

Staff Report

April 9, 2008

This report from Margie Harris is on behalf of all staff and spans the period January 28, through March 21, 2008. Items not otherwise addressed in this board packet are described here.

General

- Research linking energy efficiency and messages about global warming is being completed by Linda Dethman Associates, with input from Jane Peters of Research Into Action. Preliminary finds of related campaigns and future options were presented to representatives from BPA, Portland Energy Conservation, Inc., the NW Power Planning and Conservation Council and Energy Trust.
- Margie participated in a third utility CEO meeting convened by BPA Administrator Steve Wright to discuss Northwest Energy Efficiency Alliance (NEEA) and focus on an update of the Alliance's strategic plan.
- Margie participated in interviews for the new Northwest Energy Efficiency Alliance executive director. As part of the early May NEEA board meeting, finalists will meet staff and stakeholders and the board hiring decision is expected to be made.
- John Reynolds, Steve Lacey and Margie joined CEO, Mark Dodson, Vice President, Public Affairs & Communications, Gregg Kantor and Director, Environmental Policy and Sustainability, Bill Edmonds at a joint strategy session with NW Natural. The discussion was very positive and key opportunities were identified, including the prospect of serving Washington NW Natural customers.
- Margie attended a lively dinner and discussion of carbon issues hosted by PGE CEO Peggy Fowler and featuring Ralph Cavanagh from the Natural Resources Defense Council and David Owens of the Federal Energy Regulatory Commission.
- Margie delivered a speech about Energy Trust opportunities to the Portland Executive Alliance, addressing a large gathering of local commercial business CEO's.
- Biofuel efficiency projects whereby commercial and industrial gas or electric fueled heating systems are being supplanted by organic fuels will be treated on a pilot basis by Energy Trust Business Energy Solutions programs. This measure went through four airings with the Conservation Advisory Committee. In the end, with the exception of one abstention, the council supported staff recommendations. They include the following premises:
 - Biopower CHP should be explored before thermal-only consideration
 - Project sites should be required to contribute to public purpose funding
 - Projects will be commercial and industrial applications
 - Participants must agree to initiate a site-wide efficiency program as a condition to undertaking biofuel projects
 - Only renewable waste fuel source projects will be accepted
 - Standard program cost-effectiveness screening and incentive process will be followed
 - Assurance that the incentive investment is realized for projects with fossil fuel backup will be required
 - All emission regulatory permits are required per program requirements

This will be initiated as a pilot program, accepting up to 10 projects over two years. An evaluation will be performed to measure efficacy and report results back to the CAC before a decision to expand the program is made.

Program Planning and Evaluation

General

- The annual true up for 2008 was completed, incorporating the Tracking Estimate Correction and True Up of 2002 – 2007 reported savings. This resulted in a 1.8 % increase in electric savings and a 2.8 % increase in gas savings over previous estimates. Changes were driven by results of the recent Industrial and Commercial evaluations. A detailed final report will be available Q2 2008.
- New avoided costs incorporated into all program and measure benefit/cost analysis models.
- Summaries of possible west coast collaboration activities to achieve zero net energy commercial buildings by 2030 and to accelerate appliance efficiency were provided to the OPUC, describing the benefits associated with a joint effort in these areas among Oregon, Washington and California. Significant coordination would be required if activities were agreed upon and undertaken, including additional resources to achieve more results collectively than any one state could achieve on their own.
- Fred Gordon, intern Lakin Garth and Power Planning and Conservation Council staff submitted a draft paper for the American Consortium for an Energy Efficient Economy (ACEEE) summer study on how supply curves for efficiency change over time.

Residential

Cost-effectiveness analyses were completed for:

- ENERGY STAR new refrigerators. Because efficiency specifications have increased, this measure is now cost-effective and will be part of 2008 program offerings.
- A pilot program to replace old refrigerators for limited income customers in Southern Oregon was also found to be cost-effective.

Commercial and Industrial

Cost-effectiveness analyses were completed for:

- Hotel room occupancy sensors and commercial dishwashers. These two measures are cost-effective and will augment our restaurant and hospitality initiatives.

