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MEMO

Date: November 4, 2009
To: Board of Directors
From: Margie Harris
Subject: Staffing

The draft 2010-2011 budget includes funding for the four positions the board approved at their September meeting, a one-year temporary position for NW Natural services in Washington State, two additional positions discussed below, and funds for a contractor to work with the public sector. This memo provides the rationale for these roles. Full descriptions for each position follow.

Background

The draft strategic plan projects 77% growth in annual electric savings and a 92% growth in annual natural gas savings over the next five years. Annual funding requirements are expected to double while we hold levelized costs down.

The organization redesign completed earlier this year identified several ways to achieve these results, including:

- ✓ A higher emphasis on strategic planning and targeted market research
- ✓ Reorientation of products and services to focus on customers and support their decisions to take action
- ✓ Innovative program delivery with more presence in outlying areas of the state
- ✓ Higher investment in trade allies, our 1200 person “sales force”
- ✓ Greater inclusion of emerging technologies
- ✓ Internal operations and productivity improvements

In September, 2009, the Energy Trust approved proceeding with the hiring of four new positions to help jump-start the organization redesign. These included: two sector leads, one each to provide more strategic direction for the homes and the business groups; a development engineer in planning and evaluation to provide faster analysis of cost-effective program measures; and a full-time industrial sector coordinator to provide operations analyst functions and help serve growing demand for small industrial and NW Natural industrial initiatives. Explanations regarding these positions, including metrics where available, are provided below. In addition, a one-year temporary coordinator position previously created as part of the expansion of services to NW Natural customers in Washington State is included and described, below.

Discussion

Two additional positions – an Office Manager/Coordinator and a Customer Relations and Marketing Manager – are included in the draft budget to help with administrative and expand our focus on customers and customer service. A third function – account management for public sector clients – would be performed by a contractor, at least until we know whether the burst of public sector work caused by stimulus funding represents a longer-term area of work. All positions are described in this document.

1. Office Manager/Coordinator.

Energy Trust has always been thin administratively**.** It is worth noting that the draft Management Review observes that our "lean" administrative structure is a potential problem and recommends that we assess our administrative support staffing more systematically. This function fits within that category. Our preliminary assessment of administrative needs has already identified these needs and this interim solution.

Since 2004, Energy Trust's Human Resource Manager has performed all human relations functions while also coordinating all office management, operations and administrative support for the organization. With growth in expectations and staffing, it is no longer possible for the Human Resources Manager to combine all human resource and office management functions and perform them well.

This recommendation would split apart human resource management responsibilities from office management responsibilities. The full-time Human Resource Manager would plan for and address employee benefits, compensation, recruitment, hiring, orientation, training, performance management and employee feedback. In addition, the Human Resource Manager would be responsible for compliance with all federal and state requirements and potentially with ARRA stimulus funding requirements.

Current administrative office management duties now performed by the Human Resource Manager would be assigned to a new Office Manager. These functions include all administrative operations and logistics responsibilities for printers, copiers and telephone systems, space, equipment, leases, receptionist functions and supplies.

2. Customer Relations and Marketing Manager.

Energy Trust is gaining ground in public awareness, and as this awareness grows, so do the demands for service. General awareness of Energy Trust has grown significantly over the past year. It was 28% in the 2008 study, and in the 2009 study, it is 42%. That's a 50% increase! Awareness is up in all regions:

	2008	2009
Total	**28%**	**42%**
Portland Metro	35%	49%
Willamette Valley, N. Coast	23%	41%
East	22%	32%
South	19%	25%

Energy Trust call volume, which in 2008 was 36,449, or 88% higher than in 2006, is now more than 4000 calls per month, another 31% increase. Our programs are serving record numbers of customers. The number of trade allies is also growing, from 750 in 2006 to1200 in 2008. We are expanding services to eastern, southern and coastal areas of Oregon. We are developing new ways to serve customers through a number of pilot programs, including EEAST and Positive Energy.

The redesign further envisions Energy Trust evolving into a more customer-focused organization, one that views our services through the eyes of customers, makes it easier for customers to take advantage of our products and services, and develops an increasingly sophisticated “front-line” of marketing and service by trade allies. All of these factors require us to put much more time, attention and strategic thought into customer service and development of the trade ally network.

Currently, all of these functions are now performed by a Customer Relations & Trade Ally Network Manager and Trade Ally Coordinator. This position would be split the functions into two areas:

The Customer Relations and Marketing Manager would:

- Engage Energy Trust program teams, trade allies, program management contractors, and others to improve the customer experience
- Manage and deliver excellent customer service through our call center contractors
- Manage and provide training and support to Energy Trust’s call center and utility customer service representatives
- Provide marketing support to the industrial and agriculture sector and the renewable energy program teams
- Jointly plan and deliver communications, promotions, events and advertising with utility managers
- Expand information sharing and training for utility customer service representatives, Energy Trust and PMC staff
- Ensure call flows and other customer intake channels and processes are easy for customers
- Align PMC and staff to provide seamless screening and matching of customers to the right efficiency and/or renewable energy services, capturing lost opportunities
- Respond to customer complaints or suggestions in a timely manner, utilizing customer feedback to continuously improve service
- Provide consistent messages to field outreach representatives, trade allies, customer relations representatives and others communicating directly with customers through training

- Provide user-friendly customer and trade ally forms and improve form processing and minimize administrative costs for trade allies and customers
- Regularly report on customer service metrics
- Ensure data capture through IT, focused on improved efficiency and effectiveness

The existing Trade Ally Manager and current Trade Ally Coordinator position would focus exclusively on trade ally network strategy, development, and management. These duties cover:

- Investment in our 1200 trade allies to create a more powerful statewide sales force through recruitment and through technical, marketing and customer service training
- Organizing trade allies into tiers, creating opportunities to become a "premier" trade ally
- Expanding on-the-ground presence in and outlying areas of the state
- Expanding work with community colleges to provide distance education sites for trade allies
- Ensuring two-way communication mechanisms for trade allies to share customer experiences and provide feedback on services and incentive offerings.
- Development of a network of “program allies” or “program affiliates” as a resource for both customers and trade allies.

