



# Clean Energy Alliance Strategic Plan

FY 2024/25 – FY 2026/27

A scenic view of a coastline. In the foreground, a sandy beach stretches along the shore, with gentle waves lapping at the edge. A few people are visible walking on the beach. To the right, a steep cliffside rises, covered in green and brown vegetation. A concrete retaining wall is visible on the cliff. In the background, several multi-story buildings are built on the cliffside. The sky is overcast with soft, grey clouds.

## PURPOSE

To establish a strategic plan including guiding principles, and goals for Clean Energy Alliance through FY2026/27

# Strategic Plan

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## OUTCOMES

- Gather background information on CEA's goals based on foundational documents, Community Advisory Committee input, and Board direction, and consolidate into core guiding principles.
- Formalize CEA's Core Guiding Principles, Goals, and Mission Statement and determine Strategic Objectives.
- Establish a process for updating a Work Plan, incorporating into the budget, and regularly reporting on its progress.

# Strategic Planning Timeline

## Fall 2024

- Review JPA Agreement and foundational documents

## December 2024

- Gather input from staff and strategic advisory partners

## January 2025

- Present first draft to Board for feedback
- Focus on Core Guiding Principles, Goals, , Mission, and Objectives

## February 2025

- Gather additional input from CAC
- Update based on Board and CAC input

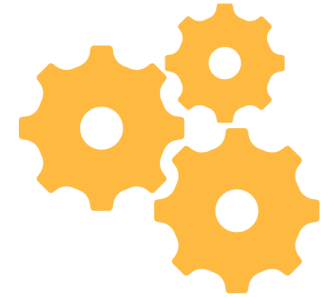
## March 2025

- Present final draft of Strategic Plan reflecting input received to Board for consideration of adoption

## May-June 2025

- Incorporate goals, objectives, and key performance indicators (KPIs) into an updated Work Plan that informs the budget

# Strategic Plan Development



**Foundation**

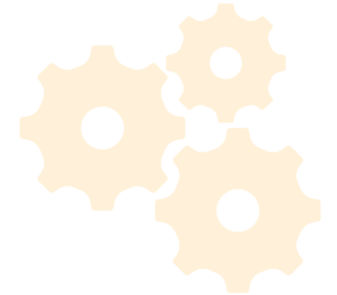
**Core Guiding  
Principles and Goals**

**Mission  
Statement**

**Strategic Objectives**

**Work Plan**

# Strategic Plan Development



**Foundation**

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# Review of Foundational Documents to Determine Core Guiding Principles



Foundation

- 6(b) ... rates ... that are competitive with those offered by ...San Diego Gas & Electric (SDG&E), for similar products with a target generation rate at least 2 percent below SDG&E's based product generation rate;
- 6(c) ... achieving – and sustaining – the Climate Action Plan goals of the Parties;
- 6(d) ...lower greenhouse gas (GHG) emission than SDG&E, ... achievement of the Parties' greenhouse gas reduction goals and renewable electricity goals;
- 6(e) ... energy portfolio that incorporates energy efficiency and demand response programs;



# Review of Foundational Documents to Determine Core Guiding Principles



Foundation

- Section 6.4 **Renewable Portfolio Standards.**  
*“...achieve – and sustain – a renewable energy portfolio with 100 percent renewable energy ... by no later than 2035...”*
- Section 6.5 **Power Supply Requirements** “... power supply base product will be greater than or equal to 50% qualified renewable sources.... In no event ... a lesser amount of renewable resources than the base product provided by SDG&E to its customers.”
- Section 7.6 **Discretionary Revenues** ... establish policies concerning the expenditure of discretionary revenues...





# Review of Current Activities

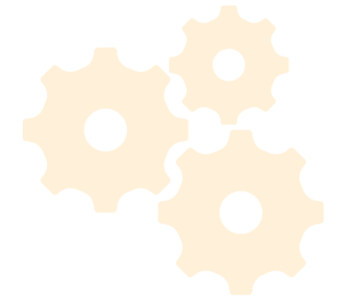
- Completing CEA's Phase 4 expansion and establishing fiscal sustainability
- Implementing Board-approved programs to benefit customers
- Pursuing long-term renewable energy contracts to meet JPA goals and regulatory obligations
- Participating in regional efforts to provide energy efficiency programs to all customers
- Actively engaging in regulatory proceedings and legislative policy initiatives on behalf of our customers



Foundation



# Strategic Plan Development



Foundation

**Core Guiding  
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Work Plan

**1. Promote Use & Development of Clean Energy**

– reduce GHG emissions by providing 100% renewable energy as the default product for all CEA customers by 2035.

**2. Build & Maintain Financial Sustainability**

– achieve financial sustainability and build reserves.

**3. Provide Beneficial Customer Programs**

– offer a variety of programs that serve the needs of our customers, promote affordability, and further reduce GHG emissions.

**4. Actively Engage in Customer Advocacy**

– engage and advocate for CEA and its customers in regulatory and legislative matters.

