2010-2011 APPROVED FINAL BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Planning and Evaluation

Department Purpose: To provide strategic and quantitative planning, reporting and evaluation for Energy Efficiency and Renewable Resources. Contributes to all Energy Trust Strategy goals. Support and enhance accelerated acquisition capabilities for Program Delivery staff.

2010 Strategies & Activities

1. New Energy Trust strategic plan identifies 5 year savings goals nearly doubling the 2008 annual rate. With sufficient increased funding from IOUs, P&E are assessing how to achieve the goals by going deeper in current programs, bringing new customers in the door and quantifying market transformation effects.
2. P&E is adding a planning engineer to manage development of measures and free up other resources for market research.
3. Increase market research across all sectors – employ more utility data and use focus groups to investigate best approaches for market segments.
4. Finalize design and evaluate pilots currently committed to and add a limited number of additional pilots. Finalize procedures for establishing prospects of new pilots and prioritizing them.
5. P&E will continue to work with IOUs and Utility commissions on a means to provide sufficient funding to achieve IRP achievable resource while managing cash flow uncertainties due to changing markets and economic swings.
6. Work with IOUs to implement improved resource potential and deployment scenarios for DSM inputs to their IRP process.
7. Participate with regional and national agencies (BPA, NEEA, CEE, NEET, RTF) to acquire resources through collaborative efforts in market transformation, manufacturer's labeling, joint marketing, etc.

2010 New Initiatives & Focus Areas

1. NW Natural new programs launched in 2009 for Washington and Oregon industrial pilots. Will support reporting and research to determine if and how to continue after first year of activity.
2. Positive Energy pilot with PGE and NW Natural will require special evaluation of 60,000 customer test group.
3. EEAST pilots in rural and Portland areas (residential and commercial) to test viability of financing of deep efficiency programs. Planning estimates, marketing and evaluations required.
4. Market research to ascertain how building and home rating systems can best help owners and renters take action. Assist ODOE in developing legislatively required commercial and residential scoring systems for Oregon.
5. Renewables market assessments and planning estimates will be enhanced and follow opportunities as they arise.
6. "Fast Turnaround" process and market assessments will be introduced and evaluated for value by program delivery staff.
7. Possible new activities depending on Federal funding are supporting ARRA related projects including but not limited to Recovery through Retrofit and demand management pilots, employing smart grid and smart metering technologies, appliances, software and hardware in cooperation with PGE.

2011 Planned Activities

1. Focus on ways to increase savings acquisition rates while maintaining current levels of quality in evaluation, planning and reporting. Improve ability to respond to ad-hoc requests for policy analysis, quantitative analyses and extra departmental quality control.

Scheduled Evaluations:

	Impact	Process	Market Assessment
Energy Efficiency			
Business Energy Solutions – Existing Buildings	Q3 2010 & Q3 2011	Q3 2010	
Business Energy Solutions – New Buildings	Q3 2010 & Q3 2011	Q3 2010	
Production Efficiency	Q2 2010 & Q2 2011	Q2 2011	
Home Energy Solutions – Existing Homes	Q2 2010 & Q2 2011	Q2 2011	
Home Energy Solutions – New Homes & Products			
New Homes			
Products			
Renewables			
Biopower			
Open Solicitation			
Solar Electric			
Utility-Scale			
Wind			

(See targets and budget details on reverse side)

2010-2011 APPROVED FINAL BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Targets

Year	Annual Expense ($M)
2009 Forecast	$ 3.6
2010 Budget	$ 5.1
2011 Projection	$ 5.1

Energy Trust of Oregon
2010 Approved Final Budget
Planning & Evaluation

	2009 Forecast	2010 Budget	2011 Projection
Program Specific P&E			
Evaluation Services	$1,485,857	$2,135,000	$1,925,000
Planning Services	262,332	752,499	1,092,499
Other	171		
Total Program Specific P&E	**1,748,359**	**2,887,499**	**3,017,499**
Non Program Specific P&E			
Evaluation Services	362,174	366,000	381,000
Planning Services	159,918	210,000	190,000
Staffing	910,562	1,043,336	1,095,503
Other Services	10,119		
General	48,092	59,000	59,000
Allocations	320,047	512,706	405,377
Total Non Program Specific P&E	**1,810,912**	**2,191,042**	**2,130,880**
GRAND TOTAL	**3,559,271**	**5,078,541**	**5,148,379**

2010-2011 APPROVED FINAL BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

General Communications

Department Purpose: The 2010 Communications budget provides for staff, services and materials necessary for outreach and communications functions and activities supporting general and cross-program Energy Trust needs. These activities contribute to all strategic goals. Program-specific marketing activities are reflected in program budgets. Customer Service and Trade Ally Network activities are reflected the specific budget for those activities.