3. Contractor for Public Sector Account Management.

The redesign report’s recommendation that Energy Trust create a public sector account manager has taken on a different color with the implementation of federal and state stimulus programs. The federal government is delivering unprecedented stimulus funding to Oregon and its cities, counties, tribes, other public entities and special districts. Much of this funding is already targeted for energy efficiency with future funding anticipated for renewable energy, green jobs and specifically for efficient appliances. In many cases, federal funding may allow innovation and different approaches to be tested as a complement to the work performed under existing utility funds. Such funding also comes with strict compliance and reporting requirements.

The availability of stimulus funds has generated a spike in activity from eligible organizations seeking to leverage Energy Trust funds as the required match for stimulus funds. To date, 16 cities have asked us for help in securing and allocating federal stimulus funding. The state's stimulus program, “Go Oregon,” is driving additional public sector requests for help with efficiency and solar projects. Nearly every state agency has contacted Energy Trust for some form of help – the Departments of Corrections, Justice, State Lands, Administrative Services, Transportation, and Legislative Administration (the Capitol complex). All 53 Oregon armories, facilities and military complexes are being assessed in order to secure state and federal stimulus funding.

The EEAST legislation, HB 2626, requires Energy Trust to initiate and operate several pilots in urban and rural parts of the state, and report to the OPUC by

October 2010. Financing for the EEAST pilots will likely require these communities to secure and leverage government stimulus funds.

In tandem with the states of Vermont and Wisconsin, Energy Trust has submitted a proposal for stimulus funding through the Rebuild America program. The funds would allow deep savings acquisition within the residential sector, testing new technologies and delivery approaches. Energy Trust stands to receive $1 million for five years for this collaborative investment and activity.

These and other developments place both opportunity and growing demand on Energy Trust to support public projects. To reach IRP targets, Energy Trust will need every bit of this public sector participation, and more. Reaching this level requires significant new effort in a sector where long-term relationships are important to establish and nourish and where decision-making takes time and engagement.

At the same time, stimulus funds are time-limited, with the federal program expected to end in 2012 and perhaps be carried forward through new programs. We therefore recommend using a contractor to track federal stimulus dollars and corresponding opportunities and to coordinate with the many interested parties pursuing joint working relationships. An alternative is to create a limited term full-time staff position for this work, coinciding with the timeframe for federal stimulus dollars. Staff is convinced that public sector service needs are indeed long-term and this decision can be made now or later.

4. Temporary Business Sector Coordinator, NW Natural Washington

As part of the opportunity to expand services to residential and commercial customers of NW Natural in Clark County, Washington, Energy Trust identified the need for a temporary program coordinator to serve this new customer base. Having secured the contract with NW Natural to deliver services in Washington on a one-year pilot basis, the program coordinator is on board. Funds associated with this position are a part of the contract with NW Natural and separate from other Oregon funding sources.

Primary Business Sector Coordinator duties and responsibilities include coordinating with program management contractors and program allies to facilitate the delivery of programs and initiatives on behalf of NW Natural in Washington. As a part of the business sector group, the Coordinator facilitates provides input of program tracking system data, monitors progress of NW Natural activity and helps prepare reports on the status of program implementation in Washington.

The coordinator reports to a permanent Energy Trust manager in the business sector group whose responsibilities encompass elements of program implementation on behalf of NW Natural in Washington State.

5. Homes Sector Lead

Since inception, Energy Trust has consistently demonstrated its ability to grow the amount of activity and resulting savings from the residential sector. Successful growth in activity stems from diversifying the number and type of opportunities

available to different kinds of residential customers. The following statistics compare growth in the residential sector from July 2008 to July 2009:

- Measure occurrence (excluding promotions) for single family participants was 181% of the volume from the same period last year.
- The PMC received 1,360 incentive applications in July 2009 which is a 51.28% increase compared to the 899 applications received in July 2008.
- Electric savings were four times the kWh booked during the same period last year and the HES Program achieved 205% of the monthly stretch goal.
- Gas savings were 178% of the therms booked during the same period last year, and the HES Program achieved 134% of the monthly stretch case goal.
- The HES Program has achieved 61.6% of the annual stretch goal as of the end of July which is 58% of the contractual year, indicating that the Program is well ahead of goal based on historical seasonality curves. The PMC submitted a R3 budget, which increases the therm goal by about 300,000 therms.
- The PMC reimbursed a total of $29,616.84 in cooperative marketing dollars in July 2009, compared to $11,677.33 paid out in July 2008.
- JB Insulation performed thirty-seven (37) projects in July, denoting more projects installed than any other trade ally, and marking a 370% increase from their activity in July 2008.
- The Contact Center answered 2,916 inbound calls in July 2009; which is up 7.12% compared to 2,282 calls answered in July 2008.
- In addition to completing twenty seven (27) multifamily projects in July, the PMC established a pipeline of an additional sixty six (66) projects.
- Energy savings projections are set to reach over five (5) million kWh and over 27,000 therms with forecasted incentive payments of $775,342 in the pipeline for 2009.