**5. Provide Exceptional Customer Service & Community Engagement**

– provide highly responsive and helpful customer service and opportunities for our staff to engage with our customers.

**6. Promote Organizational Development**

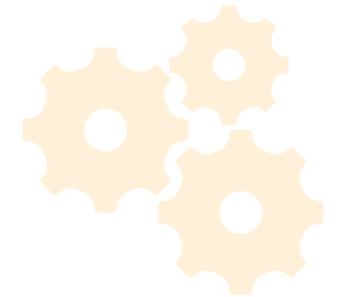
– create an organization that fosters employee creativity and engagement in meeting CEA's goals, recognizes employee achievements and supports employee development and growth.



Core Guiding  
Principles and Goals

# Core Guiding Principles and Goals

# Strategic Plan Development



Foundation

Core Guiding  
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**Mission  
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Mission  
Statement

# Mission Statement

## Key Questions to Consider

- What do we do?
- What are we good at?
- Who are our customers?
- What is our value-add for customers?
- What makes us unique?



# Mission Statement



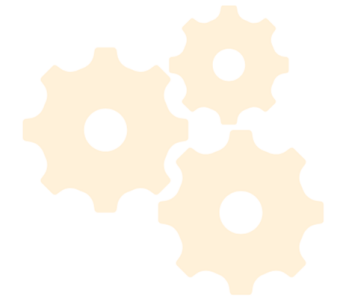
Mission  
Statement

“Clean Energy Alliance (CEA), is committed to empowering communities by providing accessible, sustainable, and cost-effective energy choices and programs, enabling individuals and businesses to actively participate in shaping a cleaner, greener energy future.”

**OR**

“To empower communities with the choice of sustainable and affordable energy, fostering local economic growth, environmental responsibility, and community well-being.”

# Strategic Plan Development



Foundation

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**Strategic Objectives**

Work Plan

# 1. Promote Use & Development of Clean Energy

- Achieve 100% renewable energy by 2035
- Highlight customers that have opted up to CEA's 100% renewable energy Green Impact product
- Support customer access to grant-funded and/or ratepayer-funded energy efficiency programs
- Pursue local generation projects



Strategic Objectives





## 2. Build & Maintain Financial Stability

- Achieve sufficient financial reserves to support rate stability
- Achieve an investment-grade credit rating
- Analyze and adjust the rate premiums for the Clean Impact Plus and Green Impact energy products to ensure appropriate cost recovery
- Offer competitive rates while maintaining financial stability
- Reduce costs by reducing peak load through energy demand management programs



Strategic Objectives



### 3. Provide Beneficial Customer Programs

- Provide all customers with access to programs that reduce energy use and address high electric bills
- Provide access to solar and battery storage to all segments of the community
- Expand access to solar and battery systems at significantly reduced costs to low-income customers
- Encourage participation in State funded income-based assistance programs
- Identify and design energy programs for government
- Collaborate to expand programs offered to CEA customers



Strategic Objectives



**Transform Your Home  
with Money-Saving  
Electric Upgrades!**

  
CLEAN ENERGY ALLIANCE

## 4. Actively Engage in Customer Advocacy

- Maintain participation in legislative and regulatory proceedings
- Actively advocate for CEA and its customers in issues such as affordability, renewable energy procurement, and local control
- Monitor and advocate for fair and reasonable charges
- Engage with local elected officials to communicate benefits CEA provides its customers and influence legislative decisions



## 5. Provide Exceptional Customer Service & Community Engagement

- Increase CEA's presence in the communities served
- Promote CEA as the preferred customer-focused renewable energy service provider in North San Diego County
- Engage with CEA customers to provide information about CEA's programs, services and benefits
- Develop a comprehensive customer communications strategy to reach CEA's diverse communities.



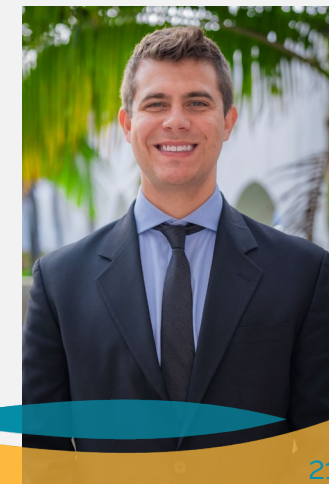
Strategic Objectives

# 6. Promote Organizational Development



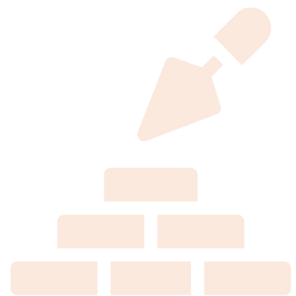
Strategic Objectives

- Expand upon key operational processes and procedures such as key workflows, performance evaluations, and recruitment and onboarding
- Support employee development
- Encourage employee participation in professional education opportunities



# Next Steps

1. Finalize a Work Plan for FY25-27 that includes goals, objectives, and key performance indicators.
2. Develop a budget and staffing plan to present to the Board for consideration.



Foundation

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**Work Plan**

# Board Feedback/Input