

# 2022 District Performance Plan

## Q2-Final

On Track	Complete	Caution	Needs Attention	Completed after Deadline	Scheduled Time Frame
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Priority	Objective	Objective #1 - COMMIT TO THE HIGHEST LEVEL OF CUSTOMER-OWNER SATISFACTION (BSc Customer-Owner/Stakeholder Objective)						
		Everything we do should be for the benefit of our customer-owners. We will take a strategic, long-term view of implications of our decisions. Our policy decisions will be built around enhancing overall customer-owner satisfaction. Our employees will interact with customer-owners in an empathetic, proactive, and attentive manner, making sure people feel like individuals and are heard. As a utility, we will take a county-wide perspective when considering the impact of all our decisions. When possible under our financial metrics, we will provide a public power benefit built around enhancing the quality of life for customer-owners as they define quality of life.						
		<b>Metrics &amp; Targets</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Lead</b>
P1	1	1. Customer Satisfaction Survey	90%					John Stoll
P1	1	2. Fiber take rate exceeds 55% by 2024 (and equals 55% by end of 2022) (Q1-54.7%, Q2-55.2%)	55%					Bob Shane
		<b>Strategic Initiatives/Critical Tasks/Actions</b>						
P1	1	3. Provide annual strategic plan status report to Strategy Partners in April. Completed 4/19/22	4/30/2022					Kirk Hudson
P1	1	4. Hydropower Research Institute-add new Contributor each year	12/1/2022					Brett Bickford
P1	1	5. Per the Rocky Reach Discovery Center Plan, complete K12 Teacher Training in partnership with NCESD. Completed training on February 17. Trained 31 teachers.	3/31/2022					Brett Bickford

Priority	Objective	Objective #2 - INVEST IN CREATING LONG TERM VALUE (BSc Business Process/Internal Operations Objective)						
		We will define plans and make resources available to invest in all our physical assets (generation, transmission, distribution, fiber, parks, water and wastewater) based on a long-term value perspective. We will continue our actions to reduce the volatility of wholesale power sales revenues while also seeking ways to enhance revenues. We will seek to work with our industry colleagues as much as possible, in a collaborative manner build around long-term relationships. Because relationships are important to us, we will look at the spirit and intent of issues rather than just the "letter of the law." Investing in the source of our organization's financial value will give us the best opportunity for deriving future public power benefits.						
		<b>Metrics &amp; Targets</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Lead</b>
P1	2	1. Electric Service Reliability: SAIDI (rolling 12 mo) Q2-Priorities and resources impacting availability for mitigation efforts. Fire mitigation and storms in last 12 were high impacts. (Q2 - 87.3)	45					John Stoll

"P1" represents the District's top priorities should trade-off decisions need to be made.

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		Metrics & Targets	Target	Q1	Q2	Q3	Q4	Lead
P1	2	2. Hydro Capability, end of year (EOY) Q2 - Total Hydro Capability = 74.2%; CH = 95.1%; RR = 75%; RI PH1 = 41.3%; RI PH2 =85.9% Targets = (Q2: 76.0% Q2: 76.4% Q3: 77.4% Q4: 76.9%)	76.9%					Brett Bickford
		Strategic Initiatives/Critical Tasks/Actions	Target	Q1	Q2	Q3	Q4	Lead
P1	2	3. Acquire 2.0 aMW of Energy Efficiency consistent with Customer Energy Solutions workplan	12/31/2022					Shawn Smith
P1	2	4. C11 disassembly completed for planned outage repairs (as part of RR large unit repairs plan to be complete at end of 2024) Q2-Delays in C4 return to service due to vendor supply of components will delay the start of the C11 turbine rehab such that disassembly will likely not be complete by the target date.	12/31/2022					Brett Bickford
P1	2	5. Reinvest in Hydros: Rocky Reach C1-C7 Trunnion bushing replacements complete by 2022 YE						
P1	2	A. Complete and return C6 to service (Returned to service 04/14/2022)	3/31/2022					Brett Bickford
P1	2	B. Complete and return C4 to service	9/30/2022					Brett Bickford
P1	2	C. Complete and return C5 to service (Return to service target moved to 01/20/2023) Outage start delayed by late completion of C6.	12/31/2022					Brett Bickford
P1	2	6. Reinvest in Hydros: Rock Island PH1 modernization complete by Q2 2024						
P1	2	A. Return B5 to service (Return to service target moved to 9/2022) B5 completion largely delayed because thrust bearing balancing system work not completed by contractor as scheduled.	6/30/2022					Brett Bickford
P1	2	C. Return B7 to service (Return to service target moved to 08/22/2022) B7 delayed due to late delivery and re-work of thrust bearing balancing system components and vendor commissioning support.	6/30/2022					Brett Bickford
P1	2	7. Begin Disassembly of U5 (as part of RI PH2 modernization plan to complete first unit by end of 2024)	12/31/2022					Brett Bickford

