

# QUEST

Quality Urban Energy Systems of Tomorrow  
Systèmes d'énergie de qualité pour les villes de demain

## QUEST 2012 Implementation Plan

## Table of Contents

Introduction .....	2
Overview .....	2
Cantley 2010 - 2013 Priorities for QUEST .....	3
Areas of Focus .....	3
Management, Governance and National Coordination .....	4
Areas of Focus and Top 10 Actions .....	5
Implementation Plan .....	6
Management and Governance Structure .....	7
National Coordination and Advisory Bodies .....	8
Appendix - QUEST Progress 2007 - 2011 .....	9

## Introduction

QUEST - **Quality Urban Energy Systems of Tomorrow** – is a national non-profit organization advancing education and research for integrated energy systems (linking energy with land-use, buildings, transportation, waste, water and wastewater at a community, neighbourhood or site level) to develop and support sustainable communities in Canada. QUEST does research, policy analysis, outreach, and capacity building to assist communities, utilities, and the broader community-building sector.

QUEST, as Canada's national voice for integrated community energy systems and solutions (ICES), has developed this business and implementation plan with an eye to engaging our partners, contributors and supporters from coast to coast to coast that have an interest in making Canada a world leader in ICES. The business and implementation plan was developed by QUEST staff in consultation with our partners, contributors and supporters. It begins with an overview of the vision, mission and critical success factors for QUEST. At its core is a series of 10 central activities (deliverables) for 2012 that contribute to moving QUEST forward to achieve its vision.

## Overview

### Who Makes Up QUEST?

QUEST is a collaborative network of organizations – from energy, technology and infrastructure industries, gas and electric utilities, all levels of government, civil society groups and community leaders, researchers and the consulting community – actively working to make Canada a world leader in the design, development and application of integrated energy solutions.

### What is QUEST's value proposition?

QUEST is responding to national energy infrastructure and investment challenges faced by 5400 rural, remote and urban communities by advancing six energy decision-making principles as part of an integrated planning, development and servicing approach:

1. Improve efficiency: reduce the energy input required for a given level of service;
2. Energy optimization "exergy": match energy supplies with energy needs;
3. Manage heat: capture all feasible thermal energy and use it, rather than exhaust it;
4. Reduce waste: use all available resources, such as landfill gas, and municipal, agricultural, industrial and forestry wastes;
5. Use renewable resources: tap into local sources of hydropower, biomass, geothermal, solar and wind energy; and,
6. Use grids (power, gas, heat) strategically: optimize use of grid energy as a resource to optimize the overall system and ensure reliability.

### What is QUEST's Mission and Vision?

The QUEST mission is to mobilize community builders to create integrated energy solutions that are central to sustainable community development. The QUEST vision is that by 2030 every community in Canada is operating as an integrated energy system, and accordingly, all community development and redevelopment incorporates an integrated energy system.

QUEST Canada is achieving its mission and vision by working with community builders to:

- Encourage a balanced and informative conversation about energy;
- Support the development of expertise and capacity across Canada for ICES;

- Prepare inclusive and independent applied research for the broader public interest; and,
- Create a collaborative framework for communities and key stakeholders to understand and to work on their energy futures.

### What Are the Core Values for QUEST?

QUEST is committed to being:

- *Objective:* QUEST is independent, non-partisan, and has a commitment to the public interest.
- *Informed:* QUEST is a trusted and credible source of unbiased, balanced and reliable information on ICES.
- *Collaborative:* QUEST engages all stakeholders in the advancement of ICES.
- *Innovative:* QUEST is focused on market transformation for ICES.

### Cantley 2010 - 2013 Priorities for QUEST

In 2009, active participants, contributors and funders for QUEST met in Cantley, Québec to evaluate the long-term operating model for QUEST. The Cantley meeting established the current mission, vision and operating focus for QUEST in terms of being an independent and autonomous organization. The QUEST meeting in Cantley also established the following critical success factors for QUEST to achieve its vision in the direction of the adopted Sustainable Canada scenario put forward at QUEST III:

1. Maintain and expand the coherence and enthusiasm of the QUEST shared community of interest;
2. Capture political interest;
3. Convert vision to action;
4. Ensure capacity is developed to support integrated community energy systems;
5. Advance visible demonstration of progress;
6. Push for innovation, development & knowledge generation; and,
7. Move the message to the masses.

