



MEMO

Date December 11, 2003
To Energy Trust Board of Directors
From Steve Lacey, Director of Energy Efficiency Programs
Subject Response to Process Evaluation for Building Efficiency Program

Management of the Building Efficiency program was awarded to Aspen Systems Corporation at the end of 2002. The program began serving customers in February 2003. The program evaluation suggested areas of the program that need support. In response, we have taken steps to:

1. Develop a sales plan to be funded by additional resources.

Aspen Systems has submitted a draft Enhanced Sales Initiative for Building Efficiency. The draft has been reviewed and commented on by Energy Trust staff. The additional funding called for in the Initiative has been incorporated into the proposed 2004 Building Efficiency budget. Aspen has created a new full time position for a marketing and sales person dedicated to developing and managing an active HVAC trade ally network for Building Efficiency. A network marketing professional is conducting an evaluation of the existing network marketing. The resultant situation analysis and recommendations will feed a new strategic marketing plan under development by Aspen.

- 2. Direct the activities of, and change the “culture” of, Energy Trust administrative staff to provide fast, customer-focused response to Energy Trust staff responsible for programs.** Because Building Efficiency was the first full scale program launched by the Energy Trust, it pushed the development of policy. Additionally, since the development and implementation was “fast tracked,” there was minimal time allowed for policy development. As a result, when policy issues went beyond program staff, and involved legal or risk management issues that had to be resolved at an organizational level, the response was considerably slower than anticipated in the program development and implementation schedule.

At this time, these organizational policy issues have been resolved. If the program were to be launched now, there would be no delay of the program. Legal issues and contracts development procedures have been addressed and are being resolved. Additionally, legal resources specializing in energy efficiency related contracts and forms are now being utilized, reducing turnaround time for document development. This has benefits to this, other and future program implementation efforts.

3. Clarify technical analysis contractor confusion about the Building Efficiency program and their role in program delivery.

Aspen has conducted another training and feedback meeting for Level I Allied Technical Analysis Contractors (ATACs). Program activity has ramped up, and a working relationship has been established with active ATACs. As a result, many of the uncertainties have been dispelled. Aspen will interview each ATAC and compile unanswered questions. An ATAC Building Efficiency Operations Guide will be assembled and distributed to all ATACs. The compiled questions will be answered and the guide will include program process, procedures, incentives and contact information.

4. Follow up with customers who contacted Energy Trust about efficiency programs prior to the launch of Building Efficiency.

Aspen has contacted and resolved all issues with each of the sample customers. Aspen has reexamined their customer hand-off procedures, and has tightened procedures to reduce the risk of customers being dropped. Customers without documented follow-up are being re-contacted to be sure they were not dropped. Among the customers sampled, Goldmine records of customer contacts do not coincide well with customer recollection as reported in the evaluation.