



## 2002 Business Plan

6-19-02

This is a business plan for 2002. Based on input from the Board of Director's retreat in November of 2001, the following strategies and activities were developed as the emphasis for 2002. Activities that are not currently included in the operations budget or in any project-related budget are highlighted. The Executive Committee would like to have a discussion with you on those highlighted activities before further work is done to develop goals and budgets for these items.

These strategies are organized according to the major work areas of the Alliance for ease of implementation. More detailed workplans will be developed by staff to ensure the timely execution of these activities. All of these strategies and activities further us toward the mission, vision and outcomes of our Strategic Plan.

### Portfolio Development

- ❖ Continue Alliance role in emerging technologies and services
  - Anticipated to be accomplished through the UP web site.
- ❖ Develop comprehensive approach to industrial sector
  - Develop and start implementation of a strategy and framework to successfully position the Alliance in the industrial sector, taking into account the nature of the strong relationships that already exist between many utilities and their industrial customers.<sup>1</sup>
- ❖ Ensure new projects have role with local implementation clearly understood
  - Select a few projects and execute a "model" approach to co-develop the Alliance and local utility role. Retro-commissioning is likely the first candidate. This can be a template for future internally-developed projects, if successful.<sup>2</sup>

### Project Implementation

- ❖ Manage existing projects to ensure they are achieving their objectives within the approved budget.
- ❖ Review those projects with contract end dates in 2002, with the potential for possible renewal/evolution or wrap-up. Projects that fall into this category are:
  - Commercial Buildings Initiative
  - Residential Lighting
  - Compressed Air Challenge

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<sup>1</sup> Anticipated to be accomplished through the Portfolio Committee and portfolio development funds.

<sup>2</sup> See footnote 1.

- National Standards
- ❖ Ensure coordination/cooperation of our projects with local delivery partners
  - Key goal of “Partner’s Forum” described below.
  - Commercial Buildings Initiative is working with utility group for enhanced coordination and cooperation
  - Work with Energy Trust to ensure leveraged effort
  - Continue residential programs field staff coordination
- ❖ Contractors become an Alliance sales force and carry our messages
  - Develop and distribute “Contractor’s Communication Kit” that includes items like power point slides, text/articles for newsletters, etc. that talk about who the Alliance is and our purpose in a form that can be used by the contractors for their audiences.
  - Key goal of “Partner’s Forum” described below.
  - Train our staff on our messages and help them carry that message to contractors.

### Alliance Marketing and Communications

- ❖ Increase the value and credibility of energy efficiency and the Alliance mission to decision-makers in key organizations. Key organizations include those represented on our Board, as well as decision-makers within organizations and/or markets targeted by projects.
  - Proactive public relations and media activities that promote the message of energy efficiency where an opportunity exists to effectively link new efficient technologies, the Alliance, utilities, innovation, business and/or government.
  - Better use of existing projects and stories to make energy efficiency tangible. Includes “field trips” to installation sites, increased access to case studies and materials/stories as they develop
  - Continuation of communication products such as: Alliance Annual Report (which will include the AAA report as an appendix this year); newsletters; list serve announcements; revised brochure for outreach to CEO/business audiences.
- ❖ Accelerate local utility/administrator outreach and integration.
  - Plan “Partner’s Summit” to bring 125 contractors working for the Alliance and 75 utilities together to increase their combined effectiveness in delivering energy efficiency through an enhanced understanding of the Alliance and the goals of its stakeholders.
  - Increase usefulness and efficiency of Alliance PC, UP, and Main web sites.
  - Implement a multi-level communication of Alliance messages to utility, administrator and regulatory stakeholder organizations

## Market Research and Evaluation

- ❖ Define most fruitful areas to conduct market research for new projects
  - This will be done through Portfolio Committee activities.
- ❖ Provide data to increase efficiency of Alliance operations and the effectiveness of Alliance projects
  - Market Progress/Evaluation Reports are anticipated on the following projects in 2002:
    - VFDs in Refrigerated Warehouses
    - Commissioning in Public Buildings
    - EnergyStar Residential Lighting
    - SavAir
    - MagnaDrive
    - Super Good Cents
    - Lighting Design Lab
    - DrivePower
    - BacGen
    - EZConserve
    - NW Energy Education Institute
    - Energy Ideas Clearinghouse
    - EnergyStar Home Products
  - In addition, a four state EnergyStar Residential Lighting Survey will be conducted and market assessments will be done for Commercial Buildings and Commercial Windows.
  - Survey our evaluation and project contractors to find out how we can increase the efficiency with which we do business.
  - Ensure that post-contract monitoring of key projects is in place and it serves the needs of organizations requiring reporting.
  - Set the goals and methods for the evaluation of the Alliance's market impact which is due at the end of 2003.

## Board/Organizational Development

- ❖ Evolve the strategic direction of the Alliance
  - Continue discussions with key stakeholders to get their input on our role in regional energy efficiency efforts
  - Develop a five year Business Plan
  - Revise Strategic Plan if necessary after discussion on five-year business plan
- ❖ Enhance the operational efficiency of the Board
  - Invigorate the role of committees, including: purpose, structure and membership of committees; clarification on delegation; role of committee chairs;
  - Enhance tools available to Board members to act as an Alliance advocate in the member's "home" organization;

- Revise Policy and Procedures book into a “Board Handbook” describing how we do business
- Ensure group/social activities around Board and committee meetings, such as workshops on selected topics (for example, cost-effectiveness), dinners or field trips
- ❖ Enhance staff effectiveness
  - Ensure all staff understand the goals of the Alliance and how their individual activities contribute to our success
  - Provide training for professional development as needed
  - Clarify relationship and expectations between Board and staff in the various settings