

User Guide for Local Energy Efficiency Self-Scoring Tool, Version 3.0

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August 2017

Report U1709

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Acknowledgments

We are grateful to all who contributed to the development of the Local Energy Efficiency Self-Scoring Tool. This project was made possible through the generous support of the Kresge Foundation.

Thanks to the ACEEE staff members who acted as project advisers and reviewed and commented on drafts: Steven Nadel, Neal Elliott, Maggie Molina, and Lauren Ross. Thanks also to ACEEE staff who supported the production of the user guide and tool along with the related communications, especially Patrick Kiker, Eric Schwass, Maxine Chikumbo, and Wendy Koch. Special thanks to Fred Grossberg for managing the editorial process and to Elise Marton, Sean O'Brien, and Roxanna Usher for copy editing.

ACEEE is solely responsible for the content of this guide and tool.

Quick Start Guide

The Local Energy Efficiency Self-Scoring Tool, Version 3.0 lets you assess any community's energy efficiency efforts. You do so by evaluating your community's locally enacted or implemented activities across local government operations, community-wide initiatives, buildings policies, energy and water utilities, and transportation policies. Through the scoring process, you can compare the community's energy efficiency efforts against median scores from the *2017 City Energy Efficiency Scorecard* (Ribeiro et al. 2017). Benchmarking puts communities' scores in perspective and can introduce you to practices that have proved successful in other communities. You can also use the tool to identify your community's strengths in energy efficiency policymaking as well as areas needing improvement.

You can download the Self-Scoring Tool at aceee.org/local-policy/city-scorecard.

Layout of the Local Energy Efficiency Self-Scoring Tool

The tool consists of seven Excel worksheets.

Introduction. This landing page discusses the tool's aims and has brief instructions for using it.

Policy area worksheets. Five worksheets correspond to the areas in which you evaluate your community's energy efficiency policies: local government operations, community-wide initiatives, buildings, energy and water utilities, and transportation. You respond to questions on each of these worksheets to score your community.

Analysis. Our analysis displays your community's scores and benchmarks them against median scores from the *2017 City Scorecard*.

The following instructions are a concise guide you can reference while using the Self-Scoring Tool. We recommend that you review this entire user guide before engaging with the tool so you fully understand its goals and features.

Step 1. Read the information on the Introduction worksheet and enter the community information requested.

Step 2. Proceed to a policy area worksheet (such as local government operations) and glance over the metrics and questions in Columns A and B. You can find comments regarding many of the questions in Column B by moving the cursor over a cell.

Step 3. Return to the top of the worksheet and provide preliminary information. If you do not, scoring errors will occur.

Step 4. After you provide the preliminary information, respond to the first question posed in Column B by answering it in your own words in the answer column, Column C. It is important to complete this column fully by recording the pertinent policy or program names, local government ordinances, or other information. These data will allow us to verify that you scored your community correctly.

- We recommend that you review the scoring criteria found on the drop-down menus in Column D before answering questions to understand how the questions relate to the methodology.
- If you do not have the data to answer a question, see Column F for a recommended data source.
- Cells in Column C that are **medium-blue** are locked. In these cases, the cell values will be automatically filled in from information you previously provided.

Step 5. After answering a question in Column C, select a scoring criterion from the drop-down menu in Column D that best fits your answer in Column C. Once you select the scoring criterion, Column E will display the score.

Step 6. After working through the questions in one policy area worksheet, go to the next worksheet and complete it in the same way as outlined in steps 3 through 6. Repeat this until you have completed all policy area worksheets.

- It is important to answer all the questions on each policy area worksheet. This is the only way to get a comprehensive assessment and benchmarking of energy efficiency efforts.

Step 7. After you complete your community's evaluation, go to the Analysis worksheet to review the results and see a comparison of your community's score with median scores from the *2017 City Scorecard*.

We base our analysis on the metrics and questions to which you have provided responses. We provide a more detailed discussion of the tool's analytical functions in the instructions that follow in this user guide.

