

Strategic Plan

2023 - 2026

Revised June 2024

OCPA Mission Statement

Provide renewable energy at competitive rates and equitably reinvest to support sustainable communities.



OCPA Vision Statement

Our vision is to think globally and act locally by empowering our communities with choice, transforming the energy landscape, driving a sustainable future, and ensuring that no community is left behind in this transition to renewable energy.



Strategic Goals

Enrich & Grow the OCPA Community
Prioritize Fiscal Sustainability & Affordability
Move Toward a More Sustainable Electric Grid
Raise Awareness of OCPA & Inform People on the Advantages of Clean Energy
Strengthen Advocacy Efforts to Bolster Community Power & Amplify OCPA's Voice
Build an Exceptional Team

Focus Area:	Enrich and Grow the OCPA Community	Expected Completion Date	Assigned To
Objective 1	Conduct an annual survey of prospective member agencies' interests and needs.	Q1 2025	Communications & External Affairs
Objective 2	Conduct quarterly meetings with policy staff from potential member agencies to discuss strategies to reduce greenhouse gas emissions, promote electrification, and identify funding sources.	Quarterly	Communications & External Affairs
Objective 3	Host Quarterly Business Roundtables at OCPA to gather insights on programs and offerings that incentivize businesses to endorse the agency.	Quarterly	Communications & External Affairs
Objective 4	Host four community town halls to introduce programs and agency updates.	Quarterly	Communications & External Affairs
Objective 5	Produce webinars on billing, programs, and OCPA general information.	Quarterly	Communications & External Affairs
Objective 6	Engage key stakeholders in prospective member agencies to promote OCPA's mission and benefits to member agencies and customers.	Monthly	Communications & External Affairs
Objective 7	Develop and implement a strategy for identifying, educating, and enrolling new member agencies.	Q3 2024	Communications & External Affairs



Focus Area:	Prioritize Fiscal Sustainability & Affordability	Expected Completion Date	Assigned To
Objective 1	Maintain strong and stable financial growth by ensuring that OCPA rates are sufficient to generate returns and meet expenses.	January 2025	Finance & Data Analytics
Objective 2	Build the Rate Stabilization Reserves Fund to be in the range of 30-50% of total operating expenses starting FY2024/25.	June 2024	Finance & Data Analytics
Objective 3	Partner with a professional load forecasting consultant to develop and maintain 5-year long-term load forecasting and 15-day short-term load forecast, aiming to improve accuracy and mitigate financial risks.	Q4 2024	Finance & Data Analytics
Objective 4	Engage with a professional credit rating consultant to develop a planning roadmap aimed at obtaining a credit rating in 2027.	Q1 2025	Finance & Data Analytics
Objective 5	Create a comprehensive walkthrough of the OCPA Rate Design, aligning it with the projected 12-month revenue requirement for CY2025.	January 2025	Finance & Data Analytics
Objective 6	Reassess OCPA's Product Offerings, ensuring the integration of the most cost-effective and appropriate renewable resources.	Q4 2024	Finance & Data Analytics
Objective 7	Develop relationships with financial institutions capable of offering prepay structured financing services on Power Purchase Agreements with power suppliers.	June 2025	Finance & Data Analytics
Objective 8	Establish a new office location to optimize costs, accommodate the requirements of a public agency, and boost organizational efficiency by maintaining our own secure environment.	September 2024	Administration
Objective 9	Partner with cybersecurity professionals leveraging both current and new resources to examine and fortify our technology infrastructure, ensuring protection against evolving threats.	Q1 2025	Administration



Focus Area:	Move Toward a More Sustainable Electric Grid	Expected Completion Date	Assigned To
Objective 1	Implement the first OCPA local generation programs, establishing contracts for developing small-scale distributed storage facilities with a 1-5 megawatt capacity each.	Q4 2024	Power Resources
Objective 2	Establish precise metrics and effective tools to proficiently identify, avoid, and mitigate market and credit risks for OCPA.	Q1 2025	Power Resources
Objective 3	Create local partnerships with clean technology companies to advance emerging long-term energy storage and technologies.	Q2 2025	Power Resources
Objective 4	Forge partnerships with other CCAs to acquire shared resources, mitigate development risks, and capitalize on economies of scale.	Q4 2024	Power Resources
Objective 5	Create a more sustainable electric grid with measurable milestones above California’s renewable energy goals.	Q4 2024	Power Resources
Objective 6	Create partnerships with member agencies to identify local development opportunities.	Q1 2025	Power Resources
Objective 7	Release at least two (2) long-term solicitations for renewable energy resources.	Q2 2025	Power Resources



Focus Area:	Raising Awareness of OCPA & Informing People on the Advantages of Clean Energy	Expected Completion Date	Assigned To
Objective 1	Launch the Community Power Plan emphasizing diverse customer engagement, which will support the creation of customer programs in the upcoming years.	January 2025	Customer Programs
Objective 2	Communicate in culturally relevant ways by providing easily accessible information in multiple languages to reach diverse communities.	Monthly	Customer Programs
Objective 3	Establish grant opportunities for member agencies and customers to support electrification and energy efficiency.	June 2025	Customer Programs
Objective 4	Continue building positive relationships with multicultural, business, trade, environmental, non-governmental, and community-based organizations.	Monthly	Communications & External Affairs
Objective 5	Continue building relationships with media outlets, creating a steady drumbeat of news around milestones, and sustaining balanced and positive stories.	Monthly	Communications & External Affairs
Objective 6	Conduct tracking surveys annually in July 2024, 2025, and 2026, to measure awareness and perceptions.	Q3 2024	Communications & External Affairs
Objective 7	Develop a sustained outreach program for elected officials and their staff.	Q1 2025	Communications & External Affairs
Objective 8	Develop and implement a Supplier Diversity Plan that encourages doing business with OCPA and promotes diversity and inclusion for all OCPA communities.	Q1 2025	Communications & External Affairs
Objective 9	Create and implement an outreach plan re-engaging customers who previously opted out to encourage re-enrollment of at least 2% of non-OCPA customers.	Q4 2024	Communications & External Affairs