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2	Strategic Initiatives/Critical Tasks/Actions	Target	Q1	Q2	Q3	Q4	Lead
P1 2	8. Review, prioritize, influence, and apply for State and Federal funding opportunities and incentives in accordance with established priorities and review criteria.	12/1/2022					Justin Erickson
P1 2	9. Agree on 2023 legislative priorities with internal stakeholders and engage with the Tri-Commission on regional priorities	12/1/2022					Justin Erickson
P1 2	10. Provide schedule and budget update to Board by June 30 for RI Relicensing Plan and Pre-Application Document (PAD) development. Q2-Due to other priority topics for the Board, update has been moved to later in the year.	6/30/2022					Justin Erickson
P1 2	11. Implement long range facilities plan						
P1 2	A. Provide Board with an updated schedule and budget for the Service Center	6/30/2022					Justin Erickson
P1 2	B. Complete plan for Customer experience in new Service Center	12/1/2022					Justin Erickson
P1 2	C. Obtain substantial completion of Rocky Reach Central Maintenance Facilities plan by end of 2022 and obtain occupancy permits	12/31/2022					Justin Erickson
P1 2	12. As part of plan to harden transmission system to protect against fire/weather, select a community-supported alternative for Plain/Lake Wenatchee resiliency improvements by Sept 30 Q2-Business case is in process. Community outreach target has been moved to Q4 after fire season and the focus on FSOM.	9/30/2022					Brett Bickford
P1 2	13. Improve distribution system reliability by completing the \$2.5M cable replacement program allocated for 2022 Q2-Priority constraints delay cable installs. Est. 10miles of new conduit installed without cable. Primary cable supply is challenging, may constrain us reaching this goal. Current spend ~\$700k	12/31/2022					John Stoll
P1 2	14. Construction substantially complete for North Shore 90% and Bavarian 60% per the project progress reporting Q2-North Shore easement and CUP process longer than scheduled. Construction not anticipated until spring of 2023 delaying energization by 1 month.	12/31/2022					John Stoll
P1 2	15. Execute 80% of capital plans on schedule & within budget. District's capital spending is at 68% of budget through June YTD.	12/31/2022					Kirk Hudson

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Priority	Objective	Objective #3 - PROTECT NATURAL RESOURCES IMPACTED BY OPERATIONS. (BSc Customer-Owner/Stakeholder Objective)						
		We will meet or exceed statutory requirements and commitments to mitigate for the environmental impacts of all our actions. As part of this objective, we will think ahead and seek out "least-cost" alternatives for meeting emerging societal environmental goals.						
		<b>Strategic Initiatives/Critical Tasks/Actions</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Lead</b>
P1	3	1. Comply with oil NPDES permit once issued by Department of Ecology	12/31/2022					Brett Bickford
P1	3	2. Complete study design for Rocky Reach 10-year HCP project survival study (to be conducted in 2023)	12/31/2022					Justin Erickson
P1	3	3. Implement public DC fast charging rate as part of Board approved electric vehicle strategy	6/1/2022					Shawn Smith

Priority	Objective	Objective #4 - ENSURE FINANCIAL STABILITY (BSc Financial Objective)						
		During these dynamic times, we will sustain a financial structure that seeks to create financial flexibility that supports affordable and stable electric rates under all plausible scenarios and create access to low cost capital when needed.						
		<b>Metrics &amp; Targets</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Lead</b>
P1	4	1. Debt Cover – District Q2-2.97	>2.0					Kelly Boyd
P1	4	2. Debt Leverage – District Q2 - 19.7%	<35%					Kelly Boyd
P1	4	3. Liquidity – District (Target >\$175M or Liquidity Methodology) Q2 - \$332M	>\$185M					Kelly Boyd
P1	4	4. Days Cash On Hand – District Q2 - 369 Days	>250					Kelly Boyd
		<b>Strategic Initiatives/Critical Tasks/Actions</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Lead</b>
P1	4	5. Complete development of NWPP RA program design, assess impacts to the District, and implement NWPP RA program. Participate in Phase 3A and contribute to Phase 3B design by attending at least 12 meetings for the year.	12/31/2022					Shawn Smith
P1	4	6. Participate in CETA rulemaking by submitting comments through PGP on at least one issue.	12/1/2022					Shawn Smith
P1	4	7. To stabilize and enhance wholesale electric revenues, execute new contract actions for 2022 per the Long-Term Marketing Strategy	12/31/2022					Shawn Smith
P1	4	8. Agree on negotiation schedule of new contracts with US entity to replace CEAA and PNCA (including headwater benefits) which have a completion deadline in 2023, and implement thereafter	12/1/2022					Shawn Smith

