Energy Advisory Work Group
August 30, 2021
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Presenter(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:30 p.m.</td>
<td>Director’s Update</td>
<td>Janine Benner, Director</td>
</tr>
<tr>
<td>1:40 p.m.</td>
<td>EAWG Roundtable</td>
<td>EAWG Members</td>
</tr>
<tr>
<td>2:20 p.m.</td>
<td>Budget Update</td>
<td>Cathy Connolly, Assistant Director for Central Services</td>
</tr>
<tr>
<td>2:30 p.m.</td>
<td>New Incentive Programs</td>
<td>ODOE Staff</td>
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<tr>
<td></td>
<td>• Solar + Storage Rebate</td>
<td>• Cathy Connolly</td>
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<tr>
<td></td>
<td>• Energy Efficient Wildfire Recovery</td>
<td>• Michael Freels</td>
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<td></td>
<td>• Community Renewable Grants</td>
<td>• Rob DelMar</td>
</tr>
<tr>
<td>3:05 p.m.</td>
<td>BREAK</td>
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<tr>
<td>3:15 p.m.</td>
<td>ODOE Studies</td>
<td>Alan Zelenka, Assistant Director for Planning and Innovation</td>
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<td></td>
<td>• Regional Transmission Organizations</td>
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<td></td>
<td>• Renewable Hydrogen</td>
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<td>• Floating Offshore Wind</td>
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<td></td>
<td>• Small-scale Renewables</td>
<td></td>
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<td></td>
<td>• Biennial Zero Emission Vehicle Report</td>
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<tr>
<td>3:35 p.m.</td>
<td>Strategic Plan</td>
<td>Ruchi Sadhir, Associate Director for Strategic Engagement</td>
</tr>
<tr>
<td>4:00 p.m.</td>
<td>Closing Comments/Q&amp;A</td>
<td>EAWG Members and ODOE Staff</td>
</tr>
</tbody>
</table>
ODOE Draft 2021-23
Legislatively Adopted Budget

Cathleen Connolly
HISTORY OF ODOE’S BIENNIAL BUDGET
SIGNIFICANT CHANGES FROM 2021-23 CURRENT SERVICE LEVEL BUDGET

• Program Solar + Storage Rebate Program
  Total Funding: $10 M General Fund
  Positions/FTE: 3/2.5 (LD)

• Program Community Renewable Investment Fund
  Total Funding: $50 M General Fund; $27 M to be spent in 2021-23
  Positions/FTE: 7/6.5 (LD – four year)

• Program Wildfire Energy Efficiency Rebuilding Incentive
  Total Funding: $10.8 M General Fund
  Positions/FTE: 3/3 (LD)

• Staff Energy Facility Siting Division
  Total Funding: $488,630 Other Fund
  Positions/FTE: 2/2 (LD)

• Staff Research Analyst, Information Services Specialist (LD), Economist (LD)
  Total Funding: $730,000 approximately
  Positions/FTE: 3/3

• Staff Eliminated Staff: Accountant, Fiscal Analyst, Office Support
  Total Funding: -$420,300
  Positions/FTE: -3/-2.77

• Debt Service Small Scale Energy Loan Program
  Total Funding: $3.5 M General Fund Debt Service
ODOE'S 2021-23 LAB BY DIVISION AND CATEGORY

ODOE’s Draft 2021-23 LAB by Division
($180.1 M)

ODOE’s 2021-23 Draft LAB Operating Budget
($35.1 M)
Solar + Storage Rebate Program
2021-23 Biennium
Cathleen Connolly
2019 LEGISLATION AND FUNDING RECAP

- Program was established by HB 2618 (2019) and is authorized until January 1, 2024.
- How the program works:
  - **Residential customers** can save up to $5,000 for solar systems and up to $2,500 for battery storage paired with solar.
  - **Low-income service providers** can save up to $30,000 for solar systems and up to $15,000 for paired storage.
  - Rebates are issued to ODOE-approved contractors who install the systems, and the full rebate amount is passed on to the customer as savings on the net cost of the system.
- Funding in 2019-21 was one-time only
  - $1.5 M for rebates
  - $440,000 for administration, including 1.3 FTE
2021-23 FUNDING AND PROGRAM CHANGES

