

Local Development and Customer Programs Strategic Roadmap Development Overview

Executive Committee | July 2025



Objective

Provide an overview of the process for developing a strategic roadmap for the next phase of local development and customer programs* within Ava's territory

** not including commodity supply*

Background

2018-2023

- Prior to start of electricity service in 2018, a team of external consultants developed the Local Development Business Plan (LDBP).
- It was intended to be a roadmap of efforts to be implemented in the first 5 years of service. It had a broad scope (operations to data architecture to procurement) while also very tactical (risk mitigation strategy to rate design).

2024-2025

- Assessment: In December 2024, staff provided an [overview](#) of the work completed under this initial plan and recommended that a future plan be more focused and based on stated priorities. Staff also provided an [update](#) on the Local Development Fund in March 2025.
- Execution: Staff has been focused on ongoing operations, expansion, and execution of committed programmatic initiatives for last several years.
- Initial Planning: Ava staff has strategic goals that drive our annual objectives. The goals are focused on: electrification, affordability, culture & workplace, and agency health (financial, regulatory).

2025-2026

- Strategy and Planning: Focus of this presentation is on the planning for efforts under the electrification goal - crafting a vision for what work Ava will focus on starting in 2027 specific to local development and customer programs. The strategic Roadmap will guide programmatic decisions, funding, and resourcing to meet Ava's goals.

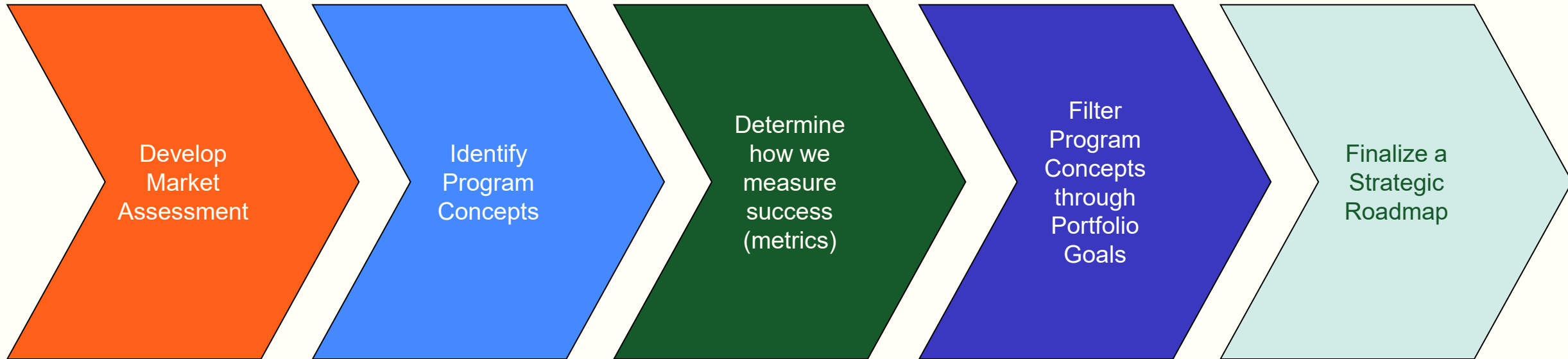
2027-2032

- Implementation: Staff will design and execute on programs and associated services guided by the strategic Roadmap.

Current Committed Roadmap of Programs

2024	2025	2026	2027	2028	2029	2030
Ava Charge						(to ~2037)
Ava Bike Electric			June 2027			
Building Efficiency Accelerator		May 2026				
Health-e Communities Pilot	Dec 2025					
HPWH support	Mar 2025					
CMF		April 2026				PPAs to 2051
SmartHome Charging			April 2027			
Solar + Storage						(to 2035)

Process Proposal



Stakeholder engagement through Board and Committee meetings, public workshops, & collaboration with municipal staff

Proposed Priority Areas for Market Assessment

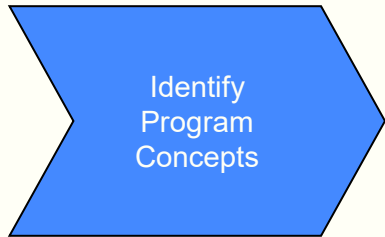


These are the core areas to target decarbonization:

- Transportation Electrification
- Building Electrification
- Energy Efficiency
- Load Management
- Resilience




Within Priority Areas, what program concepts or mechanisms can be applied to achieve goals?




- Staff, along with consultant and stakeholder feedback, will develop a list of potential program concepts
- An example program concept could be:
 - *Mechanism*: Financing for used EVs
 - *Metrics*: \$\$ financed or # EVs financed which lead to resulting emissions reduction
 - *Timeline*: 3 year program
 - *Audience*: Low-moderate income residential customers



Identify Appropriate Metrics



Determine how
we measure
success
(metrics)



Filter Program
Concepts
through Portfolio
Goals

The Roadmap should be informed by outcome metrics. Program concept metrics may include considerations such as:

- Total CO2 reduction
- Total reduction in NG usage
- # customers benefited
- \$\$ savings for Ava
- \$\$ savings for customers

The Roadmap should also consider the composition of programs at a portfolio level and equitable offerings, such as:

- Customer segment/account type
- Market sector/priority area
- Demographic considerations including communities of concern
- Geographic diversity

Primary metrics may vary between programs in order to balance the objectives of the portfolio.

- For example, if decarbonization was the primary metric for all programs, the focus would likely be on our largest commercial customers. We would want to balance our portfolio with programs for residential customers in order to bring benefits to a larger number of customers.



Current Proposed Key Dates

Below are some key dates but not an exhaustive schedule. There will be additional touchpoints with municipal staff and other public meetings.

2025

- | | |
|-----------------|--|
| July | Overview presentation to Executive Committee and CAC |
| November | Selection of consultant to perform market assessment, program concepts, and metrics analysis |

2026

- | | |
|-----------------|--|
| February | Presentation of market assessment report to the Board and CAC |
| April | Public workshop on market assessment, proposed program concepts, and metrics |
| May | Presentation of program concepts and metrics to the Board and CAC |
| August | Public workshop on portfolio metrics |
| Sept/Oct | Presentation of Roadmap to the board |