The Cantley meeting also introduced a series of priority objectives for 2010-2013 to achieve the critical success factors for QUEST and serve as the basis of the 2012 workplan for establishing the areas of focus and related actions.

### Areas of Focus

For 2012, QUEST's activities and structure are focused around three areas:

- **Research and Education:** QUEST serves a useful and recognizable role in addressing the knowledge gaps related to ICES. QUEST is set up to create forums, advance policy and conduct research towards achieving a vision with a focus on solutions and positive advocacy. QUEST leads and supports a range of research on governance, financial, technical and sustainability issues related to ICES and urban energy systems. QUEST's research and education focus provides a vehicle for communicating ICES concepts and issues, an educational resource for ICES practitioners and a capacity-development tool for developers, municipalities, energy players, other project proponents and the investment community.
- **Partnerships and Engagement:** QUEST is building partnerships based on positive collaboration across sectors, regions and stakeholder groups and by actively working with QUEST Caucuses. QUEST brokers conversations between all levels of government, utilities, developers, private investors, and suppliers of expertise, products and services together with community leaders to advance integrated planning, development and servicing approaches for ICES. QUEST has traction

with policy makers and is establishing a healthy discourse about the merits of an integrated approach to energy and other critical community services.

- **Programs:** QUEST plays an active role in disseminating information, building capacity and mobilizing players to address local energy issues. QUEST is also advancing market transformation for ICES by investing in the development of the market place through the removal of barriers, offering training and holding national events and tradeshow.

### **Management, Governance and National Coordination**

QUEST established a formal governance model that entails a compact membership and board structure, and broader outreach provided through a National Advisory Committee (NAC) and Provincial and Territorial QUEST Caucuses. QUEST Canada's Board of Directors and Officers include: Michael Harcourt, Chair and CEO; Ken Ogilvie, Vice-Chair and Mike Cleland, Secretary and Treasurer.

The NAC offers guidance for achieving the QUEST vision and advice to the Board of Directors and management of QUEST. Provincial/Territorial Caucuses implement the QUEST vision relative to different provincial and territorial contexts. All Caucuses adhere to a QUEST Caucus Charter and a memorandum of understanding (MOU) with QUEST concerning operations, fundraising, branding and other administrative matters. Additional support bodies, such as the National Affiliate Body and the Research Support and Review Committee provide operational support for QUEST focus areas of activity.

The strategic directions and day to day functions of QUEST are guided by the Executive Director who has overall accountability for management, human resources and finances of the organization. The Executive Director advises the Board, leads, advocates for and promotes the organization, and sets organizational and programmatic priorities as directed by the Board and on the advice of the NAC.

Directors (part of the Management Executive Committee – MEC) have responsibility for the management of organization-wide activities and developing the capacity of QUEST to sufficiently fulfill the QUEST mission and vision. Directors take significant responsibility for business planning, business and sponsorship development and coordinating the implementation of the business plan. Directors are accountable for the overall operation of their practice area and for overseeing the work of staff and contractors assigned to their area of practice.