NW Alliance Evaluations

Market progress evaluation reports were completed for the following programs in the last 3 months and are available on the NW Alliance website (www.nwalliance.org):

- Analysis of window energy savings in commercial buildings in the Pacific Northwest (E08-182)
- BetterBricks Grocery Initiative (E08-183)

Efficiency Programs

General

- Staff attended a BPA sponsored workshop to discuss energy efficiency options in the northwest region post-2011. This information meeting was held to assemble stakeholders and identify issues for discussion. Coordination opportunities were discussed after a presentation of the NW Power and Conservation Council 6th Power Plan, delivered by Tom Eckman. One outcome is that BPA will require their customers to submit 10-year conservation plans and corresponding program delivery needs.
- Staff has been working with the Portland Development Commission to design a pilot initiative that addresses low income multifamily new construction projects. These buildings are unique in construction and could be more adequately addressed through greater collaboration of Energy Trust programs or funding with that of state agencies.
- Staff has been actively helping to frame the Portland High Performance Green Building Committee's recommendation to the city council for greenhouse gas reduction policy. Council action is expected this fall.

Home Energy Solutions—ENERGY STAR® New Homes

- Working with the EPA on their new “designed to earn” label for architectural plans that when built as specified and certified, will meet ENERGY STAR requirements.
- Conducted a focus group where participants stated that economic and cost issues are very important to them and that they have little knowledge of the ENERGY STAR brand for new homes.
- Staffed the annual Oregon Manufactured Home Show which had a great turn out and provided good exposure for the program to industry and the public alike.

Home Energy Solutions—ENERGY STAR® Products

- Received the EPA's 2008 ENERGY STAR Program Delivery Award for our Change a Light, Change the World fundraiser initiative.
- Collaborated with Energy Trust's internal Web Forms Team to kick-off the creation of the first web form for the clothes washer program.
- Paid incentives for over 255,000 specialty CFLs during the first two months of the year, resulting from a significant uptake in the BPA specialty bulb promotion.

Home Energy Solutions—Existing Homes

- The program completed 569 Home Energy Reviews, achieving a new program record.
- Home Performance with ENERGY STAR incentives paid were 12-fold over the same time last year.

Business Energy Solutions—New Buildings

- The program hosted “Form Meets Function” a gathering of architect and engineering firms to network and generate leads.
- Outreach and marketing efforts are expanding to bring in more projects and penetrate the “design-build” market through a trade ally driven approach.
- Efforts are underway to expand the trade ally network and gain more traction with small- and medium-size projects in the new construction market.

Business Energy Solutions—Existing Buildings

- On April 1, 2008, the program will receive an award from the US Environmental Protection Agency and US Department of Energy for Excellence in ENERGY STAR Promotion for our commercial foodservice initiative.
- Staff delivered a presentation titled “Moving the Foodservice Market in Oregon” at the Association of Energy Service Professionals National Energy Services Conference in Clearwater Beach, Florida.
- Continued close collaboration with BPA on activities in the lodging and foodservice markets.
- Initiated a close working relationship with Travel Portland (formerly the Portland, Oregon Visitors Association, POVA), a destination marketing organization for the Portland metro area as a channel into the lodging sector.
- Collaborated with BetterBricks on the Office Energy Showdown contest where commercial office buildings in the Portland area compete against each other using the ENERGY STAR Portfolio Manager tool.

Business Energy Solutions—Production Efficiency

- Officially launched the small industrial initiative compressed air incentive calculation tool with seven new compressed air trade allies.
- Walt Mintkeski has joined the team as a contractor working part-time to assist with water and wastewater treatment facility audits and training.
- Updated the Production Efficiency web pages to reflect multiple program initiatives, including small industrial, agriculture, water and wastewater, and large industrial.
- Participated in the Northwest Food Processors annual show in Portland.
- Held a “Power Lunch” town hall style meeting as part of the Corvallis Energy Challenge creating an opportunity for industrial facilities in Corvallis to learn about the program.

