



UA Summit[®]

May 10 - 12, 2022 | New Orleans, LA

Hosted by Entergy

Using Data to Bring Your Strategy to Life

Travis Metcalfe

Culture Eats Strategy for Breakfast...



**Operational Excellence
for Lunch**

**and Everything Else
for Dinner**



YOU'LL LIKE TACOMA



Twitter: @weareuai

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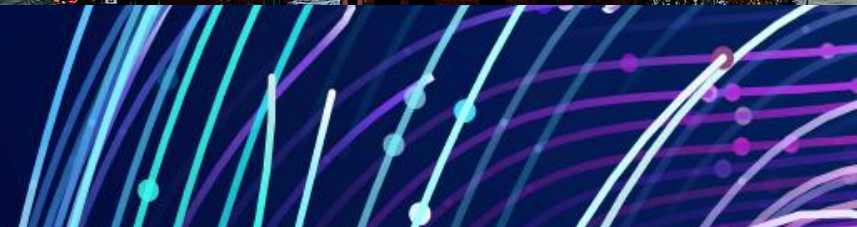




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Who is Tacoma Power?

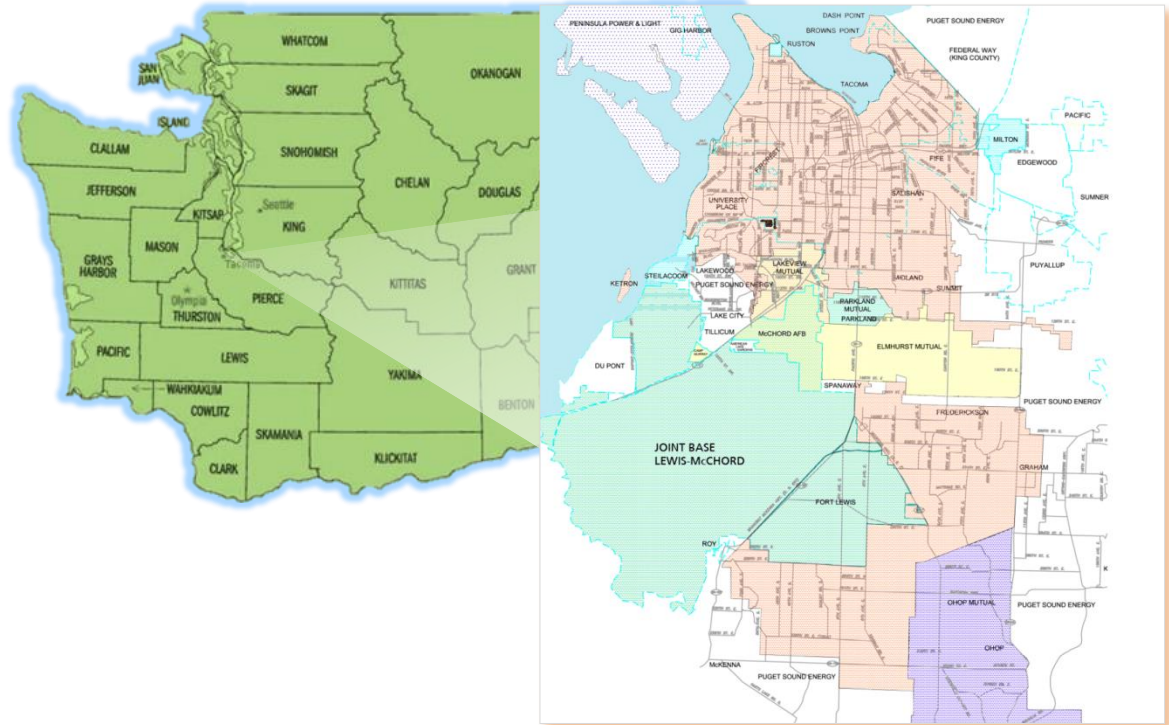
Municipal utility formed in 1893 providing affordable and reliable electric services to the greater Tacoma area.