## Areas of Focus and Top 10 Actions

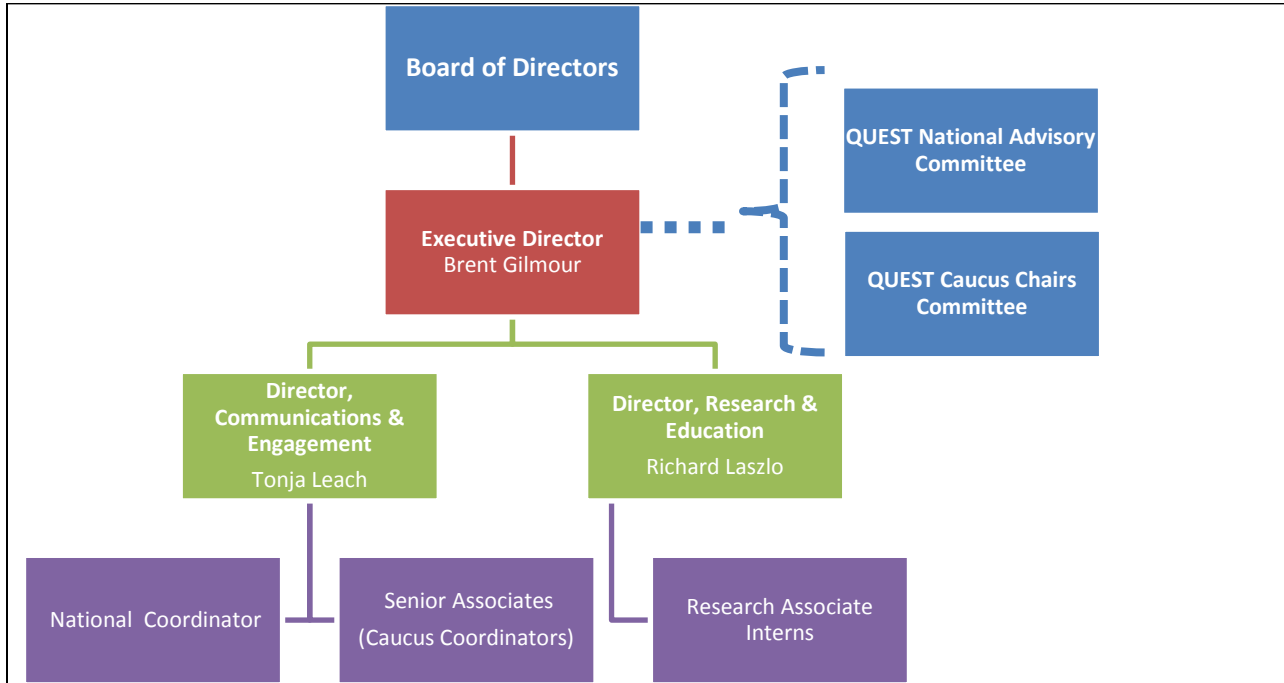
To advance the priority objectives, ten actions are identified for implementation in 2012 under the areas of focus.

Activity	Area of Focus	Core Objectives 2010-2013 <sup>1</sup>	Ten Actions for 2012	Detailed Description	MEC - Lead
<b>Research &amp; Education</b>	Applied Research	<ul style="list-style-type: none"> <li>Continue to coordinate / instigate and / or conduct research that increases economic, business and technical knowledge and advancement of ICES.</li> <li>Advance and encourage ICES curriculum development at Canadian Universities, Colleges and educational institutions.</li> <li>Encourage the development of new technology related to ICES.</li> <li>Capture, monitor, analyze and synthesize ICES projects and disseminate learning as new knowledge.</li> <li>Identify gaps in standardization, accreditation and professional certification needed for ICES.</li> </ul>	1. Develop two (2) or more ICES Business Cases and advance ICES National Project Mapping.	The Business Case Series is designed to bring forward the key factors contributing to successful ICES project implementation and track ICES projects across Canada digitally through an information map.	Director, Research & Education
			2. Support knowledge dissemination and related partner research initiatives, including: developing business cases lessons learned synthesis; and ICES alternative financing models.	A Lessons Learned Overview will be prepared that draws on the QUEST Business Case Series. QUEST will support and advance related partner research on financing of ICES. This work will be assisted through the QUEST Internship Program and Energy Ambassadors.	Director, Research & Education
			3. Develop QUEST Issue Paper Series.	The papers will identify, document and establish a framework for the six Technical Principles and emerging Policy Principles for QUEST, along with the roles/responsibilities of various levels of government, utilities, regulators, developers and other actors involved with advancing ICES.	Executive Director
			4. Host three (3) or more workshops for identifying and addressing barriers to ICES.	Work with established QUEST Caucuses to host a workshop series across Canada that is directed at identifying, documenting and addressing barriers to ICES (policy, process etc).	Director, Communications & Engagement
			5. Host a QUEST National Issues Series Dialogue.	Work with each established QUEST Caucus to host one half day national issue series dialogue session on the issues paper series.	Executive Director and Director, Research & Education
<b>Partnerships &amp; Engagement</b>	QUEST Caucuses	<ul style="list-style-type: none"> <li>Encourage pilot and demonstration projects.</li> <li>Influence regulatory community to mitigate barriers to ICES.</li> <li>Work with municipalities to identify and mitigate barriers, identify community builders and new business models needed for ICES proliferation in Canadian communities.</li> <li>Influence policy and program development through analysis and communication with all three levels of government.</li> <li>Support and encourage federal, provincial and territorial ICES capacity program development</li> </ul>	6. QUEST Caucus work.	Working with the QUEST Provincial and Territorial Caucuses to advance the QUEST Caucus Charter and implement an MoU between QUEST and each operating QUEST provincial and territorial Caucus.	BC & AB - Executive Director  ON & QC - Director, Research & Education  NB & NS - Director, Communications & Engagement
				Working with provincial / territorial organizations, governments and interested groups to launch new QUEST Caucuses in provinces not yet up and running, including: New Brunswick, Manitoba, and a Northern Caucus, including (Yukon, N.W.T. and Iqaluit).	MB - Executive Director  Atlantic Canada & Northern Canada - Director, Communications & Engagement

