

## **Executive Director Report**

June 9, 2004

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This report from Margie Harris is for the period from March 29, 2004, through May 26, 2004, and describes those items not otherwise addressed in this board packet.

### **General**

- New board member, Debbie Kitchin, participated in an orientation session to become more familiar with Energy Trust history, strategies, plans and program results. Debbie has already demonstrated both her knowledge of the subject matter and a keen interest in our activities.
- Margie continued outreach to all utility contacts, the governor's office and other parts of state government. Feedback focused on ways to dovetail marketing and referrals, co-branding, sharing planning and evaluation results, participating in integrated resource planning activities and economic development opportunities.
- The Northwest Energy Coalition hosted an event at the EcoTrust building, drawing participation from wide spectrum of energy community representatives. Several speakers offered positive comments about Energy Trust programs, progress and results, including those present from Kettle Foods.

### **Program Planning and Evaluation**

#### *Planning*

- Oregon Department of Energy (ODOE) and Energy Trust staff held the first joint quarterly meeting on May 5th. Over 20 participants compared programs and activities from the respective organizations in an effort to better understand and coordinate activities and enhance customer service. Follow-up work groups will address opportunities and priorities to strengthen working relationships between now and the next quarterly meeting.
- Energy Trust managers gathered for two work planning sessions, the first on internal work load priorities, structure and staffing matters and the second to prepare for the upcoming board planning session in July. More emphasis is being placed on internal workload management, establishing and refining systems for data collection and reporting and enhancing operational productivity, efficiency and stability.
- Energy Trust staff has participated in a support role for the Governor's Global Warming work group, helping explain how Energy Trust programs might assist in concert with other State efforts to fight Global Warming. Assistance has been through both consultation with counterparts at the Oregon Department of Energy and attendance at meetings where this is important to make a contribution.

#### *True-up:*

- Staff has begun working on the summer "true-up" of savings estimates, starting with Home Energy Savings.

*Peak Savings:*

- We have completed an estimate of Energy Trust 2002 and 2003 program savings in regional peak energy periods, and are developing a methodology to help show how we can respond to concerns about peak energy availability or price spikes.

*Benchmarks:*

- Staff is developing comments on draft PUC benchmarks for Energy Trust performance, and compiling updated information on program progress and costs, and forecasting costs.

*Irrigation:*

- Contractor Walt Trimmer has produced a draft irrigation program design for the Klamath Basin. We are screening the program for cost-effectiveness and the design with PacifiCorp and Klamath parties. We are continuing to coordinate with Equip, the federally-funded water conservation program in the basin, and developing ways to help farmers reduce water use.

*Commercial Programs:*

- Our contractors are expanding an analysis of the cost-effectiveness of efficient commercial washing machines.
- We are co-sponsoring a study of commercial package air conditioning commissioning tune-up methods, following up a NW Alliance pilot program.

*Residential:*

- Planning staff recently certified the cost-effectiveness of high rise multifamily windows with a U value slightly lower than previously required for incentives.
- Working with program staff, we developed and screened as cost-effective a second refrigerator pickup program.
- We are co-sponsoring a regional study of heat pump performance, a critical issue for the New Homes program. Results should be available in late 2005.

*Evaluation**Evaluation Reports Completed:*

- Market Assessment of Solar Thermal Market\*
- Process Evaluation of SELP Pilot\*
- Process Evaluation of Production Efficiency (End of 1<sup>st</sup> yr)\*\*
- Impact Evaluation of Pilot Mobile Home Duct Sealing\*\*\*
- Impact Evaluation of Utility Transition Contracts- Commercial and Industrial Retrofit\*

\*Executive summary follows; evaluation is posted on Energy Trust website.

\*\*Will be released with response memo within two weeks.

\*\*\*Executive summary and response memo follows; evaluation is posted on Energy Trust website.

*New Evaluation Efforts Begun:*

- Home Energy Savings Phase II
- Building Efficiency Phase II

- Production Efficiency Phase II
- Transition Industrial Process
- Transition C&I Retrofit: 2003 participants

