

APPENDIX 4: Progress to 2020-2024 Strategic Plan

Energy Trust’s 2020-2024 Strategic Plan defines the organization’s areas of focus and key strategies for the five-year period. These focus areas align to 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 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 board Strategic Planning Committee receives progress reports on a quarterly basis and provides committee updates at public board of directors meetings. The strategic plan and plan management information is available at www.energytrust.org/strategicplan.

Key

On track	On track, managing	Off track	Not started
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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 1
We achieve our annual savings and generation goals.	

- Energy Trust achieved its annual organizational electric savings goal, exceeded its annual organizational gas savings goal and far exceeded its annual organizational renewable energy generation goal.
 - Staff responded to the impacts of COVID-19 on customers and the economy in ways that improved energy savings forecasts and reached underserved customers, especially rural communities and customers with low incomes.
 - Staff held a virtual workshop with Umatilla County residents to understand interests and barriers to participating in our programs, fulfilling an OPUC performance measure requirement while gaining insights that will inform future offers and engagement.
 - Following the Labor Day wildfires that occurred across the state, an internal response team developed an initial strategy to support rebuilding and promote energy efficiency.

Progress Indicator	Status as of Year 1
We continue to use multi-year planning processes to identify ambitious longer-term energy targets that incorporate emerging sources of savings.	

- This progress indicator guides the organization to plan for and pursue innovative projects and approaches. Energy Trust uses a business planning process to reserve time for innovation efforts that explore new and emerging sources of savings and generation, among other things. This was the first year Energy Trust set targets and tracked staff time planned for innovative projects. Even though less time than planned for was dedicated to the most innovative types of projects (transformational innovation), time was dedicated as planned to the other two areas of innovation (core and adjacent innovation).

Progress Indicator	Status as of Year 1
We meet or exceed the goals we establish to increase the diversity of program participants.	

- This progress indicator aligns with the organization's diversity, equity and inclusion goals. Energy Trust achieved about half the goals by the end of 2020 set in the Diversity, Equity and Inclusion Operations Plan, including goals to increase residential customer participation in communities of color.
 - Looking forward, strategies and data tracking efforts that were part of the 2020 plan helped to inform the 2021 operations plan and goals. The Existing Buildings and business lighting request for proposal process and the subsequent contracts awarded prioritized diversity, equity and inclusion in subcontracts and customer service.

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 1
We develop a framework to value, deliver, report and evaluate energy efficiency and renewable energy resource opportunities in targeted locations in collaboration with utilities.	

- Staff began documenting approaches and lessons learned from targeted partnerships with utilities in order to streamline and standardize this emerging area of work.

Progress Indicator	Status as of Year 1
We implement and evaluate initiatives designed to drive customer adoption of energy efficiency and renewable energy projects in targeted areas.	

- Targeted partnerships with three of the five partner utilities were in progress or in the planning stage by year-end, for example:
 - Becoming a subcontractor to deliver PGE's residential Smart Battery Pilot and supporting PGE with the launch of a ductless heat pump controls pilot. Staff also participated in three working sessions hosted by PGE's Smart Grid Test Bed team to provide feedback on potential design concepts in the next phase that could launch in 2022 if approved by the OPUC.
 - A targeted load management project with Pacific Power in the Phoenix area wound down at the end of 2020, as scheduled; offers remained available through the end of 2020. Energy Trust has supported the planning and marketing of the project.
 - Energy Trust is also working with NW Natural on a targeted load management project in the Cottage Grove and Creswell area. Marketing efforts there continue with a focus on peak demand reduction. The next phase, if approved, would apply a localized avoided cost value to cost-effectiveness screening.
 - Targeted load management involves deploying energy efficiency and solar to serve customers and strengthen utility systems, potentially deferring utility infrastructure investments.

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 1
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 initial internal policy tracking system. The purpose of the system is to evaluate and adjust allocation of resources dedicated to this focus area, and when combined with periodic stakeholder surveys, assess staff effectiveness in this area.
- Staff provided public comment on the OPUC's work plans to implement greenhouse gas emissions reductions under Governor Brown's Executive Order 20-04.
- Staff monitored and participated in multiple OPUC processes and dockets, including Distribution System Planning requirements (UM 2005) and the investigation into the impacts of COVID-19 on customers (UM 2114). Staff provided information on cost-effectiveness, low-income initiatives and co-funding approaches.
- Staff was invited by the Governor's Office to provide information and perspective as a public purpose charge administrator to ongoing stakeholder discussions related to SB 1149 and the subsequent proposed 2021 legislation to revise the public purpose charge (HB 3141).

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 1
We acquire more energy savings and renewable generation than would otherwise be achieved with only public purpose charge funding.	
We coordinate with more organizations and communities where their additional resources help accomplish mutually supportive objectives.	

- Staff began working with the board Strategic Planning Committee to develop methodologies for tracking savings and generation that result from leveraging non-public purpose change funding, as well as tracking partnerships with organizations and communities that help accomplish mutually supportive objectives. Energy Trust will begin reporting progress in these areas in 2021.

Progress Indicator	Status as of Year 1
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.	

- Work on a concept agreement with a natural gas utility was prioritized for 2021.

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 1
We achieve diversity, equity and inclusion goals for employee hiring and recruitment, and for the board of directors.	

- Staff continued work on a diversity, equity and inclusion recruitment strategy and started working on a retention strategy. Energy Trust’s board of directors formed an ad-hoc committee to lead the development of diversity, equity and inclusion metrics for the board.
 - In 2020, Energy Trust increased the percentage of employees and job applicants who self-reported as people of color even as the rate of hiring in 2020 slowed significantly due to COVID-19. Changes made to recruitment and hiring included:
 - Hiring panels must have qualified applicants of color in consideration throughout the hiring process.
 - Members of the Diversity Advisory Council are asked to participate on hiring panels.
 - Hiring managers and hiring panel participants are required to attend an implicit bias training prior to holding interviews.

Progress Indicator	Status as of Year 1
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.	

- A survey on staff perception of organizational flexibility, adaptability and nimbleness indicated six of 12 statements where staff perceive the organization to be demonstrating these values. Those places that were not on track indicate a need for improvements to business planning and prioritization to better align work with available staff capacity. Overall, more staff feel the organization is improving in the ability to quickly and effectively respond to change, needs and new opportunities.
 - Organization flexibility was exemplified by staff pivoting and prioritizing COVID-19 and wildfire response efforts to serve vulnerable and impacted customers. In addition, staff were invited to a series of informational sessions to promote adoption of tools and resources to support innovation.
 - Efforts to improve organizational flexibility included prioritizing strategic initiatives during quarterly business planning updates and initiating longer-term efforts that seek to enhance organizational structure and clarify decision-making.