ENERGY TRUST OF OREGON
STRATEGIC PLAN
2025-2030

Energy Trust of Oregon

Introduction

Energy Trust of Oregon has a proven history of evolving to meet new demands and better serve our customers. We were created nearly 25 years ago with a clear mandate: to invest ratepayer funds to save electricity cost-effectively, support the development of renewable energy and transform markets to higher-efficiency products. Since then, we have added more services to our portfolio – natural gas efficiency, battery storage and community solar among them. We have worked with communities and utilities on innovative responses to capacity and system needs, and we have worked to advance diversity, equity, inclusion and belonging within our organization and through new offers and services delivered with community-based organizations to benefit more Oregonians. In recent years, we started adding new funding sources to broaden and deepen our impact and expand services to customers beyond what was possible with utility ratepayer funding.

Now, as we look ahead to 2025-2030, we see more needs and opportunities that will require our continued evolution. In this strategic planning process, we have heard from stakeholders that we have an important role to play in helping ensure all customers have access to reliable and affordable energy, that communities are prepared for and can recover from disasters, and that Oregon makes progress toward achieving its decarbonization goals in the most affordable way possible.

The focus areas, outcomes and strategies included in this 2025-2030 Strategic Plan reflect the critical importance of maximizing energy efficiency, small-scale renewable energy generation and, increasingly, the adoption of internet- and grid-connected technologies customers use to manage their energy use. How we maximize these resources matters. This plan calls for a continued focus on serving customers we have historically underserved and responding to emerging customer and community needs for clean energy solutions.

On behalf of the board and staff, we look forward to working with you to achieve our vision of clean, affordable energy for everyone.

Sincerely,

Henry Lorenzen, President, *Energy Trust of Oregon Board of Directors*

Jane S. Peters, Chair, *Board Strategic Planning Committee*

Michael Colgrove, Executive Director, *Energy Trust of Oregon*

About Energy Trust of Oregon

Energy Trust is an independent nonprofit dedicated to helping people and communities thrive through clean, affordable energy. We offer services and cash incentives to help 2.4 million utility customers in Oregon and Southwest Washington save energy, generate renewable power and realize other benefits. We work closely with utility partners, industry experts, community-based organizations and our Trade Ally Network of contractors and builders. We are governed by an independent board of directors and are accountable to the Oregon Public Utility Commission for investment of customer funds from five of Oregon's investor-owned utilities.

Our vision

Clean, affordable energy for everyone.

Our purpose

Working together with customers, communities and utilities, we save energy and maximize adoption of clean energy solutions, reducing costs and accelerating community-centered benefits.

What we deliver

Our information, cash incentives and network of relationships help utility customers lower their energy use and costs and achieve other clean energy benefits.

Our impact

Since 2002, our work has helped participating customers save $7.2 billion on their utility bills while reducing greenhouse gas emissions, generating renewable energy, and helping customers become more confident in their clean energy actions. These impacts have a direct benefit on the energy system and the people and businesses it serves. Our investments lower overall energy costs for all utility customers by helping utilities defer costs associated with generating and distributing more energy. These are costs that would have otherwise been passed on to customers through higher utility rates.

Our funding

A significant portion of our funding comes from the customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista to invest in energy efficiency and renewable energy programs in Oregon and energy efficiency programs in Southwest Washington. We also receive funding from other sources, including federal and state government programs and other contracts and grants, to complement and expand our core utility customer programs and services.

Defining clean energy solutions and benefits

This plan references clean energy solutions and benefits. Energy Trust defines clean energy solutions as electric and natural gas efficiency, since both lower energy use and the need for non-renewable energy generation. Our clean energy solutions also include small-scale renewable energy generation and customer-sited distribution system connected technologies that support reliability, resilience and integration of renewable energy resources with the utility grid, such as battery storage and smart inverters that are part of a solar energy system.

Clean energy benefits include energy savings, renewable energy generation, utility bill savings and avoided greenhouse gas emissions. There are also non-energy benefits such as reduced vulnerability to climate change, more comfortable working and living environments, more resilient communities, improved health outcomes, increased productivity for businesses and non-energy cost savings on things like water, equipment and maintenance.

