted information, findings and recommendations to the intended audience. The strategic value of this type of work was raised frequently in planning input sessions with SEMC leaders, members, and the broader community.

Our Approach to Gathering and Disseminating SEM Information

Research and dissemination of new information is a high effort activity with potentially high strategic value if scoped and executed well. Historically, the SEM Collaborative and its predecessor the NW SEM Collaborative have produced this type of work primarily through Working Groups or a Research Committee staffed by member volunteers, with some support in finalizing deliverables and disseminating info from the administering org and/ or its consultants. In a few instances, the Collaborative has co-funded research executed by ACEEE staff.

Going forward, as a very small, independent non-profit, there will be a need to consider how best to resource and execute these types of efforts, as our current volunteer-staffed approach greatly limits what is possible. We also need to ensure that organizational resources produce new, strategically valuable and sound information with a clear purpose and plan for dissemination that serves our goals. Requests for org resources supporting specific projects along with their scope/plan should be part of annual Action Planning and subject to Board approval.

We have a remarkable strength that offers a unique opportunity to succeed in these efforts. Combined, the Collaborative's community of SEM practitioners, including implementers, program administrators, evaluators and other consultants, are the best and most current source of detailed information about how SEM practices and programs are being applied in the field, what is working, what challenges they face and what the ultimate results of these efforts are.

Policy / Regulatory Advocacy

Policy and regulatory outreach and advocacy is another new activity the Collaborative will be implementing over the next five (5) years. This type of work was anticipated by leadership when our 501(c)(6) nonprofit was formed in 2025, the need for it surfaced again in strategic planning input processes, and it has been incorporated within this plan as Objectives 3.b and 3.c. under Goal 3: Advance effective SEM practices, programs and policies.

Unless scoped and managed carefully, policy/regulatory work has the potential to be both high effort and high complexity/risk, with only medium benefit. But this is not how we are envisioning approaching the work. To proactively prevent overwork or error, we are anticipating that policy and regulatory efforts will be centrally planned and managed by staff leadership. As this new work area develops and evolves, the need for other individual volunteers, new groups such as a new Committee or Task Force, the role of Regional chapters and/or member engagement to support and guide these efforts will be considered and established.



4. Detailed Ideas & Topics Harvested

Many specific ideas or topics for exploration/ action were raised during the strategic planning input processes. While this level of detail was not incorporated in this 5-year Strategic Plan as an Objective or potential Action, we have documented them in this appendix. These ideas and topics should have relevance and be useful for those scoping and planning what specific strategic initiatives, projects or other efforts will be undertaken to meet many of the objectives in this plan.

Please note that categorization of ideas and topics below by potential use/owner in this appendix are just suggestions based on alignment with the current purpose/characteristics of those groups or functions. But any idea or topic listed below may be of interest to others. Where topics or ideas are connected to new Goals or Objectives, they are categorized by the associated Goal or Objective.

- **Regional Chapters** ideas are directly related to the establishment, development, role and operations of Regional Chapters and their relationship with SEMC.
- **Events Agenda** list includes interesting one-off topics that push the envelope. Many attendees don't already know about this, but a few do, so could be well-suited for a presentation at an org or regional live event or webinar. But these might also work well for a newsletter article.
- **Working Group** topics are those best addressed collaboratively in a deeper, applied way by groups of current SEM practitioners with exposure to the field/ market. But most Working Group outputs eventually are presented at events and/ or published as new information or tools on our website.
- **Communications/Marketing** ideas fit primarily within that Committee's function, and they could be most appropriate to scope and plan what is done, but actual development of new SEM information resources may be executed by others.
- **Research & Dissemination** topics surface the essential, high value information the community thinks is most needed to advance and spread SEM and SEM programs. (Objective 2.a and Objective 3.b). What specifically will be done and who would "own" execution is TBD.
- **Professional Development** topics and ideas apply to Goal 4 and Objective 4.a. What specifically will be done and who would "own" execution is TBD.
- **PA/Utility Engagement** topics and ideas apply to Objective 1.a. What specifically will be done and who would "own" execution is TBD.

Regional Chapter Ideas

- Create Mid-Atlantic Chapter to foster local SEM community
- Customized support for Regional Chapters to address program or state-specific challenges.
- Develop, document and deploy a cohesive SEMC org – chapter strategy
- Add organizational diagram for clarity of relationship between SEMC and chapters
- Define what SEMC provides to Chapters and what Chapters provide to SEMC
- Conduct an annual Chapter needs assessment
- At least one program/ resource/ practice shared
- Determine how much money SEMC can realistically devote to Chapters' activities and how it should be allocated. Equal funding may not make sense given differences in Chapter size, maturity, geography, and programming.
- Include non-traditional players/ stakeholders/ those outside of SEM inner circle in the chapters
- Encourage cross-chapter mixing to support peer to peer learning
- SEMC to create marketing/ outreach materials centrally for Chapter use/adaptation.