Introduction

The *2017 City Energy Efficiency Scorecard* rates 51 large US cities on the basis of their policies and leadership in advancing energy efficiency (Ribeiro et al. 2017).¹ More than 50 metrics in the *City Scorecard* evaluate efforts across local government operations, community initiatives, building policies, energy and water utilities, and transportation policies. The *City Scorecard* applies these metrics to large cities, but the same metrics can be valuable to other communities trying to reduce energy waste.

With these ideas in mind, we translated the metrics of the *2017 City Scorecard* into the Excel-based Local Energy Efficiency Self-Scoring Tool, Version 3.0. You can use the tool to benchmark your community's current energy efficiency efforts across the same policy areas addressed in the *City Scorecard*. The Self-Scoring Tool also compares your community's scores with the median scores from the 51 cities in the *City Scorecard*. These comparisons help put your community's scores into better perspective. You can also measure progress over time by using the tool to reevaluate efforts as the community implements new policies.

Because we have already scored the largest US cities in the *City Scorecard*, we envision small and medium-size localities to be the primary users of the tool. The tool can inform the energy policy decisions of smaller, more resource-constrained local governments and assist them in prioritizing future investments. It gives a policymaker, stakeholder, student, or informed citizen the opportunity to score a community's energy efficiency efforts in an easy, transparent manner. The following are some ways that stakeholders can use the tool:

- Sustainability staff can benchmark municipal energy efficiency efforts to get a better understanding of their progress and inform future policy decisions.
- Nonprofit organizations can learn about new energy efficiency programs and policies to consider for their community, which they can advocate for or work to implement.
- Informed citizens can measure and track the energy efficiency progress of their community and learn about the strengths and weaknesses of current programs, in order to keep local officials accountable for these efforts.

After scoring your community, we encourage you to submit your results to ACEEE by sending the completed Self-Scoring Tool to cityscorecard@aceee.org. Resources permitting, we will publish the results of leading and innovative communities in our State and Local Policy Database.² This database lets us publicly recognize municipalities and share information on their activities with other local governments.

When publishing or citing your results from the Self-Scoring Tool, please use the following format:

¹ The *City Energy Efficiency Scorecard* is available at aceee.org/research-report/u1705.

² The State and Local Policy Database is available at database.aceee.org.

[User's name]. [Year]. Based on analysis of self-reported data using the ACEEE Local Energy Efficiency Self-Scoring Tool (2017).

Please do not attribute the results and scores for a jurisdiction to ACEEE unless you have submitted the data to ACEEE and we have verified the scores.

There are no version requirements for using the Self-Scoring Tool on a PC or Mac computer. The tool should work on all versions of Microsoft Excel. If you encounter any issues while using the tool, please contact us.

Instructions

The Self-Scoring Tool gives you an opportunity to catalog locally enacted energy efficiency efforts and benchmark energy efficiency policies. It takes time to learn how to properly use the Self-Scoring Tool, collect the pertinent data on energy efficiency activity, and subsequently use the tool to score the community. The total time it takes depends on the complexity of your community's energy efficiency policies and how familiar you are with the community's policy landscape.

INTRODUCTION WORKSHEET

When opening the Self-Scoring Tool, you will start on the Introduction worksheet, as shown in figure 1 below.



Local Energy Efficiency Self-Scoring Tool, Version 3.0

Last Update: 08/23/17

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With these ideas in mind, we translated the metrics of the 2017 City Scorecard into the Excel-based Local Energy Efficiency Self-Scoring Tool, Version 3.0. You can use the tool to benchmark your community's current energy efficiency efforts across the same policy areas in the City Scorecard. The Self-Scoring Tool also compares your community's scores with the median scores from the 51 cities in the City Scorecard. These comparisons help put your community's scores into better perspective. You can also measure progress over time by using the tool to reevaluate efforts as the community implements new policies.

The tool can inform the energy policy decisions of smaller, more resource constrained local governments, and assist them in prioritizing future investments.

