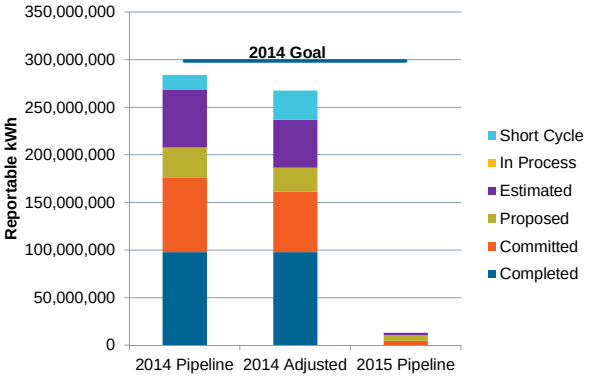
Energy Efficiency Summary *

All programs; not including NEEA

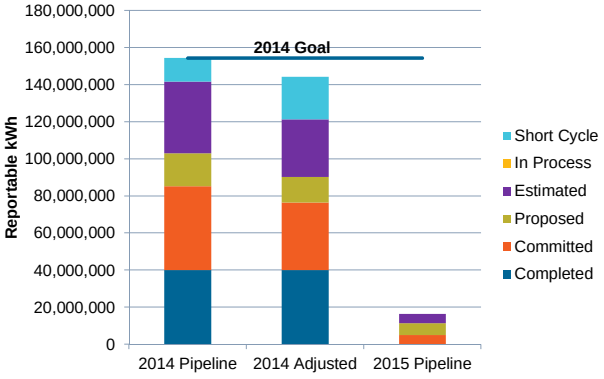
July 1, 2014

Combined Efficiency		PGE	PAC	NWN	CNG
Achievement	2014 Achievement to Date (Rpt kWh or therm)	97,827,142	40,056,753	1,642,058	144,753
	To date % of 2014 Goal	33%	26%	31%	31%
Context	Historical % of actual accomplishment	34%	26%	34%	27%
Budget	To Date % of Incentive Budget Spent	10%	17%	13%	8%

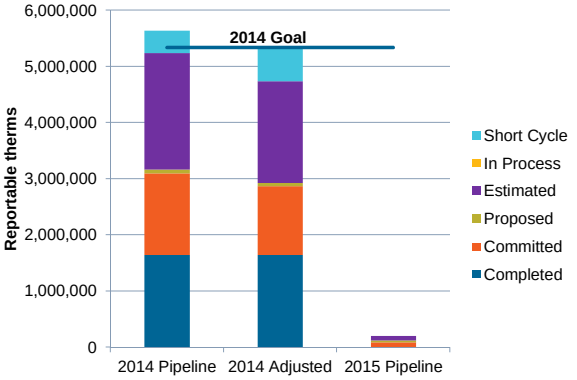
PGE Savings Pipeline 2014-2015



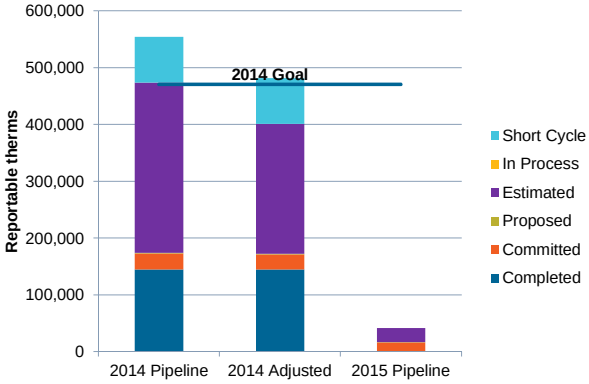
PAC Savings Pipeline 2014-2015



NWN Savings Pipeline 2014-2015



CNG Savings Pipeline 2014-2015



2014 Adjusted Pipeline percent of Goal	
PGE: 89.66%	**PAC:** 93.57%
NWN: 100.57%	**CNG:** 102.39%

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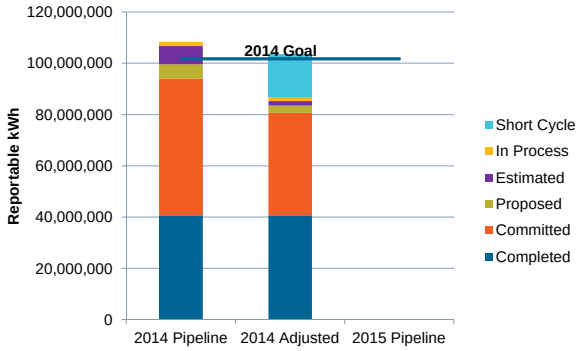
Industrial Sector Summary* **July 1, 2014**

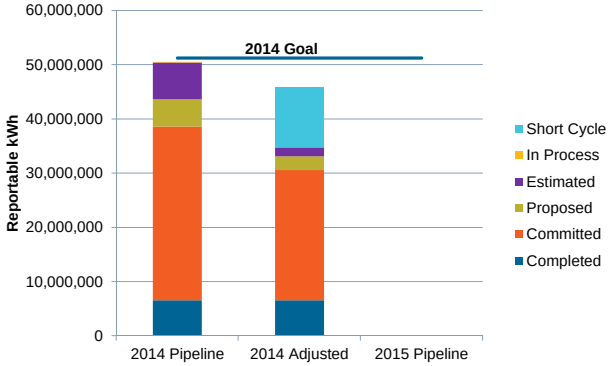
Production Efficiency; not including NEEA