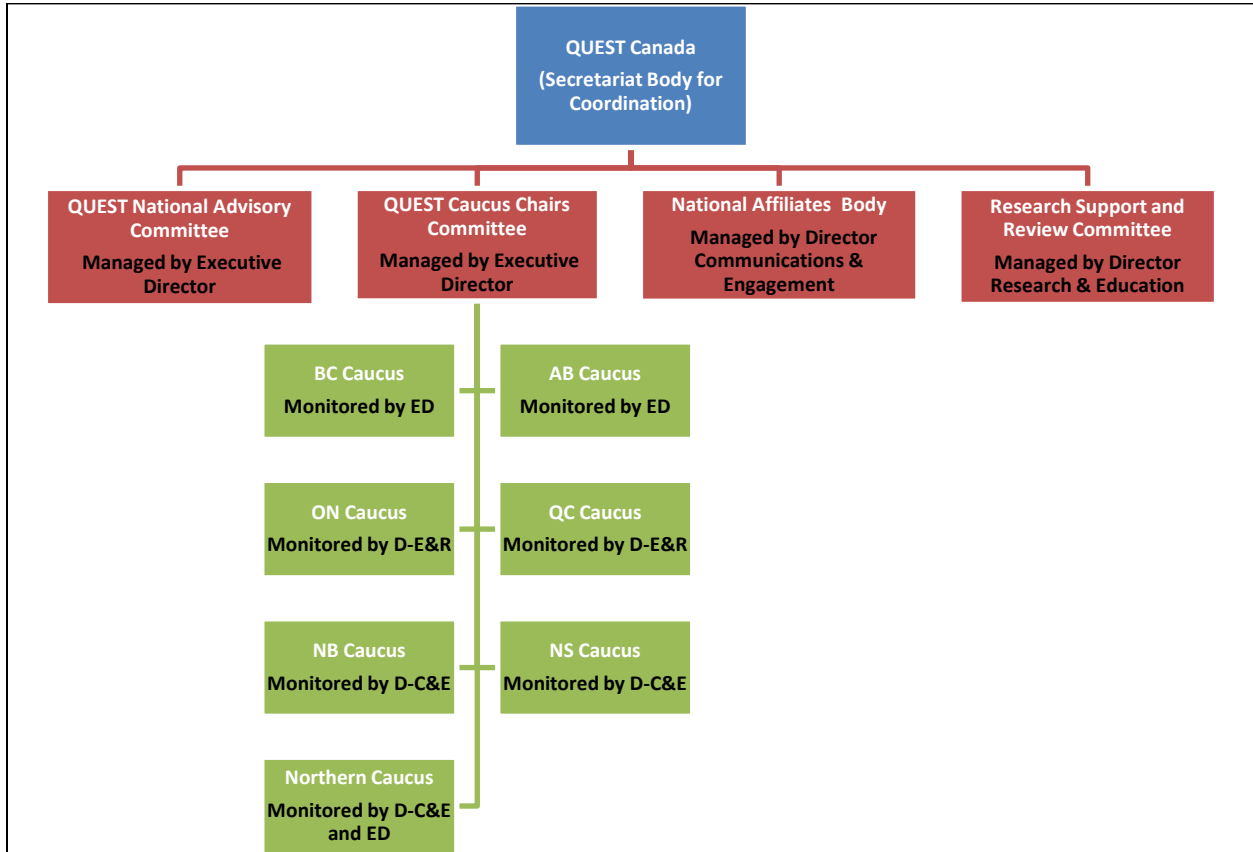
<sup>1</sup> Core objectives for QUEST were established at a strategic retreat – referred to as Cantley - initiated by the QUEST Core Advisory Group (CAG). At the Cantley session, the QUEST Vision, Mission and Principles were formalized by the QUEST CAG.