Community name	Number of community households	State population
Community population		
US census	US census	US census

Note: Please complete the cells to the left before moving on to the next tab. We provide a link to the US census to help you find the number of households in your community as well as your state's population

Instructions: Before using the *Self-Scoring Tool*, we recommend you reference the *Local Energy Efficiency Self-Scoring Tool User Guide* available at aceee.org/local-policy/city-scorecard.

The following instructions are a concise guide you can refer to while using the *Self-Scoring Tool*.

Step 1. Read the information on the introduction worksheet and enter the community information requested.

Step 2. Proceed to a policy area worksheet (such as local government operations) and glance over the metrics and questions in Columns A and B. You can find comments regarding many of the questions in Column B by moving the cursor over a cell.

Step 3. Return to the top of the worksheet and provide preliminary information. If you do not, errors in score will occur.

Figure 1. Introduction worksheet

Before going to other worksheets, please read the introduction and instructions on this worksheet. They give important highlights from this user guide and suggest how to use the tool best. After reading those notes, please complete the community information requested on the worksheet, including population and number of households. The tool will use these values in calculations that follow.

POLICY AREA WORKSHEETS

After reading and completing the Introduction worksheet, you will choose one of the five policy area worksheets (local government operations, community-wide initiatives, buildings policies, energy and water utilities, and transportation policies) to begin scoring your community. Each worksheet is set up with a series of multiple-choice questions. We give you a set of questions, space to respond to the questions, and multiple-choice options. Figure 2 shows one of the policy area worksheets.

Transportation policies					
Transportation policies total		2 of 30 points			
Sustainable transportation plan		2 of 4			
Location efficiency		0 of 6			
Mode shift		0 of 6			
Transit		0 of 5			
Efficient vehicles		0 of 3			
Freight system efficiency		0 of 3			
Affordable housing in transit-oriented developments		0 of 3			

<p>Note: You must answer the preliminary information questions before moving on to other questions. If you do not answer these questions first, errors in scoring will occur.</p>	Preliminary information		Recommended source
	Average total funding from five most recent years for transit systems that serve the community	\$1,198,889,390	National Transit Database
	Metropolitan statistical area population (in most recent year for which data are available)	900,000	Census Bureau

Sustainable transportation plan					
Metric	Question	Answer (Document programs and	Scoring criteria (Select best option from drop-down)	Score	Recommended source
Sustainable transportation plans and targets	Does your city have a standalone sustainable transportation plan? If not, has the city outlined sustainable transportation strategies as part of a broader city plan, like a climate action plan or sustainability plan?	Yes, the city has developed the Sustainable City Transportation Plan	Yes, the city has a standalone sustainable transportation plan in place.	2	Community research
	Does your city have specific VMT reduction targets or CHG emissions reduction targets for the transportation sector?				Community research
	Not applicable				Community research

Location efficiency					
Metric	Question	Answer	Scoring criteria	Score	Recommended
	In its zoning code, has your city removed or reduced minimum parking requirements for new				

Figure 2. Transportation policies worksheet

The following is the column layout for the policy area worksheets:

- Column A: Metric. This column identifies the metric to which the question in Column B refers.
- Column B: Question. This column has a question related to the metric listed in Column A.
- Column C: Answer. This column has a cell where you can key in your reply to the question posed in Column B. It is important to fully complete this column in order to record the specific policy or program information for your community. You should record policy or program names, local government ordinances, or other references in these cells. In a few instances, you cannot alter cells in Column C. We have colored these cells **medium-blue**. In these cases, the value in the cell will be automatically filled in from information in previous inputs.
- Column D: Scoring criteria. Here you filter your answer in Column C into one of ACEEE’s multiple-choice scoring criteria. You click on the cell to unlock a drop-down menu. Then you select the option that best fits your description in Column C.
- Column E: Score. Once you select an option in Column D, Column E automatically updates to reflect the score for a metric.
- Column F: Recommended source. This column suggests a data source to help you respond to each question.

We also include questions at the top of each worksheet in a box labeled “Preliminary information.” You must answer these before completing others in the section. If you do not, scoring errors will occur.