Looking forward, mining the residential sector for additional savings remains a critical component of achieving utility IRP targets. EEAST pilots, behavioral strategies, outreach to underserved parts of the state and full integration of solar and marketing functions all represent new residential program elements.

The organization redesign identified a missing element for the residential sector, one dedicated to strategic thinking, planning and execution for the sector as a whole. The recommendation was made to create a Sector Lead for the Homes Group, whose responsibilities would include determining the overall vision, strategic direction and market penetration goals for all customers of residential properties. Approved by the board in September 2009, this position and is now being recruited.

6. <u>Business Sector Lead</u>

Not unlike the residential sector, the commercial sector holds great promise for achieving IRP targets, especially among small commercial businesses. Over the last several years, Energy Trust has developed highly targeted approaches to serve small businesses, identifying specialized measures and approaches for restaurants, groceries, the hospitality industry, hospitals and care facilities and data centers, among others. The investment has paid off.

In 2009 the existing buildings program expects to increase energy savings by 50% - 60% compared to 2008. This will likely push the number of completed projects from roughly 1,400 in 2008 to up to 2,000 in 2009. Early 2010 estimates of program activity indicate a 10% growth over 2009, with projects over to 2,200 anticipated.

New commercial building activity is down due to slow market conditions. However, a surprising number of projects came forward in 2009 as part of the "path to net zero" pilot program. The program "sold out" in its first weeks and has been expanded for 2010. The program also plans to increase activity to serve high performance schools, leverage NEEA Better Bricks activity and prepare for new 2010 code adjustments.

Similar to the conclusion regarding the sector lead for homes, the organization redesign identified the need for a sector lead for the business group. This position was approved at the September board meeting and is currently under recruitment. As with the homes sector lead, the business sector lead will be responsible for achieving commercial market penetration goals to meet IRP targets. As with the homes sector lead, the business sector lead will strategically plan, budget, design and delivery on behalf of the commercial sector as a whole, ensuring continued success for all commercial customers.

7. Industrial Sector Coordinator

Since 2007, the industrial program has been managed in-house. At that time, the industrial program took on all administrative and managerial functions that had been performed by a program management contractor.

The program has experienced significant growth since it was taken in-house, and Energy Trust has fallen behind in its ability to adequately serve growth in existing demand within the Industry and Agriculture program. Volume has dramatically increased, with the number of projects growing from ~350 a year prior to 2008 to over 530 in 2008 and what will likely be 600 in 2009. This increase stems primarily from the deployment of prescriptive and semi-prescriptive tracks in lighting, small industrial compressed air and irrigation and motors. The volume of projects in the industrial sector continues to rise, tracking with the increase in goals for the sector.

Energy Trust is able to offer these projects to small and rural Oregon manufacturers cost-effectively, which were not served by the previous to large-custom-project approach. In spring of 2009, the NWN Industrial Gas pilot was launched, which has added over a million dollars in incentive and delivery funding for industrial gas projects. This addition represents significant new efforts for ETO in house staff, both in developing the offering, as well as training our program delivery contractors. Additional increased volume stems from services also available in Cascade Natural Gas territory. These smaller tracks are just beginning to take off with volume expected to increase going forward.

All measures and projects had been managed by one staff person, who also performs Coordinator duties. The proposed solution involved shifting the current Program Coordinator into a Project Manager role, freeing up time for complex and technical special projects to be addressed. As part of this transition, the board approved the hiring of a permanent Program Coordinator/Operations Analyst to perform administrative tasks, data analysis functions and enhance program

communications with external customers, Allies and PDCs. These transitions have been completed in the Industry and Agriculture group (previously industry sector).

8. Planning Engineer

Cost-effectiveness analysis is a threshold requirement for new measures. As such, it is important to adequately staff this function in order to avoid creating bottlenecks. Energy Trust has not kept pace with the growing volume of measures identified by program staff and contractors to be screened for cost-effectiveness. This is causing delays in program implementation and corresponding savings acquisition. The single largest area of demand is in the commercial sector, which corresponds to opportunities identified in utility Integrated Resource Plans. This includes growth in the number of commercial measures increasing from 24 in 2008 to 52 in the current queue for analysis. An additional 32 more measures are in the “future potential” category without resources to analyze them.

In addition to measure screening, growth is also being experienced in the following areas:

- Code revision in 2010 will result in a need to revise most New Commercial prescriptive measures and measure bundles
- Changes in the federal standards for fluorescent ballasts (2013) will necessitate a wholesale change in strategy for our commercial lighting retrofit program.
- Finalizing the Energy Performance Score in 2010, as required by the Legislature

These ongoing and expanded requirements led to the board authorizing recruitment of a new Planning Engineer position within the Planning and Evaluation group.

POSITION DESCRIPTION

TITLE: **OFFICE MANAGER/COORDINATOR**

REPORTS TO: **CHIEF FINANCIAL OFFICER**

BACKGROUND

Energy Trust of Oregon, Inc., is an independent nonprofit organization dedicated to energy efficiency and renewable energy development. We serve Oregon customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.

