

Strategic Plan

2023 - 2026

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 in energy needs. We are committed to transforming the energy landscape, driving a sustainable future and beyond by empowering and enabling our communities, and ensuring that no community is left behind in this transition to renewable energy.

Key Focus Areas

Attracting and Increasing Member Agencies

Financial Sustainability

Energy Procurement

Rebuilding Public Trust

Branding/Marketing Communications/Public Outreach & Engagement

Recruitment and Retention of a Talented Team

GOAL	DEADLINE	RESPONSIBLE PARTY	STATUS
Attracting and Increasing Member Agencies			
Conduct an annual survey of potential member agencies' interests and needs.	Q4 2023	CEO	
Create and develop an outreach strategy that educates potential new member agencies on the benefits of CCAs.	Q4 2023	Communications & External Affairs	Ongoing
Conduct quarterly meetings with policy staff from potential member agencies to engage in discussions about strategies to reduce greenhouse gas emissions, promote electrifications, and identify funding sources.	Q4 2023	CEO	Ongoing
Attract two new member agencies.	Annually	CEO	In Progress



GOAL	DEADLINE	RESPONSIBLE PARTY	STATUS
Financial Sustainability			
Establish long-term disciplined fiscal and operational strategies to obtain an investment-grade credit rating in 2027.	Q4 2023	CFO	Complete/ Ongoing
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.	Annual Rate Approval Timeframe (December Every Year)	CFO/CEO	Complete/ Ongoing
Conduct an annual rate design workshop with the Board to review and refine rate structures.	Q4 Every Year	CFO	Complete/ Ongoing
Implement a new forecasting function that integrates software and resources to enhance insights, planning, and reporting capabilities.	Q4 2024	Director of Power Services/CFO	
Perform a comprehensive Cost-of-Service analysis and design retail rates.	Q3 2026	CFO	
Achieve cost savings in energy procurement through the implementation of structured financing.	2028	Director of Power Services/CFO/CEO	



GOAL	DEADLINE	RESPONSIBLE PARTY	STATUS
Energy Procurement			
Create/adopt energy procurement policy to guide future power purchase agreements.	Q4 2023	Director of Power Services/ CEO	Complete
Contract for renewable Power Purchase Agreements that will ensure 100% of OCPA's electric demand by 2030.	Ongoing	Director of Power Services/ CEO	Ongoing
Establish contracts for the development of small-scale local distributed storage facilities with a capacity of 1-5 MW each.	Q4 2024	Director of Power Services/ CEO	
Establish precise metrics and effective tools that can proficiently identify, avoid, and mitigate market and credit risks for OCPA.	Q1 2024	Director of Power Services/ CFO/CEO	
Allocate resources to invest in new renewable and energy storage technologies.	Q4 2024	Director of Power Services/ CFO/CEO	
Forge partnerships with other CCAs to acquire shared resources, mitigate development risks, and capitalize on economies of scale.	Q3 2024	Director of Power Services/ CFO/CEO	



GOAL	DEADLINE	RESPONSIBLE PARTY	STATUS
Rebuilding Public Trust			
Complete 24-point Improvement Plan.	Q4 2023	CEO/CFO	Complete
Educate the public on the mission, vision, values, and benefits of OCPA.	Ongoing	Communications & External Affairs	Complete/ Ongoing
Continue building relationships with media outlets, create a steady drumbeat of news and milestones and cultivate an increase in neutral and positive stories.	Ongoing	Communications & External Affairs	Complete/ Ongoing
Continue building positive relationships with non-governmental organizations, including businesses advocacy and trade associations, multicultural organizations, community-based-organizations and environmental and sustainability.	Ongoing	Communications & External Affairs	Complete/ Ongoing
Develop a sustained outreach program to elected officials and their staff.	Q4 2023	Communications & External Affairs	Complete/ Ongoing
Establish potential grant opportunities for member agencies and customers.	Q3 2024	Communications & External Affairs	
Launch the development of a community power plan with a focus on engaging member agencies on the type of customer programs that are most useful and relevant and a customer programs implementation plan.	Q2 2024	Communications & External Affairs	



GOAL	DEADLINE	RESPONSIBLE PARTY	STATUS
Branding/Marketing Communications/ Public Outreach & Engagement			
Conduct primary research (survey and focus groups) to establish baseline awareness.	Q3 2023	Communications & External Affairs	Complete
Conduct tracking surveys annually in July 2024, 2025, and 2026.	Ongoing	Communications & External Affairs	
Develop crisis communications/issues management plan.	Q3 2023	Communications & External Affairs	Complete
Leverage key insights from the primary research to refresh the existing marketing communications/public outreach and engagement plan.	Q4 2023	Communications & External Affairs	Complete
Update public outreach materials (e.g., website, brochures, fact sheets).	Q3 2023	Communications & External Affairs	Complete
Launch new brand campaign that is informed by primary research.	Q4 2023	Communications & External Affairs	Complete
Develop and implement Supplier Diversity Plan that is consistent with state responsibilities and policies in place in member agencies.	Q4 2023	Communications & External Affairs/Regulatory & Legislative/Power Procurement	Complete
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.	Q4 2023	Communications & External Affairs	Complete



GOAL	DEADLINE	RESPONSIBLE PARTY	STATUS
Recruitment and Retention of a Talented Team			
Recruit permanent Chief Executive Officer.	Q4 2023	Board of Directors	In Progress
Retain Executive Search Firm to assist with recruitment of Director of Power Services and Chief Operations Officer.	Q3 2023	CEO	Complete
Recruit Chief Operations Officer.	Q2 2024	CEO	
Recruitment of open positions.	Q4 2024	H.R./CEO	Complete/ In Progress
Implementation of Cost-of-Living Increase.	Q1 2024	CFO/CEO	Complete
Collaborate with other California CCAs on a comprehensive classification study and salary survey or pursue the development of a OCPA specific comprehensive classification study and salary survey if no joint effort is possible.	Q4 2023	H.R./CFO/CEO	In Progress
Establish and sustain a high-performing agency while developing comprehensive plans for remote, hybrid, and in-person work through internal guidelines.	Q4 2023	H.R./CFO/CEO	Complete/ Ongoing



Rules of Engagement

A set of operating principles to guide conduct, communication, and relationships as the Board fulfills its duties. Rules of Engagement are created to set standards of excellence and best practices for board governance, decision-making, communication, and interaction. Rules of Engagement can also be extended and adopted for an entire organization to guide conduct internally and beyond the organization (community, customers, stakeholders, and general public).

Rules of Engagement are:

- Clear expectations and accountability on how you will conduct yourselves.
- Best practices in decision-making, communication, collaboration, and governance.
- How you will guide your behavior with each other.
- How you will work together and work with others.

OCPA Board to consider adopting the following Rules of Engagement at the July Board Meeting

1. We will be mindful and ensure our energies focus on our mission statement, goals, and principles.
2. We will function as a team with a commitment to excellence. We will treat each other with trust, respect, and dignity, working together with openness, honesty, and integrity while fostering camaraderie and mutual support.