Questions on these worksheets will change depending on the preliminary information you provide. If the text in a cell changes to “Not applicable,” skip that question.

Data Source Recommendations

To complete the Self-Scoring Tool, you will need to collect information from different data sources. To help streamline this process, we recommend sources when possible so you can locate relevant data quickly. In some cases, central data sources contain the information to address questions in the tool. In these cases, we provide web links in Column F of each policy area worksheet that take you directly to the data sources. We have also provided comments in the cells with the web links to explain how to retrieve data once you have clicked through to the website.

For many metrics, we recommend engaging with local government staff to collect information. We signify this for a metric by inputting the term “Community research” in Column F. This will be necessary when a central data source does not exist to address those metrics. When we used the tool to score the two communities that we profile later in this guide, we gathered much of this information directly from the local government offices responsible for developing and implementing energy plans. When conducting community research, you may wish to follow a few guidelines to get the data you need:

- Investigate whether the community has a comprehensive energy or climate plan that addresses energy efficiency-related topics.
- Conduct a simple web search or browse your community’s local government website to determine which agency or department administers energy efficiency goals or programs.
- If no one agency or department oversees energy efficiency policy, you may need to ask multiple offices for information. For instance, the office of administrative services may have information on energy efficiency initiatives in local government operations, while the planning department has information on location-efficient zoning codes.
- Finally, it may be easier to contact an energy manager or sustainability staff member directly. This person will be able to guide you to the appropriate information or answer your questions.

Other Navigational Features

To make the tool intuitive and help you use it accurately, we have embedded features directly in each policy area worksheet. Please keep these in mind as you use the tool.

- We provide comments for many metrics to help you understand each question’s context. You can read comments for a particular metric by holding the cursor over a question, or you can see all comments on a worksheet by selecting the Show All Comments button in the Excel toolbar. Each metric with a comment has a small red triangle in the upper right-hand corner of the cell.

- We have color-coded all scoring cells in the Self-Scoring Tool to distinguish the locked cells from those you need to address. Respond to the **light-blue** cells; those in **medium-blue** are locked, so you cannot edit them.

ANALYSIS WORKSHEET

The Analysis worksheet analyzes scores as you respond to questions on the policy area worksheets. You can review the Analysis worksheet as you respond to each metric to get a snapshot of how your community is performing.

The purpose of the analysis is to put scores in a comparative framework. While a community's overall score is an objective representation of performance, it is difficult to know if a community is "doing well" without having a means of comparison. For example, if your municipality receives a score of 55, is it failing in its efficiency efforts? Or does a 55 indicate a strong suite of energy efficiency programs? The analysis tries to answer these questions.

The points we allocate to each policy area and metric are the same as they are in the *2017 City Scorecard*. You can find the maximum score for each policy area and metric on the Analysis worksheet. The highest possible total score a community can receive is 100. The *2017 City Scorecard* provides more information on each metric and its point allocation (Ribeiro et al. 2017).

The Analysis worksheet has two sections: a high-level snapshot of results and a detailed breakdown of scores. The first feature of this worksheet is a bar graph aggregating your community's score and comparing it with median scores from the *2017 City Scorecard*. Figure 3 displays this bar graph from the tool.

