CITY LIGHT REVIEW PANEL MEETING

Wednesday, April 19, 2023
9:00 – 11:00 A.M.
SMT 2821
—or—
Microsoft Teams Meeting
<u>Proposed Agenda</u>

<u>Item</u>   <u>Lead</u>

1. Welcome *(5 min.)*   Mikel Hansen, Panel Chair

2. Public Comment *(5 min.)*

3. Standing Items: *(10 min.)*
   a. Chair's Report (Mikel)
   b. Review of agenda (Leigh Barreca)
   c. **Action**: Review and approval of meeting minutes of March 22, 2023
   d. Communications to Panel (Leigh)

4. General Manager Update (40 *min*.)   Debra Smith

7. Strategic Plan Progress (*60 min*.)   Jen Chan/DaVonna Johnson/Kalyana Kakani
   a. Strategic Priority: Develop Workforce & Organizational Agility

8. Adjourn

Next Meeting: Thursday, May 11, 2023

City Light Review Panel Meeting
Meeting Minutes

Date of Meeting: March 22, 2023 | 1:00 – 3:00 AM |
Meeting held in SMT 2821 and via Microsoft Teams "Draft"

MEETING ATTENDANCE							
Panel Members:							
Anne Ayre	√	Leo Lam	√	John Putz			
Mikel Hansen	√	Kerry Meade	√	Tim Skeel	√		
Scott Haskins	√	Joel Paisner					
Staff and Others:							
Debra Smith	√	Jen Chan	√	Julie Ryan (Consultant /RP Facilitator)	√		
Kirsty Grainger	√	Mike Haynes	√	Craig Smith	√		
Jim Baggs		DaVonna Johnson		Michelle Vargo	√		
Kalyana Kakani		Emeka Anyanwu		Maura Brueger	√		
Julie Moore	√	Chris Ruffini	√	Leigh Barreca	√		
Greg Shiring		Carsten Croff	√	Angela Bertrand	√		
Eric McConaghy	√	Caia Caldwell	√	Brian Taubeneck	√		
Kathryn Aisenberg	√	Joe Fernandi	√	Marcus Jackson	√		
Melissa Skelton	√	Chad Ihrig (Google Nest)- Guest	√	Amy Wheeless (NWEC) - Guest	√		

Welcome and Introductions. The meeting was called to order at 1:03 p.m.

Public Comment. There was no public comment.

Standing Items:

Chair's Report. Mikel Hansen greeted everyone and opened the meeting.

Review Agenda. Julie Ryan reviewed the agenda. Julie also shared two questions raised by two Review Panel members immediately following the prior meeting. One question was when will the debt strategy be finalized? That will occur when the finance team completes the white paper. The second question regarding quantitative analysis of benefits with the regional WRAP and EDAM initiatives was forwarded to the internal City Light leads. Currently, these initiatives are at non-binding stages.

Approval of February 15, 2023, Meeting Minutes. Minutes were approved as presented.

Communications to Panel. Leigh Barreca reported that she has received interest from two, possibly three, people to serve in the Low-Income Customer Advocacy position on the Panel. She is gathering resumes and statements of interest to submit to the mayor's office for selection.

General Manager's update.

1. <u>Skagit Relicense update</u> - Last week we reached another major milestone in our relicensing of the Skagit River Hydroelectric Project with the filing of the Updated Study Report to the Federal Energy Regulatory Commission (FERC). Two extraordinary summers and a total of 18 months of intense research on the Skagit River were completed with the results of 33 studies submitted to FERC. The filing of the Updated Study Report this week signals that another milestone has been reached in the Skagit Hydroelectric Project relicensing process. While not all of the 33 studies were required by FERC for the relicensing process, they were completed as part of our commitment to the Tribes and local, state, and federal agencies. These license partners are using the studies to guide protection, mitigation and enhancement plans as a part of the next license agreement.

   While hydroelectric power is the most reliable form of renewable energy available – and the Skagit Project supplies about 20% of City Light's power – all power-generation systems have costs. That is why City Light takes a comprehensive, ecosystem-wide view of the whole river. The relicensing process is an opportunity to reset how we manage fragile ecosystems, and because the environment is always changing, we need to update the underlying science. We take our stewardship responsibilities very seriously and manage the hydroelectric project to these priorities: 1) Flood risk management; 2) Fish, 3) Recreation; 4) Power generation.

   Ecosystems are delicate, and seemingly small changes in one place can have significant repercussions in another. The new license will allow City Light to continue producing clean, carbon-free energy while also updating the utility's stewardship of the watershed's cultural and natural resources. At the end of the day, we know that City Light will make a significant contribution to the health of the Skagit River and endangered salmon, and we will continue our partner-based approach to ecosystem stewardship. I am so thankful to the many City Light staff, our consultants, and our partners, especially the Tribes and regulatory agencies, for their commitment to collaborating on these challenging yet vitally important efforts.

   Q: Do the tribes support "transport" of fish rather than structural barrier elimination?
   A: We are discussing early action on items that will start before FERC's decision through a variety of pilots, for we want to make sure there are not unintended consequences as we move species. Actual fish passage likely would not start until around year 10.

2. <u>RSA</u> – Kirsty Grainger presented the proposal that City Light made to the mayor's office to fund the RSA account from surplus cash, as opposed to triggering a surcharge on customers' bills. The RSA account relates to the level of surplus power sales. Since the utility's load was higher than forecasted in 2022, there was less surplus energy to sell. As a result, the RSA account declined starting

November 2022, but this was offset by higher revenue from increased customer sales volume. The resulting surplus cash from higher sales can be used to re-build the RSA reserve account, thereby avoiding an RSA surcharge on customer bills.

Q: It looks like the cash position is strong. But are there things you will need to sacrifice or not do that you intended to do?
A: If we make the transfer, the bond sale will be slightly larger. But the total amount to be transferred is fairly small. Our cash position is much stronger than anticipated so we have more money than originally projected. We are optimistic though we do not know how the summer will go temperature-wise. What drove the increase YoY from 2021 to 2022 in retail sales? **A:** The short answer is that it was a weird weather year. It was hot in the summer with more air conditioning load and cold in the winter with more heating load. In December we hit a new peak load. It was not due to new customers or new projects.

Q: With this knowledge, how does this change your future forecasting?
A: This is something we're discussing with the Mayor's Office. The fact we didn't see this coming is concerning and we are reviewing our forecasts.
A: Our power management group was negatively impacted by our high vacancy rate. I want to acknowledge that there is work for us to do to review our risk management policies and practices. We could have done better in December, but not with our current staffing. A lot of work is being done to understand that and what we need to do. The System Operations Center staff are working very closely with the real-time traders.

Comment: The RSA is in place to deal with these sorts of situations. In this case, the positive cash position allows us to avoid triggering the surcharge for customers.
A: We agree. The RSA is there to manage an uncontrollable risk.