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P1	4	Strategic Initiatives/Critical Tasks/Actions	Target	Q1	Q2	Q3	Q4	Lead
P1	4	9. Maintain or enhance AA bond ratings: Fitch AA+, Moody's Aa3, S&P AA+ (Stable Ratings), S&P Rock Island Senior AA	12/31/2022	✓	✓			Kelly Boyd
P1	4	10. Receive clean financial audit opinion-no material deficiencies	4/30/2022	✓	✓			Kelly Boyd
P1	4	11. Near final business plans for 2023-2027 presented to Board first meeting in October	10/3/2022	✓	✓			Kelly Boyd
P1	4	12. 2023 Budget approved by Board by first meeting in December	12/5/2022	✓	✓			Kelly Boyd
P1	4	13. Implement system impact fees approved in 2021 to be effective April 1	4/1/2022	■	■			John Stoll
P1	4	14. Implement annual rate adjustments for Electric, Water, Wastewater and Fiber consistent with the long-term rate plan.	6/1/2022	✓	■			John Stoll
P1	4	15. Fiber system will achieve financial solvency (excluding expansion capital) measured by the operating coverage ratio of 80% by 2025 (with 79.1% as the target for 2022)	79.1%	✓	✓			Bob Shane

Priority	Objective	<b>Obj #5 - CONTINUOUSLY IMPROVE EFFICIENT, EFFECTIVE, COMPLIANT, RISK-ASSESSED AND RESILIENT OPERATIONS</b>						
		<b>(BSc Business Process/Internal Operations Objective)</b>						

		We will rigorously and holistically review spending and policy decisions using strong risk assessment practices to assure best value and resiliency. We will comply with all statutory requirements. We will seek out, evaluate, and utilize new technology that is ready for deployment if there are sufficient economic and customer benefits.						
P1	5	Strategic Initiatives/Critical Tasks/Actions	Target	Q1	Q2	Q3	Q4	Lead
P1	5	1. Conduct one multiple business unit disaster recovery exercise each year to test and advance Business Continuity/Disaster Recovery plans	12/1/2022	✓	✓			Kelly Boyd
P1	5	2. Conduct and complete collective bargaining agreement (CBA) negotiations for 2022-2025 by March 31	3/31/2022	■	■			Rosario Nystrom
P1	5	3. Strengthen Cyber security program by executing annual plans for operations, business systems, and fiber/telecom networks based on LPPC principles, C2M2 analysis and other industry guidance						
P1	5	A. Complete Two (2) Cross Functional Cyber Security Exercises	12/1/2022	✓	✓			Ian Fitzgerald
P1	5	B. Assess new C2M2 standard first half of next year & reset targets Used 2021 C2M2 version to build upon to reset targets as 2022 update had not been issued.	6/15/2022	▲	■			Ian Fitzgerald
P1	5	C. 2023 GridEx Participation decision	6/1/2022	✓	■			Kirk Hudson

"P1" represents the District's top priorities should trade-off decisions need to be made.