Our values

Our values represent who we are as organization on our best days – how we approach challenges and work together, building a culture of trust and acceptance.

We care about people: We deliver results because it makes a difference to those we serve. As teammates, we support each other's success and well-being as we work together toward common goals.

We learn and change: We continuously learn from listening, experimentation and evaluation. We recognize that emerging needs and complex challenges often require adaptation and new solutions.

We are transparent: We work with integrity. We share our work, are honest about what we have done and will do, and we hold ourselves and each other accountable.

We value diversity, equity, inclusion and belonging: We acknowledge the deep importance of diversity, equity, inclusion and belonging in our work. Everyone brings value; we seek different perspectives because we know our solutions are stronger when we collaborate with each other.

As we grow and evolve as an organization, and as we work to achieve all the outcomes we have identified in this plan, we recognize Energy Trust may benefit from working toward additional, aspirational values that will support our ability to innovate and accelerate in a dynamic environment while managing the risks and benefits of doing so. During this 2025-2030 strategic plan period, staff is committed to identifying aspirational values and bringing them to life in our work and organizational culture.

Our strategic planning process

Energy Trust's work is guided by strategic plans as required under our funding agreement with the Oregon Public Utility Commission. Work on the 2025-2030 plan was led by a board of directors' strategic planning committee and developed in an open process that invited staff and stakeholders to inform the board's thinking on Energy Trust focus areas for the coming years. [1,2]

The process of drafting the plan began with engaging members of Energy Trust's Conservation, Diversity and Renewable Energy advisory councils to understand customer and community needs, market trends, challenges and opportunities they see coming in 2025-2030. Staff conducted interviews with stakeholders including partner utilities, the OPUC, Oregon Department of Energy, Business Oregon, businesses, customer advocates, Energy Trust trade allies, and community-based organizations.

Staff also researched and created learning papers on emerging areas and issues for our industry: utility capacity and coordination; decarbonization; workforce development; evolving approaches to evaluating the cost and benefits of energy efficiency; and customers Energy Trust has historically underserved. [3] Staff presented to the board on energy resource assessments, trends in energy and housing, emerging funding opportunities and the policy context.

All staff contributed to the assessment of the organization's strengths and capabilities, values and future opportunities.

Last, the board hosted several panel discussions in public board meetings in the first half of 2024 to hear directly from stakeholders and community leaders, including state and local elected representatives, community-based organizations and utilities.

All this information grounded the board's understanding and thinking of future scenarios, Energy Trust's existing strengths and capabilities, and potential focus areas. Board members discussed and refined elements of this plan at public meetings; the board's strategic planning committee prepared for those discussions by synthesizing board input and providing recommendations.

Further refinements were made following a five-week public comment period that yielded significant input, including from our utility partners, municipalities, national and regional energy organizations, community-based organizations, energy and climate advocates, business groups and individuals. We also got feedback from our advisory councils and OPUC commissioners and staff. While comments showed broad support for the draft plan and alignment with stakeholder priorities, they also revealed a need to clarify Energy Trust's core work in relation to the focus areas. Other commenters emphasized the need for collaboration, consumer education and protection, while some advocated for expansion of Energy Trust activities. Comments regarding strategies will be considered as Energy Trust develops its 2026-2030 Multiyear Plan, which will be developed in 2025.

We are grateful to all those who participated in this process and helped shape our priorities for the coming years.

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[1] Unlike previous strategic plans that covered five years, this plan spans a six-year period to align with a 2030 target for electric utility emissions reductions.

[2] The strategic planning committee was Jane Peters, Peter Therkelsen, Bill Tovey and Ellen Zuckerman from Energy Trust's board of directors, with Commissioner Letha Tawney from the Oregon Public Utility Commission, Director Janine Benner from the Oregon Department of Energy and Energy Trust Board President Henry Lorenzen serving in an ex officio capacity.

