UAI Value Matrix Sub-Committee Journey, Outcomes & Next Steps

Executive Advisory Council (EAC)
UA Week · Austin · October 28, 2025

Thank You to Our Sub-Committee Members!

- **Bobby Besharati** – Exelon
- **Aaron Dock** – retired, formerly Salt River Project
- **Cassie Dellinger** – NiSource
- **Najda Dupanovic** – ENMAX
- **Eugene Hamrick** – Rappahannock Electric Cooperative
- **Sandi Joralemon** – UAI
- **Neelanjan Patri** – Tennessee Valley Authority
- **Nadia Powell** – El Paso Electric
- **Haley Saul** – Tacoma Public Utilities

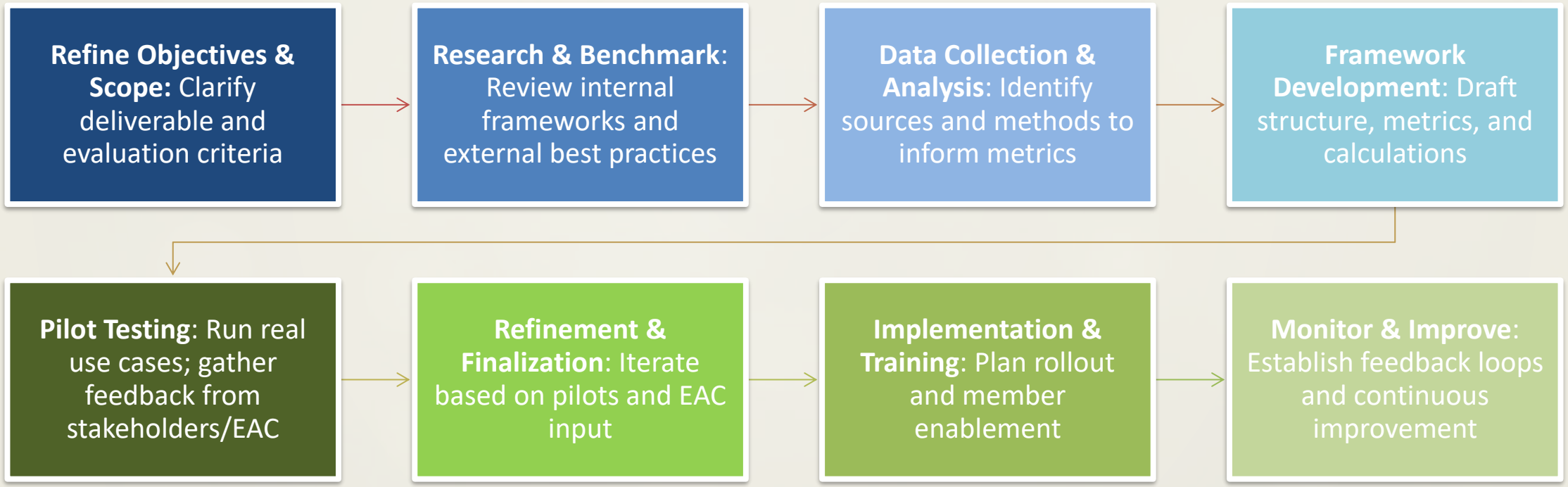
Original Goal (from SAB)

- Develop a comprehensive Value Matrix to systematically evaluate and quantify the benefits of analytics use cases within the utility sector—highlighting the tangible value they bring to the business

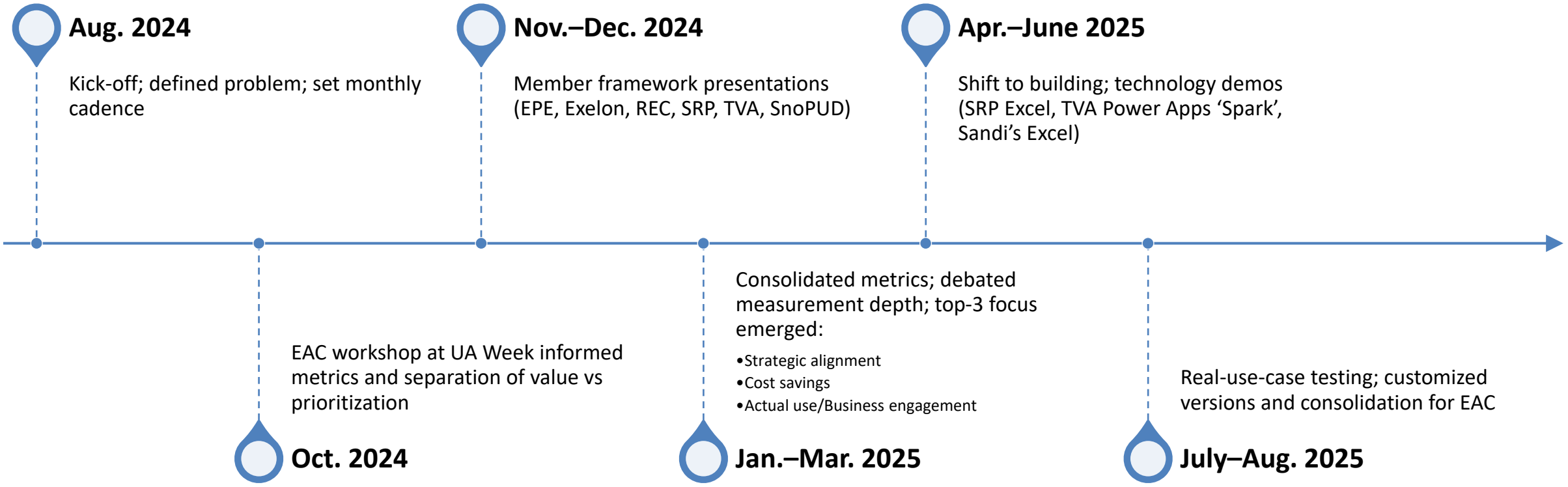
Why This Work Matters

- Strategic Advisory Board (SAB) SWOT (June 2023) identified a gap:
  - The “How” to find value from shared use cases and the “Why” to pursue them
  - This initiative addresses that weakness by providing a common, credible approach to define and quantify value

Our Process


Refine Objectives & Scope: Clarify deliverable and evaluation criteria
Research & Benchmark: Review internal frameworks and external best practices
Data Collection & Analysis: Identify sources and methods to inform metrics
Framework Development: Draft structure, metrics, and calculations
Pilot Testing: Run real use cases; gather feedback from stakeholders/EAC
Refinement & Finalization: Iterate based on pilots and EAC input
Implementation & Training: Plan rollout and member enablement
Monitor & Improve: Establish feedback loops and continuous improvement

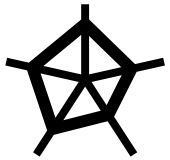
How We Got Here (Journey Highlights)