- Additional funding in **2021-23** is $10 M total, $9.2 M for rebates and $0.8 M for administrative costs including 2.5 FTE
- Program will operate substantially the same as it did in 2019-21, with the following changes to administrative rules either in temporary rules or at a later date through permanent rules:
  - Expansion of program eligibility to certain affordable multifamily housing
  - Expansion into communities/providers that have not participated to date
  - Updating ETO trade ally contractor eligibility to reflect ETO’s updating of its star rating system
  - Other changes depending on stakeholder engagement
STATUS OF PROGRAM

Where we are with re-starting the program

• We have hired two new limited duration positions who will start September 7 and undergo training
• We are looking for opportunities to increase efficiency
• We are proposing to provide contractors with 30 days notice of the date the reservation system will open, and the level of funding that will be available.
• We have submitted temporary rules to the Secretary of State
• We anticipate that we will begin rulemaking for permanent rules in January 2022
• Do you have suggestions for how to facilitate the inclusion of multi-family affordable housing solar projects in the program?

• What changes are needed to make the Solar + Storage Rebate program a feasible option for underserved communities and low-income service providers to choose?

• Do you have suggestions on who ODOE should contact to promote the program, especially among underserved communities?
Energy Efficient Wildfire Rebuilding Incentive

Michael Freels
2020 Labor Day Wildfires

- 21 fires
- 1.07 million acres burned
- More than 5,000 structures destroyed
2021 Legislative Session

- HB 2289
- HB 5006
## Destroyed or Damaged Buildings

<table>
<thead>
<tr>
<th>County</th>
<th>Homes Destroyed</th>
<th>Homes Major Damage</th>
<th>Other Structure Damages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clackamas</td>
<td>62</td>
<td>0</td>
<td>215</td>
</tr>
<tr>
<td>Douglas</td>
<td>133</td>
<td>0</td>
<td>N/A</td>
</tr>
<tr>
<td>Jackson</td>
<td>2,364</td>
<td>9</td>
<td>295</td>
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<tr>
<td>Klamath</td>
<td>11</td>
<td>0</td>
<td>54</td>
</tr>
<tr>
<td>Lane</td>
<td>574</td>
<td>41</td>
<td>95</td>
</tr>
<tr>
<td>Lincoln</td>
<td>288</td>
<td>0</td>
<td>51</td>
</tr>
<tr>
<td>Linn</td>
<td>71</td>
<td>0</td>
<td>122</td>
</tr>
<tr>
<td>Marion</td>
<td>629</td>
<td>4</td>
<td>91</td>
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<tr>
<td>Totals</td>
<td>4,132</td>
<td>54</td>
<td>923</td>
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</tbody>
</table>

Source: Oregon Office of Emergency Management [Oregon Wildfire Response and Recovery Overview](#)
BUILDING CODES AND MARKET PRACTICES

- 2008 Building Codes
- Current Building Codes
- Market Practices
- Energy Savings
INCENTIVE PROGRAM DESIGN

- Code level support
- Above code support
STAKEHOLDER ENGAGEMENT

State Agencies
• Oregon Housing and Community Services
• Oregon Department of Consumer and Business Services
• Oregon Office of Emergency Management

Local Communities
• Counties
• Long Term Recovery Groups (LTRGs)

Utilities in affected areas and Energy Trust of Oregon
• Who else should we be talking to and what ideas do you have to help us reach wildfire survivors?

• How much should we invest in the code-level incentive vs. above-code program support?
Community Renewable Energy Grant Program

Rob Del Mar
COMMUNITY RENEWABLE ENERGY GRANT PROGRAM

HB 2021 Establishes the Community Renewable Investment Fund to:

• Offset costs of planning and developing community renewable energy projects
• Support projects in traditionally underserved communities
• Promote small-scale community renewable energy projects
• Provide direct benefits to communities across Oregon by improving energy resilience, creating local jobs, promoting economic development, and offsetting local energy costs.
• 50 percent or more for grants to be awarded for planning or developing community renewable energy projects that qualify as community energy resilience projects.