One division of Tacoma Public Utilities

- Tacoma Power
- Tacoma Water
- Tacoma Rail

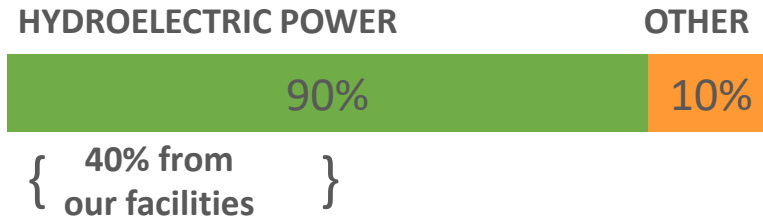
Quick Facts

- Service Area: 180 square miles
- Customers Served: 155,498 residential and 18,166 commercial (54% in city limits and 46% outside)
- Fourth largest public power utility in WA
- Approximately 792 Employees
- Average residential cost: \$924 per year / \$77 per month
- Cost of service utility with a revenue requirement of about \$500M per year
- \$40-\$50M of surplus energy and flexibility sold into wholesale energy market to offset retail rates



How we serve our customers

Virtually Carbon-free Portfolio



60% Contracted Generation

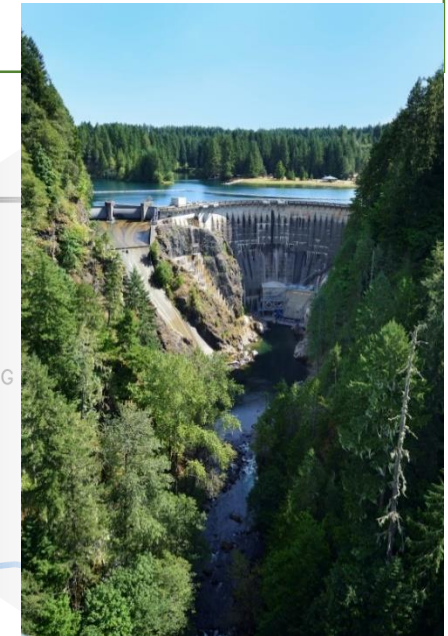
- The long-term power supply contract with Bonneville Power Administration is largest source and extends through 2028

40% Owned Generation

- 7 hydro developments on 4 rivers in Western Washington

Quick Facts

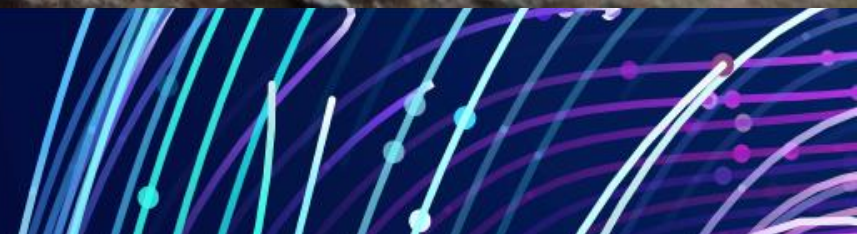
- 5 transmission substations and 351 miles of transmission lines
- 49 distribution substations and 2,014 miles of distribution lines
- 23 BPA customer substations
- 8 generation switchyards





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Our Strategic Plan



Briefing Book

TACOMA POWER
TACOMA PUBLIC UTILITIES

STRATEGY

COMMUNITY VALUE FIRST

OUR MISSION
We provide affordable and reliable electric services.