What We Learned

- **Decouple Value from Prioritization**: Value matrix first; prioritization optional/adjacent
- **Cafeteria-Style Metrics**: No one-size-fits-all! Select the metrics that fit the use case
- **Blend Objective + Subjective**: Use rubrics and pick-lists to reduce subjectivity
- **Keep It Simple**: Excel-first approach for accessibility; dropdowns and clear guidance
- **Document Assumptions**: Capture rationale to support transparency and executive review

Metric Set



Link to Slide 33

Working list of metrics for the base framework:

1. Alignment to corporate goals & strategic objectives
2. Cost savings (e.g., liquidable savings, deferred labor, avoided costs)
3. Actual use / Business engagement (adoption)
4. Customer value score (impact on customer experience)
5. Customer satisfaction (ESAT/CSAT)
6. Resource requirements
7. Availability of data
8. Impact on operational efficiency (key operational KPIs)
9. Impact on reliability (e.g., SAIDI/SAIFI/CMI)
10. Value of avoided FTEs (subcategory of cost savings)
11. Short-term value (near-term KPI impact)
12. Long-term value (sustained KPI impact)
13. Risk mitigation (safety, compliance, fines, reputational)
14. Employee productivity (subcategory of cost savings)
15. Increased revenue (often a sub-metric of cost savings)

Measurement Approaches (High-Level)

Strategic Alignment:

OKR-based intake + rubric (2–10 score with defined criteria)

Cost Savings:

Net Savings = Benefits – Costs (include deferred labor, avoided costs, productivity)

Actual Use/Engagement:

Adoption metrics (unique users, usage frequency), training/enablement activities

Operational/ Customer/Reliability:

KPI-driven impacts; define pre/post baselines or benchmarks

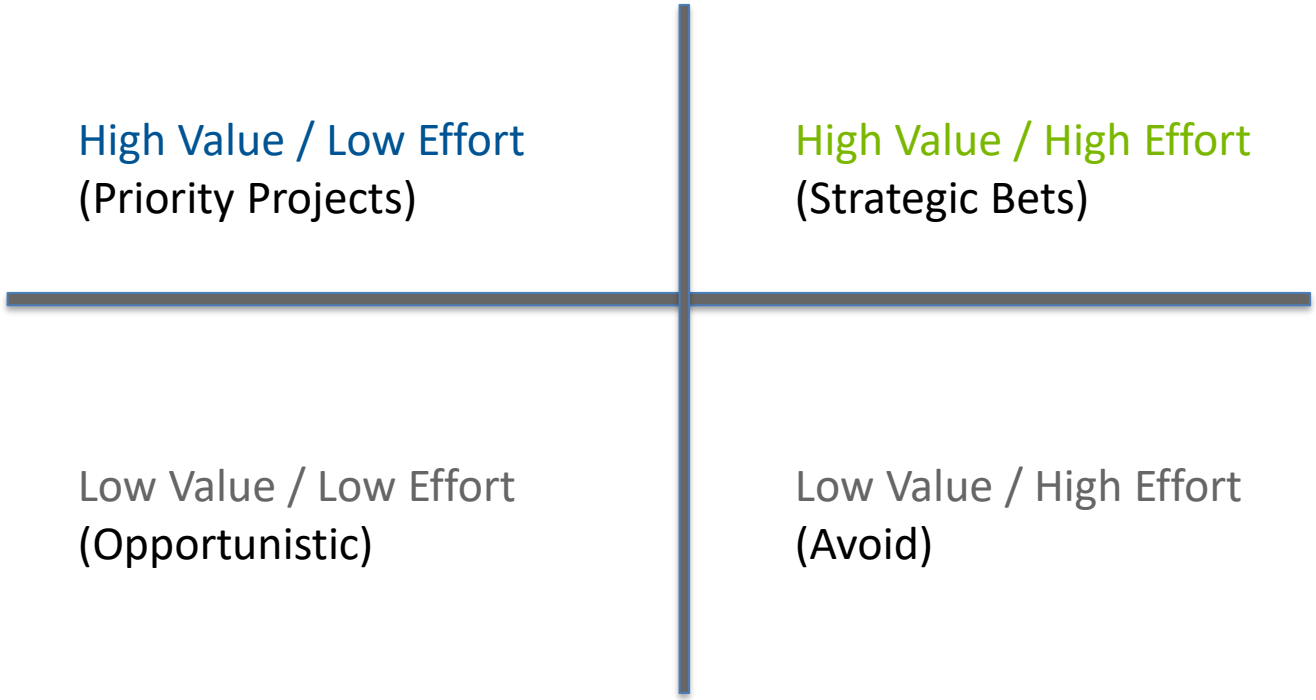
Risk Mitigation:

Qualify/quantify compliance, safety, and penalty avoidance where feasible

Tooling Approaches We Explored

- **Excel Template** (Sandi/UAI): One-use-case-at-a-time scoring, clear options/weights, warnings/validation
- **Power Apps + Power BI** (Neelanjan/TVA ‘Spark’): Intake, scoring, quadrants (Value vs. Resource), transparency
- **Excel Framework** (Aaron/SRP): Weighted criteria; weekly updates in stand-ups/backlog reviews
- **Customized Versions** (Eugene/REC & Haley/TPU):
  - Eugene: Specific thresholds, multi-project view, documented rationale, PI dashboards
  - Haley: Weighted value & effort, consolidated list view, value–effort matrix visualization

Example Value vs Effort Quadrant



Benefit	Option	Total
Alignment with strategic goals	Directly supports one strategic goal	0.9
Impact on revenue growth	Moderate revenue growth potential	0.3
Impact on data assets	Improves assessibility and/or quality of multipe data doma	0.3
Impact on risk mitigation	Not Applicable	0
Impact on productivity	Provides minor time savings for a limited group	0.2
Impact on safety	Not Applicable	0
Impact on reliability	Prevents major service interruptions or critical asset failur	1.6
Impact on customer experience	Delivers new capabilities or services directly to customers	1.6
Cost reduction	Improves efficiency with potential for cost reduction	0.6
Business engagement	Frequent use by one user or group	0
Ongoing impact	Moderate duration (6–12 months)	0.4
Total Benefit		5.9

Cost	Option	Total
CAPEX	Moderate	2
OPEX	High	2
Staff capability gap	Not Applicable	0
Data readiness	Fully supported by existing, usable data assets	0
Time to implement	More than 1 year	1.6
Adoption efforts	Not Applicable	0
Total Cost	**Must equal 100%**	5.6

Total Value
0.3

Total Value = Total Benefit - Total Cost

Cells on this tab are locked because they copied data from the Benefit and Cost tabs. To unlock the cells, click Review/Unprotect sheet. There is no password.
If value weights do not add up to 100% for Benefits or Costs, a note will appear in that table. Edit from the appropriate tab.