• 50 percent or more for grants to be awarded for planning or developing community renewable energy projects that primarily serve one or more qualifying communities.
Environmental justice communities:

- Communities of color
- Communities experiencing lower incomes
- Tribal communities
- Rural communities
- Coastal communities
- Communities with limited infrastructure
- Communities traditionally underrepresented in public processes and adversely harmed by environmental and health hazards, including seniors, youth and persons with disabilities
## Membership

- A member of the Environmental Justice Task Force;
- A representative of Business Oregon;
- A representative of electric companies;
- A representative of consumer-owned utilities;
- A representative from an organization that represents community renewable energy development;
- A representative from a federally recognized Oregon Tribe;
- Three representatives of local government to represent the interests of counties, cities and special districts;
- Representatives from nongovernmental organizations that represent communities of low income or disadvantaged households; and
- Representatives from relevant state and federal emergency management or response agencies.

## Potential Roles

- Provide guidance on program rules
- Establish program equity metrics
- Adopt a methodology to identify qualifying communities.
- Support statewide community outreach
- Support project application review processes
APPLICANT ELIGIBILITY

- Tribes
- Counties
- Municipalities
- Special government bodies such as ports and irrigation districts
- Consumer-Owned Utilities

Grid Edge Demonstration Project in Eugene
Photos courtesy of Eugene Water and Electric Board
## OPPORTUNITY ANNOUNCEMENTS

<table>
<thead>
<tr>
<th>PROJECT CATEGORY</th>
<th>MAXIMUM GRANT AWARD</th>
<th>MAXIMUM % OF COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning, Energy Resilience</td>
<td>$100,000</td>
<td>100%</td>
</tr>
<tr>
<td>Planning, Renewable Energy Only</td>
<td>$100,000</td>
<td>100%</td>
</tr>
<tr>
<td>Construction, Energy Resilience</td>
<td>$1,000,000</td>
<td>100%</td>
</tr>
<tr>
<td>Construction, Renewable Energy Only</td>
<td>$1,000,000</td>
<td>50%</td>
</tr>
</tbody>
</table>

Grants will be awarded on a competitive basis and will include performance agreements and time limits for completing projects.
TIMELINE

Summer 2021
- Advisory Committee
- Program Design

September 2021 – February 2022
- Program Rules
- Materials Development
- Community Outreach/Workshops

March 2022
- Issue Opportunity Announcements
• What is the best way to reach our potential applicants?

• What are the needs for capacity building in rural communities?

• Do you have feedback on how the advisory committee and their responsibilities could support success over the life of the program?
Update on New ODOE Studies & Reports

Alan Zelenka
ODOE STUDIES & REPORTS UPDATES

- Regional Transmission Organization Study
- Renewable Hydrogen Study
- Floating Offshore Wind Study
- Small-Scale Renewable Energy Study
- Biennial Zero Emission Vehicle Report
What the study includes:
• Literature review
• Develop key questions and consult with PUC
• Advisory Committee discussion
• Write a summary report

Deadline: Report due December 31, 2021 (6 months total)

Status:
• Stakeholder advisory committee in place
• Kick-off meeting was Thursday August 5
• Literature review and key questions available for comments until September 13
• Advisory committee meetings set for September 20 and October 6.
What the study includes:
• Current use of hydrogen in Oregon
• Potential applications
• Potential for coupling with electricity generation
• Discussion of future costs
• Identification of barriers
• No requirement for advisory committee but we will involve stakeholders

Deadline: Report due September 15, 2022

Status:
• Just starting project planning
• Fielding questions from interested stakeholders/building a list of stakeholders
• Several conference presentations
FLOATING OFFSHORE WIND STUDY
Jason Sierman

What the study includes:
• Literature review and develop key questions
• Stakeholder meeting on key questions
• Public meetings
• Write report

