



2026-27

# Strategic Plan



## CEO Message



**Joseph M. Mosca**  
Chief Executive Officer

As we enter the 2026–2027 planning year, the energy landscape continues to evolve at an unprecedented pace. Volatile power markets, increasing regulatory complexity, shifting state and federal policy, climate-driven system stress, and global geopolitical forces all shape the cost and availability of electricity in California. In this environment, certainty is hard to come by—but disciplined planning, strong governance, and local control matter more than ever.

Community Choice Aggregation was created for moments like this. Community Choice Aggregators (CCAs) are uniquely positioned to be nimble, responsive, and accountable to the communities they serve. At the Orange County Power Authority (OCPA), our not-for-profit structure allows us to prioritize customer value, affordability, and long-term stability over short-term market reactions. We exist to deliver reliable, clean energy at competitive rates while reinvesting locally and equitably in the communities we serve.

This Strategic Plan reflects OCPA's continued maturation as a public power provider and community affordability advocate. For the 2026–2027 cycle, we intentionally refined this plan from 27 strategic-level objectives to 13 clearer, higher-impact objectives—improving focus, accountability, and transparency. Our Board sets direction at the right altitude while staff execution is grounded in measurable, operational actions.

At its core, this plan is designed to deliver a high level of value and rate certainty for our customers. Through disciplined cost-of-service analysis, prudent procurement strategies, and strong financial and risk management practices, OCPA is focused on navigating uncertainty without losing sight of affordability.

Our strategic priorities remain consistent and community-centered:

**Enriching and Growing the OCPA Community** — building trusted partnerships, engaging residents and local leaders, and pursuing responsible growth.

**Prioritizing Fiscal Sustainability and Affordability** — aligning rates with true costs, strengthening financial resilience, and positioning OCPA for future credit readiness.

**Designing and Deploying Community-Aligned Customer Programs** — reflecting the diverse needs of our communities with emphasis on equity and measurable outcomes.

**Energizing Our Community with Renewable Energy Sources** — diversified, cost-effective portfolios and programs that advance California's clean energy goals.

**Raising Awareness of Community Energy and Advocating for Our Customers** — equipping Board members and stakeholders to engage constructively in regulatory and policy discussions.

This plan is also a commitment to discipline. As a public agency, OCPA remains focused on spending responsibly, investing in critical services, and ensuring that every initiative advances our mission. Growth, innovation, and advocacy must always be grounded in transparency, measurable value, and the trust placed in us by our customers and member cities.

I am proud of the progress OCPA has made and confident in the direction outlined in this Strategic Plan. By staying focused, adaptable, and guided by our public purpose, we are well-positioned to navigate uncertainty and continue building a cleaner, more affordable, and more resilient energy future for Orange County. Thank you for your continued trust and partnership.

# Board of Directors

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**Susan Sonne**  
Board Chair, Councilmember

Buena Park



**James Mai**  
Vice Chair, Vice Mayor of Irvine

Irvine



**Fred Jung**  
Board Member, Mayor of Fullerton

Fullerton



**Glenn Grandis**  
Board Member, Councilmember

Fountain Valley



**Kathleen Treseder**  
Board Member, Councilmember

Irvine

## Our Member Cities



## Alternate Board Members

City	Name
Buena Park	Lamiya Hoque, Mayor, District 4
Fountain Valley	Ted Bui, Councilmember
Fullerton	Shana Charles, Councilmember, District 3
Irvine	William Go, Councilmember, District 2
Irvine	Betty Martinez Franco, Councilmember, District 5

## Mission & Vision

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### MISSION

Provide renewable energy at competitive rates and equitably reinvest to support sustainable communities.

### VISION

Think globally and act locally by empowering our communities with choice, transforming the energy landscape, driving a sustainable future, and ensuring that no community is left behind in this transition to renewable energy.

## Strategic Goals

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**Enrich & Grow the OCPA Community**

**Prioritize Fiscal Sustainability & Affordability**

**Design & Deploy Community-Aligned Customer Programs**

**Energize Our Community with Renewable Energy Sources**

**Raise Awareness of Community Energy & Advocate for Our Customers**

## Enrich & Grow the OCPA Community

OCPA engages with local leaders, community organizations, and educational institutions to help foster a deeper understanding of renewable energy and the benefits of CCAs. Staff continuously build and maintain relationships with key stakeholders to ensure ongoing support and collaboration.

### 1.1 Expand awareness of OCPA through targeted outreach to prospective member cities and regional organizations

- Present to 2 groups per quarter in OC region
- Present to stakeholders in 2+ prospective cities annually
- Develop stakeholder engagement talking points

### 1.2 Develop educational programs and partnerships promoting renewable energy understanding across age groups

- Develop school partnerships and curriculum support
- Launch youth ambassador/internship program
- Establish curriculum for community academy program(s)

## Prioritize Fiscal Sustainability & Affordability

OCPA maintains a robust financial strategy that ensures affordable rates and fiscal health. Staff regularly review and adjust financial plans to adapt to market changes, regulatory shifts, legislative mandates, and optimize cost-saving opportunities.