Sample Value Matrix

Value | Benefit | Benefit_Options | Benefit_Scores | Cost | Cost_Options | Cost_Scores

Benefit	Option	Total
Alignment with strategic goals	Directly supports one strategic goal	0.9
Impact on revenue growth	Moderate revenue growth potential	0.3
Impact on data assets	Improves assessibility and/or quality of multipe data doma	0.3
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Cost	Option	Total
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Staff capability gap	Not Applicable	0
Data readiness	Fully supported by existing, usable data assets	0
Time to implement	More than 1 year	1.6
Adoption efforts	Not Applicable	0
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Value | Benefit | Benefit_Options | Benefit_Scores | Cost | Cost_Options | Cost_Scores

Final UAI Value Matrix – Generic Version

Benefit	Option	Score	Weight	Total	Note
Alignment with strategic goals	Directly supports one strategic goal	6	15%	0.9	
Impact on revenue growth	Moderate revenue growth potential	6	5%	0.3	
Impact on data assets	Improves assessibility and/or quality of multipe data domains	6	5%	0.3	
Impact on risk mitigation	Not Applicable	0	0%	0	
Impact on productivity	Provides minor time savings for a limited group	2	10%	0.2	
Impact on safety	Not Applicable	0	0%	0	
Impact on reliability	Prevents major service interruptions or critical asset failures	8	20%	1.6	
Impact on customer experience	Delivers new capabilities or services directly to customers	8	20%	1.6	
Cost reduction	Improves efficiency with potential for cost reduction	4	15%	0.6	
Business engagement	Frequent use by one user or group	6	0%	0	
Ongoing impact	Moderate duration (6–12 months)	4	10%	0.4	
			100%	5.9	

If Option = Not Applicable and Weight <> 0%, text will turn **red** and a note will appear.
If Weight <> 100%, a **red** note will appear.

Data validation is used for option dropdowns. Go to Data/Data Validation to change.

Value | Benefit | Benefit_Options | Benefit_Scores | Cost | Cost_Options | Cost_Scores

Final UAI Value Matrix – Generic Version

Benefit	Option 1	Option 2	Option 3	Option 4	Option 5	Option 6
Alignment with strategic goals	No clear strategic alignment	Supports operations, not strategy	Enables future strategic initiatives	Directly supports one strategic goal	Strongly aligns with multiple goals	Not Applicable
Impact on revenue growth	No revenue growth potential	Low or indirect revenue potential	Enables future revenue opportunities	Moderate revenue growth potential	High revenue growth potential	Not Applicable
Impact on data assets	No impact on data assets	Limited improvement to existing data	Improves assessibility and/or quality of one data domain	Improves assessibility and/or quality of multipe data domains	Gains new, high-value data assets	Not Applicable
Impact on risk mitigation	No identifiable risk mitigation	Raises awareness of low-impact or localized risks	Mitigates a known moderate risk in a specific area	Reduces a single high-severity or multiple moderate risks	Addresses multiple high-severity risks with enterprise impact	Not Applicable
Impact on productivity	No noticeable change in effort or efficiency	Provides minor time savings for a limited group	Supports faster or more efficient execution of routine tasks	Replaces or streamlines high-effort tasks for key users	Eliminates major manual effort across multiple roles	Not Applicable
Impact on safety	No impact on safety	Provides data to support safety-related decisions	Improves visibility or awareness of safety risks	Reduces likelihood of safety-related incidents	Directly prevents high-risk safety incidents or hazards	Not Applicable
Impact on reliability	No impact on reliability	Provides visibility to data that may inform reliability-related decisions	Improves detection, diagnostics, or early warning of reliability concerns	Prevents localized reliability issues or recurring failure scenarios	Prevents major service interruptions or critical asset failures	Not Applicable
Impact on customer experience	No impact on customer experience	Provides data to support customer experience	Enables proactive communication or responsiveness	Improves customer experience through efficiency	Delivers new capabilities or services directly to customers	Not Applicable
Cost reduction	No impact on costs	Provides data to support cost-related decisions	Improves efficiency with potential for cost reduction	Produces measurable one-time cost savings	Eliminates or automates ongoing, recurring costs	Not Applicable
Business engagement	No known frequency of use	One-time use for a specific purpose	Occasional use for a specific purpose	Frequent use by one user or group	Frequent use across multiple business functions	Not Applicable
Ongoing impact	No lasting benefit	Short-term benefit (< 6 months)	Moderate duration (6–12 months)	Long-term benefit (1–3 years)	Sustained value (>3 years)	Not Applicable

Final UAI Value Matrix – Generic Version

Option	Score
Option 1	0
Option 2	2
Option 3	4
Option 4	6
Option 5	8
Option 6	0

These scores apply to the corresponding header in the Benefit_Options tab.
You can change the score range from here for Benefits

Final UAI Value Matrix – Generic Version

Cost	Option	Score	Weight	Total	Note
OPEX	Moderate	4	50%	2	
Staff capability gap	High	8	25%	2	
Data readiness	Not Applicable	0	0%	0	
Time to implement	Fully supported by existing, usable data assets	0	30%	0	
Adoption efforts	More than 1 year	8	20%	1.6	
#VALUE!	Not Applicable	0	0%	0	
			125%	5.6	Must equal 100%

If Option = Not Applicable and Weight <> 0%, text will turn **red** and a note will appear.
If Weight <> 100%, a **red** note will appear.

Data validation is used for option dropdowns. Go to Data/Data Validation to change.

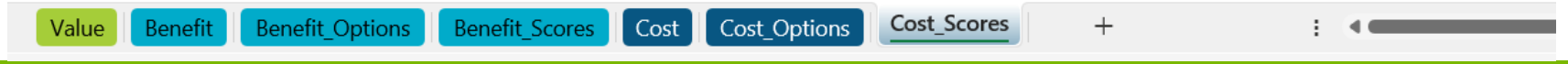
Final UAI Value Matrix – Generic Version

Cost	Option 1	Option 2	Option 3	Option 4	Option 5	Option 6
CAPEX	None	Minimal	Moderate	Large	Major	Not Applicable
OPEX	None	Minimal	Moderate	Significant	High	Not Applicable
Staff capability gap	No new skills or capacity needed	Minor learning curve; current staff can absorb	Moderate upskilling or added workload for existing staff	Requires specialized staff or reallocation of resources	Multiple specialized roles or external support needed	Not Applicable
Data readiness	Fully supported by existing, usable data assets	Requires minor standardization or access effort	Requires moderate data preparation or integration for a single domain	Requires extensive data mapping and cleanup across multiple domains	Requires acquisition or integration of new external data assets	Not Applicable
Time to implement	Less than 1 month	1 to 3 months	3 to 6 months	6 to 12 months	More than 1 year	Not Applicable
Adoption efforts	No adoption challenges anticipated	Minor adjustments needed for a few individuals	Moderate effort required within one group	Broad adoption effort across multiple groups	Major effort requiring cultural change or sustained support	Not Applicable