3. Funding Opportunities –
   a) **FEMA** - On Monday, March 6, the Office of Emergency Management and City Light were informed of a FEMA grant award for the City Light Transmission Tower Landslide Mitigation Project. The project will retrofit six high voltage transmission towers in Snohomish County, and the power lines they support, to minimize damage and possible cascading collapse due to landslides. The devastating 2014 Oso landslide highlighted the vulnerability of these transmission towers, which are located close to what became the debris field. All utility customers will benefit from this hazard mitigation work as these transmission lines bring power from the Skagit River Hydroelectric Project, a three-dam system that supplies about 20% of City Light's power.

   Through FEMA's Hazard Mitigation Grant Program, City Light will be reimbursed 95% of all eligible costs. The project includes a Phase 1 for design ($60k), followed by a Phase 2 for

construction ($989k), for an estimated project total of over $1 million. In partnership with City Light, OEM will manage the grant award, which is the first FEMA grant City Light's Emergency Preparedness program has obtained.

b) **DOE Grid Resilience & Innovation Partnership (GRIP)** - City Light submitted an application for $50M in DOE funding last week. The proposed body of work represented a critical investment in technology, hardware, and enterprise architecture to enable our core operational needs to keeps the lights on safely and cost effectively, while putting our customers first and enabling new customer choices with a focus on our equity values..

Success in this effort will enable us to accelerate and buy down the cost of known technology investments that are rapidly becoming mainstream operational tools in our industry.

c) Continue to participate with other utilities on **Hydrogen Hub concept**. We are in the running for funding.

4. <u>General Manager Smith's next steps.</u> Debra will be stepping out of the role of General Manager around July 1. She will remain at City Light in an advisory role through October. The Mayor's Office's intent is to find a replacement before that July 1st date. If there is any delay filling the General Manager position, the mayor will appoint an interim General Manager.

Strategic Plan Priority: Improve the Customer Experience. Craig Smith (Chief Customer Officer) introduced his team. The presentation materials are in panel packets. The presentation provided information on the many projects, initiatives, and activities (PIA) that his team is engaged in to support the "Improve the Customer Experience" strategic priority in the City Light Strategic Plan. The Customer Service team presented work completed in 2022 and upcoming initiatives for 2023 in the following areas:

a. Strengthen and fix core customer services
b. Expand customer service options
c. Integrate the "Voice of the Customer" into our organizational culture

Q: Are you planning any real time response programs? I'm thinking of the grid responsive buildings in Spokane.
A: We use Oracle™ and have access to historical 15-minute interval data, so our current programs will draw from that. Phase 1 is helping customers understand their consumption patterns and finding customers who would benefit without changing any behaviors. Then

we plan to provide tools so customers can manage their load and change behaviors. This does have an element of grid flexibility. Future real-time programs are on our roadmap. We are engaged with the National Lab (NREL), the Electric Power Research Institute (EPRI), and Community Roots Housing to build a grid interactive building. This could also look like providing customers with activities they can do when they know the next day will be very warm or very cold.

Closing: Julie advised the Review Panel that the Create an Agile Workforce strategic priority would be the topic at the next meeting. As the timing for some future topics has changed, an updated Review Panel workplan is in the meeting packet.

Adjourn: Meeting adjourned at 2:53 p.m.

Next meeting: April 19, 2023, 9:00 – 11:00 a.m.

Develop Workforce & Organizational Agility

City Light Review Panel

April 19, 2023

Seattle City Light

WE POWER SEATTLE

Team Introductions

DaVonna Johnson, Chief People & Culture Officer

Jen Chan, Chief of Staff

Kalyan Kakani, Utility Technology Director

Kristina Pham, Enterprise Organizational Change/Business Process Manager

Jody Bauder, Utility Technology PMO and Business Relationship Manager

2023-2028 Strategic Plan

OUR STRATEGIES

The update is organized around the following business strategies:

1 **Improve the Customer Experience**

2 **Create our Energy Future**

3 **Develop Workforce & Organizational Agility**

4 **Ensure Financial Health & Affordability**

5 **We Power**

The fundamentals of the Strategic Plan remain unchanged for the 2023–2028 update. We are delivering on our investments to maintain current service levels and additional strategic investments to enhance service and improve productivity. This plan update further describes the steps City Light is taking.

Focus on Develop Workforce & Organizational Agility

Institutionalize Organizational Change Management (OCM)

Strategic Plan 2023 - 2028

- **Business Strategy this PIA supports:**
  - Develop workforce & organizational agility
- **PIA Executive Sponsor:**
  Jen Chan
  - **PIA Project Manager:**
    Kristina Pham

PIA Description

A formal change management program will be established to provide consistent structure, standards, training, coaching, and resources. This will *help employees successfully adapt to and master changes* in job functions, business processes, and technology usage.

OCM: Race, Social Justice, Inclusion Lens

- Ensure OCM is fully engaged and supports the organization's transition to future state, including employee readiness and morale when appropriate.
- Incorporate human center design that focuses on personal experiences, knowledge and emotions when performing OCM activities and tasks on initiatives and projects.
- Leverage OCM change principles as a toolkit to imbed into Utility's culture and support actualization of the employee behavior and readiness through our work.

Foundation: Why Organizational Change Management

Increase probability of project success

Manage employee resistance to change

Capture people-dependent ROI

Build change competency into the organization

Building our OCM Program & Service Offerings

*… Roadmap for a **progressive** journey towards a change ready organization*

2024 & Beyond
Mature the Program & Continuously Improve Our Service Offerings

➢ Be the '**service partner of choice'** in leading and managing change for Seattle City Light
➢ Build organizational change management capabilities and competencies through effective trainings and workshops

2023
Enhance OCM Services & Business Relationships

➢ Provide OCM support as shared enterprise services
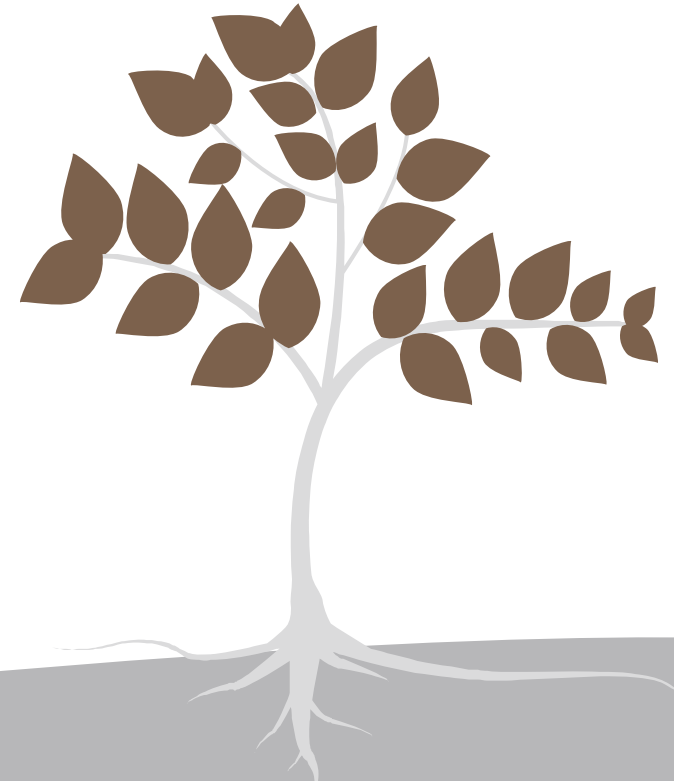➢ Further establish trust and positive relationship with other teams across the Utility

