

## Renewable Energy Advisory Council Agenda

### The RAC has moved to Thursday afternoons:

Thursday, July 18, 2024; 1:30 pm – 3:00 pm

### Meeting is on-line only

Please register in advance:

<https://us06web.zoom.us/meeting/register/tZEudOypqTwvG9QxNEX65B9ehUfZbFzoyGCx>

After registering, you will receive a confirmation email containing information about joining the meeting.

#### 1:30 Welcome and updates

- Community solar development assistance
- Commercial battery incentive
- Custom project development assistance for energy resilience and portfolio solar
- Solar for All update

#### 1:45 Consumer protection for solar customers *(presentation, feedback)*

Consumer protection has become an important topic nationally and in Oregon for the solar industry and our program. Staff will provide some information about how we have approached this in the past and potential changes and questions for the coming several years.

#### 2:15 Multi-year planning *(presentation, feedback)*

Energy Trust is moving to a five-year budgeting and planning model that will be implemented for the 2026-2030 period. Staff will discuss how this will roll out and how the RAC and other advisory councils will be engaged in the process.

#### 2:45 Updates and announcements from RAC members *(information)*

Any RAC members who have information or announcements to share at the meeting are welcome to do so.

#### 2:55 Public comment

#### 3:00 Adjourn

You can view this agenda and notes from previous meetings at: [energytrust.org/about/public-meetings](https://energytrust.org/about/public-meetings).  
If you have comments on meeting notes, please email [Bayoan Ware](mailto:Bayoan.Ware@energytrust.org).

### Next meeting:

- The next regular meeting of the RAC will be Thursday, September 19 at 1:30 pm.



# Update on Multiyear Planning Transition

## Renewable Advisory Council

July 18, 2024

# Topics

- Context about multiyear plan transition
- Multiyear Plan Process Design
  - Multiyear plan development process and stakeholder engagement
  - Plan management
  - Structure of five-year business plan
- Multiyear Savings Assessment

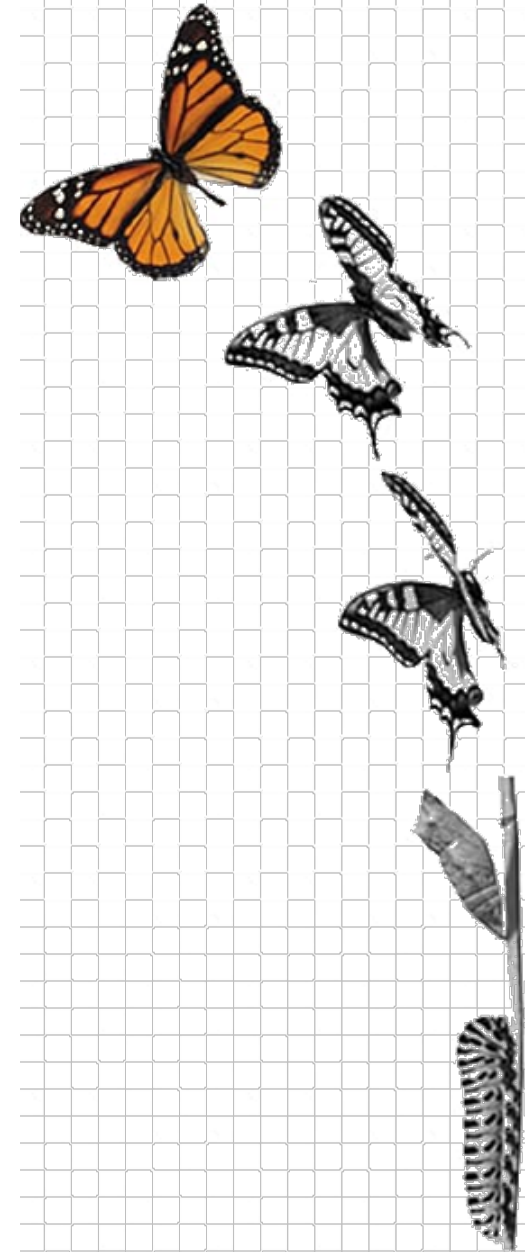
# Transition to a Multiyear Plan - 2024

## Multiyear Savings Assessment

- Outline approach to maximize acquisition of cost-effective savings by 2030
- Explore program strategies to accelerate savings
- Engage utilities and other stakeholders

## Multiyear Plan Process Design

- Develop process documentation
- Outline information & data needs
- Create stakeholder engagement plan