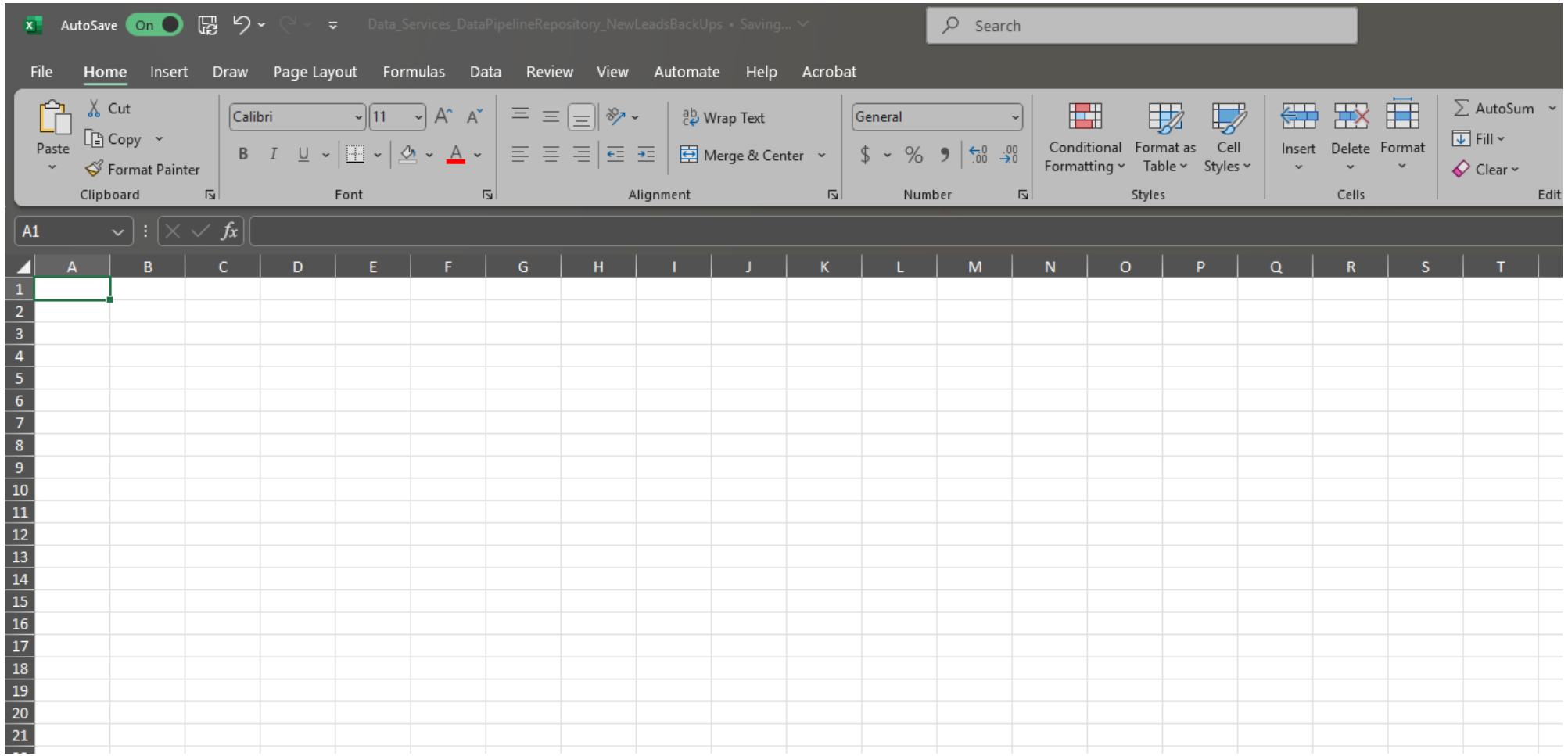
Final UAI Value Matrix – Generic Version

Option	Score
Option 1	0
Option 2	2
Option 3	4
Option 4	6
Option 5	8
Option 6	0

These scores apply to the corresponding header in the Cost_Options tab.
You can change the score range from here for Costs



Haley's Version



Haley's Version

Expected ESAT and/or CSAT Affect (In a specific category)
Strategic Priority/Alignment
Improved Data Reliability
Improved Data Accessibility
Financial Efficiency
Customer Value Score
(How important is this to our customer?)
Business Engagement
Level of Business Process Change
Project Size
FTE Requirement (including business)
Cost (One-Time & Ongoing for 5 yrs) (Does not include labor)
Completion Date Expectation

Haley's Version

Value Criteria	Weight	Score: 2	Score: 4	Score: 6	Score: 8	Score: 10
Expected ESAT and/or CSAT Affect (In a specific category)	0.1	Less than 2%	3% - 5%	6% - 8%	9% - 11%	12%+
Strategic Priority/Alignment	0.15	Does not support any strategic objectives or initiatives	Supports 1 strategic objective or initiative	Supports 2 strategic objectives or initiatives	Supports 3 strategic objectives or initiatives	Supports 4 strategic objectives or initiatives
Improved Data Reliability	0.2	Current method for pulling data is always available	Current method for pulling data is regularly available	Current method for pulling data is occassionally unavailable	Current method for pulling data is regularly unavailable	A method for pulling data does not exist
Improved Data Accessibility	0.2	Data is ready for analysis in seconds	Data is ready for analysis in 5 - 60 minutes	Data is ready for analysis in 1 - 2 hours	Currently takes more than 2 hours to make data ready for analysis	Access to data for analysis doesn't currently exist
Financial Efficiency	0.15	Annual cost reduction of $5,000 or less	Annual cost reduction of $5,001 to $10,000	Annual cost reduction of $10,001 to $20,000	Annual cost reduction of $20,001 to $30,000	Annual cost reduction of $30,001+
Customer Value Score (How important is this to our customer?)	0.2	Effort is not valuable to business/customer requesting the work	Effort has some value to business/customer requesting the work	Effort is valuable to business/customer requesting the work	Effort is very valuable to business/customer requesting the work	Effort is extremely valuable to business/customer requesting the work
	1					
Effort Criteria	**Weight**	**Score: 2**	**Score: 4**	**Score: 6**	**Score: 8**	**Score: 10**
Business Engagement	0.1	Not Engaged	Somewhat Engaged	Average Engagement	Good Engagement	Fully Engaged
Level of Business Process Change	0.2	None	Changes to 1 - 3 process steps	Changes to 4 - 7 process steps	Changes to 8 - 12 process steps	Changes to 13+ process steps
Project Size	0.2	XS	S	M	L	XL
FTE Requirement (including business)	0.25	1 FTE or less	2 - 3 FTEs	4 - 5 FTEs	6 - 7 FTEs	8+ FTEs
Cost (One-Time & Ongoing for 5 yrs) (Does not include labor)	0.1	$10,000 or less	$10,001 - $30,000	$30,001 - $60,000	$60,001 - $100,000	$100,001+
Completion Date Expectation	0.15	Within 2 years	Within 1 year	Within 6 months	Within 4 months	Within 2 months