Deadline: September 15, 2022

Status:
• Project plan underway
• Started literature review and formulation of key questions
• Project webpage
• Meeting with stakeholders in late October/early November
What the study includes:
• Barriers
• Benefits and contributions
• Ownership opportunities
• Potential rate impacts
• Potential legislation to encourage small-scale renewables
• Convene a work group

Deadline: September 30, 2022

Status:
• Project planning underway
• Recruiting for economist to help us with the analysis
• Working on external engagement plan and compiling list of potential workgroup members
What the report includes:
Report on ZEVs and the state’s progress towards achieving its ZEV adoption goals

Spoiler Alert: While we have a lot going on and made significant progress, Oregon is not on track to meet the 2025 or 2030 goals

Deadline: September 15, 2021

Status: The report is in the final stages of publication after significant stakeholder feedback and engagement

SB 1044 (2019)
Preview of the Top 6 Takeaways:

• ZEV adoption plays a critical role in supporting the state’s efforts to meet its greenhouse gas emissions reduction goals.

• As ZEVs approach cost parity with gasoline-powered vehicles in the next few years, incentives will mean increasing numbers of models are more affordable than equivalent gas models.

• ZEV platforms availability is rapidly increasing, especially in the light-duty passenger vehicle sector.

• DEQ’s Charge Ahead rebate is a pivotal state policy to support equitable ZEV adoption.

• Electric utilities are prepared to handle increasing light-duty ZEV adoption in the near term and have historically been able to provide load growth equivalent – and in some cases more than needed – to support transportation electrification.

• Availability and reliability of sufficient charging infrastructure is necessary to achieve the state’s ZEV goals, and the defined metrics are needed to more precisely measure and report on the state of charging infrastructure in Oregon.
Questions/Comments on ODOE Studies?

www.oregon.gov/energy/Data-and-Reports/Pages/ODOE-Studies.aspx
Strategic Plan Update

Ruchi Sadhir
EAWG & STRATEGIC PLAN

Excerpts from EAWG Charter:

• **Section 2:** "To further the public interest, the Department has been working to increase transparency of its programs and activities and to foster close communication and collaboration with energy users and other stakeholders with an interest in the provision of energy. A broad purpose of the EAWG is to serve as a forum to further these objectives and to provide feedback on the strategic priorities and long-term vision for the Department."

• **Section 4(a):** "Strategic Priorities and Long-Term Vision: During the development of its strategic plan, the Department will provide EAWG members with an opportunity to review and provide recommendations on the plan’s vision statement and strategic goals. In addition to seeking feedback on the development of the strategic plan, the Department will share information about progress of strategic plan actions to keep EAWG members informed of its implementation."
PURPOSES OF STRATEGIC PLAN

- Define our organizational values and improve operations to shape how we work together and serve our mission
- Clearly prioritize and define ODOE’s work, and build better understanding by – and stronger collaboration with – stakeholders like the EAWG
- Measure progress and strengthen alignment between our goals, programs, and budget
The Oregon Department of Energy helps Oregonians make informed decisions and maintain a resilient and affordable energy system. We advance solutions to shape an equitable clean energy transition, protect the environment and public health, and responsibly balance energy needs and impacts for current and future generations.

On behalf of Oregonians across the state, the Oregon Department of Energy achieves its mission by providing:

- A Central Repository of Energy Data, Information, and Analysis
- A Venue for Problem-Solving Oregon's Energy Challenges
- Energy Education and Technical Assistance
- Regulation and Oversight
- Energy Programs and Activities
STRATEGIC PLANNING TIMELINE

**2020**
- EAWG Outreach
- Develop Values, Position, & Reputation
- Leg Session Break
- Develop Imperatives & Finalize Phase 1 clarity elements
- All Staff Meeting: Finalize Phase 1 clarity elements
- EAWG Outreach
- Phase 2 Launch
- Develop objectives
- EAWG Outreach
- Strategic Planning Launches
- Strategic---Stakeholder Outreach
- EAWG Outreach
- Insights Report
- Develop Vision & Mission
- EAWG Outreach
- Create Initiatives
- All Staff Meeting & Survey
- Finalize Phase 2 elements