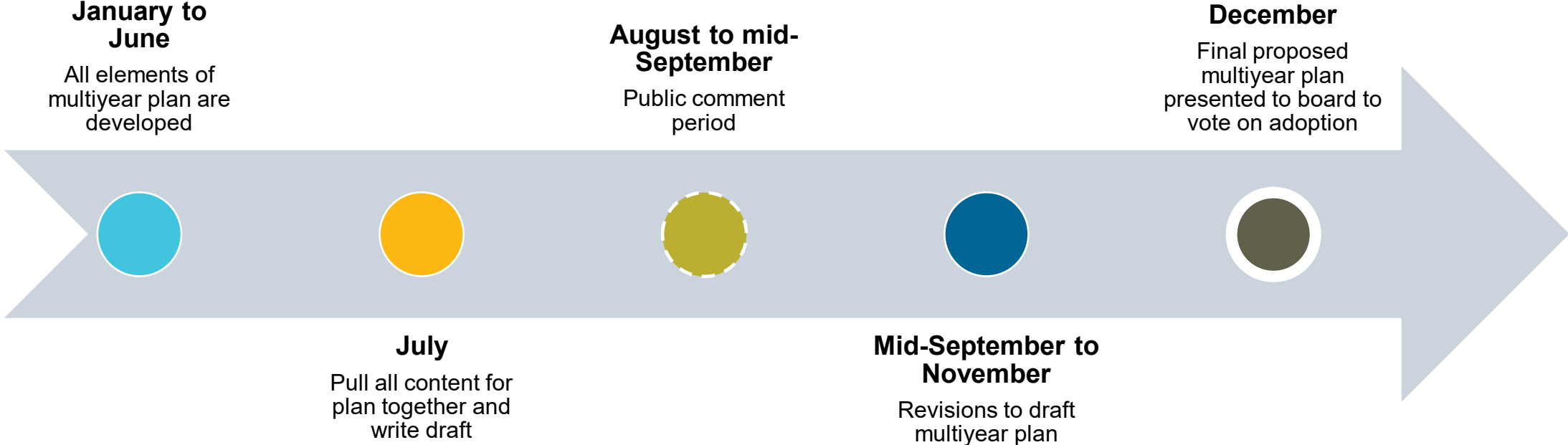


## Transition to a Multiyear Plan - 2025

- Set savings & generation targets
- Develop of our first Multiyear Plan
  - Business Plan
  - Human Resource Plan
  - Complementary Funding Strategy
  - Financial Plan
- Engage stakeholders
- Transition to 6-quarter rolling forecast

Multiyear plan process & stakeholder engagement

# Draft multiyear plan development process for 2025



# Stakeholder engagement points – Advisory Councils

## January:

- Present schedule and engagement opportunities
- Review focus areas and outcomes for multiyear plan

## February and March:

- 3-4 workshops, organized around focus areas
- Seek input to prioritize and narrow down initial list of activities

## August:

- Present draft multiyear plan
- All stakeholders and the public will have 6 weeks to comment on the draft multiyear plan (August through mid-September)



Plan management

## 2026-2030 Multiyear Plan

## Plan Management

5-year business plan



5-year project roadmap

5-year financial plan



6-quarter rolling forecast

5-year human resource plan



Annual staffing plan

Complementary funding strategy



Development plan



Overarching plan management framework

## Draft plan management process

- Produce 6-quarter incentives forecast and financial report
- Compare progress toward targets and ranges of expected expenditures, revenues and reserves
- Identify any areas that are off track
- Use plan management framework to take appropriate response actions depending on extent of deviation from targets and ranges



# Structure of 5-year business plan & example

## Strategic Plan Focus Areas

### Multiyear Plan Focus Areas

Same as or aligned with Strategic Plan focus areas



### Outcomes

Changes desired by 2030

Same as outcomes identified in Strategic Plan, plus additional outcomes as needed

### Activities

Actions planned to achieve outcomes

### Goals

Things we can measure to show achievement of outcomes; direct result of activities