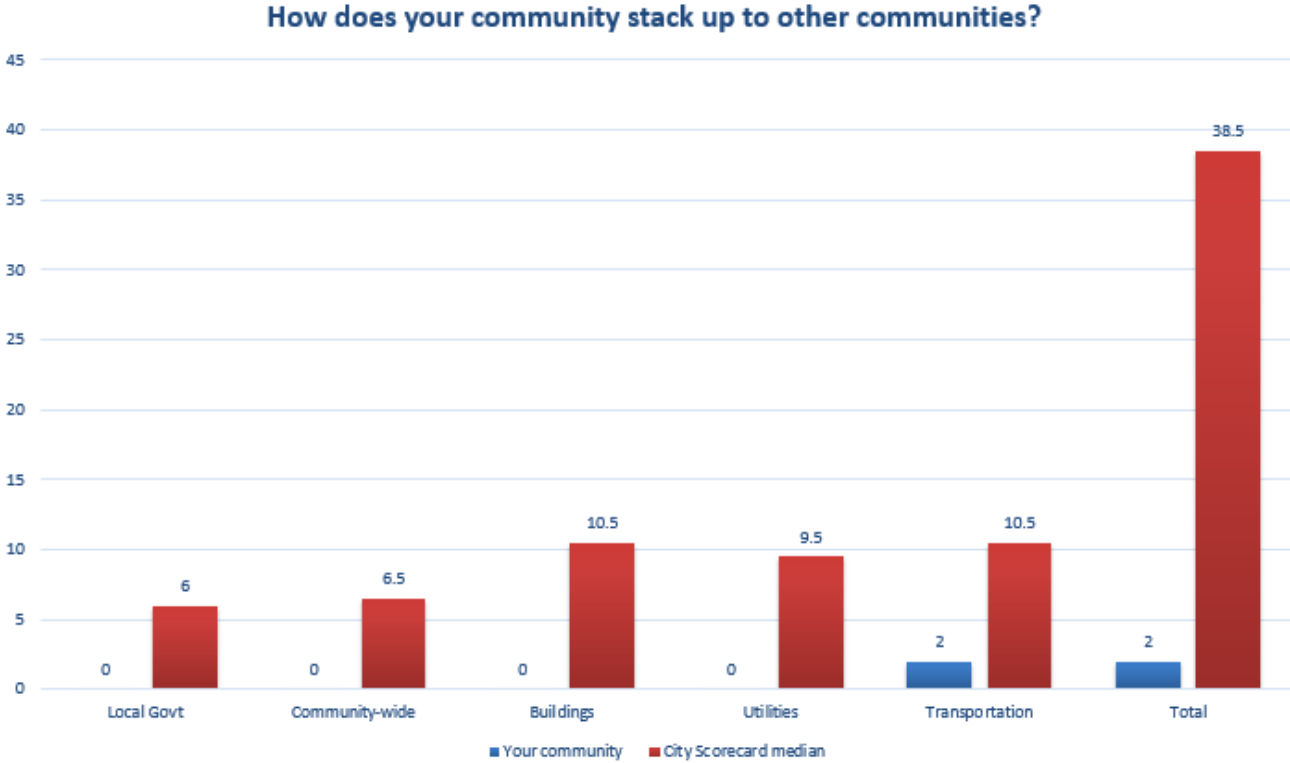


Figure 3. Comparison with *City Scorecard* median scores, from Analysis worksheet

The next section offers a more detailed analysis. Here you can see a table that displays scores associated with each individual metric in the Self-Scoring Tool. In it we list the maximum score for the metric, the median score in the *City Scorecard* for the metric, and your community’s score for the metric. Figure 4 shows more detail.

ACEEE scorecard detailed results			
	Max scores	Median City Scorecard scores	Your community
Grand totals	100	38.5	5.5
Local government operations	10	6	1.0
Energy efficiency & GHG emissions reduction goals	4.5	3	1
<i>Existence of goal</i>	2	1.5	1
<i>Stringency of goal</i>	1	0.5	
<i>Annual public reporting</i>	0.5	0.5	
<i>Progress toward goal</i>	1	0	
Procurement & construction policies	3	1.5	0
<i>Public lighting</i>	1	0.5	
<i>New buildings and equipment</i>	1	0.5	
<i>Fleet efficiency and vehicle infrastructure</i>	1	0.5	
Asset management	2.5	1.5	0
<i>Public workforce</i>	0.5	0.5	
<i>Building benchmarking</i>	1	1	
<i>Comprehensive retrofit strategy</i>	1	0.5	
Community-wide initiatives	12	6.5	1.5
Energy efficiency & GHG emissions reduction goals	7.5	3.5	1.5
<i>Community-wide energy efficiency targets</i>	1.5	0.5	1.5
<i>Community-wide GHG emissions reduction targets</i>	1	1	
<i>Stringency of goal</i>	2	0.5	
<i>Progress towards goal</i>	2	0	
<i>Annual public reporting</i>	1	1	
District energy & CHP	2	0	0
<i>Efficient distributed energy systems planning</i>	2	0	
Mitigation of urban heat islands	2.5	1.5	0
<i>Urban heat island goals</i>	0.5	0.5	
<i>Urban heat island strategies</i>	2	1	
Buildings policies	28	10.5	0