GENERAL POSITION SUMMARY

The office manager/coordinator will be responsible for full range of support in functional areas of office management and office operations/facilities management. The position also coordinates and manages office purchasing, and space and equipment planning and acquisition. Responsible for the preparation and monitoring of the administration and shared cost budget.

ESSENTIAL FUNCTIONS / MAJOR RESPONSIBILITIES

Office Management and Finance Functions

- Supervise receptionist and ensure training and development
- Arrange and supervise temporary employee assistance when needed
- Prepare and monitor annual office management and shared cost budget, including invoice review and approval
- Initiate, receive, track and approve general office purchase orders
- Review and approve authorized petty cash expenditures; maintain fund
- Complete/update credit applications and initiate payments for subscriptions and dues
- Establish and maintain document control and retention policies, including a library of published materials
- Ensure maintenance of master calendar, rolodex, distribution, phone and emergency contact databases and organization chart

Office Operations and Facilities Management Functions

- Serve as liaison to building owner/manager regarding building operations, maintenance, repairs and tenant improvements.
- Coordinate storage requirements on and off site
- Coordinate with management team and committee regarding possible office relocation
- Acquire and maintain non-computer equipment and furniture
- Ensure optimal and efficient office lighting, heating, cooling and air conditioning and efficient operation and maintenance of kitchen appliances

- Manage contracts for security system, janitorial, recycling, rental car, coffee/tea and foliage maintenance or other related service contracts
- Inventory and ensure availability of sufficient office supplies
- Performs all functions of the job in a safe and conscientious manner.

SUPERVISORY RESPONSIBILITY

The position supervises the receptionist.

POSITION REQUIREMENTS

- Minimum five years of office and facility management experience
- BA/BS in business-related field
- Proven supervisory, organizational and project management skills
- Ability to relate successfully to all levels of employee groups
- Finance and budgeting skills
- Contract management capabilities and experience
- Strong technical knowledge of office equipment
- Demonstrated computer application skills, including MS Word, Outlook, Excel and PowerPoint
- Customer service orientation and responsiveness
- Excellent organizational skills and competency

The above information is designed to outline the functions and position requirements of this job. It does *not* identify all tasks that may be expected, nor address the performance standards that must be maintained.

POSITION DESCRIPTION

TITLE: **CUSTOMER RELATIONS & MARKETING MANAGER**

REPORTS TO: **COMMUNICATIONS & CUSTOMER SERVICE SENIOR MANAGER**

BACKGROUND

Energy Trust of Oregon, Inc., is an independent nonprofit organization dedicated to energy efficiency and renewable energy development. We serve Oregon customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.

GENERAL POSITION SUMMARY

This position supports Energy Trust's customer focus priority by assuring all customers of Energy Trust experience excellent customer service from their initial point of contact through receipt of incentive payment and subsequent follow-up and re-engagement. This position will focus on customer service at Energy Trust and PMC call centers, incentive application forms, web sites, and other means of customer interaction with Energy Trust. This position will work with program staff, Program Management Contractors (PMCs), Information Technology (IT), and Communications & Customer Service (CCS) colleagues to foster customer relationship management plans and activities.

The incumbent develops and reports on metrics for customer service excellence; designs customer service procedures; ensures tracking and resolution of customer complaints; ensures consistent communication of program information to call center representatives, program staff, field representatives, and utility customer service staff; and designs and implements training sessions for internal, call center, PMC, outreach contractors, and utility staff. Additionally, this position manages communications projects and program marketing initiatives, and presents on behalf of Energy Trust to public organizations and customer groups.

ESSENTIAL FUNCTIONS / MAJOR RESPONSIBILITIES

- Monitors ongoing operations of outsourced Energy Trust call center, which handles over 4000 calls per month, to ensure highest level of customer service and satisfaction; trains call takers on new and changed Energy Trust offers; assures quality in call-taker response to customers. Identifies customer service issues that need to be resolved by the CCS team, programs, or others.
- Manages compliance with customer service standards, procedures and feedback mechanisms. Anticipates needs and monitors inbound call volume to determine proper call center staff level and ensure customer service standards and response times are met.
- Monitors operations of PMC call centers and customer service activities, providing ongoing training to assure quality and consistency in response to customer inquiries across programs.
- Supports Energy Trust's customer-focus priority by identifying opportunities for improvement and facilitating implementation of improvements organization-wide.

- Develops and implements training, resources, and tools for internal, call center, PMC, and utility staff for the purposes of improving customer relations.
- Collaborates with CCS and IT department colleagues to create and update online information resources supporting customer service processes.
- Reviews customer forms and customer-facing communications. Represents the customer's viewpoint to ensure incentive application forms are user-friendly and customer-facing communications are engaging and uncomplicated.
- Supports seamless customer referrals to Energy Trust by utility call centers, coordinating regularly with utility customer service managers and delivering training to utility staff as needed.
- Oversees automated routing of calls via IVR, and works with IT to optimize phone systems for ease of customer use and to support warm transfers from utilities.
- Manages and supports appropriate and timely response by CCS staff to incoming customer e-mails via web site and info@energytrust.org.
- Represents customer's interest in tracking and resolving customer complaints. Investigates complaints, assures appropriate resolution and documents each case, collaborating with the trade ally manager as needed. Identifies and recommends systemic improvements to eliminate situations triggering complaints.
- Designs and produces customer service reports for use with utilities, stakeholders, executive management and the OPUC.
- Develops and delivers presentations tailored to groups interested in learning more about Energy Trust.
- Manages cross-sector marketing and corporate communications projects and initiatives.
- Performs all functions of the job in a safe and conscientious manner.