2022
Deliver Measurable Results
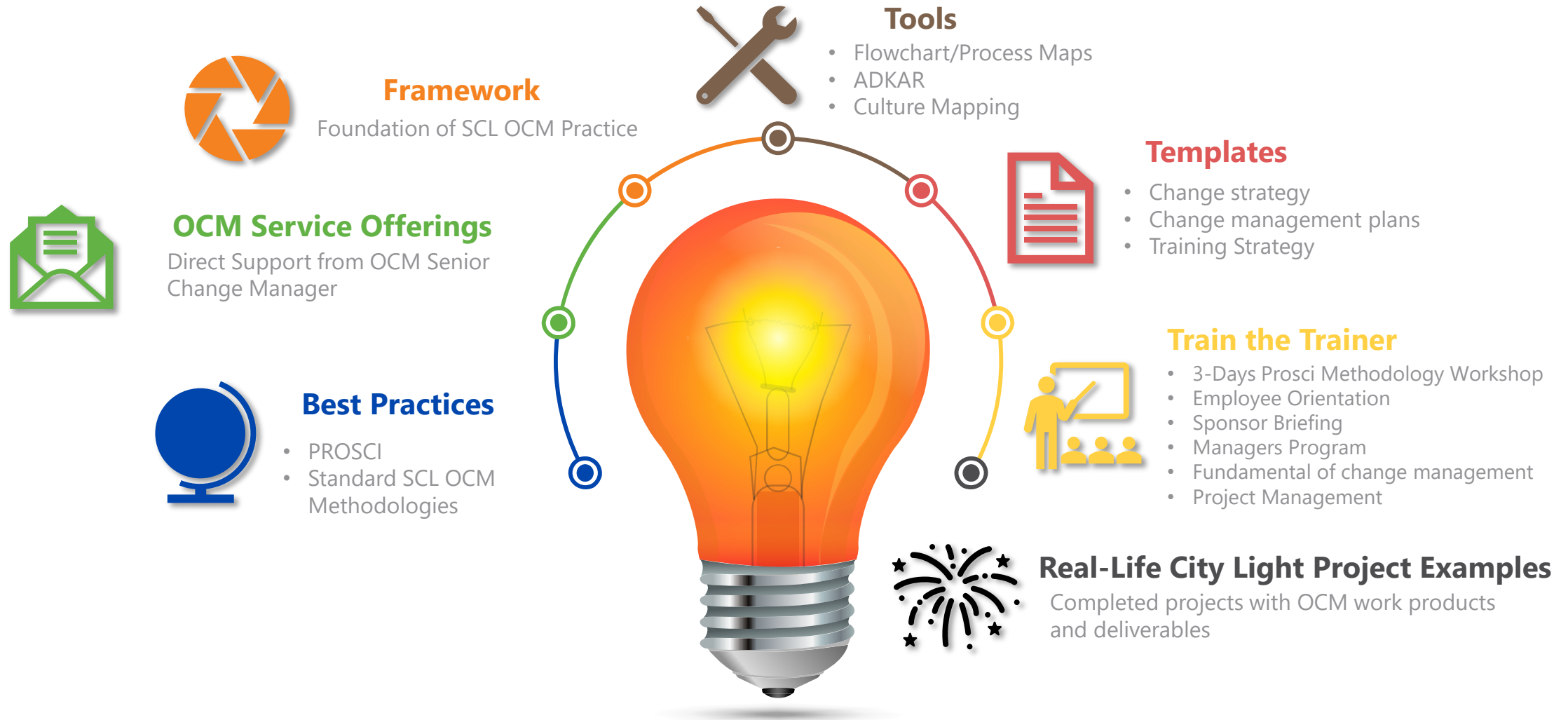
✓ Successfully supported 22 change initiatives
✓ Documented and optimized key business processes

2021
Develop Standards and Baseline

✓ Established Enterprise OCM Team
✓ Created Consistent Core tools
✓ Defined Core Service Offerings

Seattle City Light OCM Toolkit

Tools
- Flowchart/Process Maps
- ADKAR
- Culture Mapping

Framework
Foundation of SCL OCM Practice

Templates
- Change strategy
- Change management plans
- Training Strategy

OCM Service Offerings
Direct Support from OCM Senior Change Manager

Train the Trainer
- 3-Days Prosci Methodology Workshop
- Employee Orientation
- Sponsor Briefing
- Managers Program
- Fundamental of change management
- Project Management

Best Practices
- PROSCI
- Standard SCL OCM Methodologies

Real-Life City Light Project Examples
Completed projects with OCM work products and deliverables