Activity	Area of Focus	Core Objectives 2010-1013 <sup>1</sup>	Ten Actions for 2012	Detailed Description	MEC - Lead
	QUEST Advisory and Working Committees	<ul style="list-style-type: none"> <li>Identify and engage champions from both the public and private sectors and across relevant silos.</li> <li>Identify and collaborate with supportive organizations and fill gaps in between where work is needed.</li> </ul>	<b>7.</b> Committee and Advisory Body Development	<p>Establish a National Advisory Committee (NAC) comprised of QUEST key funders, key ICES sectors, affiliate bodies and Caucus Chairs. NAC is the principle focus of advice for QUEST.</p> <p>Establish a National Affiliates Body of professional bodies and related associates that represent ICES sectors, including: land-use; built form, transportation, water/wastewater and waste.</p> <p>Establish a Research Support and Review Committee.</p> <p>Establish a QUEST Caucus Chairs Committee.</p>	Executive Director
	Multi-media and Communications	<ul style="list-style-type: none"> <li>Develop the QUEST website as the portal for information and understanding on ICES.</li> <li>Develop QUEST's capacity to function as a catalyst of ICES.</li> <li>Work with and engage media to broaden the understanding of ICES and the associated energy and environmental benefits.</li> </ul>	<b>8.</b> QUEST Multi-media and Website Development.	Overhaul the QUEST website to meet corporate communication needs and for information dissemination. Introduce capacity to allow QUEST Caucuses to maintain own page. Serve as a portal to related partner sites and research activities on ICES.	Director, Communications & Engagement
	ICES Communication and Briefing	<ul style="list-style-type: none"> <li>Work with and engage media to broaden the understanding of ICES and the associated energy and environmental benefits.</li> </ul>	<b>9.</b> Establishment of ICES Communication Piece (brought to you by QUEST) and Communications Plan for QUEST	Develop an ICES Communication Piece that can serve as Annual Report/ Awards Recognition and Program for conference. Also prepare a communications strategy that: develops a brand for QUEST; has a plan for all multi-media activities (twitter, RSS, LinkedIn etc); introduces a QUEST Quarterly Bulletin; standardizes all communication formats; and, sets out a critical path to identify the top 200 people to be informed about QUEST across Canada.	Director, Communications & Engagement
<b>Programs</b>	Conference	<ul style="list-style-type: none"> <li>Broaden the QUEST interest group.</li> </ul>	<b>10.</b> Convene an international conference on ICES including a market place for ICES technologies and services.	<i>QUEST International Conference &amp; Tradeshow</i> is a three day event dedicated to showcasing the latest developments, activities, approaches and services for integrated community energy systems and solutions. Predicated on the theme of meeting the heating needs of Urban, Rural, Remote, First Nations, Inuit, and Métis communities.	Executive Director and Director, Research & Education