SUPERVISORY RESPONSIBILITY

This position is responsible for supervision and training of third party call center representatives.

POSITION REQUIREMENTS

- Minimum of Bachelor's Degree in marketing, communications or related field.
- Minimum of five years of experience working in a customer or member services environment, with two years of manager-level experience.
- Demonstrated understanding of and commitment to excellence in customer service. Ability to diffuse potentially negative customer contact situations.
- Knowledge of Energy Trust programs and energy terminology preferred.
- Ability to use Microsoft Office suite, especially MS Word, MS Excel, and MS PowerPoint.
- Demonstrated writing, communication, public-contact, and presentation skills.
- Demonstrated ability in complaint resolution.

The above information is designed to outline the functions and position requirements of this job. It does *not* identify all tasks that may be expected, nor address the performance standards that must be maintained.

POSITION DESCRIPTION

TITLE: **PUBLIC SECTOR ACCOUNT MANAGER**

REPORTS TO: **PROGRAM DIRECTOR**

BACKGROUND

Energy Trust of Oregon, Inc., is an independent nonprofit organization dedicated to energy efficiency and renewable energy development. We serve Oregon customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.

GENERAL POSITION SUMMARY

This position coordinates Energy Trust program delivery to cities, counties, and other government entities. In particular, this position will be tasked with coordinating program delivery for projects related to American Recovery and Reinvestment Act of 2009 (ARRA), Go Oregon! and Oregon Energy Efficiency and Sustainable Technology Act (EEAST) pilot projects. Ongoing, the account manager will lead or work in multiple teams providing coordination and customer support for commercial, industrial and residential market programs delivered though governmental jurisdictions.

ESSENTIAL FUNCTIONS AND MAJOR RESPONSIBILITIES:

- Oversee coordination of program services involved in EEAST pilot projects.
- Oversee coordination of program services involved in ARRA and Go Oregon! funded projects.
- Ensure public sector customers have one point of contact.
- Perform liaison role between Energy Trust and program contractors and public sector stakeholders.
- Increase engagement through relationship selling of energy solutions to public sector customers.
- Identify methods for shepherding prospective projects through the program and application process.
- Work with program management contractors and program allies in project generation and facilitate the delivery of comprehensive cross program services.
- Capture opportunities to promote multiple programs to individual public entities or institutions. Work with program contractors to collaborate in implementing projects across programs and sectors.
- Coordinate with sector leads, program managers, program management contractors, and marketing staff to modify various program delivery efforts including marketing pieces, and correspondences to address unique aspects of public sector procurement.
- Develop and implement innovative methods of engaging public sector customers such as workshops and small working groups.
- Identify and work to address barriers to increased participation by public sector customers.

SUPERVISORY RESPONSIBILITY

This position may supervise support position(s) through a team structure.

EXPERIENCE REQUIREMENTS:

- Minimum of Bachelors degree and five years experience in project management and or public sector account management.
- Strong knowledge of Microsoft Excel, Power Point and Word software applications. Ability to build spreadsheet models for budgets, forecasts, project management, etc.
- In depth understanding of Oregon public finance and procurement process.
- Strong interpersonal and relationship sales experience.
- Excellent communication skills.
- Experience in all phases of managing and coordinating contractor activities, from internal approval of funding, writing scopes of work, soliciting bids and proposals , negotiating and finalizing contracts, to managing the execution of the contract.
- Experience developing processes, and leading cross functional teams.
- Significant knowledge and demonstrated experience managing energy efficiency or renewable energy generation strongly preferred.

The above information is designed to outline the functions and position requirements of this job. It does *not* identify all tasks that may be expected, nor address the performance standards that must be maintained.

POSITION DESCRIPTION

TITLE: **BUSINESS SECTOR COORDINATOR**

REPORTS TO: **SR. BUSINESS SECTOR MANAGER**

BACKGROUND

Energy Trust of Oregon, Inc., is an independent nonprofit organization dedicated to energy efficiency and renewable energy development. We serve Oregon customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.

GENERAL POSITION SUMMARY

The coordinator will provide implementation and customer coordination support to the Energy Trust Business Sector managers responsible for Business Sector program delivery.

ESSENTIAL FUNCTIONS / MAJOR RESPONSIBILITIES

- Support Business Sector Group activities.
- Input energy efficiency information into program tracking system as required.
- Develop various Excel spreadsheets tools in support of Business Sector initiatives.
- Assist sector manager and program management contractors in developing various program forms, marketing pieces, and correspondences.
- Work with program management contractors and program allies to facilitate the delivery of Energy Trust programs and initiatives.
- Assist Communications Manager with efforts to facilitate cross program referrals and plan to integrate program services between individual Energy Trust programs.
- Perform research tasks as requested.

SUPERVISORY RESPONSIBILITY

This position may obtain services of and direct the work of interns.

POSITION REQUIREMENTS

- Strong analytical and internet research skills.
- Experience working on multiple concurrent team-based initiatives.
- Experience managing processes and projects.
- Strong knowledge of Microsoft Excel, PowerPoint and Word software applications. Ability to build spreadsheet models based on input from managers of concept and data.
- Minimum of Bachelors degree and two years experience in technical field.