Some Projects We're Working On Across the Utility

- Work & Asset Management

- SCL Reimagining Workspace
- HRIS Replacement

- Electrification & Strategic Technology

- Outage Management System
- Time of Day Program

- Utility Technology Roadmap

- Hiring Process Improvement
- Workforce Excellence Core Services Design

Distributed Energy Resources
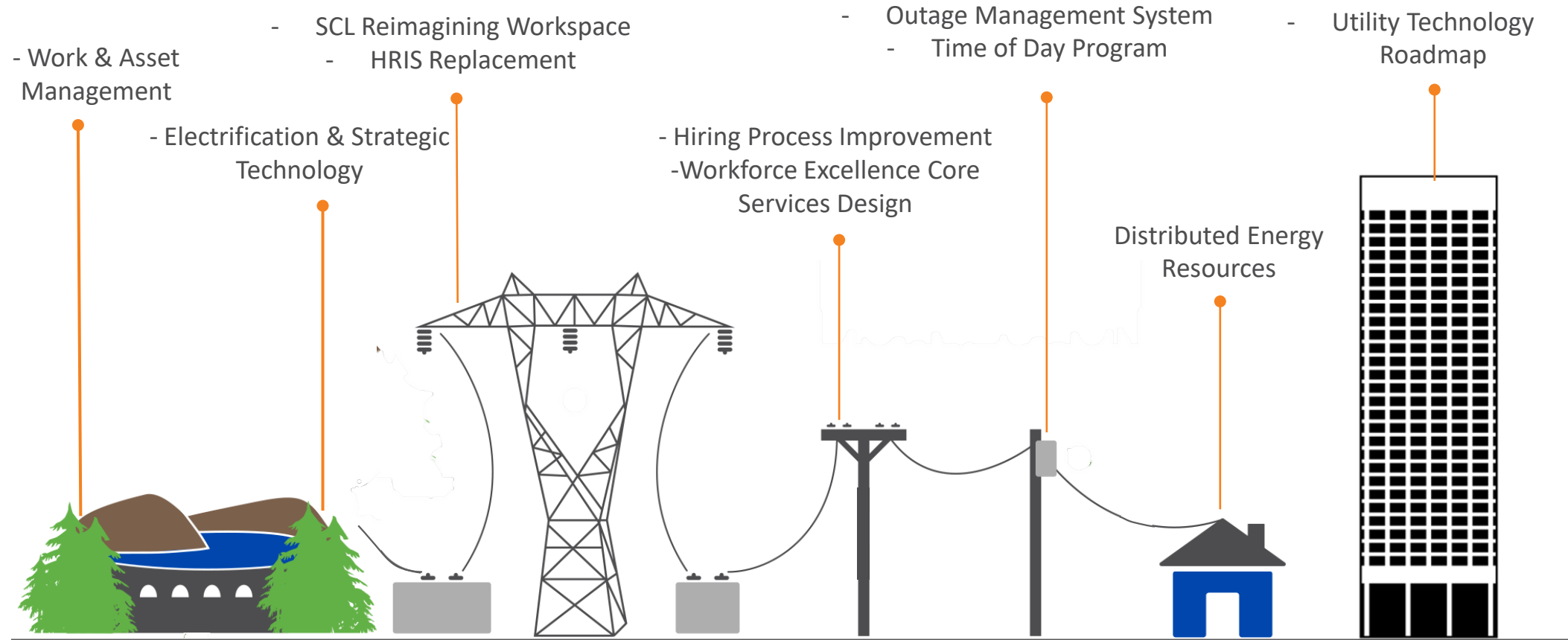
...and many more!

About our Enterprise OCM/BPM Program

❖ Our program vision & objectives

❖ Our team

❖ Highlight of 2022 accomplishments

❖ Looking ahead to 2023 and beyond

Seattle City Light

2022

Year in Review

OCM/BPM Programs

DEVELOPING THE ENTERPRISE OCM/BPM SERVICES

Seattle City Light established the enterprise Organization Change Management/Business Process Management (OCM/BPM) services to improve the adaptability, effectiveness, and efficiency of the organization. Our goal is to infuse these skills across the organization and become part of our regular business operations. To increase awareness of the services, we performed enterprise OCM Change Action Planning workshops in Q1 with all 8 business units (BUs), with over 80% participation from the Leadership Team.

We also presented at key leadership meetings to raise active sponsorship and awareness (Strategic Forum, ETeam, Leadership Team, etc.)

As of the end of December, we have delivered roadshow presentations to all planned BUs, which increased staff awareness on foundational and fundamental OCM/BPM practices.

> ❝ *I remember the days when we had to try to squeeze ALL this in on our own. So happy to have an enterprise team that is so skilled and passionate about OCM.* ❞
>
> -Britt Luzzi, Customer Technology Solutions Senior Manager

SUPPORTING PEOPLE LEADERS THROUGH
OCM/BPM KEY SERVICES

By focusing on the development of OCM/BPM-related skills and behaviors within project deliverables, OCM/BPM is supporting people leaders through key initiatives. In addition, training and workshops are hosted accordingly to further build these critical skills. Some examples of our efforts:

• Facilitated joint workshop with Electrification & Strategic Technology and Customer Care and Energy Solutions around OCM fundamentals with an activity addressing resistance within teams.

• Hosted two 3-day PROSCI workshops for targeted audiences including the General Manager's Office, Service to Bill and the Electrification & Strategic Technology.

• Developed and published the OCM playbook and toolkit for people leaders to continuously initiate and respond to change in ways that create advantages, minimize risk, and sustain performance.

Build an Agile Workforce

DaVonna Johnson

Seattle City Light

WE POWER SEATTLE

Build an Agile Workforce

Strategic Plan 2023 - 2028

Business Strategy this PIA supports:
- Develop workforce & organizational agility

PIA Executive Sponsor:
DaVonna Johnson
- **PIA Project Managers:**
  Melanie Peck
  Reagen Price
  Brendan Armstrong
  Kathy Knoelke

PIA Description
Develop and implement a future of work strategy that encompasses reimagining the workspace for a hybrid work environment; broadening recruitment to reach a more diverse applicant pool; enhancing employee development and training; and developing a culture of accountability and outcomes.

Race, Social Justice, Inclusion Lens
- Programs are rooted in equity by design and should support RSJI vision and work
- Use best practices related to equity and environmental justice indicators
- Outreach and recruitment to increase the population of women, BIPOC, and others into non-traditional work pathways
- Develop participation guidelines for the Culture Action Plan Workgroups that take into consideration employee affinity groups
- Seek to understand barriers to growth and support in employee lifecycle
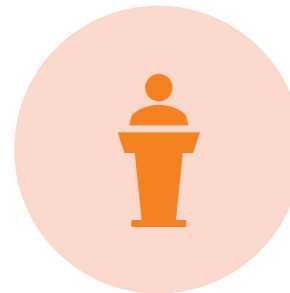
Pillars of the Equitable Employee Lifecycle

Diverse Recruitment & Retention

Developing Organizational Leaders

Supported Employee Career Pathways & Progression

Knowledge Transfer & Succession Planning

Workforce Excellence Activities **2023**

Identify critical knowledge, skills & abilities

Streamline tools, templates and processes

Build Equitable Employee Lifecycle Framework

Continue employee/leadership development and gather data for improvements

Create knowledge sharing & succession norms

Form regional partnerships to leverage best practices and create efficiencies

Work with industry experts to support design and implementation

Establish learning standards, norms, processes and expectations

In a Culture of Excellence, employees feel that what they are working on is meaningful, significant, and purpose-based. Everyone concerned is highly inspired by the common purpose, which becomes the driving force behind everything they do.

Develop an Equitable Employee Lifecycle Framework

...Outreach to increase the population of women, BIPOC and other under-represented groups, into non-traditional work pathways

Attract & Hire

01

- Proactive **recruitment** and workforce pipeline development approach
- Identify and **promote** SCL's unique competitive edge (our mission and vision)
- **Attract** workers by modeling our culture & values

Retirement and Transition

04

- Effective job **transition** including hand-off, exit interviews and surveys
- **Knowledge transfer** culminates upon transition but takes place throughout employee tenure
- **Positive** vibes and relationships when exit occurs