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Priority	Objective	Objective #6 - ADVANCE HUMAN AND ORGANIZATIONAL PERFORMANCE (BSc People & Culture Objective)						
		Through continual learning and investments in developing our employees, we constantly improve our resiliency, our defenses and our ability to adapt to our environment. Through curiosity and continual learning, our employees provide the solutions to problems. By learning from our errors and failures, and examining our practices, we improve our operational excellence on behalf of our customer owners.						
	6	<b>Metrics &amp; Targets</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Lead</b>
P1	6	1. Business Unit attendance at safety mtgs/alternatives Q2 - 79.81%	80%					Ronda Wilkinson
P1	6	2. Senior Team Safety Visits (2 every 6 mos. for 5 MDs and 1 every 6 mos for others)	32					Ronda Wilkinson
P1	6	3. BUs implement corrective actions from safety events within 90 days	50%					Ronda Wilkinson
P1	6	4. Learning teams conducted (proactive and reactive by 12/1) Currently, there has been a limited number of trained Facilitator resources available to conduct Learning Teams; however, 20+ additional employees will be trained Aug. 15-17th, after which a minimum target of 2 Learning Teams will be conducted through the remainder of 2022.	10					Ronda Wilkinson
	6	<b>Strategic Initiatives/Critical Tasks/Actions</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Lead</b>
P1	6	5. Overall OSHA Incident rate EOY Q2-1.91	3.71					Ronda Wilkinson
P1	6	6. Complete HPI Tools training for 90% of required attendees by 12/1 Q2-Ramp-up is scheduled for Q3 and into Q4. 8 Frontline Coaches sessions and participants scheduled (July/Aug/Sep); Currently scheduling Craft/Field/PM/Plan Workers for Sept/Oct/Nov; Office/Others sessions to be scheduled and held Sept.-Nov.	90% by 12/1					Ronda Wilkinson
P1	6	7. Execute 90% of the 2022 TQ Safety action plan (ergonomic assessments, noise evaluations and hearing protection fit-testings) by 12/31 Q2-In progress with a range of results: Ergo Assessments Currently at: 50%, Noise Assessments Currently at: 83%, Hearing Conservation Fit Testing Currently at: 40%	90% by 12/31					Ronda Wilkinson
P1	6	8. Integrate Accountability, Modeling of District Values and Cycle of Personal Ownership into daily processes as demonstrated by monthly CPO nominees and awards	12/31/2022					Kirk Hudson

"P1" represents the District's top priorities should trade-off decisions need to be made.



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Priority	Objective	Objective #7 - ENCOURAGE INNOVATION (BSc People & Culture Objective)						
		We encourage creative thinking and trying new ideas to meet the challenges of the future. We set aspirational goals with the belief that much will be learned and achieved even when the ultimate goal maybe unachievable. We seek to be recognized as experts and industry thought leaders on all issues relevant to our operations. We provide educational opportunities and diverse work experiences to foster diversity in perspectives and thought.						
		Strategic Initiatives/Critical Tasks/Actions	Target	Q1	Q2	Q3	Q4	Lead
P1	7	1. Field Workforce Management: Solicit proposals and demo solutions <u>Due to JDAQ delays, PMO office has not been filled. PMO Contractors started in April to cover. Task began in April.</u>	11/1/2022					Ian Fitzgerald
P1	7	2. Advanced Metering Infrastructure (AMI) implementation: Complete all project phases necessary to implement AMI and begin mass smart meter deployment by Nov. 30	11/30/2022					John Stoll
P1	7	3. Advanced Distribution Management System (ADMS) implementation						
P1	7	A. Phase 2: DMS - Complete AMI/OMS integration <u>Q2-There are enabling events that must occur for this to be completed including: Data cleanup associating customers to transformer.</u>	9/1/2022					Ian Fitzgerald
P1	7	B. Phase 3: Enhanced Customer Offerings - Release public outage portal to public <u>Project was put into production on March 25. Communication has been delayed to customers due to lack of real outages.</u>	3/31/2022					Ian Fitzgerald
P1	7	4. Geographic Information System (GIS): Using 2021 study as foundation, develop 3-5 year GIS strategy with milestones	6/15/2022					Ian Fitzgerald
P1	7	5. Customer Engagement Portal: Solicit proposals and demo solutions <u>Q2-Contractor came on later than expected but we are still pushing to complete this task by year's end.</u>	11/1/2022					Ian Fitzgerald
		Strategic Initiatives/Critical Tasks/Actions	Target	Q1	Q2	Q3	Q4	Lead
P1	7	6. Advance Business Intelligence, Data Analytics, and District Digital Transformation capabilities focusing on the three pillars of data, tools and people and culture						
P1	7	A. Develop AMI time series business intelligence/data analytics plan including documented business requirements and a finalized Oracle Utilities Analytics/Customer Information System data/system decision	9/1/2022					Ian Fitzgerald
P1	7	B. Recommend and develop data analytics architecture and roadmap	12/1/2022					Ian Fitzgerald