Renewable Energy

Open Solicitation

- Made a presentation to the Oregon Association of Nurseries state conference.
- Provided assistance to the Oregon Institute of Technology in Klamath Falls, helping to develop their plan for a 1 MW geothermal electric project on campus.
- Received completed feasibility studies for hydropower in Hood River County and geothermal for the town of Lakeview.
- Launched a program offering municipalities in the PGE service territory the opportunity to share the cost of hiring a consultant to write an application to the state's Renewable Energy Feasibility Fund for a hydro feasibility study.
- Presented the results of a hydropower scoping study to the Sheridan City Council.

Utility Scale

- The GoodNoe Hills 94 MW wind project for Pacific Power remains on-track for a June, 2008 completion.

Wind

- Approved the first small wind project application, a 10kW system to be installed on a farm near McMinnville, Oregon.
- Presented at the Oregon Dairy Farmers Association annual meeting on small wind.
- Started planning for two upcoming small wind seminars for communities in windy areas.

- Contracted with installer for three new tall tower wind resource assessments. One anemometer is a cost share with a USDA Value-added Production Grant (Umatilla County); one is a cost share with an Oregon Economic Community Development Depart feasibility grant (Hood River County); and one is a cost share with a land owner (Hood River County)
- Attended a Hood River School District meeting where the school board unanimously approved the High School's Science Club proposal to install a wind turbine at the school's football field as a demonstration project with Energy Trust.

Biopower

- Presented on dairy digesters at the Oregon Dairy Farmers Association annual meeting.
- Provided letter of support and committed matching funds for USDA VAPG applications for 2 dairy digester projects in Tillamook County.
- Provided letter of support and committed matching funds for USDA VAPG application for an anaerobic digester project at a chicken ranch in Junction City.
- Completed 3 feasibility studies: Hood River County Biomass Potential, Stimson Lumber (wood waste and forest thinnings) and Pacific Natural Foods (food waste and manure biogas).

Solar

- In response to high solar project demand for non-taxable entities, lowered incentives and instituted more stringent reservation requirements to ensure reserved funding is redirected, if necessary, to projects with highest probability of completion in 2008.
- Worked with Portland General Electric, League of Oregon Cities, Renewable Northwest Project, and Oregon Department of Energy on solar and green tags on a March 5th workshop for local governments, attracting 150 people.
- Provided comments to City of Portland on draft guidelines for building permits for residential and commercial solar installations.
- Contracted with Solar Oregon for delivery of solar seminars and staff at public events
- Collaborated with ODOE, Solar Oregon and City of Portland Office of Sustainable Development to develop a statewide outreach campaign called Solar Now!
- Coordinated installation of solar electric and water heating systems on Good Energy house at the Energy Trust Better Living Show.
- Implemented PowerClerk, an online project management, tracking and reporting system for solar electric projects.

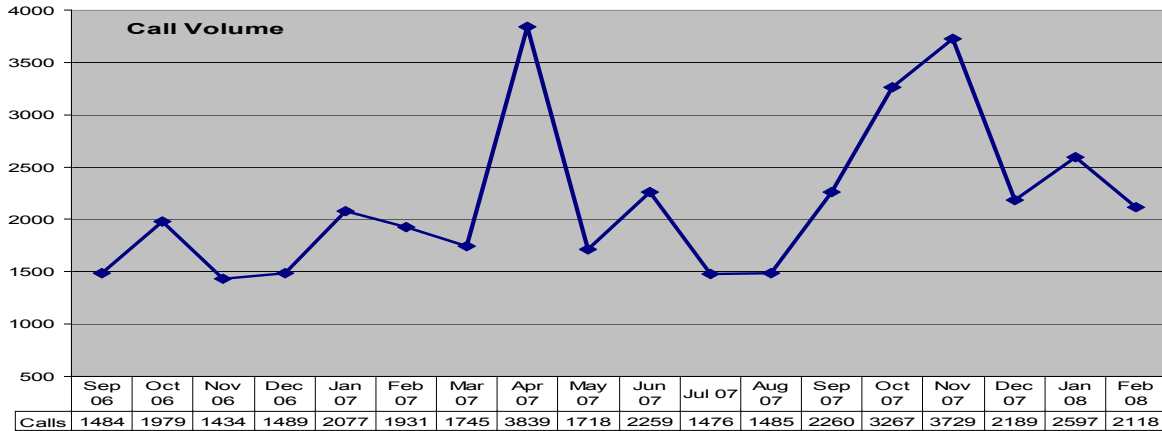
Communication, Marketing and Outreach

Center/Customer Service

- Released RFP for call center services and reviewed proposals; decision will be announced on March 24.
- Planned for customer tracking of Better Living Show responses.