Inspire & Galvanize

02

- Support and equip new employees through a robust experience of **onboarding, orientation and training**
- **Seamless** and proactive process that takes an applicant through employment
- Provide ongoing **mentorship**, guidance and personal support for new employees
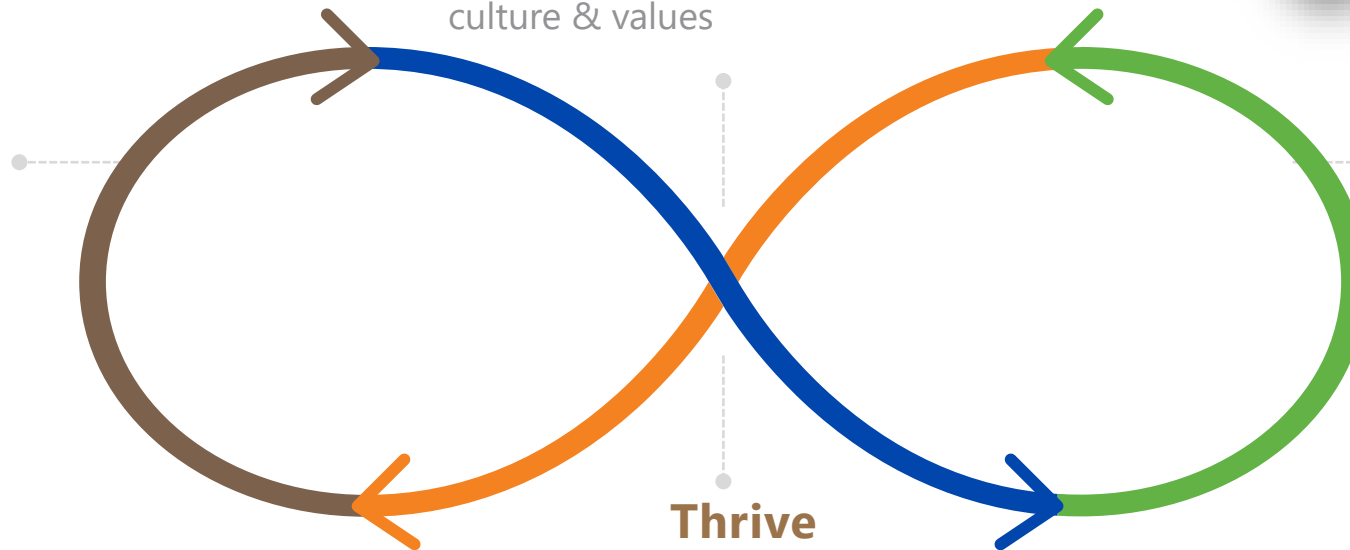
Thrive

03

- Professional career **development** pathways and mapping
- Relevant **rewards** & **recognition**
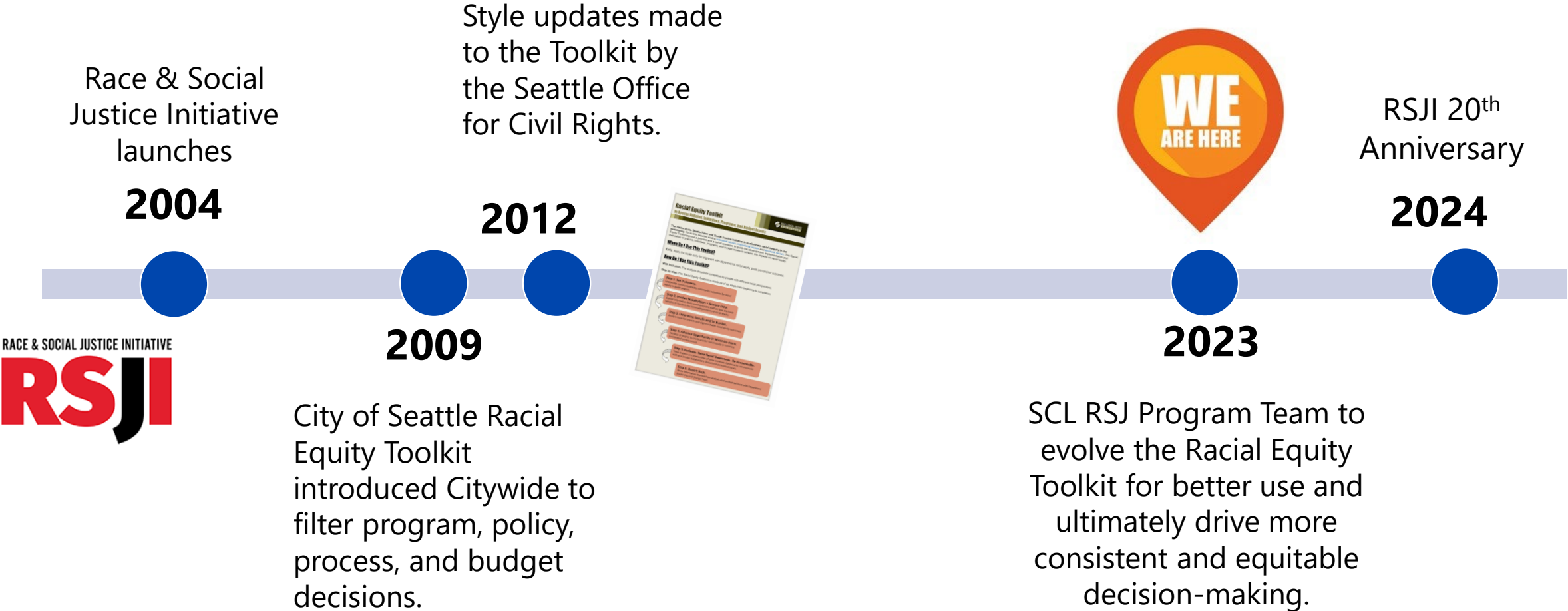- **Opportunities** to grow, collaborate and perform meaningful work

It's Time to Improve Our Racial Equity Analysis

Race & Social Justice Initiative launches
2004

Style updates made to the Toolkit by the Seattle Office for Civil Rights.
2012

2009

City of Seattle Racial Equity Toolkit introduced Citywide to filter program, policy, process, and budget decisions.

WE ARE HERE

RSJI 20th Anniversary
2024

2023

SCL RSJ Program Team to evolve the Racial Equity Toolkit for better use and ultimately drive more consistent and equitable decision-making.

RACE & SOCIAL JUSTICE INITIATIVE
RSJI

Equity Analysis Improvement **Goals**

Toolkit

Redesign the tool collaboratively with utility equity advisors.

Process

Reimagine the racial equity analysis process in ways that advance the missions of both City Light and the Race and Social Justice Initiative.

Education & Resources

Inform and educate utility on the updated tool, process, and resources.

Evaluation & Accountability

Develop tracking, evaluation, and accountability methods.