## Management and Governance Structure

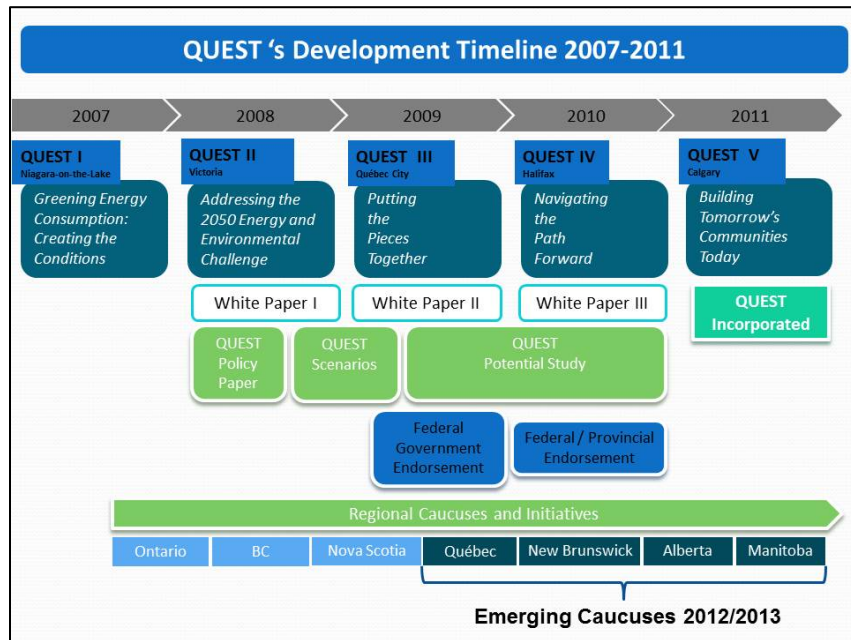


## National Coordination and Advisory Bodies



## Appendix - QUEST Progress 2007 - 2011

QUEST has progressed quickly since its inception in 2007 by engaging a broad-cross section of organizations and individuals in the discussion of the energy system and energy use in communities across Canada. QUEST was initiated as a response to a growing concern that the approach to addressing energy issues in communities was becoming increasingly fragmented rather than integrated. This has led QUEST to gain progressive momentum and the national model to be replicated within select



provinces across Canada through the formation of caucuses. QUEST Caucuses were established to advance the QUEST ideas “on the ground”, while addressing local context issues in a consistent manner with the QUEST principles, mission and vision.

The development timeline pictured above outlines the progress of QUEST across Canada. The initial meeting of QUEST in 2007 led to the establishment of a common platform for discussion through the establishment of six principles for optimizing the energy system through efficiency, distributed energy systems, alternative heating and cooling systems, use of local energy sources and compatible urban design. In 2008, QUEST initiated a series of forward looking energy efficiency scenarios that clearly established a path for achieving sustainable community development through an integrated approach. This led QUEST in 2009 to begin actively examining the opportunities for advancing the implementation of an ICES approach through a national network of partners across all sectors. As the opportunities and applications of ICES in community development advance, QUEST directed its efforts at encouraging the documentation of examples in 2010 and analyzing the business merits for increasing market up take for ICES in 2011. In April of 2011, QUEST was established as a federally registered non-profit organization.

### 2011 Accomplishments

QUEST successfully achieved a number of important firsts in 2011 including:

- Incorporated as a national non-profit organization and formed a Board comprised of Michael Harcourt as Chair and CEO, Ken Ogilvie as Vice Chair and Mike Cleland as Secretary and Treasurer.
- Established an office in Ottawa and retained three staff, including an Executive Director, Director of Education and Research, and a Director of Communications and Engagement.
- Launched the first business case series for Integrated Community Energy Systems initiatives across Canada. This involved the development of five cases in five provinces by five leading academic business schools.

- Initiated and launched QUEST caucuses in New Brunswick, Alberta and began discussions to form a Northern QUEST Caucus with the communities of Whitehorse, Yellowknife, and Iqaluit, as well as a Caucus in Manitoba.
- Hosted a successful national conference in Calgary that focused on *Integrated Community Energy Solutions: Building for Tomorrow's Communities*.
- Partnered to launch QUEST International - Canada's only national conference and trade show dedicated to ICES to take place in Winnipeg, Manitoba in 2012 in association with Manitoba Hydro and the International Institute for Sustainable Development (iiSD). The international conference and trade show is focused on addressing the urban, rural, First Nations, Métis and Inuit heating needs with ICES and forming a defined commercial market presence for ICES.
- Established a national advisory committee (NAC) for QUEST comprised of QUEST contributors and national leaders, as well as related advisory committees, including a research committee.
- Worked closely with the QUEST Nova Scotia caucus to actively evaluate alternative and renewable energy options for transportation related to sustainable development and mobility.