Haley's Version

Benefit	Option	Total
Alignment with strategic goals	Directly supports one strategic goal	0.9
Impact on revenue growth	Not Applicable	0
Impact on data assets	Improves assessibility and/or quality of multipe data dom	1.2
Impact on risk mitigation	Not Applicable	0
Impact on productivity	Not Applicable	0
Impact on safety	Not Applicable	0
Impact on reliability	Prevents major service interruptions or critical asset failu	1.6
Impact on customer experience	Delivers new capabilities or services directly to customer	0.8
Cost reduction	Improves efficiency with potential for cost reduction	0.6
Business engagement	Frequent use by one user or group	1.2
Total Benefit		**6.3**

Cost	Option	Total
CAPEX	Not Applicable	0
OPEX	Not Applicable	0
Staff capability gap	Not Applicable	0
Data readiness	Not Applicable	0
Time to implement	Not Applicable	0
Adoption efforts	Not Applicable	0
Business Engageme	Somewhat Engaged	0.3
Level of Process Ch	Changes to 8 - 12 process steps	1.5
Project Size	S	0.9
FTE Requirement (i	4 - 5 FTEs	0.2
Cost (One-Time & C	$10,000 or less	0
Total Cost		**2.9**

Total Value	
3.4	Total Value = Total Benefit - Total Cost

Haley's Version

UTS Work Request ID	Requestor Name	Status	Complete By	Owned By	Created Date Time	Summary	One-Time & Ongoing for 5 yrs) (Does include labor)	Effort Score 5	Completion Date Expectation	Effort Score 6	EFFORT SCORE	PRIORITIZATION SCORE
13177	Alice Massara	On Hold	12/31/2025	Haley Saul	3/28/2025	BACKLOG_Advise in and Build TPU Hiring Process Data Structure, Security, & Accountability Metrics	00 or less	2	Within 6 months	6	3.4	-1.1
13354	Amanda Cashman	On Hold	12/31/2025	Haley Saul	3/28/2025	BACKLOG_Access Database Removal/Update Plan	00 or less	2	Within 6 months	6	3.4	0.6
13852	Anne Larrabee	On Hold	12/31/2026	0	5/30/2025	BACKLOG_API for Regis Replacement	00 or less	2	Within 1 year	4	3.3	-1.3
13313	Audrey Lamb	On Hold	1/1/2026	0	3/28/2025	BACKLOG_ Get Science & Research data into Snowflake	00 or less	2	Within 6 months	6	6.4	-1.1
13312	Audrey Lamb	On Hold	1/1/2026	0	3/28/2025	BACKLOG_SharePoint transition	01 - $60,000	6	Within 1 year	4	3.3	-1.3
13315	Bode Makinde	On Hold	12/31/2025	0	3/28/2025	PROJECT_New Contact Center KPIs	00 or less	2	Within 6 months	6	3.4	-1.2
13316	Breanna Chance	On Hold	12/31/2025	0	3/28/2025	BACKLOG_API Connection to EV Charger Data	00 or less	2	Within 6 months	6	3.4	-1.1
13317	Brianne Ballard	On Hold	1/1/2026	0	3/28/2025	BACKLOG_Report for all certifications	00 or less	2	Within 6 months	6	3.4	-1.1
13325	Brittany Broyles	On Hold	12/31/2025	0	3/28/2025	BACKLOG_Power Management Data Strategy	00 or less	2	Within 6 months	6	3.4	-1.1
13708	Charleen Jacobs	Scheduled	4/30/2026	Haley Saul	5/16/2025	UP NEXT_PUB Guiding Principles Metrics Dashboard	00 or less	2	Within 6 months	6	3.4	-1.4
13318	Corey Bedient	On Hold	6/30/2026	Nicole Edwards	3/28/2025	BACKLOG_Sensus Data Lake API	00 or less	2	Within 6 months	6	3.4	-0.9
13319	Dan Cox	On Hold	1/1/2026	0	3/28/2025	BACKLOG_Day Ahead Market Implementation	00 or less	2	Within 6 months	6	3.4	-1.2
14240	Doug Lane	Scheduled	12/31/2025	Hannah Ball	7/17/2025	ENHANCEMENT_AMI Interval Data Aggregation Changes		FALSE		FALSE	2.3	-0.3
13940	Ed Greer	On Hold	6/30/2026	0	6/5/2025	BACKLOG_Combine GIS & ITSM Data for Service Desk Analytics	00 or less	2	Within 2 months	10	4.6	-2.4
13848	Ed Greer	Scheduled	3/31/2027	Catherine Lee	5/30/2025	ENHANCEMENT_Add UTS Service Desk Call Center Data to OSCC (Openscape) Pipeline	00 or less	2	Within 6 months	6	3.5	-0.7

[Project Value_Prioritization Template]

[Value_Prioritization Test]

Eugene's Version – Generic + Example

Benefit	Weight
Alignment with strategic goals	12%
Impact on revenue growth	5%
Impact on data assets	5%
Impact on risk mitigation	12%
Impact on productivity	5%
Impact on safety	5%
Impact on reliability	17%
Impact on customer experience	17%
Cost reduction	17%
Business engagement	5%
	100%

Cost	Weight
CAPEX	15%
OPEX	20%
Staff capability gap	20%
Data readiness	15%
Time to implement	10%
Adoption efforts	20%
	100%

Eugene's Version – Generic + Example

- Criteria is key on scoring options to eliminate as much subjectivity as possible