Figure 4. Detailed results from Analysis worksheet

By reviewing this table, you will see where your community is performing best and where it can most improve. Using the results, you can identify particular metrics and prioritize policy actions of interest. You can also use ACEEE's State and Local Database to learn about other communities' policy accomplishments. We organize the database by city, and then by topic areas corresponding to the policy areas in the Self-Scoring Tool. We also present the policy information for each city in the same order as we do in the tool. Additionally, you can view the complete policy information for each metric in a *list all* format.³

COMMUNITY PROFILES

In past editions of the Self-Scoring Tool, we embedded the scores of eight "peer communities" in the tool itself. This year we scored two municipalities, Arlington County, Virginia, and Oakland, California; their performances are profiled below. Their policies can provide lessons for communities looking to strengthen their energy efficiency efforts. More

³ Again, the State and Local Policy Database is available at database.aceee.org.

detail about their specific policies, plans, reports, and ordinances can be found in the Local Policy Database.

These profiles also show the value of using the Self-Scoring Tool to assess your community’s efficiency efforts. The tool’s focus on policies and other initiatives is meant to help identify and highlight specific actions cities can take to improve efficiency. By doing so, it can help communities develop road maps for becoming more energy efficient. In a process similar to the one used for Oakland and Arlington County below, communities can identify their strengths and areas for improvement and use those results to inform their policymaking.

OAKLAND, CALIFORNIA

Oakland is a moderate-size city with a population of approximately 420,000. It is in the same metro region as San Francisco, one of the 51 cities in the *2017 City Scorecard* (Census Bureau 2017). Like other localities in the Bay Area, Oakland has taken steps to increase energy efficiency. The city’s Energy and Climate Action Plan details several of the city’s energy efficiency strategies (Oakland 2012).

Figure 5 displays Oakland’s results from using the Local Energy Efficiency Self-Scoring Tool.

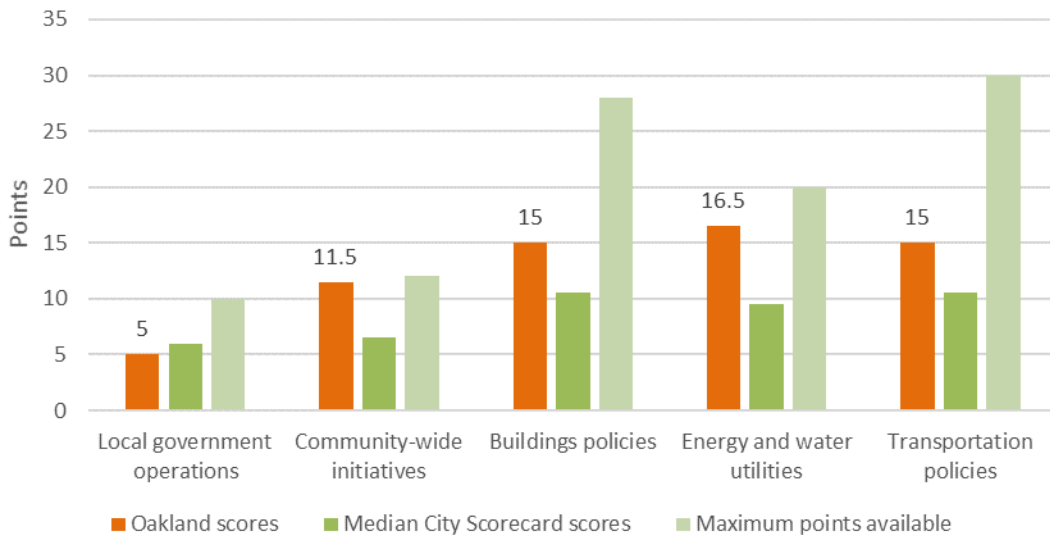


Figure 5. Oakland 2017 Self-Scoring Tool results

Oakland performed well, with a combined score of 63 across the five policy areas, which is 25.5 points higher than the total median score in the *2017 City Scorecard*. If Oakland were in the *City Scorecard*, it would have nearly cracked the top 10.

