EnergyTrust of Oregon, Inc.

Staff Report

March 28, 2007

This report from Margie Harris is on behalf of all staff and spans the period January 29, 2007, through March 9, 2007. Items not otherwise addressed in this board packet are described here.

General

- Tom Foley and Margie Harris visited with two commissioners from the Washington Utilities and Transportation Commission and provided an overview of the Energy Trust program delivery model and highlighted accomplishments. The productive meeting was a preliminary and informal exchange of potential opportunities to consider different delivery options in Washington State.
- Energy efficiency sector managers presented program details to Christine Kautzmann of Cascade Natural Gas, the Cascade contact overseeing all efficiency activities for the company. The presentation provided Christine with an overview of how Energy Trust programs operate in Oregon for her to consider when evaluating different models for future program offerings to Washington Cascade customers.
- Actions necessary to secure Bonneville Power Administration Conservation Rate Credit funding are being finalized. Utility agreements are nearing completion. The transfer of measure savings information to BPA's tracking system has been finalized and will be ready for the mid-year project submission deadline of April 30.
- Tom Foley and Margie Harris had an introductory meeting with the new President of Pacific Power, Pat Reiten and with Jay Clemens, new President and Chief Executive Officer of Associated Oregon Industries. Both Pat and Jay were most generous with their time and the meetings were fruitful.
- Margie met with Governor Kulongoski's staff Allen Alley and Peter Cogswell and provided an update on Energy Trust achievements.
- Margie made a general Energy Trust presentation at the request of Representative Jackie Dingfelder to the House Energy and Natural Resources Committee, which was well received.
- The majority of Energy Trust staff participated in an all-day strategic planning session, during which program managers made brief and informative presentations on the purpose, opportunities and challenges of their programs. The highly informative exchange engaged staff at a very productive level. Follow-up issues and ideas will be distilled and where appropriate, incorporated into pre-planning for the board strategic retreat in June.
- Oregon Natural Step Network and Energy Trust staff held two meetings to exchange information about common interests in sustainability and to exchange ideas about possible synergies between the two organizations. One key outcome is to address the full circle impacts of the services we each offer, as in the example of promoting CFL use and proper disposal. A sustainability workshop and website links to the multiple resources for those interested in sustainable practices may be future outcomes.
- At the request of former "Yalie" Al Jubitz, Margie addressed the Yale Alumni Club at a recent luncheon and delivered a speech linking energy efficiency, renewable energy and global warming. Discussion was lively.

Program Planning and Evaluation

- The Evaluation Committee convened on February 23, 2007 to review draft reports on the 2005 Building Efficiency Impact Evaluation and 2003-2005 Production Efficiency Impact Evaluation.\
- Completed the 2007 true up; results will be incorporated into the annual report.
- Completed cost-effectiveness analyses for several revised measures for the Home Energy Solutions -- Existing Homes program.
- Completed cost-effectiveness analysis for commercial washers (laundromat and multifamily) at a higher efficiency level, recently become feasible; will offer Incentives through programs for new and existing homes and commercial buildings.

Efficiency Programs

General

- Based upon a referral from John Savage, efficiency staff met with Salem officials to prepare a comprehensive energy efficiency action plan for the city's municipal buildings. Outcomes include construction opportunities for four new firehouses, a library lighting retrofit, and a plan to identify the energy efficiency potential in 100 buildings using an Energy Star benchmark tool and leveraging an intern from Willamette University.

Home Energy Solutions—ENERGY STAR® New Homes

- Represented the program at several well attended sessions of the HBA's Green Week, including "Energy Tax Credits and Other Incentives" and "Selling Green Homes."
- Launched ENERGY STAR New Manufactured Homes in January to 58 eligible retailers in Energy Trust territory, with positive feedback from retailers.
- Mailed Manufactured Homes 2007 program packets to every retailer with an introduction letter, home counter card, customer incentive form and Energy Trust zip code list.