[3] Learning papers, interview summaries and other development materials are available at energytrust.org/strategic plan.

The future we are planning for

Oregon has seen tremendous changes in its energy landscape in recent years, from advancements in technology to significant load growth and peak demand challenges to growing emphasis on decarbonization and addressing the impacts of climate change. We expect changes to continue and even accelerate in 2025-2030, increasing demand for Energy Trust's existing services and creating the need for new services.

First, extreme weather events due to climate change will occur with increasing frequency. We are already seeing climate-related events that threaten health and quality of life, from devastating wildfires and prolonged heat waves to winter storms that affect customer access to utility services. In addition to these events and the need for utilities to plan for them, increasing energy demand, energy market volatility and other trends have increased energy costs significantly in recent years, and we expect energy affordability will remain a pressing concern for customers, policymakers and regulators in the years ahead. Both of these trends – increasing impacts of climate change and increasing costs – will have an outsized impact on environmental justice communities.[4] Calls for equity and ways to address systemic injustices in our energy system will grow louder in both the advocacy and policy arenas.

Second, policymakers in Oregon have set ambitious greenhouse gas emission reduction goals, with initial targets for electric utilities that must be met by 2030. Energy efficiency and renewable energy are featured prominently in utilities' long-term plans as critical resources to meet their targets. We expect decarbonization will remain a priority at the state level, although cost implications and new demands on the energy system may affect the pace. At the same time, utilities are evolving their operations and planning to prioritize reliability, capacity and flexibility in the face of climate change, and working to replace fossil fuel energy resources with wind, solar and other renewable or non-emitting resources. Distribution system planning and upgrades will be needed to support system reliability amid a significant increase in demand due to building and transportation electrification, data centers and semiconductor manufacturing.

Third, funding for clean energy will continue from federal, state and other programs. This will help more energy burdened customers by raising benefit levels to cover more of their project costs; combining our utility ratepayer dollars with this new funding will also help us achieve more results. Utilities, meanwhile, will develop additional programs and offers to support demand response, electrification, battery storage and more. There will be challenges in connecting customers with new offers, and there is a risk of confusing customers, contractors and on-the-ground organizations delivering clean energy services. There needs to be coordination among Energy Trust, public agencies, utilities, nonprofits and community-based organizations to ensure customers see real and timely benefits. Organizations new to the industry will need training and support, while customers will need education and resources to understand the new offers and technologies available to them. And the continuing shortage of contractors and clean energy workers to support energy efficiency and small-scale renewable projects will require workforce development.

[4] See "Defining priority customers" box on page 11.

Our role in 2025-2030: Supporting customers and communities to reduce energy costs and realize additional benefits

Over the past two decades, Energy Trust has developed a broad portfolio of services and market reach to support residential, commercial, industrial, agricultural, public, nonprofit customers and communities in their clean energy investments to save electricity and natural gas and generate and store renewable energy. We have become a trusted nonprofit administrator of utility customer funds with strong financial controls and stable systems; industry-leading program planning, design and delivery; rigorous evaluation processes; engaged stakeholders and transparent public reporting.

We have always been a learning and evolving organization. As a result of our efforts to better reach and serve customers, we now bring a well-established commitment to diversity, equity, inclusion and belonging. We have also become an expert resource for information and analysis regarding clean energy opportunities for customers, communities and local and state policymakers. Through relationship development and innovation, we are testing and refining new approaches with community partners and funders to unlock previously stranded savings and benefits for customers.

Our strong and growing network of relationships uniquely positions us to respond to emerging needs over the next six years, supporting customers and communities in saving energy and adopting clean energy solutions that reduce their energy costs while contributing to community-centered benefits, energy justice outcomes and state, local and tribal energy objectives.