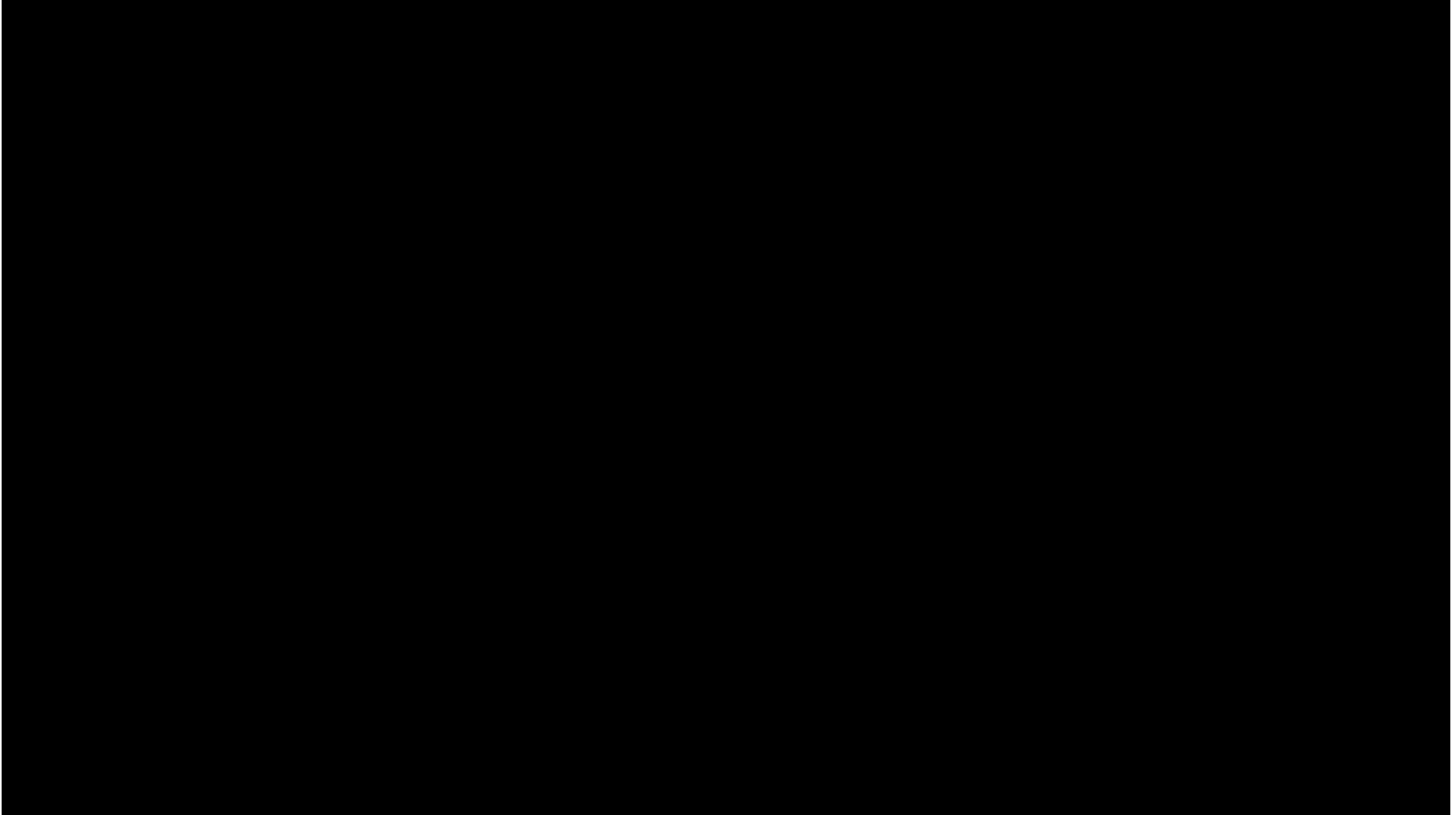
OUR VISION
Be an equitable 21st century utility where employees want to grow and customers want to stay.

OUR VALUES
Be safe, always • Learn and be curious • Do the right thing even when it's hard
Take care of things for future generations • Rely on and respect each other

OUR STRATEGIC GOALS

 Equity Advance our understanding and application of equity through continual learning, honest reflection, and meaningful action.	 Resiliency Measurably improve Tacoma Power's ability to respond to physical and cyber disasters.
 Customer Better understand and act upon the wants and needs of our customers.	 Employee Inspire and empower employees to do their best work and live their best lives.
 Affordability Be wise stewards of our resources to sustain affordability for our customers.	 Environment Lead efforts to restore a healthy planet through wise use of our renewable energy and sustainable fish and wildlife programs.