### Targets

Specific numbers we expect to achieve corresponding to each goal

### Resources

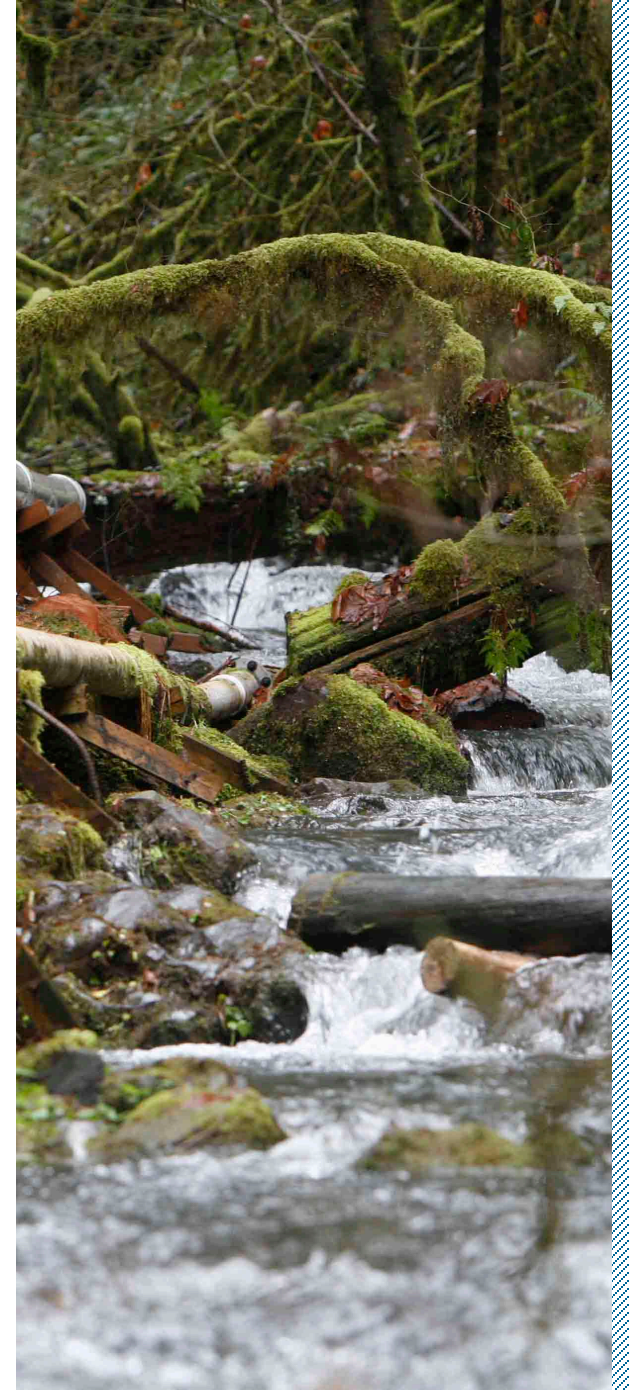
Staff, funding, knowledge and influential factors needed to accomplish activities and achieve outcomes for each focus area

Focus area	Engage customers with relevant EE & RE programs, including services for underserved customers		
<b>Outcomes</b>	Underserved customers have more opportunities to participate in our programs	Energy Trust maximizes our contribution utility decarbonization requirements	Our Trade Ally Network is larger and more diverse
<b>Activities</b>	<p>Engage with trade ally contractors, including minority and women owned, to reach customers</p> <p>Do more whole home energy upgrades for customers with low-to-moderate incomes</p>	<p>Deliver residential, commercial and industrial programs</p> <p>Launch new offers</p>	<p>Expand contractor development pathway</p> <p>Launch trade ally mentorship program in rural areas</p>
<b>Goal &amp; targets</b>	<p><u>Goal:</u> Number of income-qualified customers served</p> <p><u>Target:</u> 500 income-qualified customers served</p>	<p><u>Goal:</u> aMW and therms saved</p> <p><u>Target:</u> 1 million aMW and 1 million therms</p>	<p><u>Goal:</u> Number of trade allies in network</p> <p><u>Target:</u> Trade Ally Network increased by 10%</p>
<b>Resources</b>	Funding to enable whole-home energy upgrades	Supplemental funding to address participation barriers	Additional staff to support expanded trade ally trainings

# Multiyear Savings Assessment update

# Savings Assessment project outcomes

- List of strategies by sector with associated data points (e.g., relative savings, cost, timing, etc.)
- Rough draft estimate of savings estimates by fuel





# Learnings

- Multiyear program planning is critical to advancing savings acquisition, but will take time to evolve
- Key market savings segments need more development in the strategy tracker
- Bottoms-up approach is sure to leave out savings and requires more precision than may be realistic
- Strategy tracker helped us communicate program ideas with utilities and OPUC staff