Defining energy justice

Energy justice is when energy is accessible, affordable and sustainable for all communities, especially those on the frontline of climate change impacts, and when energy benefits and burden are equitably distributed. Energy Trust engages environmental justice communities to achieve energy justice outcomes. (Initiative for Energy Justice; National Renewable Energy Laboratory)

In 2025-2030, we will remain focused on our core work of supporting as much cost-effective energy efficiency, renewable energy and customer-sited distribution system connected technologies as possible. As our energy system faces more pressures – to its affordability, reliability and flexibility during periods of peak use – the benefits that Energy Trust delivers are needed now more than ever:

- Through low-cost electric and natural gas energy efficiency, small-scale renewable energy generation and solutions that help customers manage their energy use, **we help customers start saving immediately on their utility bills and realize other, non-energy benefits** like staying safe and comfortable amid extreme heat, wildfires or winter storms.
- By lowering customer demand for energy, **we help utilities avoid investing in more energy generation, transmission and distribution system upgrades** to meet that demand.
- In mitigating capital cost and operational expense pressures on Oregon's energy system, **we help ensure future costs are as low as possible for all customers**, including those who don't directly participate in our programs.

Desired outcomes

If we are successful, by the end of 2030, customers will be paying less for energy than they otherwise would have thanks to Energy Trust's clean energy solutions. Utilities will have avoided needing to make some investments in additional generation, distribution and transmission. They will also have reduced power costs that customers help pay for during peak periods and extreme weather events. Customer-sited energy efficiency,

renewable energy and distribution system connected technologies will be providing system capacity and flexibility, especially during periods of high demand and in specific geographic areas.

Strategies to support our core work

In addition to the strategies proposed under each focus area, we'll continue to pursue the following strategies that support our core work:

- While Energy Trust has always worked to acquire all available cost-effective energy efficiency and offset above market costs of renewable generation, we will increase investment to maximize our impact, using complementary funding in addition to ratepayer funding where appropriate.
- We will continue to cultivate a strong network of trade ally contractors, distributors, retailers, community-based delivery partners and workforce development groups to reach and serve customers in all areas of the state.
- We will increase investments and support for efforts to address insufficient workforce, lack of contractor availability and readiness, supply chain issues and other market barriers. This could include engaging labor unions and educational providers help train and encourage more workers.
- We will continue to work with utilities to understand the 20-year potential for cost-effective energy efficiency and how that will help them meet future demand, and we will strive to acquire that potential at the lowest cost to utility customers.
- We will work with the OPUC and stakeholders to quantify non-energy benefits and explore options related to cost-effectiveness requirements for ratepayer investment where significant customer benefits are identified but not quantifiable or where complimentary funding may be applied.
- We will look to deepen our relationships and streamline collaboration with groups at the community, state, regional and national level where we see opportunity to accomplish mutual objectives in support of our role and focus areas.
- We will remain flexible and adaptable to meet changing needs, policies and regulations as they occur, continuing to follow guidance from OPUC regarding the investment of ratepayer funding.

Measuring our progress

Energy Trust has long-standing metrics for measuring the overarching success and impact of our investments. The OPUC also sets annual performance measures to evaluate Energy Trust performance for the utility ratepayer funds we administer. These metrics and performance measures are the backbone of our performance reporting to our board, the OPUC and the public.[5]

Among these metrics are:

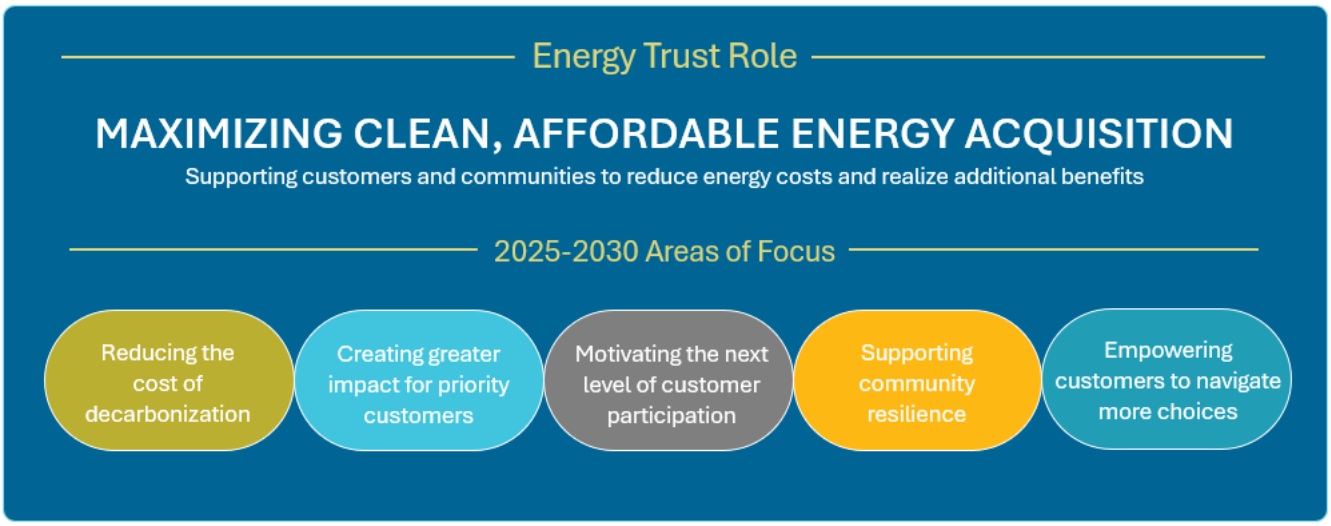
- Energy savings, peak demand reduction and renewable energy generation associated with Energy Trust's investments in electric and natural gas energy efficiency, renewable energy, battery storage and other customer-sited distribution system connected technology and comparisons to utility Integrated Resource Plan targets.

[5] Reports are available online at energytrust.org/reports.

- Total customer cost savings resulting from electric and natural gas energy efficiency, peak demand reduction, renewable energy, battery storage and other customer-sited distribution system connected technology investments.
- Financial benefits for customers from avoiding utility system costs resulting from Energy Trust's energy efficiency investments.
- Cost-effectiveness (according to cost tests required through regulatory oversight) of acquired savings using ratepayer funding.
- Amount of non-ratepayer funding managed by Energy Trust to acquire savings, net peak demand reduction and generation.
- Levelized costs, or the amount of ratepayer funding Energy Trust spends for each unit of energy saved.
- Equity metrics established annually by the OPUC to evaluate progress related to serving customers and communities Energy Trust has historically underserved.

Where we will focus

To realize our role as the anticipated future unfolds over the next six years, we have identified five areas of new or continuing focus essential to responding to utility and customer needs and maximizing our impact. These focus areas live within the larger context of our core work:



- **Reducing the cost of decarbonization:** We will accelerate our investments supporting customers and communities in saving energy and adopting clean energy solutions, delivering significant cost savings while reducing greenhouse gas emissions and ensuring a more affordable decarbonization of the energy system. We will help the state achieve its clean energy goals by supporting utilities aggressively decarbonizing their systems while managing significant load growth.
- **Creating greater impact for priority customers:** We will increase participation among historically underserved groups and increase the benefits for these customers through collaboration and community engagement. We will integrate new funding sources with existing utility ratepayer funds to further lower costs for these customers.
- **Motivating the next level of customer participation:** We will seek to achieve the adoption of clean energy solutions by customers who have not yet acted, while also realizing the full savings and generation potential of those who have previously participated in our programs.
- **Supporting community resilience:** We will engage communities, local, state and Tribal governments, utilities and others in resilience efforts so that clean energy solutions can contribute to energy resilience.
- **Empowering customers to navigate more choices:** We will elevate our approach to customer support by guiding people to information on solutions for managing their energy use and engaging in conversations that prepare them to make energy-related decisions.

On the following pages, we describe the rationale for each focus area. We identify **desired outcomes** that describe the impact we expect to achieve; **metrics** we will use to track and measure our progress; and **example strategies**[6] we could employ to achieve that impact. Each of the five focus areas will contribute to the overarching results that we track on and deliver in our performance reporting.

[6] Strategies proposed under each focus area do not represent all the planned strategies and activities that will be employed; a more comprehensive list will be available in our 2026-2030 Multiyear Plan, which will be finalized in late 2025.