2010 Strategies & Activities

1. Position Energy Trust as a trusted energy resource through story placements and advertising in Oregon media outlets. Provide coordinated media buying services for program advertising to ensure efficient use of advertising dollars. Collaborate with utilities on co-branded program and general advertising opportunities.
2. Manage Energy Trust media relations responding to growing interest in energy issues and Energy Trust programs and services. Produce or support media events highlighting success stories and program information.
3. Leverage relationships with utilities, associations representing niche market groups and public/private institutions to reach prospective customers in all parts of the service territory.
4. Offer excellent customer service through website, e-mail, customer-friendly materials and communications.
5. Continue to develop website content, tools and functionality to improve customer engagement in Energy Trust programs and provide easy access to information for customers, trade/program allies, stakeholders and citizens. Maintain online Home Energy Analyzer and other interactive user tools. Conduct follow-up usability testing to identify opportunities to further improve customer experience and engagement.
6. Utilize online social media tools and develop ongoing communications with customers through e-mail, including monthly e-newsletter SYNERGY (general audience) and bi-monthly INSIDER (trade allies) to re-engage past participants and build awareness of energy solutions and success stories.
7. Leverage resources and impacts by sponsoring outreach events in cooperation with peer and stakeholder organizations. Participate in community activities and organizations through sponsorships and other collaborations.
8. Provide communications support for community energy project(s) with utilities, cities and other stakeholders.
9. Maintain marketing and communications guidelines to ensure consistent look and feel in all Energy Trust material. Design, review, approve and track Energy Trust materials to ensure consistency and customer-focused tone.
10. Promote and support cross-sector marketing initiatives, such as GreenStreet Lending, NW Natural in Washington, etc.
11. Expand and maintain image library and quotation database of representative Energy Trust projects.
12. Produce and disseminate public annual report, help prepare quarterly reports and other special reports.
13. Control costs by supplementing staff resources with contractors. Manage services provided by contracted creative and public relations professionals to programs.

2010 New Initiatives & Focus Areas

1. Accelerate communication support to meet growing demands from extensive media interest in energy.
2. Support transition of marketing management to Homes and Business programs while providing non-PMC programs (Industrial/Ag and Renewables) with all marketing and communication services.
3. Facilitate comprehensive coordinated outreach utilizing regionally-based contractors and leveraging program field representatives and services to ensure broad geographic customer access and participation. Coordinate stakeholder and special group outreach by all programs and PMCs.
4. Evaluate focused community outreach to Klamath Falls. Utilize learning to increase participation in outlying areas.
5. Identify and develop new cooperative relationships with membership associations, agencies and organizations serving the public, utilizing co-branded materials and joint communications initiatives to reach potential customers.
6. Provide web-based “do it yourself” tools and resources for communities promoting citizen action on energy solutions.
7. Provide communications/project support for Clean Energy Works Portland and other pilots testing EEAST objectives.
8. Work collaboratively with programs and IT to identify and implement improvements to simplify the customer experience and create efficiencies, such as streamlined forms and access to customer ‘account’ information online.
9. Work with evaluation group and regional partners to refine segmentation and messaging for 2010 based on 2009 research.

2011 Planned Activities

1. No major changes planned for 2011.

(See targets and budget details on reverse side)

2010-2011 APPROVED FINAL BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Targets

Year	Annual Expense ($M)
2009 Forecast	$ 1.7
2010 Budget	$ 1.8
2011 Projection	$ 1.8

Energy Trust of Oregon
2010 Approved Final Budget
General Communications

	2009 Forecast	2010 Budget	2011 Projection
Staffing	**$448,303**	**$549,246**	**$576,708**
Marketing			
Public Rel/Creative	30,000	25,000	26,250
Creative Services	243,086	210,000	210,000
Media Advertising	59,800	102,316	54,816
Events Co-Sponsor	16,000	20,000	21,000
Total Marketing	**348,886**	**357,316**	**312,066**
Services			
Evaluation and Planning Services	2,134	26,650	25,918
Website Design & Maintenance	360,250	273,500	280,750
Other Professional Services	216,125	260,000	275,100
Total Other Services	**578,510**	**560,150**	**581,768**
General			
General Program Support Costs	83,885	73,000	73,000
Shared	52,249	58,435	59,676
IT Services	186,432	248,142	192,254
Total General	**322,566**	**379,577**	**324,930**
TOTAL EXPENSE (Note 1)	**1,698,265**	**1,846,288**	**1,795,472**

Note 1 - 100% of these expenses are allocated to programs, located towards the bottom of each report on the line "Administrative Costs."