Benefit	Option 1	Option 2	Option 3	Option 4	Option 5	Option 6
Alignment with strategic goals	No clear strategic alignment	Supports 1 or more strategic Initiative	Supports 2 or more strategic Initiative	Supports 3 or more strategic Initiative	Supports 4 or more strategic Initiative	Supports 5 or more strategic Initiative
Impact on revenue growth	No revenue growth potential	Creates a **documented path** to ≥0.25% annual new non-regulated revenue. [External]	Enables ≥ 0.5 % revenue lift **or** ≥ $50 k/yr margin from new product/service. [External	Enables ≥ 1 % revenue lift **or** ≥ $250 k/yr new margin. [External]	Enables ≥ 3 % revenue lift **or** ≥ $1 M/yr new margin. [External]	Enables ≥ 5 % revenue lift **or** ≥ $3 M/yr new margin, with contracts or PPA in place.[External]
Impact on data assets	No impact on data assets	Establishes ≥ 1 new currated data set impacting ≥ 1 functional area	Establishes ≥ 1 new currated data set impacting ≥ 2 functional area	Establishes ≥ 2 new currated data set impacting ≥ 2 functional area	Establishes ≥ 2 new currated data set impacting ≥ 3 functional area	Establishes ≥ 2 new currated data set impacting ≥ 4 functional area
Impact on risk mitigation	No identifiable risk mitigation	Reduces exposure to one documented operational/compliance risk.	Closes ≥ 25 % of risk gap or enables required reporting (e.g., RUS, NERC).	Cuts likelihood or severity of a High-risk item by ≥ 50 %.	Achieves regulatory compliance ahead of deadline and avoids ≥ $100 k potential penalty.	Eliminates a Top-5 corporate risk or insures against ≥ $1 M potential loss.
Impact on productivity	No noticeable change in effort or efficiency	Saves ≥ 1 FTE hour/week (25hr/yr) for one role or process.	Saves ≥ 5 FTE hours/week(250hrs/yr) **or** ≥ $25k labor cost/yr.	Saves ≥ 10FTE hours/week (500hr/yr) **or** ≥ $100k labor cost/yr across teams.	Automates a **core process** (e.g., outage dispatch) saving ≥ 20FTE hours/week (1000hr/yr) or $200K labor cost/yr across teams.	Frees ≥40 FTE hours/week (2000hrs/yr) or redeploys entire resource or parts of team to higher-value work.
Impact on safety	No impact on safety	Projected reduction of preventable, operational, or OSHA recordable events by ≥ 5%	Projected reduction of preventable, operational, or OSHA recordable events by ≥ 10%	Projected reduction of preventable, operational, or OSHA recordable events by ≥ 15%	Projected reduction of preventable, operational, or OSHA recordable events by ≥ 20%	Projected reduction of preventable, operational, or OSHA recordable events by ≥ 25%
Impact on reliability	No impact on reliability	Projected reduction in Routine SAIDI ≥ 1% or Routine SAIFI ≥ 1% or Routine Tree Caused outages ≥ 1% or combination of the three exceeding ≥ 1% equivalent	Projected reduction in Routine SAIDI ≥ 2% or Routine SAIFI ≥ 2% or Routine Tree Caused outages ≥ 2% or combination of the three exceeding ≥ 2% equivalent	Projected reduction in Routine SAIDI ≥ 5% or Routine SAIFI ≥ 5% or Routine Tree Caused outages ≥ 5% or combination of the three exceeding ≥ 5% equivalent	Projected reduction in Routine SAIDI ≥ 10% or Routine SAIFI ≥ 10% or Routine Tree Caused outages ≥ 10% or combination of the three exceeding ≥ 10% equivalent	Projected reduction in Routine SAIDI ≥ 15% or Routine SAIFI ≥ 15% or Routine Tree Caused outages ≥ 15% or combination of the three exceeding ≥ 15% equivalent

Eugene's Version – Generic + Example

- Criteria is key on scoring options to eliminate as much subjectivity as possible

Impact on customer experience	No impact on customer experience	Projected improvement in overall satisfaction in any of the following OSAT measures by ≥ 5%: JD Power, ACSI, NPS, or Power Pulse Index	Projected improvement in overall satisfaction in any of the following OSAT measures by ≥ 10%: JD Power, ACSI, NPS, or Power Pulse Index	Projected improvement in overall satisfaction in any of the following OSAT measures by ≥ 15%: JD Power, ACSI, NPS, or Power Pulse Index	Projected improvement in overall satisfaction in any of the following OSAT measures by ≥ 20%: JD Power, ACSI, NPS, or Power Pulse Index	Projected improvement in overall satisfaction in any of the following OSAT measures by ≥ 25%: JD Power, ACSI, NPS, or Power Pulse Index
Cost reduction	No impact on costs	Projected OpEx reduction of ≥ $25K or Differed CapEx ≥ $25K or Power Cost ≥ $25K or cumulative reduction ≥ $25K from three formentioned items	Projected OpEx reduction of ≥ $50K or Differed CapEx ≥ $50K or Power Cost ≥ $50K or cumulative reduction ≥ $50K from three formentioned items	Projected OpEx reduction of ≥ $200K or Differed CapEx ≥ $200K or Power Cost ≥ $200K or cumulative reduction ≥ $200K from three formentioned items	Projected OpEx reduction of ≥ $500K or Differed CapEx ≥ $500K or Power Cost ≥ $500K or cumulative reduction ≥ $500K from three formentioned items	Projected OpEx reduction of ≥ $1M or Differed CapEx ≥ $1M or Power Cost ≥ $1M or cumulative reduction ≥ $1M from three formentioned items
Business engagement	No known frequency of use	One-time Adhoc analysis for a necessary decision	≥ 1 user Occasional use for a specific purpose [Monthly]	≥ 1 user or group frequent use [Weekly]	≥ 2 groups frequently use [Weekly] or ≥ 4 groups use occasionally [Monthly] Cross functional applications	≥ 1 user or group uses as foundational [Daily] or ≥ 3 groups frequently use [Weekly] or ≥ 5 groups use occasionally [Monthly] Cross functional applications

Eugene's Version – Generic + Example

- Criteria is key on scoring options to eliminate as much subjectivity as possible

Cost	Option 1	Option 2	Option 3	Option 4	Option 5	Option 6
CAPEX	None	< US $25 k **or** < 0.1 % of the annual capital budget	$25 k – $100 k **or** 0.1 % – 0.5 % of capital budget	$100 k – $500 k **or** 0.5 % – 2 % capital budget	$500 k – $1 M **or** 2 % – 5 % capital budget	> $1 M **or** > 5 % of capital budget; requires new field hardware or substation upgrades
OPEX	None	< US $10 k/yr **or** < 0.05 % of O&M	$10 k – $50 k **or** 0.05 % – 0.25 %	$50 k – $150 k **or** 0.25 % – 0.75 %	$150 k – $500 k **or** 0.75 % – 2 %	> $500 k/yr **or** > 2 %; requires dedicated service contract or 24 × 7 support
Staff capability gap	No new skills or capacity needed	Existing skills cover > 90 % of needs; < 0.1 FTE extra load; ≤ 1-day upskill	Minor up-skilling (< 1 week) or < 0.5 FTE added workload	Need 1 new FTE **or** multi-week training for existing team	Need 2–4 specialised FTEs **or** major reskilling program	Need a **new team/department** (≥ 5 FTE) **or** long-term managed-service partner
Data readiness	Fully supported by existing, usable data assets	Data already in curated warehouse; completeness & quality ≥ 95 %	Data exists in ≤ 2 systems; light transformation; quality 85–95 %	Data in 3–4 systems; gaps & cleansing required; quality 70–85 %	Critical data missing or quality < 70 %; requires new integrations into architecture	Data **not collected today**; requires new system/application expansion or field studies resulting in physical assets to capture non-existent data
Time to implement	None	Less than 1 month	> 1 – 3 months	3 – 6 months	6 – 12 months	> 12 months **or** phased multi-year roll-out
Adoption efforts	No adoption challenges anticipated	≤ 10 users; minor process tweak; < 2 h training; no new SOP	Single dept., ≤ 20 users; < 8 h training; comms plan light	Cross-functional, 20–100 users; 1–2 days training; new SOP	Enterprise-wide (> 100 users) or field crews; > 1 week training; change champions & governance	Multi-organization (e.g., statewide G&T + member co-ops); culture-shift program over months

