

# 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/2020-2024-strategic-plan](https://energytrust.org/2020-2024-strategic-plan).

## Key

On track	On track, managing	Off track
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## Focus area 1: Services to customer

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 2023
We achieve our annual savings and generation goals and continue to use multiyear planning processes to identify ambitious longer-term energy targets that incorporate emerging sources of savings.	

- Energy Trust exceeded its annual electric and natural gas savings goals and its annual energy generation goal for 2023. It also met or exceeded goals in all utility service areas and achieved its highest ever annual savings in Cascade Natural Gas and Avista service areas.
  - For 2020 through 2023, Energy Trust has met or exceeded its annual electric savings goal for two years, met or exceeded its annual gas savings goal for three years, and met or exceeded its annual electric generation goal all four years.
  - For 2020 through 2023, Energy Trust has achieved 99% of the years’ combined electric savings goals and 103% of the combined gas savings goals.
- Energy Trust deployed several strategies mid-year to boost gas savings among commercial and industrial customers, including increasing incentives in response to rising costs and doing more outreach to help customers identify easy-to-complete projects.
- Energy Trust worked with Avista to begin offering incentives to its interruptible and gas transport customers. These large commercial and industrial customers were previously ineligible for incentives; helping them save energy supports Avista’s long-term decarbonization goals. (Outreach to some gas transport customers was paused at the request of Avista following an Oregon Court of Appeals ruling that invalidated the state’s Climate Protection Program in late 2023.)

- Staff proposed and the board approved a 2024 budget and 2024-2025 action plan that includes significant investments in the capabilities, staffing and market support needed to deliver more savings in future years and will also maximize the impact of new complementary funding expected to enter the market in 2025 and beyond, ensuring those funding sources result in measurable value to utility systems as soon as possible.

Progress indicator	Status as of 2023
We meet or exceed the goals we establish to increase the diversity of program participants.	

- Energy Trust reported on metrics for progress to goals in its Diversity, Equity and Inclusion (DEI) Plan, which was developed by staff and focuses on community engagement. Metrics include the number of cultural awareness trainings and events attended by staff; the number of community members participating in Energy Trust projects, initiatives or advisory groups; the percentage of contract expenditures paid to businesses owned by women, people of color and service-disabled veterans; and the number of community engagement activities and result of these activities. See Appendix 2 in Energy Trust’s 2023 annual report for results.
- In addition to the internal DEI metrics, Energy Trust began reporting to the OPUC in 2023 on results of the new equity metrics as required in HB 3141 (2021) and included in the OPUC’s annual performance measures for Energy Trust. The 2023 metrics focused on increasing support for nonprofit organizations that serve environmental justice communities; increasing funding for outreach to environmental justice communities; creating and expanding low- and no-cost offers; and supporting solar and solar + storage projects for customers with low and moderate incomes. Energy Trust met or exceeded all four metrics; see Section III of Energy Trust’s 2023 annual report for results.

## 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 2023
We develop a framework to value, deliver, report and evaluate energy efficiency and renewable energy resource opportunities in targeted locations in collaboration with utilities.	

- Energy Trust conducted targeted load management (TLM) feasibility studies for sites identified by Cascade Natural Gas and Avista. The studies showed the energy efficiency potential was not great enough to address potential load constraints in those locations.
- Staff began exploring TLM opportunities with PGE and Pacific Power and how they could apply to the non-wires solution concepts in the utilities’ distribution system plans.

Progress indicator	Status as of 2023
We implement and evaluate initiatives designed to drive customer adoption of energy efficiency and renewable energy projects in targeted areas.	

- Energy Trust is participating in PGE’s Smart Grid Test Bed Collaboration, which began offering incentives in late 2023 to customers in the North Portland neighborhoods of Overlook and Arbor Lodge with specialized efficiency and solar + storage offers for residential, commercial and multifamily properties.

### 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 2023
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 developed an internal policy monitoring system in 2020.
- In 2023, staff provided feedback to the Oregon Department of Energy (ODOE) on the design of new rebate programs for residential customers with low and moderate incomes authorized under the federal Inflation Reduction Act and on its application for Solar for All funding. Energy Trust feedback was focused on how to ensure customers can access these offers and reduce confusion in the marketplace.
- After Portland City Council’s approval of a five-year Climate Investment Plan in 2023, staff worked with city staff to develop a shared strategy for combining funding from Energy Trust and the Portland Clean Energy Community Benefits Fund to maximize benefits for eligible customers. Staff also facilitated a work session with staff from City of Portland, ODOE, utilities and others on this topic.
- Staff supported cities and counties developing and implementing sustainability, climate change or clean energy plans and programs, including the City of Salem’s climate action plan, the City of Hillsboro’s Environmental Stewardship Committee and greenhouse gas inventory, the City of Tigard’s climate action plan and Wallowa County’s Community Energy Strategic Plan.
- Staff provided briefings to more than a dozen legislators and legislative staff members during the 2023 Oregon legislative session on Energy Trust benefits to their districts and provided written and verbal comments to relevant committees.