**2021**
- EAWG Outreach
- Finalize Phase 2 elements
- Publish Strategic Plan Comms & Website
- EAWG Outreach
- Strategic Plan Implementation Kick-Off
- Strategic Plan Implementation Planning
- EAWG Outreach
- Strategic Plan Implementation

---
FOUR-YEAR TIMELINE

VISION AND MISSION
VALUES, POSITION, REPUTATION
IMPERATIVE, OBJECTIVES, INITIATIVE
IMPLEMENTATION PLANNING

Aug 2019 - May 2020
STRATEGIC CLARITY

Jun 2020 - Dec 2020
STRATEGIC FOCUS

Jan 2021 - Jul 2021
PLANNING AND IMPLEMENTATION

YEAR 1 IMPLEMENTATION

YEAR 1 & 2 REPORT OUT

YEAR 2 IMPLEMENTATION

YEAR 3 IMPLEMENTATION

YEAR 4 IMPLEMENTATION

FINAL REPORT

QUARTERLY REVIEWS
QUARTERLY REVIEWS
QUARTERLY REVIEWS

Jun 2019
Jan 2020
Jan 2021
Jan 2022
Jan 2023
Jan 2024
Jan 2025
Jan 2025
PLANNING FOR IMPLEMENTATION

Grounding
• Moving from strategy to action

Prioritization
• Considering complexity, needs, and alignment with existing efforts

Change management
• Strong skills and interest
• Addressing pockets of resistance (which is expected!)
• Effective communication & flow of information for staff
CHANGE MANAGEMENT

Preparing yourself for change

Understanding changes underway and your role
- Identify changes impacting your group
- Identify how changes will impact your role
- Understand why changes are being made
- Understand your role in supporting the change

Adapting to change that is happening to you
- Identify your own areas of resistance
- Discuss your objections or concerns
- Make a personal choice to support and participate in the change

Developing competencies for managing change
- Understand the concepts of change management
- Learn how to use the tools for navigating change
- Develop action plans to personally work through the change process
2021-2024 IMPERATIVES/FOCUS AREAS