Our Strategic Plan





ATTITUDE

BEHAVIOUR

MINDSET

ACTION
↓
SOLUTION

PERFORMANCE

RESULTS



Implementing Objectives & Key Results

Simple framework supporting:

- Execution of our plan
- Accountability
- Communication
- Alignment through organization
- Learning and adjusting as things change

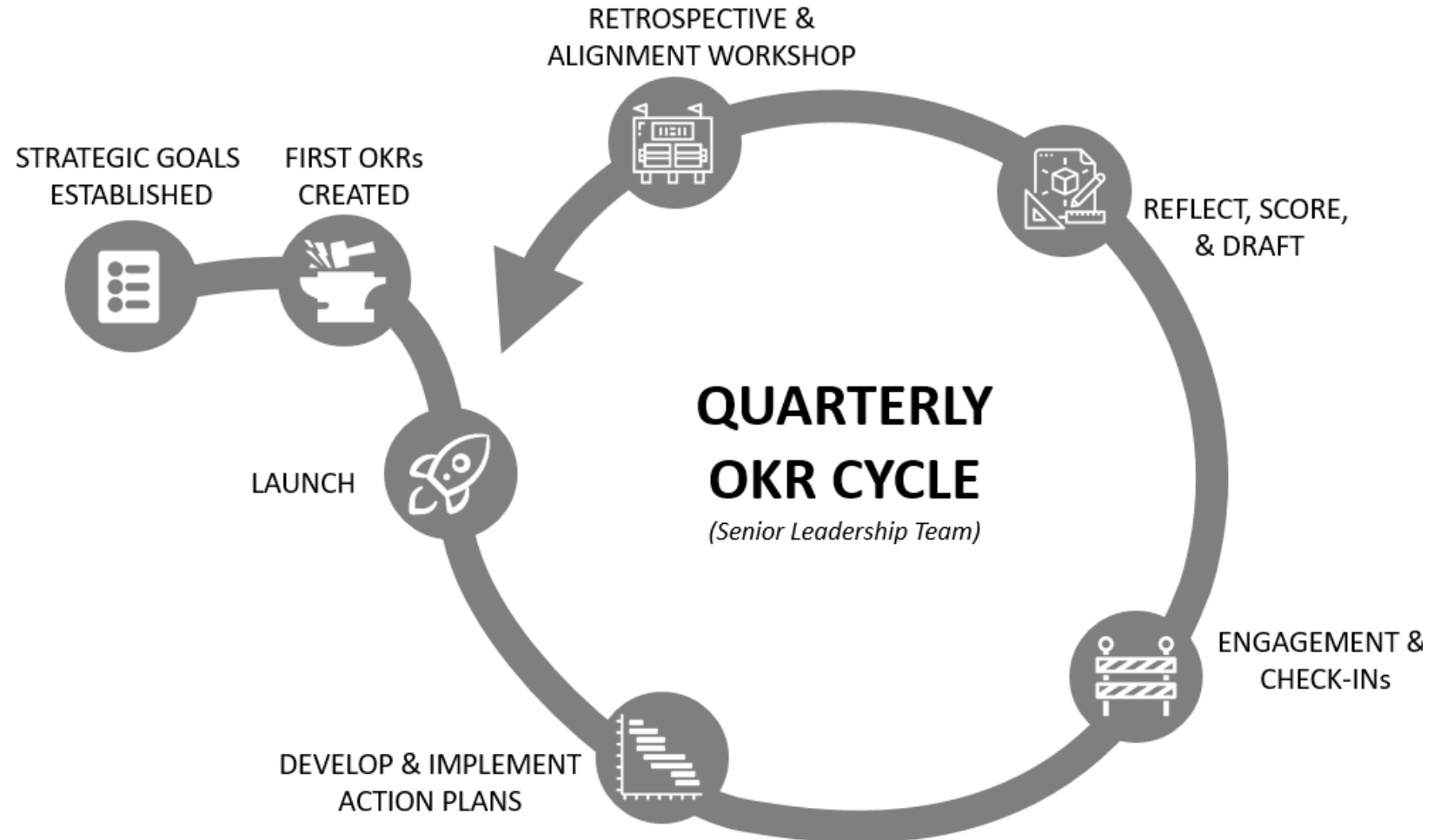


Quarterly Process

3-5 YEAR STRATEGIC GOALS



(Reviewed Annually)



Themes to Goals



Equity

Advance our understanding and application of equity through continual learning, honest reflection, and meaningful action.



Customer

Better understand and act upon the wants and needs of our customers.



Affordability

Be wise stewards of our resources to sustain affordability for our customers.



