

Attachment C: Scope of Work

Task 1: Project Management and Facilitation

The Consultant will provide overall project management and strategic facilitation for the long-term planning process, ensuring the work is completed on time, within budget, and in alignment with Ava's organizational goals. The Consultant will:

- Oversee the entire planning effort to make sure all planning strategy aligns with Ava's broader goals and initiatives
- Oversee consultant team and coordinate with Ava staff to deliver inputs needed in this process.
- Identify, recommend approaches for, and manage the process to arrive at key decisions and stakeholder engagement approach
- Facilitate a project kickoff meeting with Ava staff to align on process, milestones, communication, and roles.
- Lead regular project check-ins with Ava's core team to review progress, address barriers, and discuss next steps
- Lead higher-level strategic direction meetings with Ava staff to review the overall planning approach, discuss and resolve strategic questions, and ensure the process is aligned with internal and external priorities.
- Interview each of Ava's functional team leads to better understand how their role supports customer programs and identify other considerations that may inform the roadmap and associated implementation guidance.
- Oversee delivery of key milestones on time, to ensure the final work product is complete by October 2026 or before.

Deliverable(s):

- Develop and circulate work plans for each of the following tasks within two weeks of the kick off meeting.
- Develop and maintain a schedule using Ava's Asana instance, identifying key milestones and dependencies in the process.

Ava's role: Ava's core "Tiger Team" will participate in regular check-ins and strategic direction meetings, and will coordinate internal staff and leadership participation in all relevant decision making points.

Task 2: Refine Customer Programs Roadmap Objective

The purpose of this task is to document a clear objective for Ava's long-term roadmap by synthesizing existing work, and the result of this identification will enable the drafting of a broad set of potential performance metrics.

Consultant will:

- Review Ava's existing work that supports the definition of the key objective for the Customer Programs Roadmap and discuss comments and questions with Ava's Tiger Team. Develop a memo that synthesizes this work to be used as a guidance document throughout the Customer Programs Roadmap process.
- Review Ava's existing and potential program performance metrics and propose a "long list" of potential program performance metrics that we may want to use to estimate the performance of program concepts and track performance of programs in the 2027-2032 period based on our objective and focus areas, leveraging the metrics we have already collected.

Deliverable(s):

- Customer Programs Roadmap key objective memo
- "Long list" of potential program performance metrics

Ava's role: Ava staff will provide the Consultant with the relevant background materials that inform the agency's strategic objective. Ava's Tiger Team will participate in review discussions and provide feedback on the Consultant's synthesis.

Task 3: Internal Assessment

The purpose of this task is to document Ava's organizational capacity and advantages in order to inform program concepts and portfolio design.

Consultant will review Ava's existing work on organizational capacity and future operational envelope to implement programs, and discuss comments and questions with Ava's Tiger Team on topics such as:

- Budget and funding pathways
- Staffing and internal expertise
- Appetite for risk and innovation
- Implementation constraints (e.g. asset ownership, direct customer financing, cross-CCA program development, etc.)

Consultant will also review Ava's competitive advantage assessment (Ava will provide this document); discuss comments and questions with Ava's Tiger Team.

Deliverable(s):

- Memo summarizing organizational capacity, operational envelope, and competitive advantages to provide input to program concepts, metric development, and portfolio development

Ava's role: Ava will provide the Consultant with the relevant background materials that inform the agency's strategic objective. Ava's Tiger Team will participate in review discussions and provide feedback on the Consultant's synthesis.

Task 4: Community & Stakeholder Engagement Support

The objective of stakeholder engagement in this planning and strategy development effort is to gather input on stakeholder priorities to inform the 5-year plan. Engagement should be structured to gain insights on guiding values and strategic direction.

Consultant will develop and implement a strategy for ongoing engagement with external stakeholders throughout the strategic planning process. Key activities include stakeholder mapping, advising on a comprehensive engagement approach and timing, facilitating engagement activities that align with key phases of the roadmap process, hosting engagement activities that provide information early in the roadmap development process to consolidate an understanding of stakeholder priorities across Ava's service area, and hosting program concept and portfolio informational sessions with stakeholders.

Consultant will also be responsible for integrating stakeholder insights into project deliverables and making recommendations for how feedback should inform each phase of the plan.