Home Energy Solutions—ENERGY STAR® Products

- Launched Savings with a Spin premium efficiency clothes washer promotion in January to 160 eligible retailers with over 89 qualified models that have an MEF of 2.0 or higher.
- Logged $1,569 in earnings for Lights for Learning CFL sales during January's fundraising efforts.
- Processed over 670 clothes washer incentives in January.

Home Energy Solutions—Existing Homes

- Finalized Existing Homes program incentives, forms and web content for a March 1, 2007, launch.
- Staffed booths at both the Portland Home and Remodeling Show and Office of Sustainable Development's Fix-It Fair in January.
- Saw online Home Energy Review (HER) requests increase in January to 381(36% increase over December).
- Sponsored the highly successful northwest Affordable Comfort Home Performance conference, which attracted over 500 participants.

- Trained Home Energy Reviewers to perform a basic assessment of a home's solar potential and to provide information about solar to the homeowner during a home energy review.
- Presented workshop in Bend Feb. 27 on energy efficiency and solar incentives for homeowners and builders as part of the Building Green Council of Central Oregon's education series.
- Presented a brownbag session to NW Natural staff Feb. 23 on residential solar applications and incentives in Oregon.

Business Energy Solutions—New Buildings

- Launched the ENERGY STAR new construction track and began accepting applications.
- Working on marketing strategies to recruit more small and medium- sized new construction projects around the state. These strategies include:

    - Hiring additional PMC staff to market and promote projects.
    - "Community engagement" – travel around state to raise awareness and help projects enroll in the program.
    - Continue to nurture existing relationships with architect and engineering firms.
    - Develop new marketing collateral including a series of case studies and fact sheets.

Business Energy Solutions—Existing Buildings

- Coordinating with Bonneville Power Administration on developing and launching a targeted suite of incentives, marketing materials and outreach activities for the hospitality industry to be launched in Q2.
- In cooperation with BetterBricks, engaging a large healthcare organization to map out for the next few years capital upgrade and retrofit projects, budget cycles and incentive funding in order to provide better service to them and to better define the timing of large incentive investments and the acquisition of associated energy savings.

Business Energy Solutions—Production Efficiency

- Presented Production Efficiency's first Energy Leader Award to Stimson Lumber Company for participating in Energy Trust efficiency programs and for making energy efficiency an integral part of the sustainable practices that carry on Stimson's long tradition of quality.
- Submitted successful application nominating Buzz Thielemann, program PDC with RHT Energy, for a Daily Journal of Commerce's Rainmaker award; he is a finalist for the award, which will be presented in April.
- Began implementing 2003-2005 impact evaluation recommendations.

Renewable Energy

Open Solicitation

- Obtained board approval and began contract discussions for an 869.4 kW solar project at Portland Habilitation Center's new manufacturing facility.

- Attended the annual meeting of the Dairy Farmers of Oregon in Sunriver to promote the biopower program and gather information about the role anaerobic digesters might play in a dairy's operations.
- Visited several potential sites for municipal solar installations in Albany.
- Addressed the Southwest Portland Rotary Club, Oregon City-West Linn Rotary, and the Hillsboro Rotary.
- Represented the Renewable Resources team in planning a community energy project with NW Natural.

Utility Scale

- Told by Pacific Power they were suspending negotiations with what had been a top candidate for a wind project to be supported with funding from the Energy Trust; replacement project to be identified by early in the second quarter of 2007.
- Continue to iterate with PGE on contract terms for the Biglow Canyon 125.4 MW wind project; expect final data for the above-market calculations from PGE in mid March, in time for a final package for board approval in May.

Wind

- Signed Letter of Intent for the 10 MW Sherman County Wind Farmer Community Wind Project.
- Contracted with NW Sustainable Economic Development (NW SEED) to prepare USDA application for the 1.5 MW China Hollow Community Wind Project.
- Contracted with NW SEED to determine best practices for state small wind programs.
- Approved funding for a 5 kW small wind project at the Thornton residence near Independence, Oregon, in PGE service territory.
- Continued participation in an Oregon PUC interconnection workshop.