2010-2011 APPROVED FINAL BUDGET & ACTION PLAN

Acquire cost-effective energy, accelerate investment, innovate, be accessible and transparent, communicate value, focus on customers.

EnergyTrust of Oregon

Customer Service & Trade Allies

Department Purpose: Provides staff, services and resources necessary to provide customer access to Energy Trust programs and information. Customer service functions include a customer call center, customer forms, online tools for accessing assistance, response to customer inquires and direct contact via outreach contractors. Trade ally network development and administration functions recruit, train and approve skilled trade professionals to serve Energy Trust customers installing energy efficiency and renewable energy solutions in all areas of the state, and to help customers access Energy Trust incentives.

2010 Strategies & Activities

1. Offer excellent customer service through contract via third party call center. Add a representative, as needed, to respond to a growing call volume that averages more than 4,000 calls per month.
2. Devote additional staff resources to support expanded information sharing and training for customer service representatives, as well as Energy Trust and PMC staff, so all are able to help educate and engage customers.
3. Ensure call flows and other customer intake channels and processes make it easy for customers to quickly access the information or support their needs. Ensure a seamless, easy and outstanding overall experience for customers in alignment with Energy Trust's "customer focus" priority.
4. Ensure alignment between PMC and internal customer relations staff members to ensure information and approach are consistent across the organization, so opportunities for more savings or renewable energy projects are not lost.
5. Work with utility companies to provide seamless routing of customers and improved Energy Trust training and materials for their staff members making it easier for their customers to participate.
6. Respond to customer complaints or suggestions in a timely manner and utilize customer feedback as part of a continuous improvement process to make existing programs, information and systems easier for customers to navigate.
7. Ensure consistent messaging among field outreach representatives, trade allies, customer relations representatives and others communicating directly with customers through training.
8. Provide user-friendly customer and trade ally forms and help improve forms processing to minimize the administrative burden on trade allies and customers.
9. Provide regular reports on customer service metrics. Work with IT on reporting capabilities to ensure data can be captured and evaluated to improve efficiency and effectiveness.
10. Provide expanded coverage in rural areas to ensure presence at events and speaking opportunities, and to provide support for both customers and trade allies to raise awareness of our programs outside the Willamette Valley.
11. Manage development of and provide administration for trade ally network to ensure customers in all Energy Trust service territories can access skilled contractors informed about Energy Trust incentives and participation requirements. Coordinate with PMC trade ally managers
12. Continue outreach and program education in rural areas to recruit local trade allies statewide and expand the network.
13. Provide a website listing service so customers can easily locate trade allies serving their geographic location.
14. Expand training for trade allies from both a business/service perspective and a technical perspective.
15. Continue to work with community colleges to provide distance education sites for trade allies. Develop additional resources to assist with distance education for trade ally contractors.
16. Expand feedback mechanisms so trade allies can provide helpful experiences from the field, thereby improving our services and incentive offerings. Make improvements based on findings from annual trade ally survey.
17. Develop network of "program allies" or "program affiliates" as a resource for both customers and trade allies.

2010 New Initiatives & Focus Areas

1. Define and implement plans and priorities for customer service/trade ally network field outreach activities. Coordinate with programs to leverage other field activities to ensure better service to all areas of Energy Trust service territory. Add outreach contractor capacity in the North Coast region.
2. Complete transition of team roles as identified by organization redesign to allow for additional attention to trade ally network strategic management and customer service management. Fill customer relations manager role and train CCS team members in support functions. Develop and implement customer relations training for Energy Trust and PMC staff.
3. Identify opportunities to improve the customer experience and develop a method to evaluate customer experience.
4. Review and improve customer forms. Migrate forms to online format, where appropriate, to make the incentive application process as efficient and user-friendly as possible for customers.
5. Improve phone transfer systems to provide better customer service. Evaluate whether new IVR (automated routing) phone equipment is needed. Provide new warm transfer numbers for utility call center staff to utilize.
6. Work with web team to improve the trade ally search capabilities on the website and give customers the means to leave feedback about their experiences with their trade ally. Develop and implement criteria for ranking trade allies in "preferred" and "normal" classifications on website.