Focus Area:	Strengthen Advocacy Efforts to Bolster Community Power & Amplify OCPA’s Voice	Expected Completion Date	Assigned To
Objective 1	Ensure OCPA’s policy platform aligns with organizational objectives and strategic priorities.	December 2024	Regulatory, Legislative, & Policy
Objective 2	Engage a wide range of stakeholders in developing and updating the OCPA Policy Platform.	June 2025	Regulatory, Legislative, & Policy
Objective 3	Enhance OCPA’s legislative and regulatory advocacy efforts by developing an advocacy roadmap to engage with key stakeholders and legislators to ensure outcomes that are consistent with OCPA’s strategic goals.	June 2025	Regulatory, Legislative, & Policy
Objective 4	Conduct at least six high-impact advocacy meetings with key legislators and stakeholders.	Annually	Regulatory, Legislative, & Policy
Objective 5	Develop and implement a regulatory monitoring framework to ensure all departments are consistently informed about regulatory changes and their implications.	June 2025	Regulatory, Legislative, & Policy

Focus Area:	Build an Exceptional Team	Expected Completion Date	Assigned To
Objective 1	Recruit Chief Operations Officer and all open positions in the 2024/2025 FY approved staffing plan.	June 2025	Administration /Human Resources
Objective 2	Expand employee professional development to include briefings with all OCPA teams for new staff and make learning sessions available to other team members to encourage continued collaboration.	Quarterly	Administration /Human Resources
Objective 3	Foster high employee engagement by establishing quarterly team-building opportunities for the OCPA team.	Quarterly	Administration /Human Resources
Objective 4	Hold an annual OCPA team offsite meeting to encourage continued planning, collaboration, and learning.	Q3 2024	Administration /Human Resources
Objective 5	Develop a recognition and awards platform for identifying individuals and organizations making significant contributions to sustainability efforts in the community, allowing OCPA to recognize and celebrate local accomplishments.	Q4 2024	Administration



COMPLETED GOALS

July 2023 – May 2024

Key Focus Area	Objective	Team
Recruitment and Retention of a Talented Team	Recruit permanent Chief Executive Officer.	Administration/ Human Resources
Recruitment and Retention of a Talented Team	Retain Executive Search Firm to assist with recruitment of Director of Power Services and Chief Operations Officer.	Administration/ Human Resources
Recruitment and Retention of a Talented Team	Recruitment of open positions.	Administration/ Human Resources
Recruitment and Retention of a Talented Team	Implementation of Cost-of-Living Increase.	Finance & Data Analytics
Recruitment and Retention of a Talented Team	Collaborate with other California CCAs on a comprehensive classification study and salary survey or pursue the development of an OCPA-specific comprehensive classification study and salary survey if no joint effort is possible.	Finance & Data Analytics/ Human Resources
Recruitment and Retention of a Talented Team	Establish and sustain a high-performing agency while developing comprehensive plans for remote, hybrid, and in-person work with human resources internal guidelines.	Finance & Data Analytics/ Human Resources
Rebuilding Public Trust	Complete 24-point Improvement Plan.	Finance & Data Analytics/ Communications & External Affairs
Rebuilding Public Trust	Continue building relationships with media outlets, create a steady drumbeat of news and milestones and cultivate an increase in neutral and positive stories.	Communications & External Affairs

Rebuilding Public Trust	Continue building positive relationships with non-governmental organizations, including businesses advocacy and trade associations, multicultural organizations, community-based-organizations and environmental and sustainability.	Communications & External Affairs
Branding/Marketing Communications/ Public Outreach & Engagement	Conduct primary research (survey and focus groups) to establish baseline awareness.	Communications & External Affairs
Branding/Marketing Communications/ Public Outreach & Engagement	Develop crisis communications/issues management plan.	Communications & External Affairs
Branding/Marketing Communications/ Public Outreach & Engagement	Leverage key insights from the primary research to refresh the existing marketing communications/public outreach and engagement plan.	Communications & External Affairs
Branding/Marketing Communications/ Public Outreach & Engagement	Update public outreach materials (e.g., website, brochures, fact sheets).	Communications & External Affairs
Branding/Marketing Communications/ Public Outreach & Engagement	Launch new brand campaign that is informed by primary research.	Communications & External Affairs
Branding/Marketing Communications/ Public Outreach & Engagement	Consider re-naming the entity to attract member agencies outside the region. Develop a naming strategy with creative rationale and new name options (July 2023). Test new names during the July/August 2023 survey and subsequent focus groups in September.	Communications & External Affairs
Financial Sustainability	Establish long-term disciplined fiscal and operational strategies to obtain an investment-grade credit rating in 2027.	Finance & Data Analytics
Financial Sustainability	Ensure rates are sufficient to generate returns and meet expenses, aiming to have the Rate Stabilization Reserves Fund in the range of 30-50% of total operating expenses from FY2024/2025 through FY2026/2027.	Finance & Data Analytics

Financial Sustainability	Conduct an annual rate design workshop with the Board to review and refine rate structures.	Finance & Data Analytics
Energy Procurement	Create/adopt energy procurement policy to guide future power purchase agreements.	Power Resources