### Efficiency Programs

- We are an official supporter of the Laboratories for the 21<sup>st</sup> Century program, dedicated to improving environmental performance of US laboratories. The program offers design and technical assistance and enhances the New Building Efficiency program.
- Energy Trust and ODOE made presentations to the commercial and industrial account representatives of NW Natural. The occasion reflects the positive working relationship between NW Natural, ODOE and the Energy Trust.
- PGE's "Energy Efficiency: It Pays" seminar featured the Energy Trust commercial and industrial programs and ODOE's BETC. This event produced program leads and reflects a positive working relationship between PGE, ODOE and the Energy Trust.
- Greg Stiles was a judge for the green building category of the "academy awards" of the construction industry – the 10th Annual Excellence in Construction Awards. Greg was formally recognized for his involvement.
- Steve Lacey and Diane Ferington met with Bruce Walker, Director of Solid Waste and Recycling, Office of Sustainable Development, City of Portland to discuss recycling of compact fluorescent bulbs (CFLs). Collaborative community-based methods were explored. Timing is optimal for consumer education regarding proper disposal. We continue to promote safe disposal through the Home Energy Savings Program and our web page. Staff is continuing discussions with OSD, and jointly will seek Metro participation promoting a regional recycling effort for this fall.
- The Efficient Home Products Program arranged for PGE and Fred Meyer to partner on an Energy Trust lighting promotion at PGE's 115<sup>th</sup> anniversary celebration at PGE Park on July 4th. The first 2,500 attendees will receive a coupon for a free ENERGY STAR CFL, and everyone will receive a \$2-off coupon, redeemable at Fred Meyer stores.
- The Efficient Home Products plans to pilot a *Lights for Learning* initiative this fall, a unique way for students to raise funds by selling energy efficient compact fluorescent light bulbs. The concept pairs raising awareness through education about ENERGY STAR efficient light bulbs and fundraising for schools. This initiative is an alternative to the traditional products sold through school fundraisers, such as candy and gift-wrap, with schools to receive 50% of the profit from the bulb sales.
- The Home Energy Savings Program is developing an insulation offer for low-income individuals. Scheduled for this fall, the measure would cover 50 percent of the cost of insulation, with the Oregon Housing and Community Services verifying income levels. Incentive funding and processing would be provided through existing Home Energy Savings Program incentives, with authorization forms disseminated by CAP agencies.

### Renewable Energy

- The Apeasay Orchard small wind project is being commissioned. This 22 KW net-metered project in Hood River will offset the orchard's pumping costs for irrigation and demonstrates how renewable resources can be implemented in scenic areas.
- Because of cost and process considerations, two projects with public entities have been cancelled. Staff have de-briefed with the sponsors and will be exploring alternative ownership models to help them hurdle their own budget restrictions.

- Staff continues to develop the structure and contracts for the wind project selected through PGE's RFP. Credit and tax issues have slowed negotiations between the developers and PGE, but progress is being made and we are assisting where ETO has a role. The timeline for completing all negotiations is uncertain.
- PacifiCorp received more than 5,000 MW of renewable resources in response to its RFP. The response prompted an extension of the time for reviewing projects. Staff have completed a rough, first cut for projects seeking Energy Trust assistance. When PacifiCorp gets further along, staff will complete its analyses, likely late June.
- Staff audited a course sponsored by Local 48 of IBEW for local solar inspectors. Due to our program, code inspectors are now interested in learning about solar.
- NREL is interested in featuring our solar program as one of the successful national examples at the meeting of the national Million Solar Roofs Program, part of the American Solar Energy Society's Conference in July in Portland.
- Staff was invited by the German government to be part of a US delegation speaking at the International Renewable Conference in Bonn, June 1-5.

## **Communications, Marketing and Outreach**

### *Call Center*

- Our toll-free call center has transitioned to a new vendor, Active TeleSource, Inc. As part of the orientation and training process, the first comprehensive compilation of information about Energy Trust structure, activities and programs was developed. The notebook will ultimately have multiple uses, including distribution to staff and program management contractors.
- In April, 1,150 calls were received by the call center, down from the all-time high of 1,456 in March, with two-thirds being referred to the Home Energy Savings program.

### *Customer Service*

- We engaged Tom Beverly, a customer service manager contractor, to oversee the call center and other customer service functions (including complaint handling and tracking, quality assurance, customer service processes). Currently Tom is spending 2-3 days a week at the new call center and is working through procedural and technical issues involved in the transition.
- We also initiated a contract with a customer service trainer, who did a 1-day training for new call center staff, and who will be returning to offer training to our staff and PMCs in the next few months.

### *Website*

- There were 7,910 visits to our website in April, the third highest month thus far (topped by 8,396 visits in January and 8,902 in March 2004). The most commonly visited pages were the searchable trade ally list, the job posting for the renewable program manager, and pages with information about the Home Energy Savings program.
- We are continuing to convert areas of the site to our new design, focusing on our most popular programs first.