7. Expand trade ally training to expand skills in sales and customer service. Implement Energy Trust background and customer service training for all trade allies. Identify and develop additional training needs.
8. Implement more defined procedures for suspending trade allies based on customer service problems. Move to a "trade-ally-only" installation requirement for Existing Homes participants.
9. Implement tracking mechanisms for program allies/affiliates and provide guidance to PMC staff members working with program allies.

2011 Planned Activities

1. No major changes planned for 2011.

Targets

Year	Annual Expense ($M)
2009 Forecast	$ 0.9
2010 Budget	$ 1.9
2011 Projection	$ 1.9

Energy Trust of Oregon
2010 Approved Final Budget
Customer Service & Trady Allies

	2009 Forecast	2010 Budget	2011 Projection
Staffing	**$242,154**	**$426,106**	**$447,412**
Marketing			
Public Rel/Creative	15,000		
Events Co-Sponsor	5,000	20,000	20,000
Total Marketing	**20,000**	**20,000**	**20,000**
Services			
Evaluation and Planning Services	2,134	26,650	25,918
Website Design & Maintenance	30,000		
Other Professional Services	265,600	855,000	815,000
Total Other Services	**297,734**	**881,650**	**840,918**
General			
General Program Support Costs	266,001	351,900	381,900
Shared	22,863	43,826	44,756
IT Services	89,395	224,844	174,248
Total General	**378,258**	**620,570**	**600,904**
TOTAL EXPENSE (Note 1)	**938,146**	**1,948,325**	**1,909,233**

Note 1 - 100% of these costs are allocated to programs and other support functions.

2010-2011 APPROVED FINAL BUDGET & ACTION PLAN

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EnergyTrust of Oregon

Management & General

Department purpose: To provide overall management, direction and resources in support of Energy Trust strategies and operations. Contributes to all strategic goals.

2010 Strategies & Activities

1. Continue to support program activities and capitalize on opportunities for developing innovative ways to showcase our core competencies.
2. Support program management requirements to provide further efficiencies and maximize performance opportunities.
3. Expand outreach efforts to variety of constituents.
4. Develop risk mitigation strategies and tactics.
5. Manage corporate compliance requirements.
6. Improve contracting capacity.
7. Support training activities as a result of design team efforts and new structure.
8. Develop Energy Trust relocation strategy.
9. Complete implementation of document retention strategy.
10. Develop process for analyzing business opportunities and potential alliances.
11. Develop capacity to accommodate acceptance of Federal grants and contracts.
    a. Implement affirmative action compliance requirements
    b. Enhance purchasing procedures and controls
    c. Implement electronic employment verification
    d. Develop systems to document job creation and retention reporting
    e. Develop recruiting strategy to reflect expanded outreach to minority communities

2010 New Initiatives & Focus Areas

1. Expanded outreach to local communities.
2. Expand risk mitigation strategies through new means:
    a. Outreach
    b. Education
    c. Participation in new venues reaching new target audiences, including low-income, minorities, etc.
3. Provide enhanced and targeted training activities in implementation of design team recommendations.
4. Participate in implementation of organizational Enterprise Resource Planning (ERP) and Business Intelligence systems.
5. Implement new HRIS system to reduce paperwork and improve flow between HR and payroll.
6. Implement processes to support acquisition of Federal awards and contracts.

2011 Planned Activities

1. Finalize corporate relocation plans if appropriate.
2. Finalize implementation of ERP system.

Targets

Year	Annual Expense ($M)
2009 Forecast	$ 2.7
2010 Budget	$ 3.3
2011 Projection	$ 3.0

(See budget on reverse side)

Energy Trust of Oregon
2010 Approved Final Budget
Management and General

	2009 Forecast	2010 Budget	2011 Projection
Staffing	**$1,415,036**	**$1,719,260**	**$1,800,243**
Services			
Evaluation and Planning Services	21,896	37,887	36,847
Legal Services	29,200	65,000	80,000
Accounting Services	81,950	73,260	75,675
Other Professional Services	452,644	453,593	242,643
Total Services	**585,689**	**629,740**	**435,165**
General			
General Program Support Costs	218,017	174,841	176,341
Shared	120,499	136,953	139,861
IT Services	324,678	608,686	456,620
Total General	**663,194**	**920,480**	**772,821**
TOTAL EXPENSE (Note 1)	**2,663,919**	**3,269,480**	**3,008,230**

Note 1 - 100% of these expenses are allocated to programs, located at the bottom of each report on the line "Administrative Costs."