The above information is designed to outline the functions and position requirements of this job. It does *not* identify all tasks that may be expected, nor address the performance standards that must be maintained.

POSITION DESCRIPTION

TITLE: **HOMES SECTOR LEAD**

REPORTS TO: **DIRECTOR OF ENERGY PROGRAMS**

BACKGROUND

Energy Trust of Oregon, Inc., is an independent nonprofit organization dedicated to energy efficiency and renewable energy development. We serve Oregon customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.

GENERAL POSITION SUMMARY

Senior management position responsible for establishing the long-term vision, comprehensive strategy and achievements of all homes sector conservation and solar energy programs.

ESSENTIAL FUNCTIONS / MAJOR RESPONSIBILITIES

- Sets overall vision and strategic direction for energy efficiency and solar energy services to customers of residential properties
- Provides input to Energy Trust long-term strategic plan and two-year action plans to fully realize utility Integrated Resource Plan potential and achieve targets
- Establishes market sector penetration goals and program priorities for the homes sector
- Ensures program innovation is accomplished in a coordinated, intentional manner where tests are well designed and provide solid, reliable conclusions
- Develops and manages homes sector annual budget of approximately $45 million
- Ensures progress toward and achievement of two-year action plan activities and corresponding measureable goals
- Supports program managers in planning for and proactively responding to market changes and defining and pursuing new opportunities, directions and strategies
- Coordinates with planning and evaluation functions to identify and pursue market research and pilot programs in support of new homes development and sector activities
- In coordination with program managers, oversees competitive bidding and contract negotiation process for complex, multi-year contracts with Program Management Contractors, ensuring full contract execution and achievement of deliverables
- Provides fiduciary oversight to ensure homes sector programs and Program Management Contractors are operating within Board approved budgets and policies
- Hires, supervises and provides direct support, feedback and professional development for homes sector staff of approximately 7
- Coordinates with Information Technology staff to ensure necessary data collection, analysis and reporting needs are identified and met

- Serves as liaison to and coordinates with other Energy Trust functions, including others sectors and renewable energy programs, operations, communications and customer services, legal and contracts, finance and administration and human resources
- Reviews and presents resolutions, program updates and reports to a variety of audiences, including staff, advisory councils, board of directors, Oregon Public Utility Commission, elected officials, utilities and other parties.
- Represents Energy Trust interests among other related organizations, engaging in policy discussions, sharing accomplishments and best practices, pursuing mutual opportunities and otherwise coordinating activities including and not limited to:
    - Participation in national, state and regional stakeholder associations and forums such as the American Consortium for an Energy Efficient Economy (ACEEE), the Consortium for Energy Efficiency (CEE), the Bonneville Power Administration, the NW Power and Conservation Council, the NW Energy Efficiency Task Force, Solar Energy Industries Association (SEIA), American Solar Energy Society (ASES), and others
    - Program planning and implementation with the Northwest Energy Efficiency Alliance
    - Quarterly Oregon Department of Energy, OPUC and Energy Trust meetings

SUPERVISORY RESPONSIBILITY

This position supervises Business Sector managers and support staff, provides mentoring and support to senior level supervisors and participates in sector staff hiring

POSITION REQUIREMENTS

- Outstanding leadership and effective personnel development and management skills
- Demonstrated strategic thinking and planning capabilities
- Ability to define market directions and develop program goals, actions, approaches and key indicators
- Strong interpersonal, staff and contractor management skills
- Demonstrated energy related program development, oversight and management experience
- Minimum five years experience in all phases of hiring and managing contractors, including competitive bidding, negotiation and contract execution
- Related responsibilities in developing and managing comparable budgets
- Customer service orientation
- Strong analytical, writing, listening, presentation and communication skills
- Minimum of Bachelors degree plus five years energy-related experience in the homes sector
- Certified Energy Manager credential within 6 months of accepting position

The above information is designed to outline the functions and position requirements of this job. It does *not* identify all tasks that may be expected, nor address the performance standards that must be maintained.

POSITION DESCRIPTION

TITLE: **BUSINESS SECTOR LEAD**

REPORTS TO: **DIRECTOR OF ENERGY PROGRAMS**

BACKGROUND

Energy Trust of Oregon, Inc., is an independent nonprofit organization dedicated to energy efficiency and renewable energy development. We serve Oregon customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.

GENERAL POSITION SUMMARY

Senior management position responsible for establishing the long-term vision, comprehensive strategy and achievements of all business sector conservation and solar energy programs.