Eugene's Version – Real world Example

Centralized repository for vegetation management data and predictive risk area score and AI recommender for ROW Schedule

Benefit	Option	Score	Weight	Total	Note	Score formula explanation: =XLOOKUP("Option " & MATCH(B2, Benefit_Op
Alignment with strategic goals	Supports 1 or more strategic Initiative	2	12%	0.24	Reliability and grid optimization	MATCH(B2, Benefits!B2:G2, 0): Finds which column in the corresponding Benefits row contains the
Impact on revenue growth	Enables ≥ 0.5 % revenue lift or ≥ $50 k/yr margin from new product/s	4	5%	0.2	Potential for external offering as part of	"Option " & MATCH(...): Finds which column the selected benefit is in, then builds a label li
Impact on data assets	Establishes ≥ 2 new currated data set impacting ≥ 2 functional area	6	5%	0.3	Centralized ROW schedule, treament,	XLOOKUP(..., Benefit_Scores!$A$2:$A$7, Benefit_Scores!$B$2:$B$7, ""): Looks up the "
Impact on risk mitigation	Closes ≥ 25 % of risk gap or enables required reporting (e.g., RUS,	4	12%	0.48	Possible reduced risk and liability in federal insurred claims and tree caused outages prevented	
Impact on productivity	Saves ≥ 5 FTE hours/week(250hrs/yr) or ≥ $25k labor cost/yr.	4	5%	0.2	Creates effiecient way to percision-based clear and spot treat areas of critical risk from TCO. Reduced analyst time	
Impact on safety	Projected reduction of preventable, operational, or OSHA recordabl	2	5%	0.1	No direct correlation to safety, but preventing outages prevents the possibility of hazard outage restoration	
Impact on reliability	Projected reduction in Routine SAIDI ≥ 15%or Routine SAIFI ≥ 15%(	10	17%	1.7	Potential for 25-50% reduction in outages. Presently 70% of CMI and events are TCO	
Impact on customer experience	Projected improvement in overall satisfaction in any of the following (	8	17%	1.36	Potential reduction of significant outages impacts the top 2 driver of satisfaction in reliable servce	
Cost reduction	Projected OpEx reduction of ≥ $1Mor Differed CapEx ≥ $1Mor P	10	17%	1.7	Present 5 yr average on routine outages is 5.7M. Reduction of 25% is a estimated O&M reduction of 1.4M	
Business engagement	≥ 2 groups frequently use [Weekly]or ≥ 4 groups use occasionally [I	8	5%	0.4	Highly impactful possibly daily application, but used by a small group of team members.	
			100%	6.68		

Cost	Option	Score	Weight	Total	Note	Score formula explanation: =XLOOKUP("Option " & MATCH(B2, Cost_Options!B2:G2, 0),
CAPEX	$25 k – $100 k or 0.1 % – 0.5 % of capital budget	4	15%	0.6	Preventing outages could require incre	MATCH(B2, Cost_Options!B2:G2, 0): Finds which column in the corresponding Cost row contains the selected cost.
OPEX	> $500 k/yr or > 2 %; requires dedicated service contract o	10	20%	2	Likely increase in OPEX for sattelite di	"Option " & MATCH(...): Finds which column the selected cost is in, then builds a label like "Option 3" to match a val
Staff capability gap	Need 1 new FTE or multi-week training for existing team	6	20%	1.2	expansion of data needs on Vegetatio	XLOOKUP(..., Cost_Scores!$A$2:$A$7, Cost_Scores!$B$2:$B$7, ""): Looks up the "Option X" label and returns
Data readiness	Data in 3–4 systems; gaps & cleansing required; quality 70	6	15%	0.9	Data resides in warehouse, few new elements required. Significant ETL to curate necessary views	
Time to implement	> 12 months or phased multi-year roll-out	10	10%	1	Long term enterprise wide project. Significant build out in phases	
Adoption efforts	Single dept., ≤ 20 users; < 8 h training; comms plan light	4	20%	0.8	This is a large change and adoption for vegetation management and operations, but relatively siloed in impact and change management	

[Link to Demo: Vegetation Management Example]

[Link to Demo: Unedited]