2010-2011 APPROVED FINAL BUDGET & ACTION PLAN

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EnergyTrust of Oregon

INFORMATION TECHNOLOGY

Department Purpose: To deliver high quality, cost-effective technology and information management solutions and services which support the strategic goals of Energy Trust.

2010 Strategies & Activities

1. Improve customer satisfaction and enhance the customer experience by improving the methods of collecting, storing and analyzing information that continues to grow in complexity and volume.
2. Enable the achievement of more energy savings and generation at lower cost by strengthening and streamlining core business processes with improved, integrated technology systems and services.
3. Ensure a stable, reliable and secure technology environment which supports improved operational efficiency and effectiveness.
4. Enhance the effectiveness of technology investments to enable Energy Trust to remain competitive and keep costs low.

2010 New Initiatives & Focus Areas

Improve customer satisfaction and enhance the customer experience

1. Enhance the customer participation experience by supporting the simplification and automation of the incentive application processes to improve the ease, accuracy and speed of requesting and issuing customer incentive checks.
2. Enhance internal customer satisfaction by providing business leadership with an improved self-service analytical and reporting tool, leading to improved business decisions.
3. Improve the quality and reliability of information as it flows through the organization by providing systems and best practices that support the efficient collection, management and analysis of data.
4. Improve the delivery of IT services through the implementation of an industry standard IT service management framework which incorporates IT best practices.

Strengthen and streamline core business systems

1. Foster a flexible, nimble and scalable organization by streamlining and enhancing core business systems and processes through the implementation of either a full Enterprise Resource Planning (ERP) solution or a more tightly integrated suite of applications.
2. Improve the flexibility, usability and stability of IT systems to meet evolving business needs. Establish a more disciplined approach to solution development that results in more reliable and trustworthy systems.
3. Implement industry standard systems and solutions that leverage best practices and are less costly to rollout and maintain.
4. Improve collaboration and access to organizational information with an integrated tool that allows project and other organizational documents to be easily found and shared and enables automated work flows to be easily created.

Ensure a stable, reliable and secure technology environment

1. Develop a Technical Architecture Roadmap that ensures the achievement of low cost and scalable growth even as business volumes double or triple over the next 5 years.
2. Ensure protection of the confidential data entrusted to Energy Trust by hardening and evolving our security systems.
3. Improve systems reliability and availability via enhancements to automated monitoring protocols.
4. Refine implementation of disaster recovery processes to ensure that data systems can be recovered in the event of a disaster.

Enhance the effectiveness of technology investments

1. Evolve project management practices to improve the quality and on-time/on-budget delivery of projects.
2. Strengthen the alignment of IT to the Energy Trust business strategies and long term needs by refining IT governance practices and processes, to ensure IT investments meet the most critical business needs.
3. Develop IT benchmarks and establish additional performance metrics to ensure IT investments are prudent and align with industry practice.
4. Facilitate the IT Advisory Committee and IT Steering committees as forums to foster innovative ideas and provide strategic direction.

2011 Planned Activities

1. Complete implementation of an enterprise information system selected in 2009.
2. Continue to roll out web-based incentive applications.
3. Continue the roll out of business intelligence projects.

(See targets and budget detail on reverse side)

2010-2011 APPROVED FINAL BUDGET & ACTION PLAN

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EnergyTrust of Oregon

Targets:

Year	Annual Expense ($M)
2009 Forecast	$ 2.9
2010 Budget	$ 4.1
2011 Projection	$ 4.1

Energy Trust of Oregon
2010 Approved Final Budget
Informational Technology

	2009 Forecast	2010 Budget	2011 Projection
Staffing	**$838,877**	**$1,209,933**	**$1,270,429**
Services			
Other Professional Services	1,408,844	2,123,800	1,726,675
Total Services	**1,408,844**	**2,123,800**	**1,726,675**
General			
Supplies and Equipment	180,859	147,550	149,230
Software	188,298	217,983	208,613
Depreciation	89,066	173,080	624,491
Other General Expenses	121,568	140,300	26,100
Allocations	116,781	118,236	120,746
Total General	**696,572**	**797,150**	**1,129,181**
TOTAL EXPENSE (Note 1)	**2,944,292**	**4,130,882**	**4,126,285**

Note 1 - 100% of these costs are allocated to programs and other support functions.