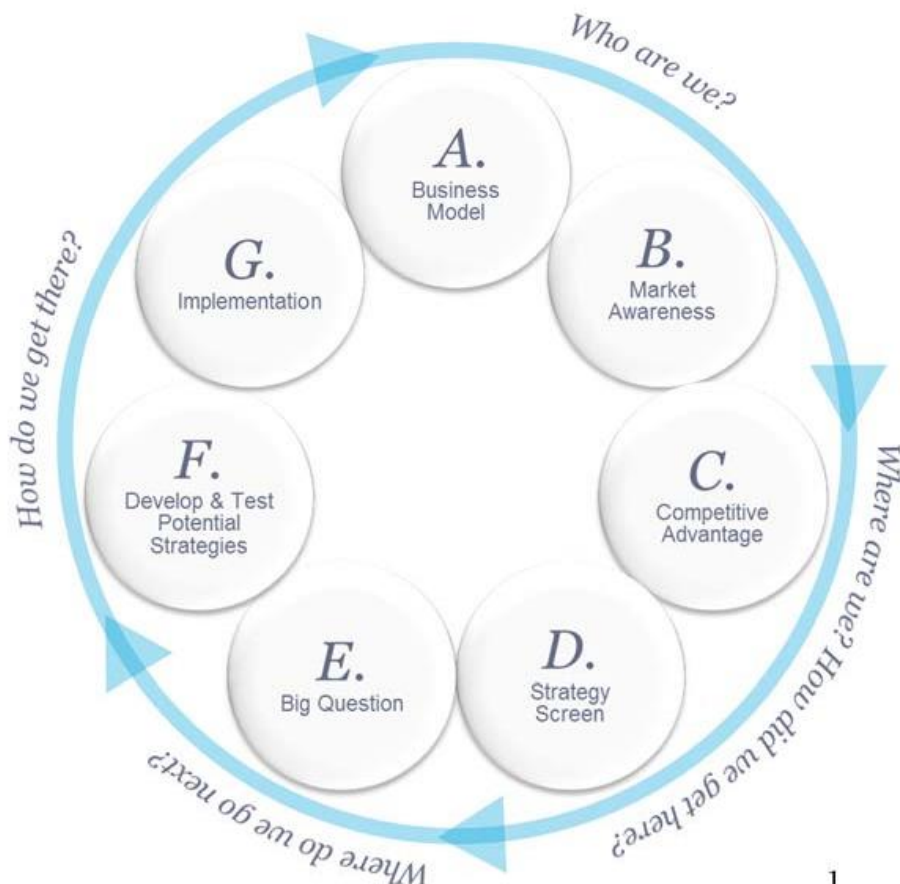


## Real Time Strategic Planning Presentation Packet

### LaPiana Real Time Strategy Pyramid



### LaPiana Real Time Strategy Cycle



## Northwest SEED Identity Statement

Components of identity statement	Your nonprofit's identity statement
<b>We advance our mission of</b>	Helping people power their lives with clean energy.
<b>...and seek to</b> <i>(impact)</i>	<ul style="list-style-type: none"> <li>• Decrease the cost of renewables</li> <li>• Increase access to clean energy for middle &amp; low-income households</li> <li>• Increase the % of distributed generation in the WA/OR energy portfolio</li> <li>• Grow the local economy through locally sourced energy projects</li> <li>• Increase the # of communities served</li> </ul>
<b>by serving</b> <i>(customers)</i>	<p><b>Customers:</b> all electricity customers, including- homeowners, farmers, rural small businesses</p> <p><b>Our clients are:</b> utilities, local governments, federal government</p>
<b>in</b> <i>(geographic area)</i>	Primarily rural and urban communities in Washington, some rural in Oregon Minimally serving Idaho and Montana
<b>through</b> <i>(programs or services)</i>	<p><b>Project Design &amp; Management</b> in renewable energy and energy efficiency: education, consulting, community organizing, and acting as a catalyst/facilitator</p> <p><b>Policy Advocacy:</b> removing barriers to implementation</p>
<b>and emphasizing our competitive advantage of</b>	<ul style="list-style-type: none"> <li>• Breadth and depth of knowledge</li> <li>• Solution oriented</li> <li>• Innovative and flexible</li> <li>• Credible</li> <li>• Convener and change agent</li> <li>• Community focused</li> <li>• Strong relationships with industry stakeholders</li> </ul>
<b>We are sustainable by</b> <i>(funding sources)</i>	<p>Revenue generated from fee-for-service/earned income (~80%) and contributed income (~20%)</p> <p>Funding sources: Government, utilities, foundations, corporations, individuals</p>

**NWSEED Strategy Screening Questions and Opportunity Matrix**

	<b>Programs/Strategies (Fit Score: 3 = High, 2 = Medium, 1 = Low)</b>						
	Option A	Option B	Option C	Option D	Option E	Option F	Option G
<b>Value - What is its value to our Mission and Strategic Goals; does it meet the needs of our target audience?</b>							
<b>Economics - Does it have a source of funding, will it pay for itself?</b>							
<b>Competitiveness - Will it build on or reinforce our current competitive advantage?</b>							
<b>Org Capacity - Do we have the capacity (expertise and resources) or can we easily create the capacity?</b>							
Does it have a high likelihood of success; is it highly feasible with strong demand?							
Will it create outcomes that are sustainable?							
Will it strengthen partnerships and/or not put key relationships at risk?							
Does it enhance our brand and credibility?							
Total Score							

Final – Adopted by Board of Directors July 2<sup>nd</sup>, 2015



## Northwest SEED Strategic Plan: Jun 2015-Dec 2016

*Our vision is a Northwest region powered by clean energy*

*Our mission is to create communities powered by locally controlled clean energy*

PRIORITIES	STRATEGIES	LEAD	KEY PERFORMANCE INDICATORS (KPIs)
<b>1) SPARK</b> local clean energy deployment	a. Accelerate solar energy deployment through education, soft cost reduction and solarize expansion	LI, JE	⇒ Grow market by 5%, \$10M in local spending
	b. Increase accessibility through pilot solar program serving low-income energy consumers	JV	⇒ 100 families benefiting
	c. Promote efficient heating/cooling by replicating Heatwise	LI	⇒ \$12,000 per year energy savings
	d. Maintain position in wind market, focusing on reducing soft costs and tech assist to rural communities	MD	⇒ 50 stakeholders engaged, 1 wind installation
<b>2) SHIFT</b> our approach to better serve communities	a. Community need drives program design: Employ new engagement process and tools	LI	⇒ 15 communities engaged; CRM tool deployed
	b. Protect and promote consumer right to generate distributed clean energy	JV	⇒ 4 legislative wins in WA & OR
	c. Stay on the leading edge of distributed energy trends: policies, financing, technology & consumer perception	LI, JV	⇒ Bi-annual review
	d. Increase visibility and engagement	JGG, CW	⇒ Re-brand, 30% increase in base
<b>3) SCALE</b> up while maintaining stability	a. Maintain financial health and increase fundraising efforts to support growth	JAG, CW	⇒ 3 month reserve, 7-10% growth
	b. Build board to increase diversity and capacity to perform strategic oversight	RB	⇒ At least 10 board members reflective of communities we serve and expertise we need
	c. Invest in people development (FD) to attract & retain talent	JGG, JAG	⇒ Organization in top 1/4 of comparable organizations; FD plans in place for staff
	d. Increase organization stability and leadership development	JGG	⇒ CRM tool, employee handbook revision, process documentation, ED succession policy