Top-Performing Areas

Oakland’s best performance is in community-wide initiatives, where it earned 11.5 out of the possible 12 points. Its high mark is due to the actions and strategies in its Energy and Climate Action Plan, including its goal to reduce greenhouse gas emissions by 32% by 2020. The plan contains more than 150 strategies to achieve its goal, including constructing green

buildings, pursuing energy retrofits, increasing mobility, and adopting a green building ordinance. The city also performed well in transportation. Here, Oakland’s performance stems from its Transportation Strategic Plan, which contains strategies to reduce vehicle miles traveled (Oakland 2016). The city is already turning those plans into action, as shown by its recently adopted Complete Streets policy, which will help increase mobility and provide more energy-efficient transportation alternatives.

Areas for Improvement

While Oakland has several energy efficiency-related accomplishments, it still has opportunities to improve its score. For example, our analysis indicates that Oakland can ramp up its efforts to make local government operations more energy efficient. It has many options for doing so, including developing energy reduction goals for local government operations (just as it has done for the community at large). Oakland could also further encourage energy efficiency in private buildings throughout the community—for example, by imposing energy audit or retrofit requirements, which it does not yet have.

ARLINGTON COUNTY, VIRGINIA

Arlington County’s population is 230,050, which is smaller than most localities in the *City Scorecard* (Census 2017). The county is located in the Washington, DC, metropolitan area, sharing a border with DC.

The county has prioritized energy efficiency. A Community Energy Plan spurs its efforts, detailing strategies to increase energy efficiency and reduce greenhouse gas emissions across the entire community (Arlington 2013). Like Oakland, Arlington County was one of the first users of the 2017 Self-Scoring Tool. We display its results in figure 6.