- Expand and Improve Stakeholder Engagement
- Build Practices and Processes to Achieve More Inclusive and Equitable Outcomes
- Assess and Enhance Organizational Data Capabilities
- Assess and Modernize Agency Programs and Activities
- Optimize Organizational Efficiency and Impact
<table>
<thead>
<tr>
<th>Imperatives</th>
<th>Objectives</th>
<th>Initiatives</th>
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<tbody>
<tr>
<td>Expand and Improve</td>
<td>• Increase diversity of agency stakeholder groups, rulemaking, oversight,</td>
<td>• Conduct assessment of current agency boards and decision-making bodies to</td>
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<tr>
<td>Stakeholder Engagement</td>
<td>and advisory boards</td>
<td>identify opportunities for more diverse representation</td>
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<td></td>
<td>• Year-over-year increase in agency engagement with organizations</td>
<td>• Develop a communication plan and engagement process collaboratively</td>
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<td>representing historically and currently underserved populations and</td>
<td>with historically and currently underserved populations and communities</td>
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<td></td>
<td>communities</td>
<td>that includes actively listening, being responsive, and incorporating</td>
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<td>• Year-over-year increase in the external use of agency</td>
<td>feedback in the development of programs, policies, and other areas of work</td>
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<td></td>
<td>produced reports, studies, and presentations</td>
<td>• Build on existing tribal engagement efforts by expanding internal</td>
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<td>responsibilities and resources, and reaching out to tribes to assess and</td>
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<td>amplify shared interests and priorities</td>
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<td></td>
<td>• Work with external entities to assess their needs and priorities to</td>
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<td>strengthen relationships and better inform Oregon’s energy policies and</td>
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<td></td>
<td>programs</td>
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<td></td>
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<td>• Strengthen staff capacity within ODOE to serve as liaisons and</td>
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<td></td>
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<td>ambassadors with communities, stakeholder groups, and Tribes</td>
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<td>Build Practices and</td>
<td>• Year-over-year increase in the percent of agency job applicants</td>
<td>• Enhance ODOE’s internship program to provide benefits to interns, such</td>
</tr>
<tr>
<td>Processes to Achieve</td>
<td>identifying as Black, Indigenous, and People of Color</td>
<td>as paid positions and greater access to educational credits, to help build a</td>
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<td></td>
<td>• Year-over-year increase in the percent of historically and currently</td>
<td>more diverse network of ODOE and energy industry employees</td>
</tr>
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<td></td>
<td>underserved populations and communities participating in ODOE programs</td>
<td>• Develop a Diversity, Equity, and Inclusion Action Plan in partnership</td>
</tr>
<tr>
<td></td>
<td>and services</td>
<td>with historically and currently underserved populations and communities</td>
</tr>
<tr>
<td></td>
<td>• Increase agency Diversity, Equity, and Inclusion</td>
<td>• Create inclusive, multi-lingual communications to increase accessibility</td>
</tr>
<tr>
<td></td>
<td>awareness and fluency</td>
<td>of agency program information and services</td>
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<td>Assess and Enhance</td>
<td>• 100% of specified agency products (e.g., produced reports, studies,</td>
<td>• Conduct agency-wide DEI assessment and training to measure and increase</td>
</tr>
<tr>
<td>Organizational Data</td>
<td>and analysis) use standardized agency data methodologies or tools</td>
<td>employee knowledge, awareness, and skills</td>
</tr>
<tr>
<td>Capabilities</td>
<td>• Year-over-year increase of collection, review, and analysis of data</td>
<td>• Establish and internally communicate agency data standards and tools</td>
</tr>
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<td></td>
<td>• Year-over-year increase in data sharing relationships</td>
<td>• Assess and enhance agency data management roles, responsibilities, and</td>
</tr>
<tr>
<td>Assess and Modernize</td>
<td>• 100% of ODOE programs and activities align with ODOE mission and</td>
<td>internal structures</td>
</tr>
<tr>
<td>Agency Programs and</td>
<td>position statements</td>
<td>• Enhance staff data analysis and visualization skills to bring more</td>
</tr>
<tr>
<td>Activities</td>
<td>• Complete assessment of ODOE work in the context of the state’s energy</td>
<td>interactive, value-add products (e.g. external data dashboards) to</td>
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<tr>
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<td>ecosystem to identify redundancies and gaps</td>
<td>stakeholders</td>
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<tr>
<td>Optimize</td>
<td>• Increase average Gallup Q12 engagement score to at least 4.0 (out of</td>
<td>• Conduct a strategic evaluation of each program and activity. Share</td>
</tr>
<tr>
<td>Organizational Efficiency</td>
<td>5.0)</td>
<td>the outcomes of the strategic evaluation and describe the alignment of</td>
</tr>
<tr>
<td>and Impact</td>
<td>• Increase “Efficient and effective processes &amp; procedures” (Whole Systems</td>
<td>programs and activities with ODOE’s mission and position statements.</td>
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<tr>
<td></td>
<td>Model) survey score to at least 3.5</td>
<td>Where necessary, identify actions to achieve better alignment.</td>
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<td>• Collaborate with energy stakeholders to identify Key Energy indicators</td>
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<td></td>
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<td>and state priorities and objectives (including statutory targets and</td>
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<tr>
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<td>goals, executive orders, non-energy goals like job creation, other</td>
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<td>executive guidance like the Equity Framework)</td>
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<td>• Create dashboard(s) to monitor and report on status of Key Energy</td>
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<td>Indicators</td>
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<td></td>
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<td>• Build on collaborative effort to assess how other agencies and</td>
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<td>organizations in the state are working toward Key Energy indicators and</td>
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<td>state priorities, and identify areas where ODOE’s work may overlap with</td>
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<td></td>
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<td>other entities or where there might be gaps in state efforts</td>
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<td></td>
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<td>• Update and improve employee development and recognition plans and</td>
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<td></td>
<td></td>
<td>programs</td>
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<tr>
<td></td>
<td></td>
<td>• Create internal action teams to identify and implement cross-functional</td>
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<td></td>
<td>process improvements</td>
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<td></td>
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<td>• Evaluate and improve agency collaboration and communication culture</td>
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<td></td>
<td></td>
<td>• Update ODOE’s KPM customer satisfaction survey and implement timeier</td>
</tr>
<tr>
<td></td>
<td></td>
<td>customer service evaluations</td>
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</tbody>
</table>
## Imperative Report Out & Highlights