Call Volume through February 2008

In February, we received 479 fewer calls than in January, consistent with our normal seasonal trend. Overall received 187 more calls in February 2008 than February 2007, resulting in a higher volume of inquiries than last year.

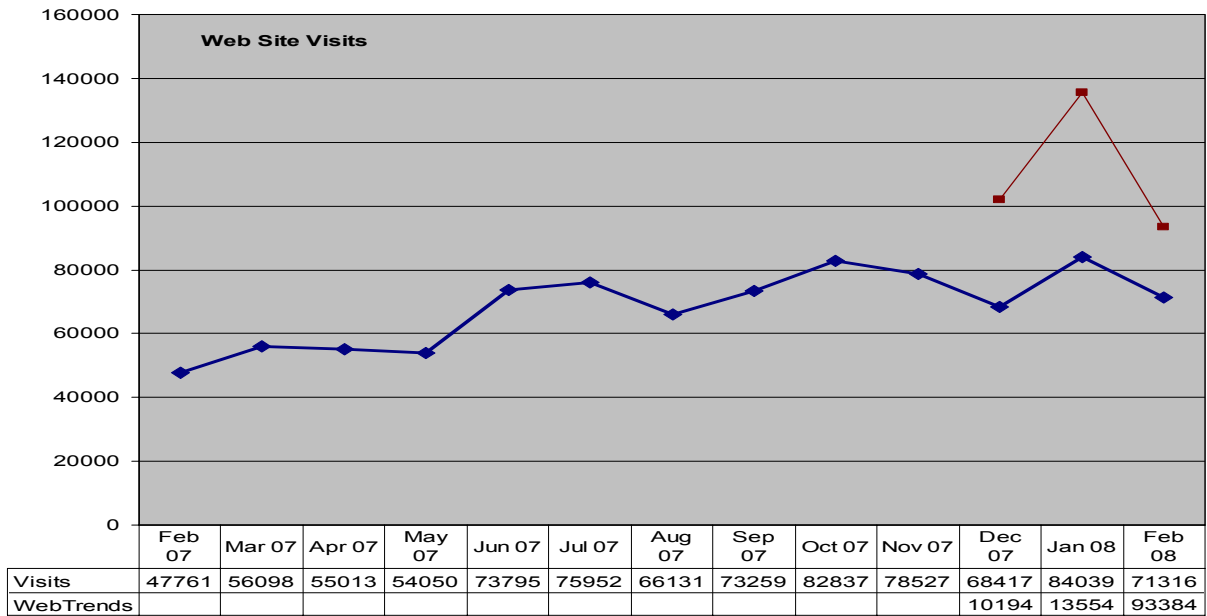


Website

- Posted new Renewable Energy Feasibility Fund grant pages.
- Developed new website for Corvallis Energy Challenge.
- Implemented customized trade ally search list for small wind.
- Posted new sector-specific Production Efficiency web pages.
- Posted new pages for Home Energy Monitor promotion.
- Coordinated and participated in WebTrends analytics training for Energy Trust and Program Management Contractor marketing staff.
- Posted clarifying language on Home Energy Solutions pages about program offerings for homeowners that heat with oil.

Website Visits through February 2008

Web site visits decreased in February, and remained significantly higher than in the same period of 2007. WebTrends (shown in red) reported the same trend as our older tool, Webalizer (shown in blue).



Trade Ally Initiative

- Coordinated with call center and Conservation Services Group to complete trade ally renewal.
- Attended Home Energy Savings trade ally training sessions.
- Held first quarter trade ally roundtables in Portland and Grants Pass.
- Implemented updated regional training calendar for trade allies.
- Began renewal process for New Buildings trade allies.
- Met with BPA’s new trade ally coordinator to discuss collaboration.
- Attended NW Trade Ally Network (BPA) training for trade allies.

