

APPENDIX 4: Progress to 2020-2024 Strategic Plan

This appendix provides updates on Energy Trust's 2020-2024 Strategic Plan, which defines the organization's areas of focus and key strategies for the five-year period. These focus areas align with Energy Trust's purpose, which is to help customers and communities reduce costs and realize additional benefits by saving energy and using renewable resources. The board-approved strategic plan was developed through a public process that involved gathering input from the OPUC, utility partners, stakeholders, advisory councils and members of the public. This appendix provides updates on activities for each focus area and related progress indicators. The strategic plan and related information are available at energytrust.org/strategicplan.

Key

On track	On track, managing	Off track
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Focus Area 1: Services to customers

We engage customers with relevant programs, information and services, including information and services specifically for underserved customers. We know we are making progress to this focus area when we achieve the following progress indicators:

Progress Indicator	Status as of Year 3
We achieve our annual savings and generation goals, and continue to use multi-year planning processes to identify ambitious longer-term energy targets that incorporate emerging sources of savings.	

- Energy Trust fell short of its 2022 annual goals for electric (at 92% of goal) and natural gas efficiency (82% of goal) but exceeded goal for renewable energy generation (145% of goal).
 - Since 2020, Energy Trust has achieved its annual electric savings goal once, exceeded its annual gas savings goal twice and exceeded its annual generation goal three times; the COVID-19 pandemic and related market conditions have negatively impacted energy savings activity.
 - Gas savings goals in 2022 were increased in collaboration with natural gas utilities to support their greenhouse gas reduction targets. For similar purposes, Energy Trust will design new programs for gas customers on interruptible and transport schedules starting in 2023.
- In 2022, Energy Trust implemented improvements to its planning and budgeting processes, including earlier and deeper stakeholder engagement and increased coordination with utility partners that identified emerging sources of savings and priority areas for Energy Trust investment.
- Energy Trust has created a communities and new initiatives sector to support comprehensive energy solutions that cross multiple efficiency and renewable energy sectors and will better serve community entities.

Progress Indicator	Status as of Year 3
We meet or exceed the goals we establish to increase the diversity of program participants.	

- Energy Trust did not have specific goals in 2022 regarding the diversity of program participants as it did in 2020 and 2021. Instead, as outlined in Energy Trust’s 2022 Diversity, Equity and Inclusion Plan, staff hosted a series of community engagements to gather feedback on activities and measures of progress around Energy Trust’s DEI work. For more information, see Appendix 2.
- Even without formal participation goals, staff devoted significant time and resources toward reaching and serving customer groups that have been historically underserved, including people of color, people with low incomes and people in rural areas.
 - The residential sector launched a no-cost ductless heat pump pilot that was developed with and will be delivered by community-based partners; the pilot seeks to identify and serve customers with high energy burdens and reduce their costs while making their homes more comfortable.
 - The commercial sector introduced higher incentive offers for small businesses and tailored development services for trade ally businesses that are certified by Oregon’s Certification Office for Business Inclusion and Diversity (COBID) or eligible for certification.
 - The renewables sector met a new requirement to invest at least 25% of ratepayer funds collected for renewable energy in activities and projects that benefit customers with low or moderate incomes.
 - Outreach staff formed the Tribal Working Group with representatives from the Klamath and Modoc tribes, the Confederated Tribes of Umatilla Indian Reservation, Confederated Tribes of Warm Springs and Confederated Tribes of Grand Ronde. They provide input on how Energy Trust can shape programs to attract more participation, provide greater benefits specific to tribal needs, and support tribes’ activities around energy planning, infrastructure, economic development, climate adaptation and resiliency.

Focus Area 2: Supporting utilities

We strengthen the value we deliver to customers by linking energy efficiency and renewable energy to the approaches utilities are using to meet changing customer energy needs. We know we are making progress to this focus area when we achieve the following progress indicators:

Progress Indicator	Status as of Year 3
We develop a framework to value, deliver, report and evaluate energy efficiency and renewable energy resource opportunities in targeted locations in collaboration with utilities.	

- In 2022, staff began planning efforts with PGE and Pacific Power to determine how Energy Trust’s experience with targeted load management could apply to the non-wires solution concepts proposed in their recent distribution system plan filings.
- Energy Trust is supporting Smart Grid Advanced Load Management & Optimized Neighborhood (SALMON), a collaborative effort with PGE and other partners to install distributed energy resources in North Portland homes, funded by a U.S. Department of Energy grant.

- Energy Trust created the new communities and new initiatives sector that will work with utility partners to develop strategies and offers to support their objectives such as carbon reduction, grid flexibility, non-wires solutions and distribution system planning.

Progress Indicator	Status as of Year 3
We implement and evaluate initiatives designed to drive customer adoption of energy efficiency and renewable energy projects in targeted areas.	

- Energy Trust completed a three-year targeted load management pilot with NW Natural in Creswell and Cottage Grove. Using higher incentive offers – in the final phase, incentives were based on a localized avoided cost value -- and targeted marketing and outreach, the pilot achieved higher residential project installation rates, higher savings and higher peak savings than the baseline.