Biopower

- Cosponsored annual convention of Oregon Dairy Farmers Association.
- Cofunded a feasibility study for a system upgrade at the dormant wood-fired Heppner Biomass project; a study of biogas options at Clackamas County's Kellogg and Tri-City wastewater treatment plants; and a scoping study for the City of Coos Bay's wastewater treatment plant.
- Restarted negotiations on the 17.9-megawatt wood cogeneration project at Warm Springs Forest Products.
- Participated in Oregon Solutions project to identify highest value solution to state's animal byproducts disposal challenge.
- Initiated meetings with Stimson Lumber to discuss potential wood cogeneration project.

Solar

- Raised solar electric incentives for businesses to spark more commercial installations. Incentives for PGE customers remain higher than for Pacific Power, and are now capped at $70,000 for a 50 kW system.
- With PGE and BEF, planned a media event for the new Solar 4R Schools 1 kW PV system on Molalla High School.
- Presented solar technologies and incentives at the ACI NW conference Feb 21, to NW Natural staff on Feb 23, and at a workshop for the Green Building Council of Oregon Feb 27-28.

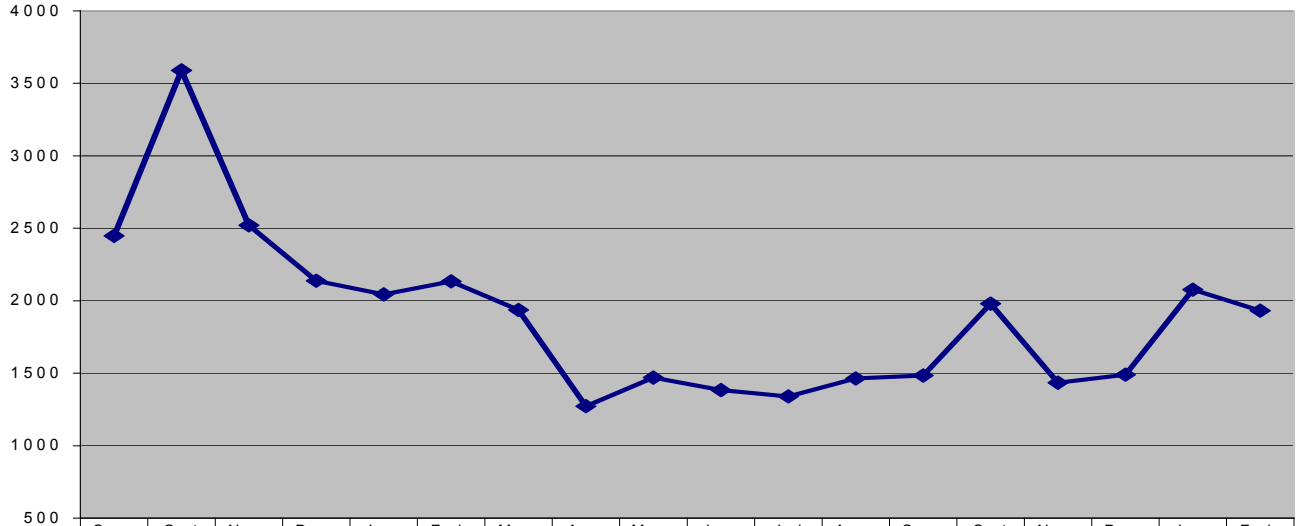
- Hired intern Eric Youngson from OIT Renewable Energy Engineering program to work on renewable energy projects, including streamlining our requirements for analyzing solar resource at project sites
- Signed contract with Solar Oregon (co-funded by OSD Solar Now! campaign) to deliver monthly basic solar workshops to homeowners in Portland, and to have a solar booth at events that provide Solar Oregon, Energy Trust and Solar Now! materials.
- Working with marketing/communications staff, developing a protocol for doing market research and revising our marketing efforts for the solar program in the PGE service territory.

Communication, Marketing and Outreach

Call Center/Customer Service

- Kept call center up to date on new program incentives and requirements.
- Conducted tribal energy/outreach planning meeting.
- Provided updated solar training for CSG call center.
- Spoke on Energy Trust programs for three events.