Feedback from these stakeholders should be gathered early on in the process to ensure stakeholder priorities inform the roadmap from the outset, and continue through the development stages.

In addition to external meetings, Consultant should attend relevant Ava staff internal working sessions, Board meetings, and other public meetings.

Deliverable(s):

- Stakeholder Engagement map - Identify and segment key external stakeholder groups and their roles in the process and with respect to roadmap implementation.

- Engagement strategy and timeline - Approach for external engagement, including timing, participants, and objectives.
- Engagement session materials - Develop materials for any engagement activities, and
- Engagement session report - Produce a clear summary of input received from each stakeholder engagement activity, including how it can be used to inform the roadmap.

Ava's role: Ava will support the stakeholder mapping exercise, review and provide feedback on draft engagement materials, lead internal alignment efforts, and facilitate all Board and Community Advisory Committee (CAC) engagement activities.

Task 5: Market Assessment on External Landscape

The purpose of this task is to provide a strategic landscape analysis to inform Ava's program concept development and prioritization, which includes identifying unmet needs, innovation opportunities, and implementation barriers across Ava's service territory.

5.1 Program Landscape and Gap Analysis

Consultant will develop an inventory electrification programs and incentives throughout Ava's service territory across entities including cities, counties, utilities, and Regional Energy Networks (REN) to identify gaps by Ava's programmatic focus areas: 1) building electrification including energy resilience, 2) energy efficiency, 3) load management, and 4) transportation electrification.

For each existing program, Consultant will include information such as (data to be finalized in this task's work plan):

- Program overview
- Target customer segment
- Key outcomes
- Implementation barriers or successes

Deliverable:

- Ava Service Area Program Inventory

5.2 National and Global Program Inventory

Consultant will identify successful programs beyond Ava's service area that advance Ava's objective. Include a range of jurisdictions and program models (utility, municipal,

rate-based, etc). Program examples should include information such as, but not limited to (data to be finalized in this task's work plan):

- Context and target customer group
- Goal and structure
- Performance metrics and outcomes
- Notable lessons or barriers
- Funding structure

Deliverable:

- National and Global Program Inventory

5.3 Ava Operational Context Market Assessment

Consultant will examine how change across the various contexts in which Ava operates may impact program implementation from 2027-2032. Ava operates as a community choice aggregator (CCA), a joint powers authority (JPA), and a load-serving entity (LSE), each with unique opportunities and constraints. Analyzing how evolving regulatory, technology, and customer trends will affect these roles is critical to designing programs that are feasible and aligned with Ava's vision for long-term success. Topical areas (e.g., regulatory, future customer needs, technology change, etc.), Ava's role(s) in each (e.g., CCA, LSE, JPA, etc.) and Ava's programmatic focus areas (building electrification including energy resilience, energy efficiency, load management, and transportation electrification) should be used to frame this analysis.

5.4 Internal Review

Design and facilitate an internal workshop with Ava staff responsible for program delivery across departments with the goals of validating insights from market assessment with Ava's internal expertise and identifying considerations to inform future tasks.

Deliverable:

- Workshop session agenda and materials
- Memorandum on workshop findings and associated recommendations

5.5 Programmatic Gaps

Based on outcomes from previous work in this task, Consultant will identify programmatic gaps in Ava's service area and contextualize these gaps with Ava's unique market position, as well as findings from the Program Inventory.

Deliverable:

- Programmatic Gaps and Opportunities Summary

Summary of All Task 5 Deliverables:

- Market Assessment Memo covering Ava Service Territory Program Inventory, National and International Program Inventory, Programmatic Gaps and Opportunities Summary.

Ava's role: Ava will provide the Consultant with relevant existing documents and data to inform the market assessment. Ava staff will identify subject matter experts or other parties to participate in this task.

Task 6: Develop Program Concepts

The purpose of this task is to develop a set of high-level program concepts that build on the findings from previous tasks. The development of these concepts does not include detailed program design or operational plans.

Based on findings from previous tasks, Consultant will develop a "long list" of program concepts that Ava could pursue across its four focus areas. Program concepts will provide information such as the following (data to be finalized in this task's work plan):

- Focus area addressed
- Delivery mechanism, duration and structure
- Target audience
- Potential program outcome(s)
- Budget range
- Key implementation dependencies or challenges

Deliverables

- Program concept "long list"

Ava's role: Ava will share its internal concept list with the Consultant, provide clarifying context on priorities, and review and give feedback on the draft "long list" of program concepts.