### 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 2023
We acquire more energy savings and renewable generation than would otherwise be achieved with only public purpose charge funding.	

- Energy Trust’s Innovation and Development team, which was created in late 2022 and staffed in 2023, reviewed more than 75 opportunities for funding outside Energy Trust’s core ratepayer funding to determine if Energy Trust should pursue the opportunity. Many of these were federal opportunities created under the Inflation Reduction Act.

- The largest such opportunity is Solar for All. Energy Trust and Bonneville Environmental Foundation joined the Oregon Department of Energy in Oregon’s application for federal funding aimed at increasing the availability of solar, especially for low-income and disadvantaged communities. Under the proposal, Energy Trust would administer incentives and project development assistance to community solar projects and support community solar and rooftop solar for Oregon. Awards are expected to be announced by mid-2024.
- Innovation and Development team led coordination efforts with state and local agencies to establish best practices for combining different funding sources to maximize benefits for customers, ensure accessibility and prepare the market to meet growing demand.
- Energy Trust continues to participate in or manage initiatives with non-ratepayer funding sources, including PGE’s Smart Grid Test Bed and the Landlord Provided Cooling Spaces with Oregon Department of Energy. Staff is exploring new opportunities that utilities are funding through distribution systems planning.

Progress indicator	Status as of 2023
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We coordinate with more organizations and communities where their additional resources help accomplish mutually supportive objectives.	
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- In 2023, Energy Trust enrolled 12 new community-based organizations in Community Partner Funding that together delivered \$3.4 million in incentives to their clients for clean energy projects. Qualifying partner organizations deliver higher incentives to residential and multifamily customers with the goal of serving more customers of color, customers with low and moderate incomes, rural customers and other priority groups.
  - Since 2020, Community Partner Funding has served 2,400 sites, delivered \$5.45 million in incentives, saved 3,386,000 kilowatt hours of electricity and saved 6,700 therms of natural gas.
- In 2023, Energy Trust awarded the second and third rounds of its Working Together Grants, which offer nonprofits funding to pursue activities that help diverse customers and communities participate in Energy Trust clean energy programs. Twenty organizations across the state were awarded grants totaling \$160,000 to support outreach, training, program development, grant writing and organizational capacity. Grantees in the first round reported grant-funded activities reached about 4,000 customers.

Progress indicator	Status as of 2023
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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.	
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- Community-specific collaboration with one natural gas utility did not move into implementation phase.
- Energy Trust developed and launched a hybrid HVAC pilot to evaluate the benefits of heat pumps installed with gas furnaces in existing gas heated homes. Staff worked with utility partners and other stakeholders on the pilot’s objectives, installation specifications, customer participation criteria and promotions. Installations began in late 2022 and the pilot will run for two years.
- Staff worked with Avista to begin offering incentives to its interruptible and gas transport customers in 2023; outreach to some customers was paused following an Oregon Court of Appeals decision (See Focus Area 1).

## 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 2023
We achieve diversity, equity and inclusion goals for employee hiring and recruitment and for the board of directors.	

- Energy Trust sought to increase the racial diversity among job applicants and new hires, setting an internal goal of 35% of job applicants and new hires identifying as Black, Indigenous and people of color (BIPOC). In 2023, 35% of applicants identified as BIPOC, as did 18% of new hires.
- In 2023, Energy Trust added three board members including one enrolled member of the Klamath Tribes and one enrolled member of the Confederated Tribes of the Umatilla Indian Reservation. Board recruiting in recent years has prioritized racial and geographic diversity.

Progress indicator	Status as of 2023
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. Survey results in 2023 indicate the majority of staff are aligned around common goals and priorities and think senior leaders “often” or “always” communicate Energy Trust’s vision and strategic direction. Results also confirm long-term improvement in staff feeling empowered to explore new ideas, as well as improved capabilities at decision making and flexible resourcing of new initiatives.
- The formation of the communities and new initiatives sector enhances Energy Trust’s ability to engage with communities and tailor integrated cross-program offerings to meet customer and community needs.
- Staff make significant process improvements to budgeting and action planning processes, including designated change periods and streamlining underlying data structures that enabled faster, more iterative budget development in 2023.
- Staff redesigned the orientation process for new employees to provide a consistent experience for larger cohorts to keep pace with accelerated hiring in 2023.