Call Volume through February 2007

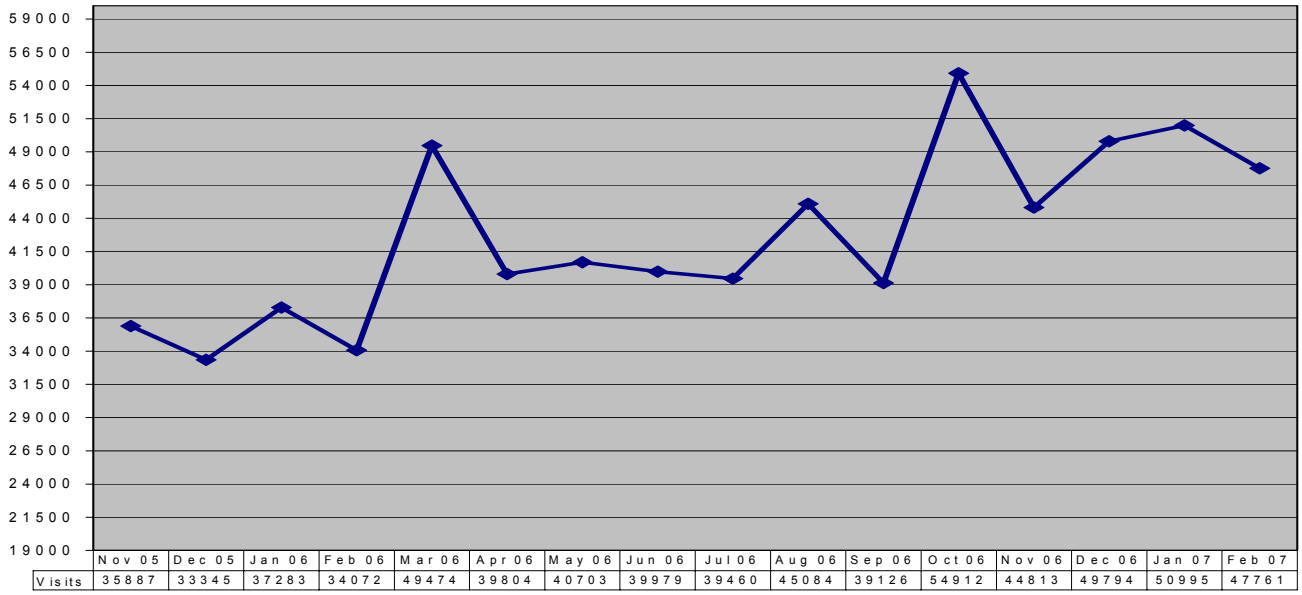


	Sep 05	Oct 05	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06	May 06	Jun 06	Jul 06	Aug 06	Sep 06	Oct 06	Nov 06	Dec 06	Jan 07	Feb 07
Calls	2447	3589	2521	2138	2043	2133	1936	1272	1470	1383	1340	1464	1484	1979	1434	1489	2077	1931

Website

- Updated Home Energy Solutions single family and multifamily pages with new incentive amounts and new copy.
- Posted new copy for New Buildings' ENERGY STAR Track.
- Took interactive solar program announcements database live.
- Updated copy and forms on Irrigation Initiative website.
- Fixed broken links in past issues of Synergy.
- Added short introductory sentences for each program index page calling out the benefits of participating in our programs.

Website Visits through February 2007



	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06	May 06	Jun 06	Jul 06	Aug 06	Sep 06	Oct 06	Nov 06	Dec 06	Jan 07	Feb 07
Visits	35887	33345	37283	34072	49474	39804	40703	39979	39460	45084	39126	54912	44813	49794	50995	47761

Trade Ally Outreach

- Notified trade allies of new program incentives.
- Held trade ally awards meetings in Portland and Grants Pass.
- Developed annual trade ally survey with Evaluations Department.