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	Strategic Initiatives/Critical Tasks/Actions	Target	Q1	Q2	Q3	Q4	Lead
P1 7	C. Grow governance, collaboration and knowledge sharing across the District by defining the program model, developing an implementation plan and completing 90% of the 2022 milestones per the plan Q2- Plan development has progressed but was not completed by the Q2 milestone due to a resource deficit. Backfill resource has started in July. Adjusted target to complete plan is Q3 with execution of milestones through Q4.	90% by 12/1					Kelly Boyd
P1 7	D. Modernize reporting and analytic tools by completing an assessment, developing an implementation plan and completing 90% of the 2022 milestones per the plan Q2- Plan development has progressed but was not completed by the Q2 milestone due to a resource deficit. Backfill resource has started in July. Adjusted target to complete plan is Q3 with execution of milestones through Q4.	90% by 12/1					Kelly Boyd
P1 7	7. Fiber customer portal replacement: Coordinate cutover and system go-live by 6/30 and closeout by 8/31 Q2-Final implementation deferred to 12/31/2022 due to unexpected issues that needed to be resolved	8/31/2022					Bob Shane
P1 7	8. Implement Stehekin Energy Resource Plan - evaluate success of battery system, track usage data, and implement least cost conservation measures						
P1 7	A. Battery system contract completed if approved by Board Q2-Initiative is complete. The team provided the Board with the information needed to make a decision on moving forward with a battery system contract. The Board decided not to move forward at this time.	12/31/2022					Shawn Smith
P1 7	B. Continue tracking usage data, implement least cost conservation measures	12/31/2022					Shawn Smith



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Priority	Objective	#8-FOSTER A CULTURE OF SERVING THE PUBLIC INTEREST (BSc People & Culture Objective)						
		Our strategic advantage is our culture of serving the public interest. We enhance the quality of life in Chelan County through a culture of serving the public interest including programs that distribute the benefits of public power.						
		<b>Metrics &amp; Targets</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Lead</b>
P1	8	1. Fiber PPB Premises Passed for infill and expansion Q2 -256 (Targets - Q1 - 238, Q2 - 476, Q3 - 714, Q4 - 952)	952					Bob Shane
		<b>Strategic Initiatives/Critical Tasks/Actions</b>						
P1	8	2. Administer the annual Public Power Benefit program						
P1	8	A. Identify preferred ideas/projects for 2023	6/30/2022					Justin Erickson
P1	8	B. Presentation to Board to select projects for 2023	8/31/2022					Justin Erickson
P1	8	C. Presentation to Board if current year funding is still remaining, update on projects	12/5/2022					Justin Erickson
		<b>Strategic Initiatives/Critical Tasks/Actions</b>	<b>Target</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>	<b>Lead</b>
P1	8	3. Complete selected Public Power Benefit Projects						
P1	8	A. Fiber Accelerated Expansion (79% County Coverage by end of 2022 as interim measure to full County Coverage target of 85% by end of 2026)	79.0%					Bob Shane
P1	8	B. Complete detailed design documents and achieve minimum 90% on Phase 1 (or partial Phase 1) of the Riverfront Park Master Plan implementation Q2-Design will be at 30% by December 31, 2022 and will achieve 90% in the first half of 2023	12/31/2022					Justin Erickson
P1	8	4. Execute and complete the annual Fiber infill plan	12/31/2022					John Stoll
P1	8	5. Establish and execute on the phase II Fire Safety Outage Management (FSOM) strategy	12/1/2022					John Stoll
P1	8	6. Complete the 2nd source surface water treatment plant feasibility (step in developing second source of water with the Regional Water Committee)	8/31/2022					John Stoll
P1	8	7. Complete acquisition of the Peshastin Water District by end of 2022	12/31/2022					John Stoll

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	8	Strategic Initiatives/Critical Tasks/Actions	Target	Q1	Q2	Q3	Q4	Lead
P1	8	8. Facilitate the productive reuse of 5th Street Campus in a way that builds community and promotes economic development						
P1	8	A. In collaboration with the Regional Port, issue RFP for campus redevelopment	3/31/2022	■	■			Justin Erickson
P1	8	B. Evaluate proposals, complete negotiations for purchase and sale agreement(s) with developer(s) <a href="#">Q2-Extended evaluation period will move this to Dec 22 or Jan 23</a>	9/30/2022	✓	●			Justin Erickson
P1	8	9. Complete Dryden Wastewater Capital improvements per the 2022 project schedule <a href="#">Q2-Next step is request for approval to bid. Supply chain challenges, increasing costs and associated funding could impact future timelines.</a>	12/31/2022	✓	▲			John Stoll
P1	8	10. As part of the Long Term Marketing Strategy, develop Large Retail Load rate options (dependent on loads in 2022), with no more than 5% incremental rate impact.	12/1/2022	✓	✓			John Stoll

**Total Tracked Items:**  
**% On Track**  
**% Completed On Schedule**  
**% Completed After Deadline**  
**Total % Completed or On Track**

Q1	Q2	Q3	Q4
83	83		
73.49%	51.81%		
6.02%	16.87%		
0.00%	1.20%		
79.52%	69.88%		