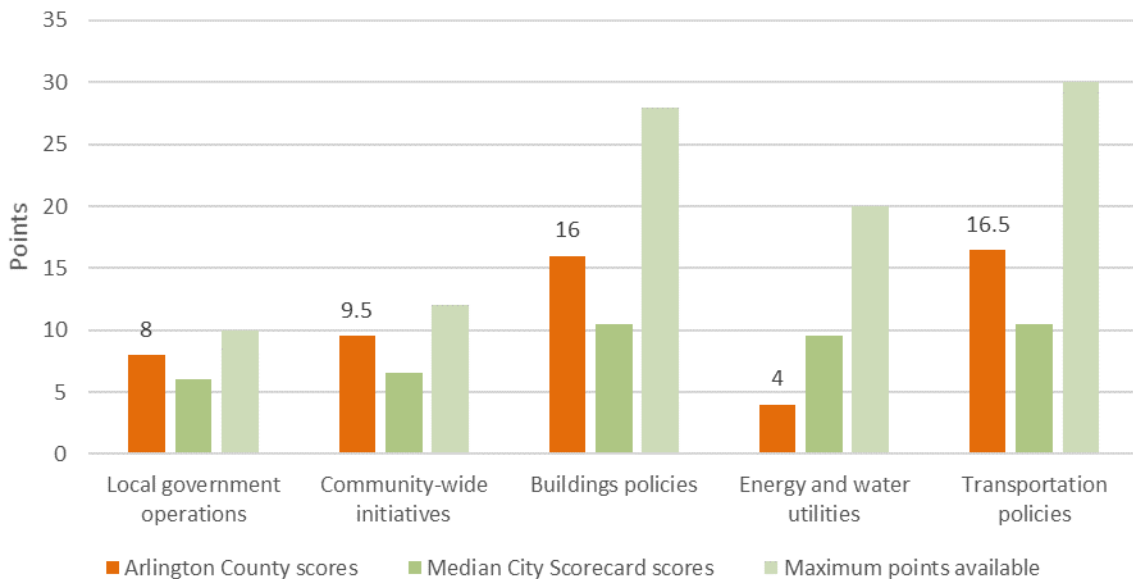


Figure 6. Arlington County 2017 Self-Scoring Tool results

The county performed well in its Self-Scoring Tool assessment. Its score of 54 would have landed it in the top 20 of our *2017 City Scorecard*. Arlington exceeded the median *City Scorecard* score in every policy area except energy and water utilities.

Top-Performing Areas

Arlington County performed well in all policy areas but did particularly well in local government operations and building policies. Arlington County's strong showing for government operations is partially due to its ambitious goal to reduce greenhouse gas emissions by 25% by 2020 as part of its County Energy Plan. The county has proven its commitment to the goal through both a fuel efficiency requirement for its public fleet and a green buildings policy requiring that all new municipal buildings achieve LEED silver certification. Arlington County has also made several efforts to increase energy efficiency in private buildings. While the county cannot adopt local building energy codes, it has actively advocated for the state to adopt more stringent energy codes. Arlington also offers several incentives to encourage greener, more energy-efficient buildings. For example, it offers a density bonus for buildings that earn an ENERGY STAR® rating.

Areas for Improvement

Arlington County scored above the *City Scorecard* median for transportation policies but has several opportunities to achieve further efficiency in this area. The county could do more to reduce vehicle miles traveled by extending its form-based zoning code to areas beyond the Columbia Pike Corridor. The county could also reduce minimum parking requirements or eliminate them in certain areas. There is also room for improvement in energy and water utilities. Arlington County's score would rise if Virginia Electric Power & Light and Washington Gas invested more in their energy efficiency programs. Arlington County could potentially partner with these utilities to help amplify the impact of existing programs. The county could also work with its water utility to galvanize water-saving efforts.

NEXT STEPS

The tool represents our efforts to translate the scoring methodology of the *City Scorecard* into a scoring instrument for other communities. This is an updated version of the Local Energy Efficiency Self-Scoring Tool we released in December 2015 (Ribeiro and Bailey 2015).

When you have finished scoring your community, we encourage you to return the results to us by emailing the completed Self-Scoring Tool to cityscorecard@aceee.org. Time and resources permitting, we will verify the data and may include policy information and scores in our State and Local Policy Database. The database details energy efficiency program and policy information for more than 60 jurisdictions and provides an opportunity to recognize your community's efforts.

After you use the tool, the following are some next steps you could consider:

- In the Appendix, we list contact information for local government staff members who responded to our requests for data from Oakland and Arlington County. To find out more about programs or policies in these communities, you can contact these individuals. You can also visit our State and Local Policy Database for more detailed policy and program information.

- ACEEE has developed resources to help policymakers and program managers engaged in advancing energy efficiency in their communities. These resources help enable action on low-cost, high-impact policies so communities can achieve energy savings. On our website, we provide technical assistance toolkits related to local energy planning, local government efforts to lead by example, local government-utility partnership strategies, and community resilience planning. You can access these toolkits on our Local Technical Assistance Toolkit web page (ACEEE 2016).
- If you cannot find information on a specific policy or program of interest, let us know. We may be able to develop new toolkits that further address local government needs.

We welcome feedback on the format and functionality of the Self-Scoring Tool and encourage your suggestions on possible improvements. Please send any feedback to cityscorecard@aceee.org.

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Appendix. Peer Community Information

Peer community	State	Energy, climate, or sustainability plan	Data request respondent	Contact information
Arlington County	VA	Community Energy Plan	John Morrill Energy Manager Arlington County Department of Environmental Services	JMorrill@arlingtonva.us
Oakland	CA	Oakland's Energy and Climate Action Plan	Daniel Hamilton Sustainability Manager City of Oakland	DHamilton2@oaklandnet.com