Resiliency

Measurably improve Tacoma Power's ability to respond to physical and cyber disasters.



Employee

Inspire and empower employees to do their best work and live their best lives.



Environment

Lead efforts to restore a healthy planet through wise use of our renewable energy and sustainable fish and wildlife programs.

Goals to Outcomes



EMPLOYEES

Inspire and empower employees to do their best work and live their best lives.

Strategic Goal Outcomes

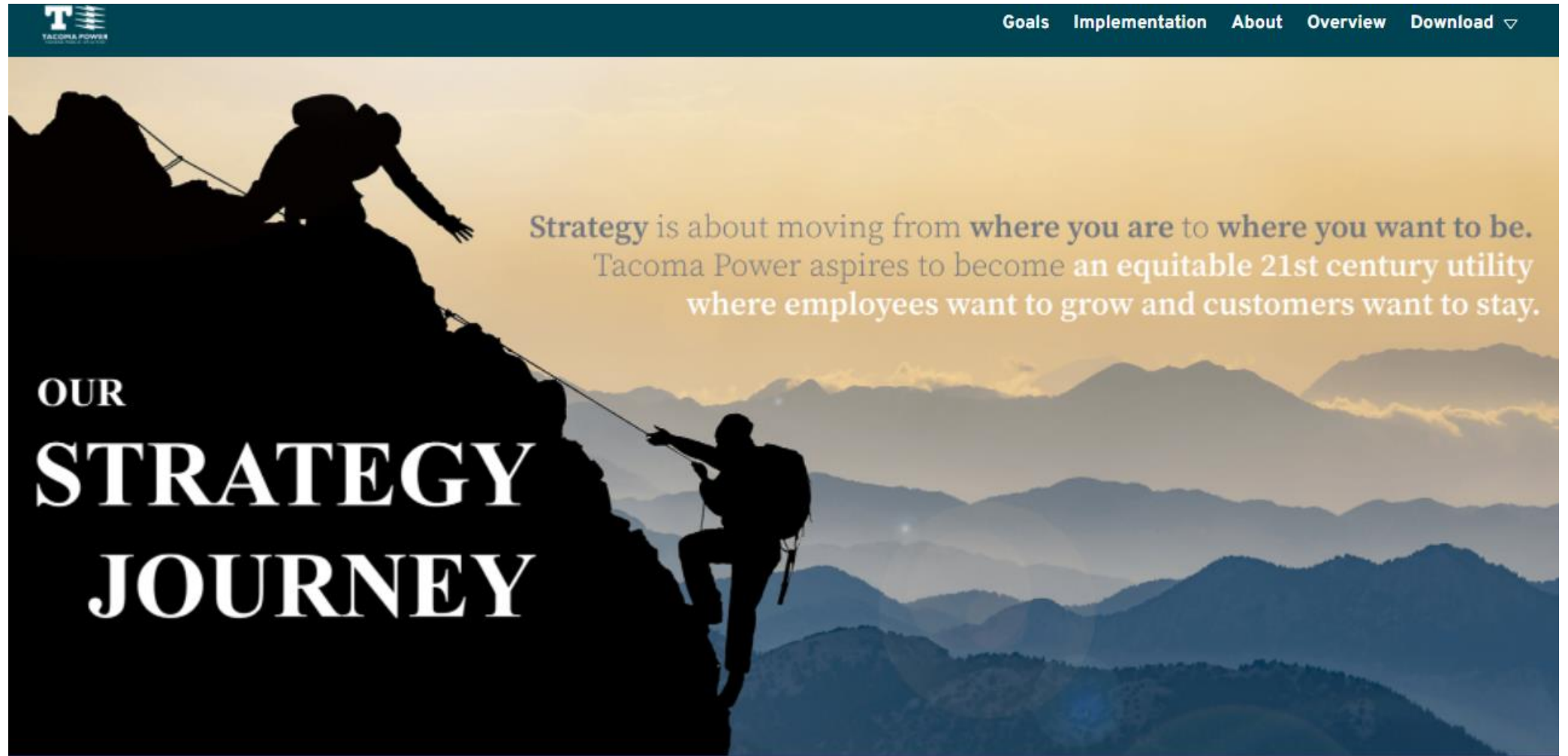
Outcome 1: Equitable access to development opportunities. Provide employees extensive opportunities to gain a rich breadth of organizational and industry knowledge in support of their growth and engagement.