Community Energy

- Launched Corvallis Energy Challenge: during kick-off week March 3-8 City Council adopted a resolution supporting the Challenge, 70 Sustainability Coalition leaders had Home Energy Reviews, 5 local businesses participated in walk-through efficiency + solar assessments, solar assessments were started on six City of Corvallis facilities, and area industrial manufacturers had the opportunity to attend a Power Lunch describing the Production Efficiency program.
- Garnered front page above-the-fold picture and story in the Corvallis Gazette-Times and a front-page story in the OSU Daily Barometer.
- Scheduled 121 additional Home Energy Reviews and 5 additional business walkthroughs by March 21.
- Made plans to secure more Home Energy Review signups at the Sustainability Coalition’s Town Hall event March 31, a Solar Seminar April 12 and an Earth Day festival April 19.
- Launched www.CorvallisEnergyChallenge.org.

Events, Speaking Engagements and Sponsorships

- Met with Lincoln City Community Sustainability Committee to discuss support of residential programs.
- Spoke at Corbett Issues Forum in support of Energy Trust programs.
- Recognized as a sponsor and placed materials at 2008 NW Energy Summit at Oregon Convention Center.
- Participated in Metro Multifamily Housing Maintenance Fair.
- Sponsored five solar workshops.
- Hosted solar workshop for municipalities and special districts.
- Provided trainings on Check me!, duct sealing, Home Performance with ENERGY STAR marketing, Home Check software, basics of air sealing, LEED for existing buildings.

Creative Products

- Developed a suite of materials for the Energy Trust Better Living show.
- Developed a new suite of materials for the Corvallis Energy Challenge launch.
- Created 13 new and resized advertisements: 6 commercial, 4 residential, 3 renewables.
- Produced and released 3 newsletters: Synergy (general, monthly), Insider (for trade allies, bimonthly) and Pit Stop (internal, monthly).
- Created 1 new fact sheet on the Production Efficiency program.
- Created 1 new 3-panel general display representing all programs.
- Produced a one-page fact sheet for Klamath Basin irrigators about Energy Trust programs that will accompany a letter from Pacific Power announcing a rate increase.
- Created a Dairy Industry Fact Sheet for distribution at the Oregon Dairy Farmers Association convention in Sunriver.

News Releases and Media Events

- Distributed a press release announcing Energy Trust's two awards for Excellence in ENERGY STAR promotion.
- Arranged for KGW Channel 8 story on home energy efficiency at the home of executive director Margie Harris.
- Developed plans for extensive media coverage of Energy Trust Better Living show.
- Continued to build a pipeline of stories and press releases for 2008.
- Continued to garner news coverage about and mentions of Energy Trust programs in local newspapers around the state, including Portland Business Journal, Green Data, Green Growth, The Sunday Oregonian, Corvallis Gazette-Times, Energy Audits Start Challenge Year and more.
- Wrote and submitted two "Energy Corner" articles for the *Main Ingredient*, the Oregon Restaurant Association's monthly magazine.
- Wrote and submitted an "Energy Corner" article for Lodging News, the Oregon Lodging Association's quarterly publication.

Utility Co-promotions

- *Cascade Natural Gas*: Created a February bill insert on high-efficiency water heaters; provided a March Warm Neighbor News newsletter story on ENERGY STAR clothes washers.
- *NW Natural*: Provided Energy Trust Better Living Show Comfort Zone newsletter story for February and ENERGY STAR clothes washer story for March newsletter.
- *Pacific Power*: Provided March bill insert on ENERGY STAR clothes washers and *Voices* newsletter story on ENERGY STAR appliance incentives.

- *Portland General Electric*: Provided March Home Connections e-newsletter story on Home Energy Monitor pilot project.