Events, Speaking Engagements and Sponsorships

- Participated in 15 energy-related events during the period.
- Sponsored and presented at the three day ACI Northwest 2007 Conference.
- Sponsored two Rethink classes with the Office of Sustainable Development.
- Presented at Eastern Oregon Entrepreneur Day.
- Staffed a booth at the Manufactured Home Show in Salem.
- Hosted tour of Stimson Lumber's energy efficiency projects for board and some staff.

Creative Products

- Created 27 new and resized advertisements: 9 commercial, 4 residential, 4 renewable and 10 general.
- Produced and released three newsletters: Synergy (general, monthly), Insider (for trade allies, bimonthly) and Pit Stop (internal, monthly).
- Produced updated solar brochure.
- Updated Multifamily Home Energy Solutions marketing materials.
- Produced ENERGY STAR® New Homes technical pocket guide, cooperative advertisement agreements, virtual tour and a suite of new materials to support the program.
- ENERGY STAR Products designed new materials in cooperation with Bonneville Power Administration to promote Change a Light, Change the World.

News Releases and Media Events

- Distributed six press releases: ENERGY STAR New Homes milestones, RMLS adds green menu, New Building Efficiency introduces ENERGY STAR, New Building Efficiency 2006 milestones, Harley Tucker Memorial Arena and Willamette Falls Hospital.
- Created pipeline of press releases for 2007.
- Continued to garner news coverage about Energy Trust programs in local newspapers around the state.
- Coordinated with NEEA on a press release about ENERGY STAR New Homes winners.

Utility Co-promotions

- Pacific Power—article on ENERGY STAR appliances and home energy efficiency improvements in March newsletter, Voices; updated web copy.
- NWN—co-branded TV spot began airing late February and will run through April 22; updated web copy.
- PGE—updated web copy.

Operations, Contracts, Human Resources, Finance and Information Technology

Finance

- Selected Moss Adams to perform Enterprise Architecture study of IT and financial systems starting in late March and completing mid-summer.
- Thanks to good preparation work by the entire team, the financial audit field was able to begin a few days early and finish early.
- Completed information gathering for round 5 of the budget to reallocate unused funds from 2006 plus add CRC funding.
- Enhanced budgeting tool by adding a macro make information consolidation more efficient
- Issued 260 1099's.
- Completed 2006 Q4 FastTrack audit.
- Updated all payroll information for new year (all deductions, group term life, etc.).
- Reconciled annual 401k uploads with Invesmart.
- Revamped and updated PMC invoice cover sheets.
- Completed compensation statements for all staff.
- Interviewed stakeholders, developed and recommendations process improvements for authorizing measure additions and changes.
- Initiated and helped design new form and process for renewables team to contract for service incentives with less paperwork (Renewable Energy Technical Assistance Agreement, RETTA).
- Updated the Financial Procedures.
- Began update of Financial Principles.
- Logged 2006 Q1 project files to archive.
- Uploaded all archived project files through 12/05 into searchable document retention database.

Human Resources

- Accepted Kevin Whilden's resignation as planner/analyst and wished Kevin well as he moves on to Climos, a company that will develop greenhouse gas offsets by enhancing the growth of natural biologic systems, focusing primarily on plankton.
- Filled the Planner/Analyst position by hiring Matt Braham, previously an intern in the planning department, graduate of California State University and Portland State University, where he recently received his masters degree.
- Hired Ryan Eubanks, Portland State University student, as an intern in the IT group.
- Completed the 2006 performance review process.
- Provided a day-long negotiations training focused on Win-Win negotiation strategies.
- Reviewed, revised and reissued Employee Handbook.

Legal and Contracts

- Incorporated in other department updates.

Information Technology

- Released a major new site attribute feature in FastTrack to make data entry more efficient while providing more useful information to planning and evaluation.
- Engaged Martin Staudacher to assist with network support as a ½-time contractor.
- Received very positive feedback was received from the PMCs at both the most recent ITAC meeting and at a Home Energy Solutions contract status review meeting on progress in resolving data and reporting issues.