Outcome 2: Unified leadership pursuing continuous growth. Empower leaders with clear expectations and provide them resources to develop a rich skillset to meet those expectations.

Outcome 3: Modern workplace and adaptable culture. Equip a modern workforce with tools and technology to enhance productivity and collaboration while encouraging change, flexibility, and work-life balance.

Outcome 4: Physical and psychological safety prioritized. Employees have access to people, supplies, training and resources to ensure their safety within their working environments. Ensure employees feel confident and comfortable bringing concerns to leadership without fear of repercussions or dismissiveness.

Strategy Portal



Measuring Progress on Outcomes

Measuring our Progress

The following is an interactive dashboard* for exploring progress on the employee focused strategic theme. Click on the tiles below to further explore the different metrics we are actively tracking. The dashboard can also be accessed directly [in tableau](#).

759
POWER
EMPLOYEES

Click on each of the metrics below to explore related visualizations.

1) SECTION TENURE	2) ELECTIVE TRAINING
<p>100.0% SECTIONS avg tenure > 7 yrs ▲0.0% above target</p>	<p>2021 - 2022 25.5% COMPLETED ▼41.2% below target</p>
3) MENTORSHIP PROGRAM	4) TRAINING/DEV BUDGETS
<p>2021 5.5% PARTICIPATED ▼4.5% below target</p>	<p>COMING SOON! Phase 2 2022</p>

Strategic Objective Champion: Rachel Allen | Strategic Objective Champion Backup: Sheryl Brown
Project Manager: Haley Saul | Viz Designer: Hannah Ball

EMPLOYEE METRICS | ELECTIVE TRAINING



Are employees taking elective training and development in similar ways across Power? Is that different over time? Each dot represents a person. **Orange** indicates the the employee took elective training or development in that calendar year. **Grey** indicates the employee did not take any elective training in that calendar year, but they may have taken mandatory training in that year. Click on a section to see details.