ESSENTIAL FUNCTIONS / MAJOR RESPONSIBILITIES

- Sets overall vision and strategic direction for energy efficiency and solar energy services to customers of commercial buildings, multi-family residential properties and non-profit organizations
- Provides input to Energy Trust long-term strategic plan and two-year action plans to fully realize utility Integrated Resource Plan potential and achieve targets
- Establishes market sector penetration goals and program priorities for the business sector
- Ensures program innovation is accomplished in a coordinated, intentional manner where tests are well designed and provide solid, reliable conclusions
- Develops and manages business sector annual budget of approximately $45 million
- Ensures progress toward and achievement of two-year action plan activities and corresponding measureable goals
- Supports program managers in planning for and proactively responding to market changes and defining and pursuing new opportunities, directions and strategies
- Coordinates with planning and evaluation functions to identify and pursue market research and pilot programs in support of new business development and sector activities
- In coordination with program managers, oversees competitive bidding and contract negotiation process for complex, multi-year contracts with Program Management Contractors, ensuring full contract execution and achievement of deliverables
- Provides fiduciary oversight to ensure business sector programs and Program Management Contractors are operating within Board approved budgets and policies
- Hires, supervises and provides direct support, feedback and professional development for business sector staff of approximately 7
- Coordinates with Information Technology staff to ensure necessary data collection, analysis and reporting needs are identified and met

- Serves as liaison to and coordinates with other Energy Trust functions, including others sectors and renewable energy programs, operations, communications and customer services, legal and contracts, finance and administration and human resources
- Reviews and presents resolutions, program updates and reports to a variety of audiences, including staff, advisory councils, board of directors, Oregon Public Utility Commission, elected officials, utilities and other parties.
- Represents Energy Trust interests among other related organizations, engaging in policy discussions, sharing accomplishments and best practices, pursuing mutual opportunities and otherwise coordinating activities including and not limited to:
    - Participation in national, state and regional stakeholder associations and forums such as the American Consortium for an Energy Efficient Economy (ACEEE), the Consortium for Energy Efficiency (CEE), the Bonneville Power Administration, the NW Power and Conservation Council, the NW Energy Efficiency Task Force, Solar Energy Industries Association (SEIA), American Solar Energy Society (ASES), and others
    - Program planning and implementation with the Northwest Energy Efficiency Alliance
    - Quarterly Oregon Department of Energy, OPUC and Energy Trust meetings

SUPERVISORY RESPONSIBILITY

This position supervises Business Sector managers and support staff, provides mentoring and support to senior level supervisors and participates in sector staff hiring

POSITION REQUIREMENTS

- Outstanding leadership and effective personnel development and management skills
- Demonstrated strategic thinking and planning capabilities
- Ability to define market directions and develop program goals, actions, approaches and key indicators
- Strong interpersonal, staff and contractor management skills
- Demonstrated energy related program development, oversight and management experience
- Minimum five years experience in all phases of hiring and managing contractors, including competitive bidding, negotiation and contract execution
- Related responsibilities in developing and managing comparable budgets
- Customer service orientation
- Strong analytical, writing, listening, presentation and communication skills
- Minimum of Bachelors degree plus five years energy-related experience in the business sector
- Certified Energy Manager credential within 6 months of accepting position

The above information is designed to outline the functions and position requirements of this job. It does *not* identify all tasks that may be expected, nor address the performance standards that must be maintained.

POSITION DESCRIPTION

TITLE: **INDUSTRIAL SECTOR COORDINATOR**

REPORTS TO: **SENIOR INDUSTRIAL SECTOR MANAGER**

BACKGROUND

Energy Trust of Oregon, Inc., is an independent nonprofit organization dedicated to energy efficiency and renewable energy development. We serve Oregon customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.

GENERAL POSITION SUMMARY

The coordinator will provide implementation support to Energy Trust's industrial energy efficiency program offered throughout Oregon State.

ESSENTIAL FUNCTIONS / MAJOR RESPONSIBILITIES

- Manage all administrative aspects of the implementation of the industrial program.
- Input and manage energy project information in program tracking system as required.
- Support program budgeting, forecasting and financial reporting.
- Assist sector manager in developing various program forms, marketing pieces, and correspondences.
- Provide first point of contact and referrals for industrial customers, potential allies and other incoming requests for information or assistance.
- Work with program delivery contractors and program allies to facilitate the delivery of Energy Trust programs and initiatives.
- Assist Communications Manager and Sector Manager with efforts to improve program outreach and communications tools and services.
- Perform research and outreach tasks as requested.

SUPERVISORY RESPONSIBILITY

This position may obtain services of and direct the work of interns.

POSITION REQUIREMENTS

- Strong knowledge of Microsoft Excel, Power Point and Word software applications.
- Strong analytical and internet research skills.
- Experience with customer service, sales and/ or outreach.
- Experience working on multiple team-based initiatives.
- Experience managing people or processes and projects.

- Experience in energy related fields.
- Minimum of Bachelor's Degree
- Two years experience in business/program administration and technical sales or customer communications.

The above information is designed to outline the functions and position requirements of this job. It does *not* identify all tasks that may be expected, nor address the performance standards that must be maintained.

POSITION DESCRIPTION

TITLE: **PLANNING ENGINEER**

REPORTS TO: **PLANNING & ECONOMIC ANALYSIS MANAGER**

BACKGROUND

Energy Trust of Oregon, Inc., is an independent nonprofit organization dedicated to energy efficiency and renewable energy development. We serve Oregon customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas.

GENERAL POSITION SUMMARY

The Planning and Economic Analysis Group is responsible for management and implementation of Energy Trust planning processes for action planning, program forecasting, screening of prescriptive measures, and incorporating evaluation findings and programmatic and engineering lessons learned into reports of efficiency program savings and renewable generation. The Planning Engineer (P/E) will provide primary support for the prescriptive efficiency measure approval process. In this capacity the P/E will accelerate review, technical enhancement, approval, and documentation of prescriptive and quasi-prescriptive efficiency measures and rebates. Quasi-prescriptive measures are ones for which rebates and/or savings are based on a defined formula using project specific parameters. The P/E will also contribute to the oversight of technical field trials commissioned by the Energy Trust and/or regional and national groups to verify measure savings.