Eugene's Version – Next Steps

70+ project requests of over 100 hours in just 2025

		2025 Project										Hour
Client / Leadership Sponsor	Category	Project Title	Value Score	Start Timeline	End Timeline	R	A	C	I	R- Hours	A- Hours	C
Internal	External technical debt (REC departments outside of our departments)	JD Power Data Model/Dashboard upgrade		Q1 2025	Q2 2025	Ayla	Anthony	Larry	Adam	40	20	
Internal	External technical debt (REC departments outside of our departments)	ACXIOM update		Q3 2025	Q3 2025	Ayla	Anthony	Eugene	Adam	20	8	
Peter Muhoro	Enterprise projects (PM led)	Process Improvement Mapping & Benchmark		Q2 2025	Q1 2026	Inina	Cedric	Adam	Eugene	93	40	
John Crawford	Enterprise projects (PM led)	Inspection Database integration		Q1 2025	Q2 2025	Matt	Josh	Anthony	Eugene	20	25	
John Crawford	Enterprise projects (PM led)	Inspection Dashboard		Q2 2025	Q2 2025	Matt	Inina	Josh	Eugene	80	12	
John Crawford	External new projects/initiatives (REC departments outside of our departments)	Vegetation Management Data Integration		Q1 2025	Q2 2025	Anthony	Josh	Matt	Eugene	86	45	
John Crawford	External new projects/initiatives (REC departments outside of our departments)	Vegetation Management Dashboard Upgrade		Q2 2025	Q3 2025	Matt	Inina	Josh	Eugene	200	40	
John Crawford	External new projects/initiatives (REC departments outside of our departments)	Vegetation Risk Area Predictor		Q2 2025	Q3 2025	Hesen	Matt	Anthony	Josh	80	8	
John Crawford	External new projects/initiatives (REC departments outside of our departments)	Vegetation ROW Schedule AI Recommender (perscriptive)		Q3 2025	Q4 2025	Hesen	Matt	Anthony	Josh	80	10	
Chris Stoia	External new projects/initiatives (REC departments outside of our departments)	Engineering O&R Reporting Automation (Task 82)		Q1 2025	Q2 2025	Matt	Anthony	Josh	Eugene	60	20	
Kris Seiber	External new projects/initiatives (REC departments outside of our departments)	First Call Resolution Process Upgrade and Dashboard		Q1 2025	Q2 2025	Ayla	Inina	Anthony	Adam	60	16	
Internal	External technical debt (REC departments outside of our departments)	ACSI/Survey Monkey Process Upgrade		Q1 2025	Q4 2025	Ayla	Anthony	Adam	Eugene	62	10	
Kris Seiber	External new projects/initiatives (REC departments outside of our departments)	CIS Historical Trend and Call Churn Analysis		Q3 2024	Q2 2025	Inina	Ayla	Anthony	Adam	24	12	
Karan Patel	External technical debt (REC departments outside of our departments)	Continuous DR and EV Program Analysis		Q1 2025	Q4 2025	Hesen	Josh	Anthony	Eugene	152	60	
Karan Patel	External new projects/initiatives (REC departments outside of our departments)	Demand Response Cost/Benefit Simulator		Q1 2025	Q4 2025	Hesen	Josh		Eugene	52	18	
Patricia Hatcher	External new projects/initiatives (REC departments outside of our departments)	D&A 101 Course Update		Q2 2025	Q3 2025	Inina	Josh	Eugene	Adam	48	28	
Patricia Hatcher	External new projects/initiatives (REC departments outside of our departments)	D&A 102 Course		Q2 2025	Q4 2025	Josh	Inina	Hesen	Eugene	48	20	
Internal	Internal technical debt projects/initiatives (our stuff)	BIRECPRD Decomission		Q1 2025	Q4 2025	Anthony	Larry	Cedric	Eugene	16	16	
Jason Satterwhite	External new projects/initiatives (REC departments outside of our departments)	WO order monthly completion report (Task 83)		Q1 2025	Q2 2025	Matt	Josh	Anthony	Eugene	40	20	
Kris Seiber	External new projects/initiatives (REC departments outside of our departments)	P&S Analysis and Churn Rate Dashboard (Tast 63)		Q2 2024	Q2 2025	Ayla	Anthony	Adam	Eugene	28	12	
Kris Seiber	External new projects/initiatives (REC departments outside of our departments)	Bill Redesign		Q4 2024	Q4 2025	Adam		Ayla	Eugene	16		
John Crawford	External new projects/initiatives (REC departments outside of our departments)	E&O Report - Training (Task 75)		Q4 2024	Q2 2025	Matt	Anthony	Josh	Eugene	60	30	
Tracey Steiner	External new projects/initiatives (REC departments outside of our departments)	Demographic Dashboard update		Q4 2024	Q1 2025	Ayla	Anthony	Eugene	Adam	28	10	
Tracey Steiner	External new projects/initiatives (REC departments outside of our departments)	Political Insights Dashboard update		Q4 2024	Q3 2025	Ayla	Eugene	Adam		28	4	
Kris Seiber	External new projects/initiatives (REC departments outside of our departments)	Power Pulse Index- REC Implementation		Q2 2025	Q2 2025	Ayla	Josh	Adam	Anthony	60	80	
Steven Roddy	External new projects/initiatives (REC departments outside of our departments)	Finance & Accounting Leadership -Vision and Analytics Roadmap		Q3 2025	Q1 2026	Josh	Inina	Anthony	Larry	66	20	
Karan Patel	External new projects/initiatives (REC departments outside of our departments)	ODEC Monthly Invoice (Task 89)		Q2 2025	Q4 2025	Matt	Inina	Anthony	Eugene	80	40	
Chris Stoia	External new projects/initiatives (REC departments outside of our departments)	Meter Load and Locations (Task 88)		Q2 2025	Q4 2025	Inina	Matt	Anthony	Eugene	40	40	
Peter Muhoro	External new projects/initiatives (REC departments outside of our departments)	Strategic Initiative Database and Dashboard (Task 95)		Q3 2025	Q3 2025	Inina		Adam	Eugene	40		
Chris Stoia	External new projects/initiatives (REC departments outside of our departments)	Cost per Job Report (Task 94)		Q3 2025	Q3 2025	Matt	Josh	Anthony	Eugene	120	20	
John Crawford	External new projects/initiatives (REC departments outside of our departments)	ARCOS integration and major outage AI (Task 93)		Q3 2025	Q2 2026	Matt	Josh	Anthony	Eugene	120	20	
Jason Satterwhite	External new projects/initiatives (REC departments outside of our departments)	Pole Age Analysis (Task 90)		Q4 2025	Q1 2026	Matt	Josh	Anthony	Eugene	120	20	
Michael Dailey	Enterprise projects (PM led)	Hyperscale Azure Tenant standup		Q2 2025	Q4 2025	Cedric			Eugene	80		
Peter Muhoro	External new projects/initiatives (REC departments outside of our departments)	Dynamic Forecasting -Revnue Budget Model		Q2 2025	Q4 2025	Hesen	Josh	Anthony	Eugene	120	20	
Chris Stoia	External new projects/initiatives (REC departments outside of our departments)	EIA Annual Report		Q2 2025	Q4 2025	Hesen	Matt		Eugene	60	20	

Eugene's Version – Next Steps

Prioritization helps elevate what is important while retaining the spare allocation time for urgent matters and innovation.

	Sum of Adam	Sum of Anthony	Sum of Ayla	Sum of Cedric	Sum of Hesen	Sum of Josh	Sum of Matt	Sum of Eugene
Project Hours	980	1800	660	800	1200	1600	1920	1200
Alloted Hours	2000	2000	2000	2000	2000	2000	2000	2000
Standard maintenance, meetings, training, emails	300	300	400	300	300	300	300	400
Management	300							400
Spare Allocation - new requests and unplanned	400	400	400	400	400	400	400	400
Cloud Architecture Maintenance				300				
Planned PTO beyond 80hrs			400					
Pre-set Subtotal	1000	700	1200	1000	700	700	700	1200
Subtotal + Project Hours	**1980**	**2500**	**1860**	**1800**	**1900**	**2300**	**2620**	**2400**
	99%	125%	93%	90%	95%	115%	131%	120%

Standard maintenance, meetings, training, emails	15%
Management	15%
Spare Allocation - new requests and unplanned	20%
Cloud Architecture Maintenance	15%

Baseline Analyst	35%
Baseline Cloud Architect	50%
Baseline Manager	50%

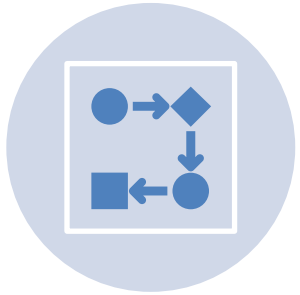
Project Size	
XXS	8
XS	20
S	40
M	80
L	120
XL	240
XXL	480

Implementation & Member Enablement

Distribute Excel framework (generic versions + examples)

Offer short how-to videos

Community Q&A



Collect feedback and iterate (continuous improvement)

EAC: What We'd Like From You

Does the Top 15 metric set feel right? Any critical gaps?

Are the rubrics/definitions clear enough to reduce subjectivity?

Would your organization adopt the base Excel as-is, or customize?

What support artifacts would help adoption?

Wrap-Up & Next Steps

- **In the session:**
  - Showed the evolution (Sandi → Eugene → Haley)
  - Presented the generic base framework + custom examples

- **Post-session:**
  - Incorporate EAC feedback; finalize & publish to members

THANK YOU!

Value Matrix Sub-Committee

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