Equity Analysis Improvement **Activities**

Toolkit

- ❑ Define and refine mission-driven equity outcomes (e.g., service equity, environmental equity, workforce equity)

- ❑ Co-create outreach & engagement guide + resources

- ❑ Plan for ethnographic data collection

Process

- ❑ Design a stage-gate process based on type of decision being made

- ❑ Develop facilitation guides for project teams

- ❑ Digitize the process for ease of use and tracking

Education & Resources

- ❑ Regularly scheduled trainings for project teams and all employees

- ❑ Technical Assistance from Equity Advisors as SMEs and from Change Team via Equity Lab

- ❑ Curated digital library of data and resources for reference
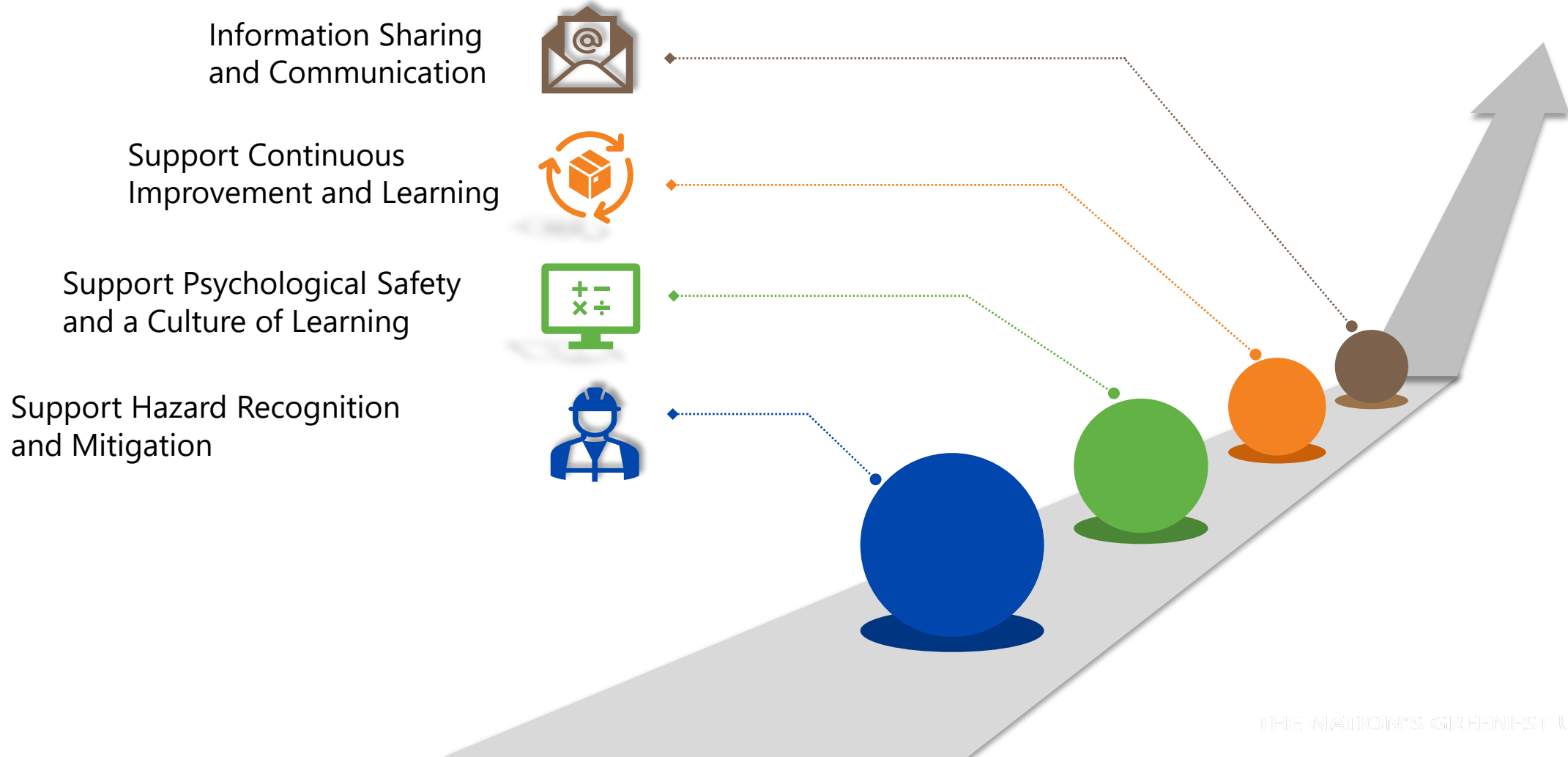
Evaluation & Accountability

- ❑ Evaluate opportunities to embed into employee goal setting and performance review

- ❑ Align reporting mechanisms with Citywide SOCR database

- ❑ Stage opportunities to regularly share lessons learned and to keep impacted communities informed and engaged

A Safe and Supportive Work Environment

...Our commitment to diligently supporting the City Light workforce

Information Sharing and Communication

Support Continuous Improvement and Learning

Support Psychological Safety and a Culture of Learning

Support Hazard Recognition and Mitigation

People and Culture Assessment and Strategic Planning
...Conduct an operational assessment to develop and implement a comprehensive workforce development plan and strategy
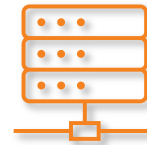
Gather Facts
- ✓ Executive leadership interviews
- ✓ Survey with People Leaders and People and Culture staff
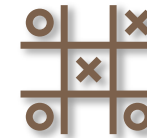- ✓ Focus group with Directors

SWOT Analysis
- ❖ External Analysis
- ❖ Internal Analysis
- ❖ Strategic Questions
- ❖ Strategic Issues.

Review Inputs
- ➢ All stakeholders review inputs
- ➢ Review SWOT analysis
- ➢ Review Strategic Plan, policies & procedures, organizational priorities, etc.

Define Strategies
- o Defined Workforce Plan design
- o Analysis for what SCL P&C currently provides
- o Recommendations to improve current SCL P&C offerings
- o Recommendations for services not currently being offered by SCL P&C

Workforce Plan
- ❖ Project report with findings and recommendations
- ❖ Create improvement strategy

Continued Implementation of the SCL's (Utility) Technology Roadmap

... that entails process, team, and tool to support coordinated technology planning and governance across Seattle City Light business units.