Focus area: Reducing the cost of decarbonization

We will focus on maximizing the contribution of energy efficiency and renewable energy resources in service to Oregon's decarbonization goals, making the transition less costly and less risky for utilities and customers.

In response to climate change, Oregon has adopted aggressive goals for electric and natural gas decarbonization, which is the reduction or elimination of greenhouse gas emissions including carbon emissions from the energy supply. By 2030, electric utilities must reduce emissions by 80% compared to their baseline levels, and declining annual emission limits for natural gas utilities are forthcoming. Our role is to accelerate energy savings and renewable generation as much as possible to support reaching those goals; our historical approach to acquiring savings and generation over the 20-year timeline of the utilities' Integrated Resource Plans is no longer sufficient.

Because it introduces new challenges related to managing variable renewable resources, decarbonization also introduces new costs and pressures on the affordability of our energy system. Cost-effective energy efficiency is among the least cost and lowest risk tools for decarbonization and can help lower demand and stress on the grid. Non-ratepayer funding that does not have cost-effectiveness requirements may further support decarbonization and electrification where customers request it. By accelerating clean energy solutions including efficiency and renewable resources, we can help manage the cost of decarbonization and help utilities meet their decarbonization goals.

Desired outcomes

By the end of 2030, Energy Trust's work will have contributed to Oregon's progress toward meeting its decarbonization goals at a lower cost. Electric and natural gas utilities will be leveraging customer-sited energy efficiency to the greatest degree possible in their Integrated Resource Plans, while electric utilities specifically will be leveraging energy efficiency and renewable energy in their Clean Energy Plans. Businesses and communities with decarbonization goals will be reducing their energy use, generating renewable power and making equipment choices that reduce greenhouse gas emissions.

Metrics

- Carbon saved as result of customers implementing clean energy solutions.
- Number of decarbonization plans and/or policies supported.

Example strategies

- Target energy efficiency and renewable energy solutions that significantly reduce carbon emissions.
- Support electrification as requested by customers or funders while seeking and adapting to direction from policymakers.
- Proactively engage and encourage communities to maximize energy efficiency, renewable energy and connected technologies in decarbonization plans and implementation activities.

Focus area: Creating greater impact for priority customers

We will focus on increasing participation among priority customer groups Energy Trust has historically underserved and on increasing the savings and generation associated with each participating customer.

Customers who directly participate in clean energy programs realize the greatest benefits, including more control of their energy use and lower energy bills. But our funding sources and our programs have not always been designed to support all customers, and many have been left out of receiving services when they would have benefited the most from them. For Energy Trust to fulfill its mission of clean, affordable energy *for everyone*, we must continue to rethink and redesign our programs, bring in additional sources of funding, and coordinate with our utility and community-based partners to make greater strides in reaching priority customers, including the environmental justice communities we have underserved.

Desired outcomes

By the end of 2030, a significant number of customers who were underserved by Energy Trust and who struggled with energy burden will be benefitting from more comfortable, healthy and resilient homes and businesses, especially during extreme heat and cold weather, thanks to energy-saving features, solar and battery storage. As a result of Energy Trust's focus here, customers' use of clean energy solutions will help offset the impact of utility rate increases on their bills by lowering long-term energy use.

Metrics

- Number of projects completed, energy saved, generation acquired and incentives delivered to priority customer groups.
- By the end of 2026, we will refine our identification of priority customer groups and build analytical capabilities to gather and report data for the purpose of increasing participation within priority customer groups.

Example strategies

- Utilize community engagement principles and approaches to co-create programs with communities that better resonate with, address the specific needs of, and motivate priority customers.
- Work with utilities, community-based organizations and diverse, local contractors to reach priority customer groups and support their adoption of clean energy solutions.
- Secure and integrate funding sources that do not have cost-effectiveness requirements to specifically support priority customer groups.

Defining priority customers

Energy Trust believes it is incumbent on us to deliver programs that provide meaningful clean energy solutions for everyone. We have identified that customers with low incomes, people of color and customers in rural areas are underrepresented in our programs.

