2015-2019 Strategic Plan

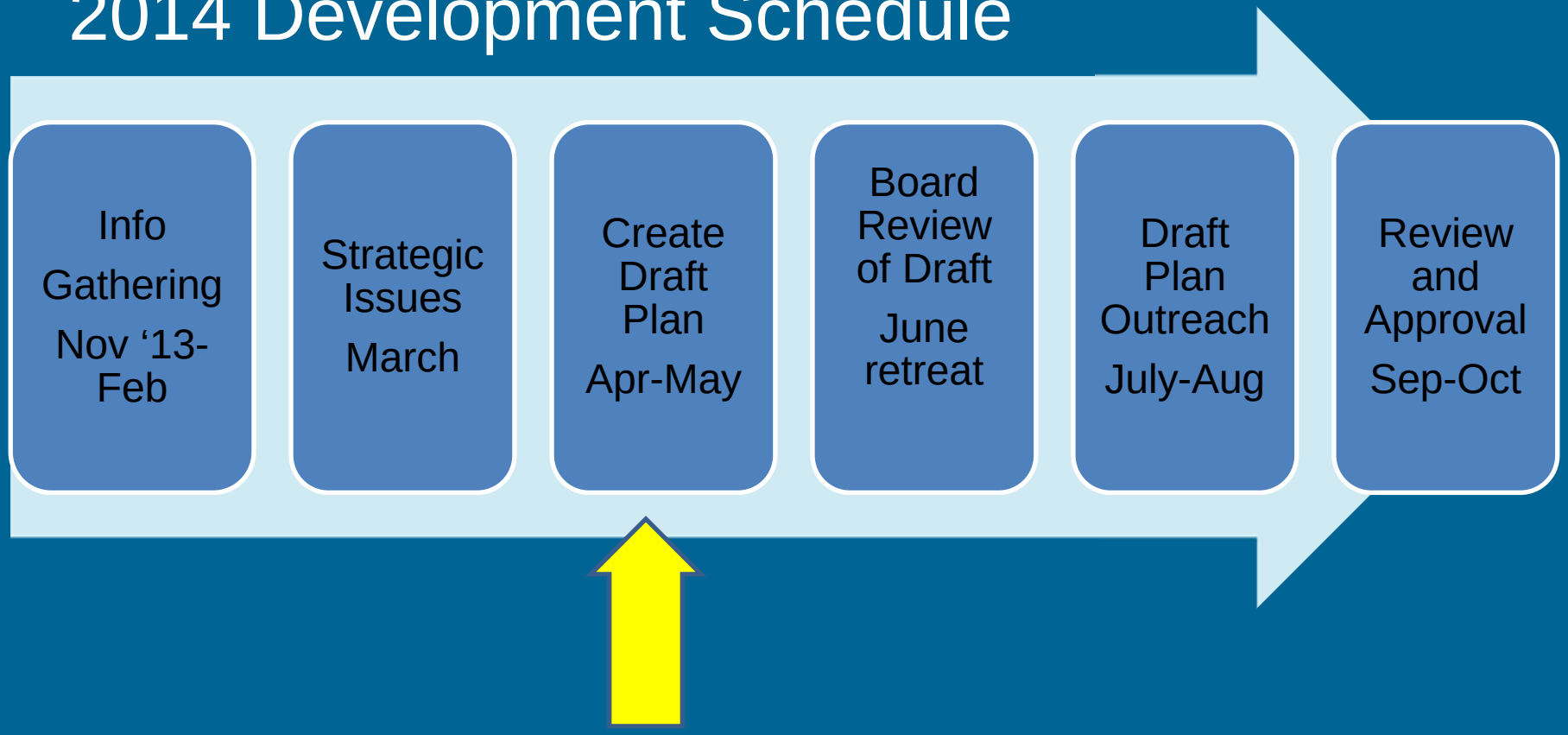
Update

April 23, 2014

EnergyTrust of Oregon

2015-2019 Strategic Plan

2014 Development Schedule



Issues Raised in Initial Information Gathering

- Affirm efficiency and renewable energy core goals
  - Add aspirational goals?
- Build on accomplishments
  - Work with communities and other resources
  - Climate related goals
  - Goals focused on peak load management
- Complementing state, regional and utility sustainability plans
- Consider 10 year vision vs. 5 year plan?

CAC and RAC and Stakeholder Input

- Focus on energy efficiency and renewable energy generation goals
- Support other opportunities only if directly linked to efficiency and renewable acquisition

Future Focus

- To achieve core goals, we will need to work in new ways
- Apply fundamentals of IRP least-cost planning to efficiency investments
- Support RE project and market development
- Leverage and collaborate with others to pursue mutual and complementary benefits
- Use strategic planning to develop prioritizations

Early Look at Efficiency Issues

- Annual savings beyond “base” outlook
- Four strategies
  - Continuously improve program designs and services to meet customer needs
  - Broaden participation, reaching under served markets
  - New technologies and new approaches
  - Pushing down costs
- Optimizing the mix of strategies to meet short and long term savings goals

Early Look at Renewable Issues

- Reconsider generation goal to reflect market
- Continue current focus on early project/market development
- Continue support of a range of technologies

Operations Plan

- Internal map to achieve goals, strategies, direction
- Provides guidance related to:
  - Optimizing resources organization-wide among competing objectives
  - Engaging partners, positioning programs to support related state or utility priorities (e.g., carbon, peak management)
  - Staffing

Next Steps

April - May

- Draft plan outline created, quantitative analyses completed
- Individual utility strategic issues discussions
- Board committee and full board meetings (May 13, 14)
- OPUC staff coordination check -in

June

- Retreat agenda shaped around draft plan review (June 13-14)
- Report in to CAC/RAC (June 18)

July/August

- Public comment period
- Discussion at CAC/RAC (July 23)
- Possible utility roundtable
- Board meeting (July 30)

September/October

- Comments incorporated
- Strategic Plan approved and adopted by full board (anticipated October 1)

Thank You

EnergyTrust of Oregon

Products and Phases

- Situation Analysis √
- Information gathering √
- Strategic Issue Identification √
- Draft Plan
- Final Plan
  - Goals
  - Focus areas
  - Operational Plan
  - Ongoing reference

Information Gathering

- Staff Working Sessions
  - Include RE Group Strategic Planning
- Management Team Retreat
- Papers: Benchmarking survey, CA Zero Net-Energy , Peak-load management
- Margie’s meetings with “Influentials”