Task 7: Program Metrics Development

The purpose of this task is to define a set of high-level metrics that will help Ava evaluate the potential impacts resulting from the implementation of individual program concepts.

Consultant will develop draft metrics to measure the potential impact of program concepts developed in Task 6. Highly detailed or overly granular metrics that risk

leading to overanalysis should be avoided and be on par with the level of detail in the program concept. After workshopping these metrics with Ava staff (Task 8), metrics will be refined for use over the 2027-2032 period to measure progress.

Deliverable(s):

- Program concept metrics

Ava's role: Ava will provide the Consultant with an initial list of draft metrics as a starting point.

Task 8: Program Concepts and Program Concept Metrics Workshop(s)

The purpose of this task is to refine draft program concepts and evaluation metrics developed in Task 6 and 7 through workshops with Ava's internal subject matter experts.

The Consultant will host two or more workshops with Ava's subject matter experts to review the Consultant's proposed initial set of program concepts and metrics, soliciting feedback on the relevant given metric, and using the estimated performance results to illustrate how program metrics track performance against proposed program concepts. Consultant will solicit feedback on refining the program concepts and metrics based on the application of the metrics to the concepts.

Deliverable(s):

- Workshop agenda(s)
- Workshop materials
- Workshop summary/summaries and proposed approach to refinement of program concepts, program concept metrics, and prioritization approach

Ava's Role: Ava staff will identify and schedule all meetings with the Consultant team and staff, review draft materials, and support the Consultant in shaping discussion topics.

Task 9: Refine Program Concepts

The purpose of this task is to refine the initial set of program concepts based on internal feedback and updated metrics, which will result in a "short list" of concepts that are ready for consideration as a part of the portfolio.

Consultant will refine program concepts based on the information gathered in the program metrics workshop(s) and other Ava staff input. Consultant will refresh estimates of program performance using final program concept metrics.

Deliverable(s):

- Program concept “short list” and associated estimated performance across program metrics

Ava’s role: Ava staff will review the proposed refinements and coordinate internal feedback needed and confirm the shortlist aligns with the roadmap’s objective.

Task 10: Portfolio Development

The purpose of this task is to translate program concepts into a balanced portfolio that reflects Ava’s broader organizational priorities.

Consultant will:

- Develop a portfolio of program concepts for inclusion in the roadmap. A portfolio of program concepts is expected to contain program concepts across Ava’s focus areas, and the construction of a portfolio should allow Ava to incorporate organizational priorities into its roadmap.
- Work with Ava staff to identify and catalogue organizational priorities to develop sample portfolios that are achievable based on Ava’s operational envelope and deliver value in terms of market need and decarbonization potential.
- Convene one or more forum(s) with Ava staff to propose an overarching set of targets that will be used to incorporate priorities about how Ava implements affordable decarbonization, present program concept portfolios, discuss how decarbonization and additional organizational goals are achieved differently based on each portfolio, and demonstrate how portfolio performance sets up Ava to perform beyond the roadmap period (2027-2032).

Deliverable(s):

- Program portfolios
- Forum agenda(s)
- Forum materials
- Forum summary(ies) and proposed approach to refinement of program concepts and program concept metrics
- Final program concept portfolio(s)

Ava's role: Ava staff will provide organizational goals, priorities, and context for constraints and opportunities. Ava will also provide feedback on draft portfolios, participate in forums, and ensure the proposed targets and portfolio designs incorporate organizational objectives.

Task 11: Customer Programs Roadmap

The purpose of this task is to synthesize the outputs of all prior tasks into an actionable roadmap that reflects Ava's long-term goal, priorities, strategic advantages, and operational constraints while also providing guidance for implementation over time.

Additional documents to be included in the roadmap include program concept assessment templates, portfolio target realignment template, program assessment templates for use while programs are operating, and implementation guidance. Implementation guidance will include recommendations on an approach to support internal alignment, stakeholder communication, and ongoing reinforcement of roadmap priorities. Consultant will also produce a short Final Summary Report of Process (maximum 2 pages) capturing the overall process, key decisions, and outcomes for future reference.

Deliverable(s):

- Summary Report of Process
- Customer Programs Roadmap by October 2026, including
 - Assessment and alignment templates