Strategic Plan 2023 - 2028

- **Business Strategy this PIA supports:**
  - Develop workforce & organizational agility
- **PIA Executive Sponsor:**
  Kalyana Kakani
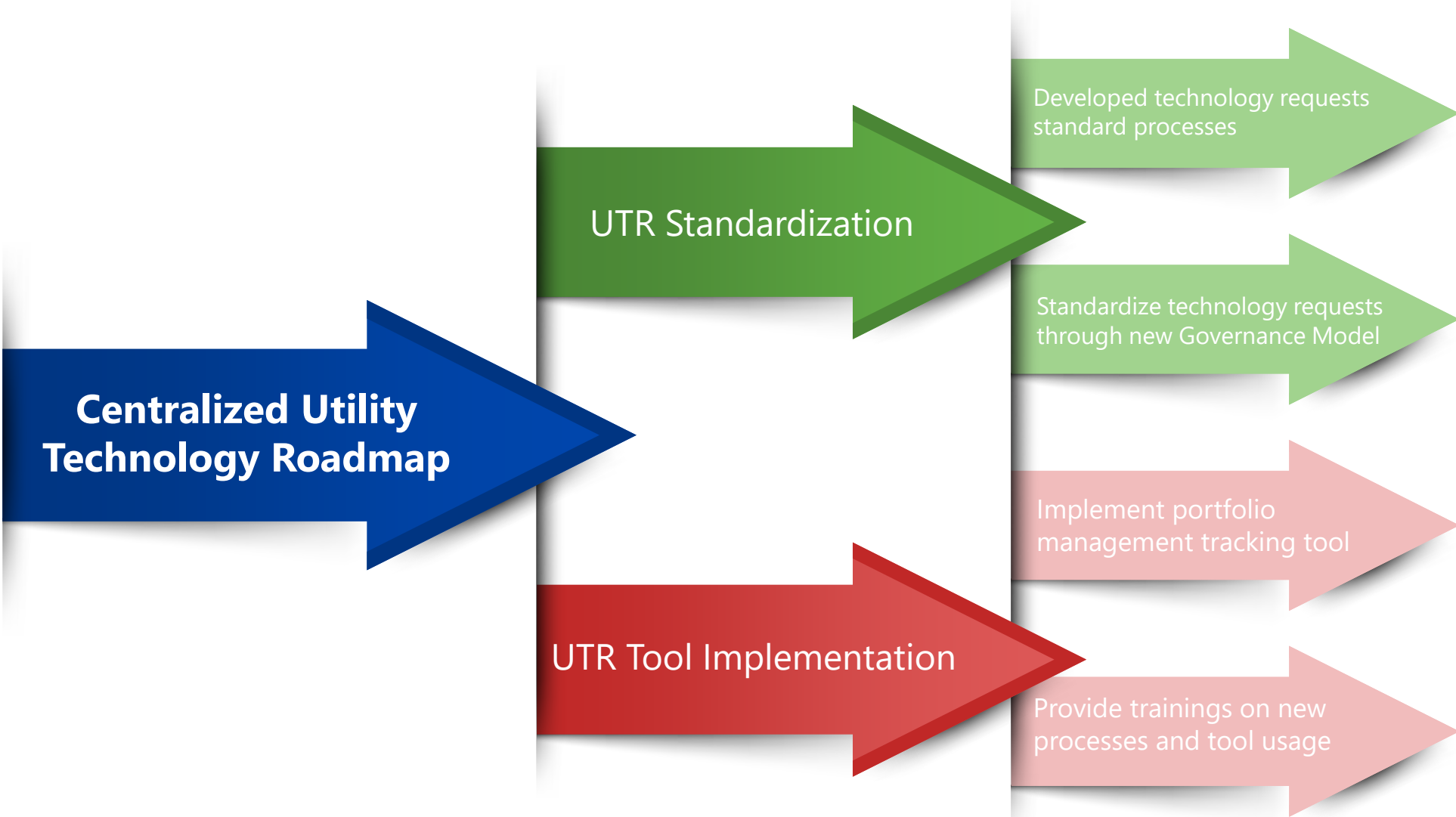 - **PIA Project Manager:**
    Jody Bauder

PIA Description

Develop and implement policies, procedures, and standards for technology governance, to help with efficient technology delivery and data management. Right-size the plan to ensure that the technology execution can be done effectively and successfully, in alignment with SCL's strategic plan and industry benchmarks.

Technology: Race, Social Justice, Inclusion Lens
- Leverage technology and data to enhance both employee diversity and diverse customer adoption.
- Architect technology/systems to achieve equitable outcomes.
- Create KPIs to measure how systems/products we are offering are impacting underserved communities and lower income groups.

Utility Technology Roadmap Adoption & Operationalization

Centralized Utility Technology Roadmap

UTR Standardization

Developed technology requests standard processes

Standardize technology requests through new Governance Model

UTR Tool Implementation

Implement portfolio management tracking tool

Provide trainings on new processes and tool usage

Foundation: Why SCL Technology Roadmap

Key Benefits

Technology work **prioritized** in alignment with SCL's Strategic Plan

More **proactive** and **coordinated** approach to technology work

Better support **customers' needs** for improved engagement and expanded energy options

Improved support and processes to ensure **successful** execution of the initiatives

2023 Priority Initiatives & Key Goals

01

Outage Management System

1. Improve overall system reliability & outage management
2. Improve effective communications channels for our customers and SCL workforce
3. Support reliable & responsible energy services

02

Work & Asset Management

1. Improve asset planning and risk management
2. Track work & cost history to further capital improvement project funding and prioritization
3. Streamline our business processes for consistency and best practices

03

Kubra Real Time

1. Post payments in real time to further support reconnect activities
2. Respond and serve our customers efficiently with payment related questions
3. Reduce customer calls related to mismatched account balance

04

Time of Day

1. Make time-of-day rates available to our residential and small/medium customers
2. Provide options to select preferred rate
3. Proactively provide effective communication to our customers and residents

Thank you!

Seattle City Light

Mission, Vision & Values

Mission

Seattle City Light provides our customers with affordable, reliable and environmentally responsible energy services.

Vision

Create a shared energy future by partnering with our customers to meet their energy needs in whatever way they choose.

Values

- **Customers First**
- **Environmental Stewardship**
- **Equitable Community Connections**
- **Operational and Financial Excellence**
- **Safe and Engaged Employees**

Seattle City Light

WE POWER SEATTLE

DEVELOPING THE ENTERPRISE OCM/BPM SERVICES

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> *" I remember the days when we had to try to squeeze ALL this in on our own.*
> *So happy to have an enterprise team that is so skilled and passionate about OCM. "*
>
> -Britt Luzzi, Customer Technology Solutions Senior Manager

SUPPORTING PEOPLE LEADERS THROUGH
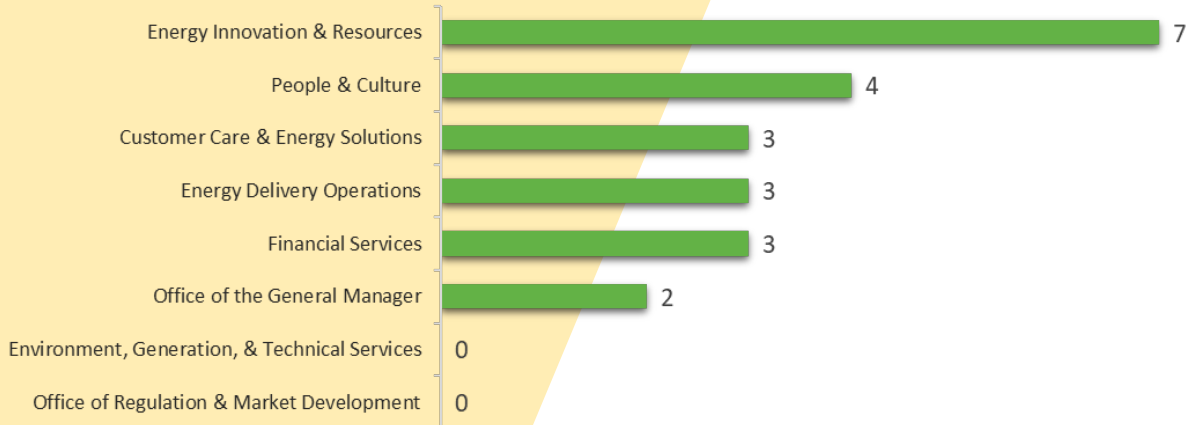## OCM/BPM KEY SERVICES

By focusing on the development of OCM/BPM-related skills and behaviors within project deliverables, OCM/BPM is supporting people leaders through key initiatives. In addition, training and workshops are hosted accordingly to further build these critical skills. Some examples of our efforts:

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- Hosted two 3-day PROSCI workshops for targeted audiences including the General Manager's Office, Service to Bill and the Electrification & Strategic Technology.