### 2.1 Deliver a financially sustainable 2027 rate and product framework grounded in cost-of-service analysis, product pathway evaluation, and disciplined cost management

- Launch cost-of-service and product pathway workplan, including consultant management, kickoff, data request, and internal coordination
- Evaluate feasible product pathways and provide procurement, compliance, cost, and portfolio inputs to support COS and rate design
- Integrate product pathway analysis into the COS study and rate design framework
- Complete draft COS model, revenue requirement analysis, and initial Board briefing
- Develop rate design scenarios and evaluate financial, affordability, and competitiveness impacts
- Refine rate design scenarios and complete customer rate impact and bill impact tools
- Present preliminary procurement and portfolio findings that inform product feasibility and Board consideration
- Conduct public meetings and return final rate design and product framework for Board action

### 2.2 Advance credit rating readiness and innovative financing strategies to position OCPA for a potential public credit rating process in 2028

- Evaluate additional prepayment and other innovative financing opportunities
- Develop a credit rating readiness roadmap and complete 2027 rate and product decisions that strengthen financial sustainability
- Strengthen procurement, hedging, portfolio risk management, and core financial/risk policies to support credit readiness
- Maintain positive net income, monitor customer retention, strengthen member/customer stability narrative, and rebuild reserves toward Board targets
- Prepare rating materials, conduct mock review, brief the Board, and determine whether to pursue a formal public rating process
- Launch formal rating process, if approved

## Design & Deploy Community-Aligned Customer Programs

OCPA collaborates with member cities to identify and address energy program needs. Staff develop and implement customer programs that meet specific needs while enhancing energy efficiency and sustainability in member communities. OCPA tracks and applies for relevant state and federal funding to support local member cities while also creating local grant funding opportunities to support community initiatives.

### 3.1 Implement customer programs informed by the Community Power Plan, with focus on equity and underserved populations

- Implement 3 new programs based on the Community Power Plan
- Provide enhanced program opportunities to underserved populations
- Build relationships with new CBOs representing diverse ratepayers in member cities to further OCPA messaging reach

### 3.2 Grow grant and program participation year-over-year

- Expand grant offerings with 25% YoY growth target
- Measurably increase participation in long-term programs in subsequent timeframes

### 3.3 Strengthen community outreach to provide customers with access to OCPA programs and resources

- Develop a website landing page that encompasses the breadth of low-income resources available to OCPA customers
- Establish a network of organizations, platforms, and contacts to support the promotion of OCPA programs and resources

## Energize Our Community with Renewable Energy Sources

OCPA invests in and develops local renewable energy projects to enhance grid sustainability. OCPA monitors and mitigates risks to ensure the stability and growth of its energy portfolio. Staff collaborate with technology partners and other CCAs to innovate and share resources.

### 4.1 Maintain a diversified, cost-effective power portfolio with risk management protocols that adapt to market conditions

- Establish risk matrix for hedging opportunities, determine feasibility based on Enterprise Risk Management Policy
- Release the long-term power products solicitation and evaluate bi-lateral offers concurrently
- Identify and release joint procurement for resources with CalChoice
- Benchmark renewable energy and GHG emissions against other Load Serving Entities and statewide metrics
- Utilize Integrated Resource Plan filing as the roadmap for OCPA's renewable energy future and greenhouse gas reduction goals to meet or surpass statewide goals

### 4.2 Advance local generation and storage programs through partnerships with member agencies and clean technology providers

- Issue CPUC-approved solicitation for the DAC-GT program per CPUC Resolution E-5435 to implement OCPA's proposed 10% discount rate for CARE and FERA customers
- Outreach with customers, developers, and clean tech companies to garner strategies and pathways, including developing an Request for Information based on engagement outcomes

### 4.3 Collaborate with other CCAs on joint procurement, shared resources, and knowledge exchange

- Execute Edison Electric Institute (EEI) agreement with Clean Power Alliance for energy trading
- Execute EEI agreement with Clean Energy Alliance for Prepay and other energy trading efforts
- Execute EEI with Dynasty Power
- Execute agreements with additional CCA partners and counterparties
- Outreach to CCA counterparts, identify CCA practices, and benchmark relevant metrics

## Raise Awareness of Community Energy & Advocate for Our Customers

OCPA continuously engages with the community through diverse events and educational programs to raise awareness about OCPA and the benefits of renewable and carbon-free energy. Staff foster strong relationships with elected policymakers, local businesses, and culturally representative organizations to ensure inclusive outreach.

### 5.1 Strengthen community engagement through culturally-inclusive events, networking, and business outreach

- Sponsor or facilitate small business mixer
- Build culturally representative outreach partnerships
- Increase OCPA Board member engagement in community events

### 5.2 Advance regulatory and legislative advocacy to enhance affordability for our customers, protect our customers' interests, and support CCA-favorable policy outcomes

- Develop stakeholder mapping document for OCPA staff, board members, and community advisory committee
- Create Policy Risk Assessment Guide to analyze rulemaking and policy impacts on OCPA customer affordability and operations
- Develop and update accomplishment tracker to illustrate impact of advocacy wins via promotional materials
- Develop and release an Energy Policy 101 resource to improve baseline understanding of energy policy and regulatory frameworks
- Coordinate Board member legislative visits for OCPA-related priorities in Sacramento/DC

### 5.3 Equip Board members with tools, training, and structured support for effective policy engagement

- Develop Board member resources for prospective city engagement
- Develop study sessions for Board members and key stakeholders (Geopolitical and global energy updates; ERRRA forecast + rates primer; summer outlook/CPUC benchmarks; PCIA; Energy costs)

## Our Team

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*The OCPA team is dedicated to making a positive impact by **empowering one another and the communities we serve**. We emphasize sustainability and resilience, fostering strong relationships through **collaboration, transparency, and trust**. Together, we strive to lead by example and nurture a culture of accountability and shared success, paving the way for a **brighter and healthier future powered by clean energy**.*