### *Surveys*

- We tacked a question onto a statewide consumer poll fielded in April to just under 500 respondents. Asked how familiar they were with the Energy Trust of Oregon prior to the phone call, 3% answered "very familiar" and 31% said they were "somewhat familiar" with us. The higher-than-expected percentage may indicate that the name

"Energy Trust of Oregon" stands out as a name that people feel familiar with. Some respondents may have thought they had heard the name or had heard of an organization with a similar mission.

- A short survey seeking feedback on Energy Trust performance was fielded in mid May to nearly 700 stakeholders.

#### *Creative products*

- Design of the public version of the annual report is in progress.
- Three case studies are in final review stages.
- Ads were developed for placement in the spring newsletter of 3E Strategies in Bend, Oregon Home's May/June issue, the summer issue of Bend Living, the directory of the American Institute of Architects/Oregon, NW Construction, Daily Journal of Commerce June Top Projects magazine, the Oregon Remodelers Association sourcebook, the July/August issue of Solar Today and the program for Solar 2004.

#### *Press releases*

- Double Your Savings washer promotion
- Bac Gen (cobranded with Oregon League of Cities)
- Labs 21 course
- Home Energy Savings' Spring Into Savings promotion

#### *Utility co-promotions*

- NW Natural green power insert in central, southern Oregon newspapers
- Promo box on NW Natural May commercial bills
- Mention in PGE June Update newsletter
- Mention in Pacific Power July Voices newsletter
- Bill inserts in NW Natural July residential and commercial bills

#### *Speaking engagements, workshops, trade shows*

- Building Efficiency sessions for lighting trade allies in Lake Oswego, North Bend, Roseburg, Medford and Bend
- Pence Place opening expo in Bend
- Pacific Power customer advisory group meeting in Roseburg
- Willamette Valley ASHRAE in Albany; Portland ASHRAE
- Southwestern Oregon Home Show in Coos Bay
- Roseburg Energy Fair
- Central Oregon Spring Home & Garden Show
- City of Portland Spring Fix-It Fair
- Building Green Council of Central Oregon forum
- Multifamily trade ally breakfasts in Bend, Portland, Medford
- Metals & Transportation Equipment Industry Service Providers Trade Fair, Portland
- Natural Style Home & Garden Show
- PGE Educational Seminar: Energy Efficiency – It Pays in Salem
- NW Plant Engineering & Facilities Maintenance Show, Portland
- Oregon League of Cities energy workshops in Pendleton, Bend, Medford, Salem

### *Sponsorships*

- Oregon Environmental Council Forum on Energy & the Environment – two events, one of which was a speech by the governor
- BEST Awards in Portland
- EPA Lab 21 High Performance, Low Energy Design Course
- Smart Talks sustainability workshop in Bend
- Earth Advantage class on indoor air quality

## **Operations, Contracts, Finance and Administration**

### *Finance*

- Finance completed its recruiting of a new Senior Accountant. After three weeks of temporary status, Thuong Ho began full time employment on May 24<sup>th</sup>. She's a Washington CPA and has experience in both public and private accounting environments.
- The 2004 budget was successfully uploaded into our financial accounting software to facilitate the preparation of comparative financial statements. Because of the major redesign work of the budget document last fall to provide more relevant information and because of the added sophistication of the end result, this became a substantial project. Financial reports were redesigned, accounts and new structures were added, and revised processes were implemented in the development and maintenance of this project. Work is underway to ensure the completion of the documentation for this project to ensure the tool created will be effective for future budgeting efforts.

### *Operations and IT*

- For the last month, our offices have been natural cooled and heated using our “night-flushing” system, perfected by Carmen. We are HVAC-free!
- We welcome John Kinnune to the Energy Trust family in the role of IT Data Manager working under contract as a data analyst, John is happy to continue development of reports for the FastTrack program tracking system. He is responsible for ensuring data needs of the organization are met, with specific tasks including data need assessments, database design, report design, development, testing and implementation. As an Oregonian, John attended OSU and holds a BS in Management and an MBA from Marylhurst University. His first day as an employee is June 1 – welcome, John!
- The FastTrack tracking system rollout continued and the system is now being used for all Home Energy Savings Program projects run by Ecos; PECl is using the system for the Efficient Home Products program; and we are using the system internally for the SHOW program. Conservation Services Group has completed system functionality for FastTrack. FastTrack implementation is under budget overall.

## **Legal**

- Since the last board meeting, three major contracts have been negotiated and signed as approved by the board:
  - the call center contract;
  - the Nexus agreement; and
  - the Northwest Energy Efficiency Alliance renewal contract