<table>
<thead>
<tr>
<th>Imperative</th>
<th>Objectives</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand and Improve Stakeholder Engagement</td>
<td>Increase diversity of agency stakeholder groups, rulemaking, oversight, and advisory boards</td>
<td>Developing baseline</td>
</tr>
<tr>
<td><strong>Timing</strong></td>
<td>Year-over-year increase in agency engagement with organizations representing historically and currently underserved populations and communities</td>
<td>Developing baseline</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Year-over-year increase in the external use of agency produced reports, studies, and presentations</td>
<td>Developing baseline</td>
</tr>
<tr>
<td>Q3 2021</td>
<td>Agency has prioritized moving on this imperative early Planning is underway</td>
<td></td>
</tr>
</tbody>
</table>

### Work Underway
Planning initiatives: communication plan and engagement process, building relationships with external entities, and creating liaisons and ambassadors
Prioritizing engagement for programs passed in 2021 legislative session

### Highlights and Look Forward
**What’s Next**
Determine who are "historically and currently underserved populations and communities"
Baseline information and determine staff capacity

### Accomplishments and Challenges
**Accomplishments/Lessons Learned**
Created internal Strategic Engagement Team (e.g. scoping for new 2021 studies)
Online portal for public comments for application site certificates amendments
Post-session debriefs and legislative report

**Challenges and Needs**
Defining "diversity" for agency stakeholder groups and advisory boards
<table>
<thead>
<tr>
<th><strong>Imperative</strong></th>
<th><strong>Objectives</strong></th>
<th><strong>Status</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Build Practices and Processes to Achieve More Inclusive and Equitable Outcomes</strong></td>
<td>Year-over-year increase in the percent of agency job applicants identifying as Black, Indigenous, and People of Color</td>
<td>Developing baseline</td>
</tr>
<tr>
<td><strong>Timing</strong></td>
<td><strong>Status</strong></td>
<td><strong>Year-over-year increase in the percent of historically and currently underserved populations and communities participating in ODOE programs &amp; services</strong></td>
</tr>
<tr>
<td>Q3 2021</td>
<td>Planning Underway</td>
<td>Increase agency Diversity, Equity, and Inclusion awareness and fluency</td>
</tr>
</tbody>
</table>

**Highlights and Look Forward**

**Work Underway**
- Building relationships with Oregon universities to enhance internship program and expand recruitments
- ODOE staff completing Intercultural Effectiveness Survey
- Prioritizing equity for programs passed in 2021 legislative session

**What's Next**
- Developing a better understanding of who we serve now by collecting demographic data

**Accomplishments and Challenges**

**Accomplishments/Lessons Learned**
- ODOE communications staff assisted with statewide DEI conference
- Translated strategic plan into four additional languages