Driving Toward Data-Inspired Decisions

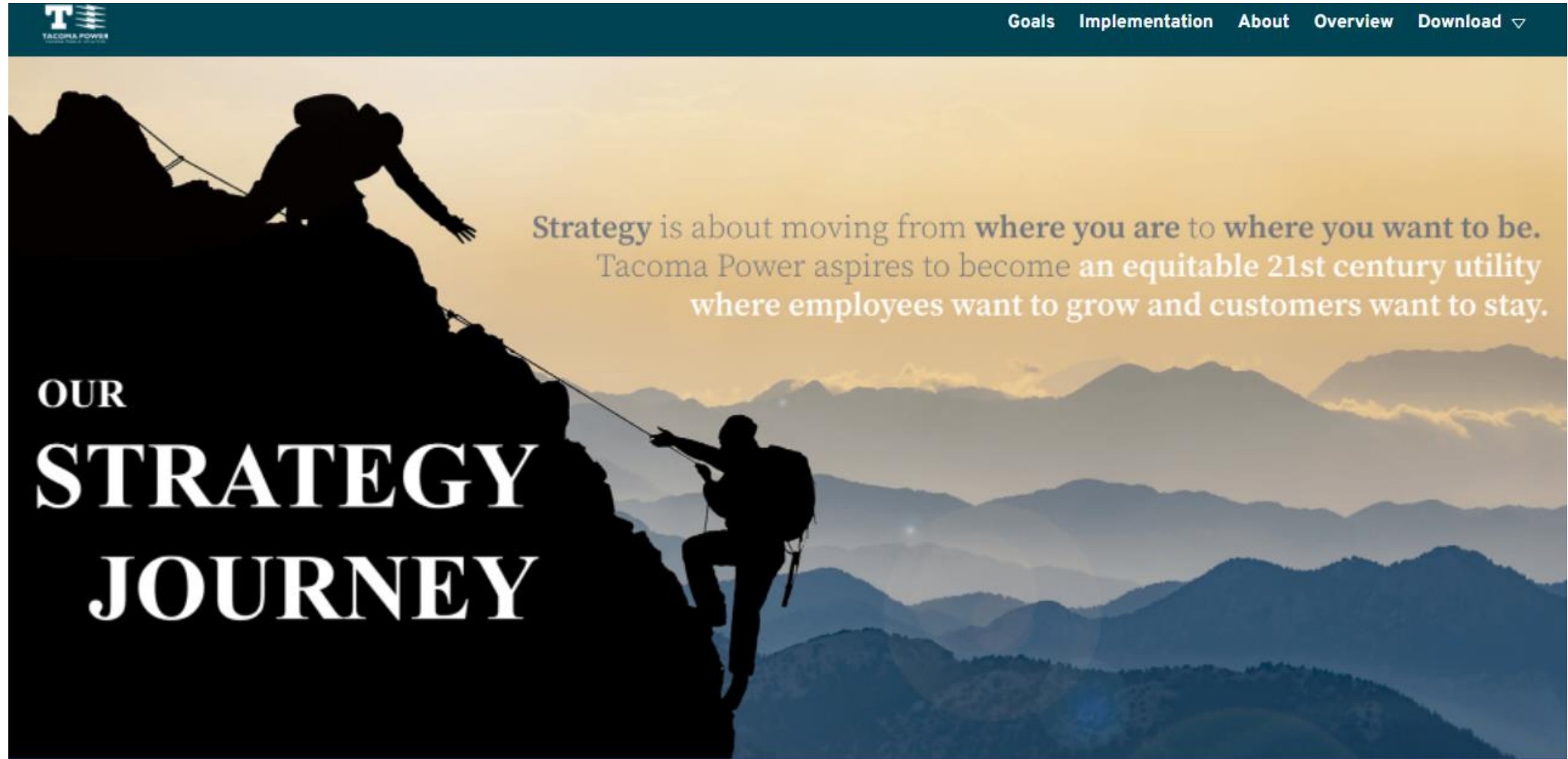
Facilitating a **Performance Briefing**

- **Background**
- **Context**
- **Targets**
- **Key Findings**
- **Actions to Consider**



"We need to come up with new measures. The ones we have are trending too low."

Demo of Strategy Portal



Advancing Your Culture

Be **Curious**

Be Ok With Being **Challenged**

Be a **Champion**

Bring Evidence to Support **Critical Decisions**



THANKS FOR ATTENDING

Please fill out an evaluation form and drop it in the collection basket located at the back of the room.

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