- Developed and published the OCM playbook and toolkit for people leaders to continuously initiate and respond to change in ways that create advantages, minimize risk, and sustain performance.

DELIVERING QUALITY SUPPORT ON KEY PROJECTS

For most of 2022 the OCM/BPM team operated at **50%** resource capacity, but has engaged in many critical project spaces across the utility, enhancing efforts in almost every BU:

2022 Project Support Efforts by Business Unit

Business Unit	Value
Energy Innovation & Resources	7
People & Culture	4
Customer Care & Energy Solutions	3
Energy Delivery Operations	3
Financial Services	3
Office of the General Manager	2
Environment, Generation, & Technical Services	0
Office of Regulation & Market Development	0

The OCM/BPM team provides continuous and ongoing support to priority efforts across the utility. This support leverages the OCM and BPM frameworks and guiding principles, which are responsive to the organization's unique needs and processes. For some of our high-visibility projects we accomplished:

PROJECT/INITIATIVE	OUR IMPACT
Asset Management	• Participation in the "customer focus and supply chain project management" initiative • Supported the **creation of training and reference materials** (job aids, staff FAQ, customer FAQ, SharePoint site), as well as execution of training for ESR's, ESE's, engineers, and purchasing on new practices for customer project material request need dates • Support resulted in **training 77 staff members** on new protocols that allow us to get ahead of customer need dates and respond to changes in timelines
Data Governance	• Advised SCL's Project Manager on OCM needs and considerations related to the development of SCL's Data Governance Roadmap • Provided feedback – in partnership with the SCL PM - on the contractor's OCM deliverables in partnership
Fusion	• Supported CCB/MSCS **800+ users across 4 departments** through post-go-live stabilization
Network Management System	• **Created and executed NMS business processing mapping** strategy, documenting current and target states • Facilitated and documented detailed technical & change success metrics • Engaged stakeholders on **27+ impacted teams**. Identified areas of improvement and assigned action items to Oracle for continuous improvement
Utility Assistance Program Automation	• When the project's OCM vendor needed to unexpectedly depart, **the SCL OCM team stepped in** to assess in process OCM work, pivot to what was needed on the updated project timeline, and support **80+ stakeholders** across SCL, SPU, and HSD through the go-live of the new system
Vegetation Management	• Organized stakeholder communication, training, and software practice sessions • Facilitated UAT and preparation of end-user hardware • **27 total end-users trained** on Seattle and Skagit VM crews • VMCS go-live is currently planned for January 2023

COMPLETING THE TEAM

In 2022 the OCM/BPM team has brought on new members, filling multiple positions on our team. This year we welcomed:

- Rebekah Shafer Ross—Business Process Manager, *started Q1*
- Jenny Six—Organizational Change Manager, *started Q4*
- Joe Chiappa—Organizational Change Manager, *started Q4*
- Vicky Nguyen—TLT OCM/BPM Process Analyst, *started Q4*
- Nina Park—TLT OCM/BPM Analyst, *started Q4*

Kristina Pham

Rebekah Shafer-Ross

Jenny Six

Jon Trout

Joe Chiappa

Ahmad Yousuf

Vicky Nguyen

Nina Park

WHY OCM/BPM?

During the Q1 change action plan workshops and throughout the roadshow presentations across the utility, the OCM/BPM team collected data from E-team members and people managers about what they are currently struggling with regarding change, processes, and efficiencies. What we heard was loud and clear: **SCL needs support managing change, improving processes, and documenting how our work is done.**
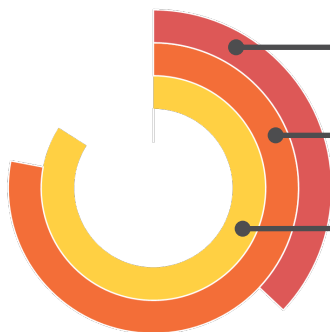
37% of people managers reported they don't know if process documentation exists, or even where to find it.

78% of people managers reported spending a disproportionate amount of time leading and navigating their teams through change.

84% of people managers reported they spend too much time dealing with process inefficiencies and redundancies.
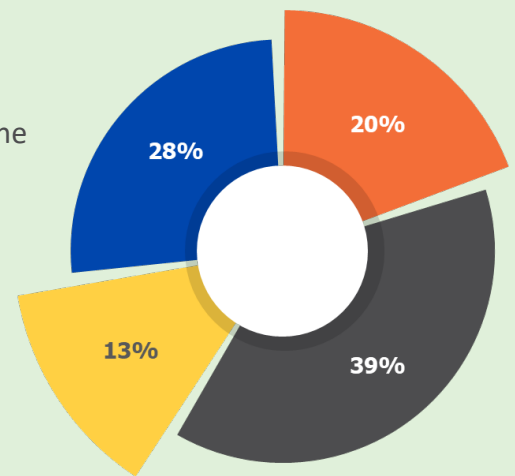
When efforts to change and efforts of process improvement struggle, the roadblocks are most attributed to:

20% Lack of communication and guidance from leadership

39% Lack of time and resources

13% Organizational culture and complexity

28% Resistance and discomfort with change

Data was collected during roadshow presentations, change action plan workshops, and leadership presentations through survey questions.

> " *I feel like dedicated OCM assignments, in-house or consultants, is a good idea for many projects with large OCM challenges.* "
>
> -Scott Roberts, Program Manager of Project Management Improvement Program

TO 2023 AND BEYOND

Our team has great plans for 2023, and many spaces where we're going to continue to deliver services. There are many ways we are creating positive impact at City Light:

Continue to deliver engaging support of priority projects and initiatives across the utility, such as:

- Work & Asset Management System
- Improving the utility's hiring process
- Cyber security policy review process
- Creating our energy future

Support organization-wide activities to **create an agile worker mindset**, helping people leaders support their teams adopt change-ready behaviors that will improve team culture, create better people leaders, and help us be more nimble

Provide training in change management and business process management, in partnership with the People & Culture business unit, upskilling OCM/BPM champions and early adopters across the utility

Continuing our maturity journey to develop an agile workforce through change management and process management, enabling our staff to respond quickly to challenges and opportunities

> ❝ *The SCL OCM/BPM team saved our hide when they stepped in on [our] project...[they] are worth their weight in gold!* ❞
>
> -SCL Program Manager