Going forward, we will continue to assess which groups remain underrepresented. This assessment will focus on customers within environmental justice communities as defined in Oregon statute as "communities of color, communities experiencing lower incomes, Tribal communities, rural communities, coastal communities, communities with limited infrastructure and other communities traditionally underrepresented in public processes and adversely harmed by environmental and health hazards, including seniors, youth and persons with disabilities" (HB 2021). Additionally, renters, people with moderate incomes, small businesses, and customers with high energy burden (households that spend more than 6% of income on energy costs) will be considered as we work to evolve programs to ensure meaningful access and services.

We recognize many people identify as belonging to more than one of these groups.

Focus area: Motivating the next level of customer participation

We will focus on testing and implementing strategies that seek to achieve the adoption of clean energy solutions by those who have not yet acted, while continuing to realize the full savings and generation potential of those who have previously participated in our programs.

While some customers have faced barriers in the past to participating in our programs, others have not participated – or *chosen* to not participate – because they have not been sufficiently motivated to do so. This group represents a significant portion of our eligible customers, and to meet our accelerated savings goals, support the state's energy system and advance decarbonization, we need to reach and motivate these customers. This will require new approaches, crafting more compelling offers and services and expanding the scale of already-successful approaches to appeal to more people and businesses, especially small businesses.

Additionally, customers who have participated in our programs in the past may not have realized the full savings or generation potential of their business, home or facility. We need to create pathways to reengage these customers and encourage them to explore and, ultimately, adopt other solutions that will help them achieve their full potential.

Desired outcomes

By the end of 2030, more customers will be benefitting from more comfortable and resilient homes and businesses with energy-saving features, solar and battery storage. Even customers who were holding off on taking actions previous have participated in Energy Trust programs and services to reduce their energy use and costs or invest in solar, battery storage and other approaches to manage their energy use. As a result of Energy Trust's focus here, customers' use of clean energy solutions will help lessen the impact of utility rate increases on their bills by lowering long-term energy use and/or offsetting it with renewable energy.

Metrics

- Percentage of customers participating in clean energy projects using site-level data.
- Number of customer sites with repeat participation.

Example strategies

- Develop new, more compelling offers and approaches and revisit technologies that have exited our portfolio to reach beyond 30-40% market participation within specific markets.
- Adapt program offerings and delivery approaches to encourage early adopters and previous customers to realize their full savings and generation potential.
- Engage organizations like Northwest Energy Efficiency Alliance to implement approaches to support market adoption of technologies beyond 40-60% in the absence of codes or standards support.

Focus area: Supporting community resilience

We will focus on working with local and state government agencies, utilities, Tribal governments, and other entities that have resilience planning and management responsibilities to support incorporation of clean energy solutions into community resilience efforts.

As climate-related disasters become more common, communities are increasingly prioritizing resilience – the ability to prepare for, withstand, respond to and recover essential needs and services after a disruption. As we support and promote energy resilience benefits and projects at the individual level, being responsive to local energy needs means we must be able to support resilience planning and recovery efforts at the community level to ensure they involve clean energy solutions. Resilience is also a growing concern for our network of collaborators, from utilities promoting resilience within their own operations, to public agencies supporting community resilience plans, and to trade ally contractors being asked to install battery storage systems and fire hardening building features. This work may require dedicated funding outside our core ratepayer funds and helping communities to combine funding from several sources given the enormous cost to recover from major disaster events.

Desired outcomes

By the end of 2030, communities that have developed local resilience plans will understand how clean energy solutions can contribute to resilience and have access to Energy Trust support for planning and implementing those solutions. Communities and their residents will be better prepared for extreme heat, winter storms, wildfires and other disruptions to energy because they will already have clean energy solutions in place. And when these events happen, people will utilize clean energy solutions in rebuilding and recovery efforts to ensure future preparedness. As a result of their work with Energy Trust, communities will be better prepared to access state and federal funding to support resilience efforts.