This is a due diligence process insuring consistency and viability of program planning developers' work. While planning has initiated development of measures, we are increasingly acting as cost-effectiveness reviewers of measures proposed and documented by Program Management Consultants (PMCs). Planning relies on consulting expert engineers to perform many of these technical reviews. This position will increase the technical capacity to perform some of the more straightforward work in-house while augmenting staff resources to oversee the expert engineers and facilitate communication with the program managers and PMCs. However, where there is inadequate technical information about the performance of recently commercialized technologies, then Planning initiates or co-funds field trials. This is done only for the highest-priority technologies where another organization has not played this role.

The P/E is also responsible for technical analysis, coordination, reporting and communications regarding renewable energy and efficiency programs. The P/E will support policy work and will participate in the development of technical options for program oversight and tracking, negotiation with utilities, regulators, and interested parties, analysis of resource and program options, analysis of possible program and corporate policies and integration of resource supply estimates into program forecasts.

This position will work under the supervision of the Manager for Planning and Economic Analysis and in coordination with Evaluation, Information Technology, Energy Efficiency and Renewable Energy staff, and program contractors. The successful applicant will be responsible for assuring that analyses meet Energy Trust purposes, are reliable, responsive to program needs and well-documented.

ESSENTIAL FUNCTIONS / MAJOR RESPONSIBILITIES

- Work closely with the engineering consultants, program managers, and PMC engineers to approve measures.
- Assist in the management and oversight of engineering contractors for the Planning group.
- Bring data and options for new measures from the Northwest Energy Efficiency Alliance, Regional Technical Forum, Consortium for Energy Efficiency, and other outside sources, for program consideration;
- Help design and oversee field trials of new technologies.
- Assess consistency of proposed new programs with innovative technical features with Energy Trust's pilot development process.
- Establish parameters for review;
- Work with PMCs and expert engineers to get enhanced documentation;
- Develop cost/benefit analyses
- Review or sometimes modify PMC-provided cost-benefit analyses; Review the simple measures and make measure changes (e.g., rebate change that's a simple change to B/C ratios);
- Manage the development of market transformation models for measures where the costs are justified by multi-year, market-wide changes in market preferences;
- Provide memos to approve measures, document key parameters, define the scope and limitations of approval (e.g., single-family only or just for a pilot with specific research requirements during the pilot phase);
- Work with IT and programs to convert the approvals into measures recorded in program tracking systems (FastTrack);
- Confirm that FastTrack parameters for new or revised measures are correct.
- Maintain and enhance archives for cost-effectiveness decision making.

The applicant will also support other planning staff in the following roles:

- Assist the Manager in working with utilities, regulators and other interested parties to develop and enhance the framework for oversight and tracking of Energy Trust's programs. This includes systems for proposing programs and establishment of performance measures for tracking success.
- Help develop internal systems for assigning program funds and performance that allow attribution to Energy Trust's multiple funding sources and expresses cost and savings consistent with the individual performance requirements and oversight regimes of each.
- Integrate resource supply estimates into forecasts of potential program activity, and to compare program activity to resource supply estimates. Use related analyses to support strategic program planning and interaction/negotiations with Program Management Contractors.
- Develop efficiency and renewable program options and working with program, evaluation, and planning personnel and utility personnel help select, document, and propose those options.
- Make public presentations and facilitate discussions regarding program and performance metric options.
- Work closely with the utilities that the Energy Trust serves to integrate Energy Trust and utility resource planning.

- Support above market cost analyses of renewable resource options.
- Performs all functions of the job in a safe and conscientious manner.

SUPERVISORY RESPONSIBILITY

This position has no staff supervisory responsibilities. The Planner/Engineer will oversee the work contractors, suppliers and/or vendors as necessary in the course of managing specific programs and other efforts.

POSITION REQUIREMENTS

- Willingness and skills to do a combination of communications and coordination, documentation, and detailed technical work.
- Demonstrated ability to work analytically at both a detailed and strategic level.
- Excellent verbal and written communication skills. In particular, ability to analyze complex technical issues and succinctly convey conclusions, inferences, and applications in general terms understandable to diverse technical and public audiences.
- Hands-on experience applying resource economics to investments in energy efficiency and renewable resources.
- Ability to manage technical contractors
- Experience with applying engineering concepts in a pragmatic way to help assess what efficiency measures will typically cost and save.
- Enthusiasm and flexibility for working with an organization that is can-do and nimble, but has extensive external accountabilities and communications needs.
- Experience and proficiency with documentation techniques and systems.
- Research design experience.
- Strong knowledge of spreadsheet analysis tools
- Ability to review and troubleshoot complex spreadsheet analyses.
- Ability to work independently with minimum supervision.
- Minimum bachelor's degree in Engineering or equivalent training and certification (e.g. Physics degree, or related quantitative degree with a P.E.)
- Experience or coursework in Business and Economics, especially as pertains to project assessment using NPV, IRR and other quantitative economic criteria.
- Knowledge of commercial and industrial processes such as heat recovery and cogeneration.
- Experience with utility regulation and with renewable and efficiency programs is preferred.

The above information is designed to outline the functions and position requirements of this job. It does *not* identify all tasks that may be expected, nor address the performance standards that must be maintained.