Events Agenda Topics and Ideas

- Incorporating AI in SEM
- SEM and RCx: similarities and differences, incorporating RCx technical service providers in SEM efforts
- SEM practices applied to optimize supply chains
- Delivering step changes in industrial electrification & load flexibility
- Sequencing capital plans for retrofits to optimize outcomes
- Positioning SEM for abundance
- The interplay of participant development and workforce development
- SEM Career change pluses & minuses
- Idea: Provide newcomers/ those from outside the SEM community with simple, clear introductory information about what SEM is in event materials or intro presentations.

Working Group Topics

- How SEM can support demand flexibility
- Customer capacity limits/ reducing SEM participation burden.
- Program design elements that constrain or maintain the benefits of SEM.
- Recruitment challenges.
- What to offer advanced participants
- How to scale SEM to expand reach & impact
- Streamlining processes to scale up cohorts
- Opportunities to expand SEM to building types not traditionally included in SEM programs
- Strategies, tools and practices for smaller, under-resourced utility customers.
- Practical strategies to integrate decarbonization opportunities such as industrial heat pumps, embodied carbon, and others.
- SEM deployment direct to market, outside of utility programs.
- SEM alignment with Building Performance Standards

Working Group Topics, cont'd

- Bridging between new construction & operations: incorporating SEM info into handover of new buildings.
- How to grow & develop an SEM workforce that is embedded at end-use customers sites
- Tools for assessment, analysis and capital planning
- What types of organizations and/ or organizational characteristics present the ripest opportunities for SEM.

Communications & Marketing Ideas

- Create shareable success stories and case studies
- Increase end-user awareness & acceptance
 - How do we bring end-use customers into this conversation?
 - Marketing/ telling the SEM story
 - Branding of SEM: make it a “household name”
 - Differentiating SEM from previous experience (good & bad) with utility programs
- Expand SEMC Resource Library of white papers, articles, etc.
- Tools for assessment, analysis and capital planning
- Include SEM value proposition in standard docs/ curriculum
- Build recognition of SEM’s value in specific C&I sectors (ex: healthcare, higher ed, food & beverage)
- SEMC to centrally create a Chapter/ members communications toolkit of marketing/ outreach materials for their use/adaptation in outreach. (Ties to Objective 2.b)
- Steward, protect and promote broad use/ adoption of the Collaborative’s definition of SEM.

Research & Dissemination Topics

- Information about the effectiveness & value of SEM practices (Objective 2.a)
- What is the “secret sauce” that makes the whole of SEM greater than its parts?
- Articulate the value of SEM within a program portfolio and in evaluation
- What constitutes effective SEM across different sectors & levels of maturity?
- Guidance on effective practices in SEM program design & implementation
- Standardizing tools & strategies for helping customers
- Information about effective SEM regulatory/ EE program policy frameworks (Objective 3.b)
- Success stories – making it resource acquisition
- Research/ compile regulatory rules, associated evaluation findings & factors (EUL, NTG, etc.) for SEM programs
- Methods to incorporate SEM savings in EE planning & resource potential models
- Justifying longer EUL for SEM measure savings
- Dual-fuel SEM engagements: technical, savings and delivery benefits & opportunities

Professional Development Topics/Ideas

- Add SEM modules/ information to the curriculum for building trades technical training and certification
- Enhance existing and create new on-demand basics & resources, part of a curriculum or some sort of “passport book” to build competency
- Gamification to attract people to career
- Coaching vs. consulting
- SEM training/ curriculum for new engineers, including what SEM is and its impact.
- Create attractive job pathways graphic showing various SEM career trajectories/ roles/ titles

PA/Utility Member Engagement Topics/Ideas

- PA member webinars hosted quarterly.
- How SEM can support utility interests beyond EE (e.g. flex demand)
- Integration of effective SEM program design strategies into the wider portfolio (capital/prescriptive, solar programs, etc.) and M&V implications
- Non-savings benefits of SEM: other value/ persistence metrics for assessing program success



Strategic Energy Management Collaborative

Advance Strategic Energy Management (SEM) by connecting people, sharing knowledge, and strengthening the SEM community.

Strategic Plan (2027-2031)