Metrics

- Number of organizations contacted to promote Energy Trust services and resources that support community resilience.
- Number of resilience projects Energy Trust is directly involved in.

Example strategies

- Proactively engage communities and Tribal governments to encourage the development of resilience plans that incorporate energy efficiency, renewable energy and connected technologies including battery storage.
- Develop stronger partnerships with resilience, emergency planning and management and recovery experts within local and state governments, utilities, Tribal governments and non-governmental entities.
- Develop clean energy solutions for a variety of potential disaster events so that they are ready to deploy quickly when needed.

Focus area: Empowering customers to navigate more choices

We will elevate our approach to customer support by guiding people to information on solutions for managing their energy use and engaging in conversations that prepare them to make energy-related decisions. Working with state and local agencies, utilities, educational entities and community organizations, we will help ensure trusted information is relatable and accessible to customers across our service area.

Over the next six years, customers will face a growing array of choices for how to manage energy use and costs in their homes, businesses and communities. As various programs promote offers related to energy efficiency, renewable energy, demand response, time of use pricing, transportation electrification and more, customers will face more terminology, more potential for confusion, and worse, more vulnerability to scams. This can undermine their interest in clean energy solutions and their confidence to make any decision, potentially delaying or deterring customers from realizing the benefits of participating in Energy Trust programs. In this more complex energy landscape, customers need information and support that is credible, easy to access and easy to consume to feel more prepared to engage with the market. Energy Trust must work in new ways with new partners toward long-term objectives for supporting and empowering customers. We must also develop measurement approaches to understand the impact of our investments in this enhanced customer support.

Desired outcomes

By the end of 2030, Energy Trust will have enhanced its capabilities for supporting customer understanding of clean energy solutions and confidence in managing their energy use, and we will have developed the internal framework for effectively delivering impactful information and measuring progress. Through engagement with Energy Trust and our partners, current and future customers will have familiarity with energy-related concepts and feel more prepared to make decisions that fit their needs. When engaging with contractors, retailers and other providers in the market, customers will have the support they need to assess options and identify misinformation and scams.

Metrics

- Market assessment and gap analysis is completed and identifies customer information and support needs to engage with solutions for managing energy use and costs; diversity, equity, inclusion and belonging considerations are centered in the analysis.
- Initiative plan that identifies key activities and budget is presented; report on measurement plan and progress annually.

Example strategies

- Convene and/or participate in a coalition of partners to identify gaps, needs and recommend initiatives to support customer confidence in solutions for managing energy use and costs; work closely with Oregon Department of Energy, utilities and community organizations to navigate and support customers.
- Improve access to information and education resources through Energy Trust communications, web site, outreach channels, Strategic Energy Management (SEM) approaches, and with partners who can support and deliver them; develop new strategies based on needs assessment.
- Build Energy Trust's competency to approach and support customers seeking a more holistic understanding of how to manage energy use and costs.

Strategic plan management

This 2025-2030 Strategic Plan will guide the development of our 2026-2030 Multiyear Plan in 2025. The 2026-2030 Multiyear Plan will add more detail how we will accomplish the outcomes outlined here, including additional program strategies, organizational initiatives, budget requirements and staff resources.

Additionally, the opportunities and example strategies within each focus area could evolve with changes in market conditions, policies and other factors. To develop this plan, we made several assumptions about what we expect to see in 2025-2030. If events differ from what we anticipated, our board and staff will manage and respond to changes through other planning processes, like our contributions to utilities' Integrated Resource Plan updates. For example, our previous strategic plan did not anticipate the COVID-19 pandemic, 2020's devastating wildfires or 2021's deadly heat dome. We were able to respond to new needs through other planning processes while maintaining our 2020-2024 Strategic Plan focus areas.

Conditions that could require a change to this plan's focus areas, measures of progress or strategies could include a change in Oregon's decarbonization policy that impacts utility targets for emissions reduction by 2030 or significant new directives from the Oregon Public Utility Commission.

The board, with input from staff, will monitor Energy Trust's operating environment on a regular cadence and adjust this plan as necessary.