Focus Area 3: Informing policymakers

We provide objective information and analyses to policymakers and implementers to support development and implementation of energy policies. We know we are making progress to this focus area when we achieve the following progress indicator:

Progress Indicator	Status as of Year 3
We establish a system for monitoring regulatory and policy initiatives. We contribute data analyses and technical expertise during policy development and participate in policy implementation when there is potential customer benefit related to energy efficiency and renewable energy.	

- Staff supported and provided input to OPUC staff in preparing to develop equity performance measures to ensure environmental justice communities benefit from Energy Trust’s investments of ratepayer funds.
- Staff provided information to the legislature’s Task Force on Resilient, Efficient Buildings that studied and proposed policy recommendations to the legislative body on ways to reduce emissions from new and existing residential and commercial buildings.
- Staff supported local governments that have passed or are developing climate or energy action plans that involve energy efficiency and renewable energy, including the City of Salem.
- Staff coordinated and shared information with Oregon’s Department of Energy, Department of Environmental Quality and Housing and Community Services on new programs focused on indoor temperature control, resiliency, renewable energy, greenhouse gas emissions and wildfire rebuilding.
- Staff revised an internal policy monitoring system that was developed in 2020.

Focus Area 4: Delivering multiple benefits

We maximize the effectiveness and reach of public purpose charge funding by leveraging additional funding to advance clean energy investments that deliver multiple benefits. We know we are making progress to this focus area when we achieve the following progress indicators:

Progress Indicator	Status as of Year 3
We acquire more energy savings and renewable generation than would otherwise be achieved with only public purpose charge funding.	

- Through a contract to administer Oregon Community Solar Program, Energy Trust has supported the development and growth of the program, which allows customers whose homes are not suited for rooftop solar to benefit from solar energy.
- In 2022, Energy Trust created an Innovation and Development team that will cultivate strategic partnerships and pursue outside funding opportunities that support ratepayer funded activities and expand our ability to serve customers.

Progress Indicator	Status as of Year 3
We coordinate with more organizations and communities where their additional resources help accomplish mutually supportive objectives.	

- Energy Trust helped build capacity within community-based organizations to promote clean energy resources – including Energy Trust offers and information for customers – by awarding small Working Together Grants to nonprofits. Grant activities funded in 2022 included development of a clean energy education program for communities of color, training for clean energy community navigators and including Energy Trust information in outreach activities.

Progress Indicator	Status as of Year 3
We establish a concept agreement with the Oregon Public Utility Commission and at least one natural gas utility to assess a joint carbon reduction effort.	

- Community-specific collaboration with one natural gas utility did not move into implementation phase.
- Energy Trust is continuing efforts with all gas utility partners to support activities that reduce greenhouse gases. This includes plans for a hybrid HVAC pilot starting in 2023 with electric heat pump incentives for customers with existing gas furnaces to explore the feasibility and savings opportunities of hybrid HVAC systems.
- Staff entered into agreements and made plans to deliver new programs with gas utilities to serve customers on interruptible and transport schedules starting in 2023.

Focus Area 5: Adapting to change

We enhance our ability to quickly and effectively respond to changes, needs and new opportunities. We know we are making progress to this focus area when we achieve the following progress indicators:

Progress Indicator	Status as of Year 3
We achieve diversity, equity and inclusion goals for employee hiring and recruitment and for the board of directors.	

- Energy Trust met goals under its previous Diversity, Equity and Inclusion Plan related to staffing, increasing the percentage of applicants and new hires who identify as people of color.
- While a board ad hoc DEI committee has not defined metrics for the board, the committee has begun holding regular trainings and developed a diversity, equity and inclusion training plan for the board.
- In 2022, Energy Trust added four board members and prioritized racial and geographic diversity in the recruiting process.

Progress Indicator	Status as of Year 3
Annual surveys indicate that staff is significantly aware of how annual goal setting, business planning and prioritization enables flexible resourcing of existing and new initiatives.	

- Energy Trust surveys staff every six months to assess progress toward enhancing organizational flexibility, adaptability and responsiveness to change and new opportunities. Results in 2022 indicated strong alignment around common goals and priorities, improved decision-making capabilities and willingness to explore innovative new ideas; however, balancing workloads as staff take on new projects and priorities remains a challenge.
- As an outcome of the business planning process, Energy Trust created a multi-year staffing plan, anticipating increased demand for core services and additional capacity needed to take on new initiatives and pursue innovative new opportunities to meet stakeholder expectations. Additional staff positions are accounted for in the 2023 budget and 2024 projection.
 - Energy Trust formed an Innovation and Development team focused on exploring new ideas and leveraging new funding sources to bring more clean energy benefits to more customers.
 - Energy Trust formed a communities and new initiatives sector focused on serving customers with integrated offerings spanning multiple sectors.
- Energy Trust conducted Learning Lab, a six-month process to test new tools and methods to improve and support team functioning, engagement and communications amid virtual and hybrid work environments. A survey at the end of the process showed increased comfort with virtual work among staff and improved communication, collaboration and meeting productivity.