Operations, Contracts, Human Resources, Finance and Information Technology

Finance

- Closed the financial 'books' for 2007 and prepared all supporting analyses.
- Analyzed 2007 PMC contract goals and performance compensation payouts.
- Managed the 1099 issuance process for calendar year 2007.
- Completed annual financial statement audit, including documentation, analyses, explanations and report preparation.
- Coordinated the re-budgeting process (Round 3) to accommodate Renewable Energy Act (SB 838) funding; completed budget and presentation materials.
- Initiated the contract accounting process-improvement project, part of the accounting system evaluation.
- Evaluated and purchased a journal entry automation tool to speed-up month end closing.
- Research and evaluated several web-based time-keeping solutions.
- Completed financial reports for January and February 2008 and prepared all supporting analyses.
- Hosted and attended a teleconference training for staff regarding how to use economic forecasts in business.
- Filed anemometer property tax reports with applicable Oregon county assessment offices.
- Prepared 2007 Q4 Board report and OPUC packet.
- Redesigned and simplified Master Schedule reporting.
- Created 2008 templates for monthly-closing process.
- Revised PMC invoice coversheets for 2008.
- Cross trained other department personnel to add departmental depth.
- Completed Annual Services Report Survey.
- Completed 2007 Q4 FastTrack audit.
- Evaluated Call Center RFP responses.
- Began addressing 2007 project document retention.
- Continued contracting process with third party insurance certificate tracking entity.
- Completed 2008 work plans for all staff.
- Continued identity theft protection discussions with staff regarding current procedures.
- Drafted flowchart for current stale-dated check procedures and processed stale-dated checks for reissuance.
- Began testing 2008 Form 1099 recipient listing.
- Researched and provided demonstration for accounts payable online assistance.
- Developed and managed tighter controls on W9 processes.
- Worked with Gold Mine systems analyst to maintain Great Plains and Gold Mine information.
- Processed between 500 and 850 incentive checks weekly.
- Assisted PMC's with incentive reversal and correction processing.

Human Resources

- Hired Jed Jorgensen as Renewable Energy Project Manager. Jed's last position was Marketing & Communications Manager at The Climate Trust.
- Hired Hannah Hacker as Communications and Marketing Coordinator. Hannah is a recent graduate of Drake University where she majored in Environmental Science and Journalism/Communications. She recently completed a temporary assignment at the Oregon Department of Energy.
- Brien Sipe joined the evaluation department as an Evaluation Analyst. Brien recently completed a Masters in Economics at PSU. Brien has been working for the department as an intern and contractor during the past two years and is replacing Philip Kelsven, who has accepted a position with Conservation Services Group.
- Sarah Castor has also joined the department in the capacity as the Market Research and Evaluation Analyst. A graduate of U of O with a B.S. in economics and math and of U-C Davis with an MA in economics, Sarah's prior experience includes work at the Federal Reserve Bank.
- Hired Matt Blomgren as a half-time Network Technician in the IT department. Matt was currently a consultant and has held positions at PSU and Microsoft.
- Accepted the resignation of Danielle Gidding, Planner/ Analyst, in the Planning & Evaluation Department. Danielle accepted a position at Idaho Power in their efficiency program.
- Recruiting in Planning & Evaluation for a Planning Engineer and Planner/Analyst.
- Recruiting for a Renewable Energy Program Manager.
- Recruiting in IT for a Database Administrator.
- Distributed annual Employee Survey to all staff for completion by March 31. Results will be compiled and presented at a future staff meeting.
- Held employee orientation for new staff.
- Accepted the resignation of Linda Rudawitz, IT Manager.
- Debbie Blanchard, contractor, is serving at interim IT manager while a replacement is being recruited.

Legal and Contracts

- Updates incorporated elsewhere in this report.

Information Technology

- Completed processing and posting of 2008 energy savings True-up.
- Published draft IT Strategic Plan for final review.
- Established project team for implementation of prototype FastTrack web form for appliance rebates and held initial project meeting.
- Released FastTrack enhanced version which supports automatic e-mail notification as project tasks are assigned to staff.
- Incorporated a new FastTrack feature to permit measure definitions to directly access external data sources, such as the EnergyStar web site, to obtain authorized values for measure attributes (i.e. qualified washing machine models and efficiency factors). This will greatly reduce the maintenance required for many of the high volume product measures while also improving the timeliness of the data.
- Processed over 500 service tickets using the new Track-it Help Desk software.
- Established automatic logging of service tickets via e-mail to help@energytrust.org.
- Established types and categories to permit Track-it to handle the wide variety of tracking issues that were previously contained in several separate databases.
- Loaded FastTrack and Help Desk ticket history into Track-it and developed initial Track-it summary reports.