

# Chelan County PUD



## Chelan PUD Performance Plan 2025 Reporting Approach

January 6, 2025

# What we will cover today

- Typical annual performance plan process
- New thinking for reporting
- Interim proposal for 2025 reporting

***Seeking Board feedback, but  
no action required today***

# PUD Business and Performance Plan

## Typical Annual Process

- Staff develops 5-year business plans annually
  - Present priorities to the Board in October
- Staff develops and Board approves a 1-year budget
  - 1-year expenditure budget aligned with priorities
- Develop PUD's Performance Plan
  - Consists of 12-month tactical goals and milestones identified under the business plan 5-year priorities
  - Plan approved by the Board in January
  - Report to the Board quarterly on progress against strategic initiatives, critical tasks, and actions

# Business Planning Transformation

## New Thinking

- Need to report on longer term strategic goals, rather than just 12-month tactical goals
  - Still maintain specific project and financial/budget reporting capability
- 50-Year Visioning next steps include building a reporting process for strategic directives by end of Q2
- Transforming our focus to building, growing and measuring business capabilities
  - If the business capabilities are effective, the PUD will get the projects right

# PUD Performance Plan Reporting

## Interim Proposal

### 2025 Performance Plan Reporting – Interim Proposal:

- Discontinue stoplight performance plan report for 2025
- Executive team to develop new reporting approach to update the Board regarding 2025 strategic goals as presented on 10/7/2024
  - Invest in assets and people
  - Financial resiliency
  - Public power benefit
  - Engage in countywide efforts
- Check-in with Board in April seeking feedback on interim reporting approach and timeline
  - In parallel, continue work to operationalize 50-Year Vision

# Appendix

# Cascading Planning Cycle

## Modified Approach



Levels of organization



# 2020-2024 Strategic Plan Goals

**1**

Invest in assets and people and seek industry top-quartile performance for hydro generation, retail reliability, and safety while improving our customer service technology

**2**

Sustain excellent financial resiliency while mitigating the risk of large rate increases

**3**

Enhance the quality of life in Chelan County through programs that distribute the benefits of public power

**4**

Engage in countywide growth planning and job creation efforts while ensuring the District's rates and policies remain stable and predictable