**Challenges and Needs**
- DEI consultant could help ODOE engage with underserved populations
<table>
<thead>
<tr>
<th>Imperative</th>
<th>Objectives</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assess and Enhance Organizational Data Capabilities</strong></td>
<td>100% of specified agency products (e.g., produced reports, studies, and analyses) use standardized agency data methodologies or tools</td>
<td>Not Started</td>
</tr>
<tr>
<td><strong>Timing</strong></td>
<td><strong>Objectives</strong></td>
<td><strong>Status</strong></td>
</tr>
<tr>
<td><strong>Q3 2021</strong></td>
<td><strong>100% of specified agency products (e.g., produced reports, studies, and analyses) use standardized agency data methodologies or tools</strong></td>
<td>Not Started</td>
</tr>
<tr>
<td><strong>Planning Underway</strong></td>
<td><strong>Year-over-year increase of collection, review, and analysis of data</strong></td>
<td>Developing baseline</td>
</tr>
<tr>
<td><strong>Planning Underway</strong></td>
<td><strong>Year-over-year increase in data sharing relationships</strong></td>
<td>Developing baseline</td>
</tr>
</tbody>
</table>

### Highlights and Look Forward

**Work Underway**
- Action planning for initiative on internal data management roles
- Recruiting for Research Analyst position (21-23 Budget)
- Interagency collaboration on equity mapping, demographic data

**What's Next**
- Look at ideal future state for internal structure, roles, and responsibilities on data
- Practice and pilot ideas during development of 2022 BER
- Data partnerships on upcoming ODOE studies

### Accomplishments/Lessons Learned
- Strong interagency coordination and cooperation on BiZEV
- Included demographic questions in KPM survey
- Census data training and usage by ODOE staff

### Challenges and Needs
- Lack of demographic data on who participates in ODOE's services and programs
## Objectives Status

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>100% of ODOE programs and activities align with ODOE mission and position statements</td>
<td>Not Started</td>
</tr>
<tr>
<td>Complete assessment of ODOE work in the context of the state’s energy ecosystem to identify redundancies and gaps</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

## Timing | Status

| Q3 2021 | Planning Underway |

## Highlights and Look Forward

### What’s Next
- Concept development and scoping of Key Energy Indicators during 2022 BER development (Winter 21/22)
- Strategic Evaluation of Siting Program and Process (RFP)

## Accomplishments and Challenges

### Accomplishments/Lessons Learned
- Worked with legislature to modernize some existing ODOE programs and optimize new ones

### Challenges and Needs
- Determine scope of assessment related to ODOE's programs and activities
<table>
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<tr>
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<th>Objectives</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optimize Organizational Efficiency and Impact</td>
<td>Increase average Gallup Q12 engagement score to at least 4.0 (out of 5.0)</td>
<td>2019 baseline - 3.79; re-eval TBD</td>
</tr>
<tr>
<td>Timing</td>
<td>Increase “Efficient and effective processes &amp; procedures” survey score to at least 3.5</td>
<td>2019 baseline - 2.73; re-eval TBD</td>
</tr>
<tr>
<td>Planning Underway</td>
<td>Increase in Key Performance Measure customer satisfaction score to at least 95%</td>
<td>KPM survey underway</td>
</tr>
</tbody>
</table>

**Highlights and Look Forward**

**What's Next**
- Develop pilot for replicable, scalable Process Improvement Pathways
- Survey of staff to identify opportunities for process improvements

**Work Underway**
- Action planning for initiative on cross-functional improvements
- Evaluating results of enhanced KPM survey

**Accomplishments/Lessons Learned**
- Evaluated siting process and eliminated paper copy submittal requirements for annual compliance plans
- Efficiencies identified as agency has evolved during COVID response

**Challenges and Needs**
- Organizational capacity and managing change
- Recruitment of new staff to run new programs (from 2021 legislative session)
QUESTIONS FOR EAWG

Do your organizations have any similar imperatives and objectives?

- How are you baselining and measuring progress? Do you have any methodologies that you could share with ODOE?
- Have you run into barriers, challenges, or lessons learned in your similar efforts that would be helpful for ODOE to consider in implementation?

Are there EAWG members interested in supporting ODOE particular imperatives and objectives?

- (1) Expand and Improve Stakeholder Engagement; (2) Build Practices and Processes to Achieve More Inclusive and Equitable Outcomes; (3) Assess and Enhance Organizational Data Capabilities; (4) Assess and Modernize Agency Programs and Activities; and (5) Optimize Organizational Efficiency and Impact