Program: Industrial		PGE	PAC	NWN	CNG
Achievement	2014 Achievement to Date (Rpt kWh or therm)	40,745,567	6,550,206	324,300	12,398
	To date % of goal	40%	13%	28%	28%
Budget Context	Historical % of actual accomplishment	11%	16%	26%	2%
	To Date % of Incentive Budget Spent	24%	17%	19%	17%

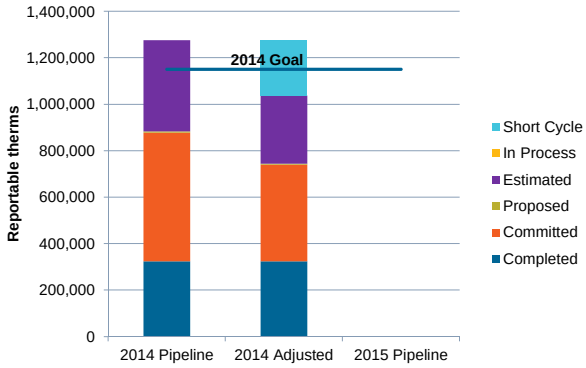
PGE Savings Pipeline 2014-2015



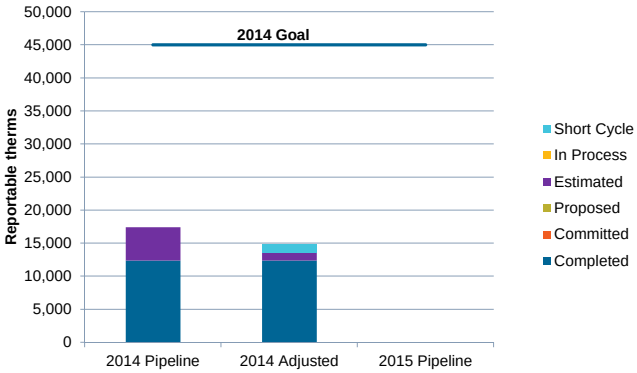
PAC Savings Pipeline 2014-2015



NWN Savings Pipeline 2014-2015



CNG Savings Pipeline 2014-2015



2014 Adjusted Pipeline percent of Goal	
PGE: 100%	**PAC:** 89%
NWN: 111%	**CNG:** 33%

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INDUSTRIAL AND AGRICULTURAL SECTOR

PROGRESS TO GOALS

Sector overall

- The industrial and agricultural sector is on track to meet electric and gas goals for 2014.
- Through Q2, electric savings are 32 percent higher than savings in Q2 2013. Gas savings are 37 percent higher than the past three years' average.
- One area of marked improvement is savings achieved by the streamlined track. Total savings from lighting, calculated and prescriptive projects through Q2 are higher than prior years.

PGE

- The sector achieved 41 percent of savings goal in PGE territory, significantly more than historical averages.
- The projected 2014 savings pipeline for PGE stands at 100 percent of annual goal, compared to 110 percent of goal at this time last year.

Pacific Power

- The sector achieved 13 percent of savings goal in Pacific Power territory, slightly lower than historical averages.
- The projected 2014 savings pipeline for Pacific Power stands at 89 percent of annual goal, compared to 76 percent of goal at this time last year.

NW Natural

- The sector achieved 28 percent of savings goal in NW Natural territory, slightly higher than historical averages.
- The projected 2014 savings pipeline for NWN stands at 111 percent of annual goal, nearly identical to this time last year.

Cascade Natural Gas

- The sector achieved 28 percent of savings goal in Cascade Natural Gas territory, significantly higher than historical averages.
- To boost savings, the program launched a bonus exclusively for Cascade Natural Gas customers in Q2. Participants who complete eligible custom or prescriptive gas savings project can receive a 20 percent bonus in addition to standard incentives.

SOURCES OF SAVINGS, TRENDS

Sector overall

- Q2 has provided further confirmation that the increased custom lighting incentives are having a positive impact on savings acquisition and project pipeline development. In addition, uptake of LED products in lighting projects is increasing more quickly than anticipated with the majority of lighting savings coming from LED upgrades. In 2013, approximately 20 percent of savings came from LED upgrades.

PGE

- Completion of a megaproject accounted for more than two-thirds of savings in PGE territory in Q2.
- While roughly 75 percent of savings through Q2 came from the custom track, lighting projects accounted for 18 percent of savings and the streamlined industrial track accounted for 8 percent of year-to-date savings.
- Fast-acting doors in refrigerated spaces are an emerging source of savings within the streamlined industrial track, accounting for nearly 20 percent of year-to-date savings.

Pacific Power

- Through Q2, 55 percent of savings came through the custom track, with 23 percent from lighting projects and 21 percent from the streamlined industrial track, consisting largely of compressed air and irrigation upgrades.

NW Natural

- Several custom projects completed in NW Natural territory during Q2, and custom track savings accounted for 63 percent of savings through Q2. The remaining savings came largely from calculated and prescriptive greenhouse projects through the streamlined industrial track.

Cascade Natural Gas

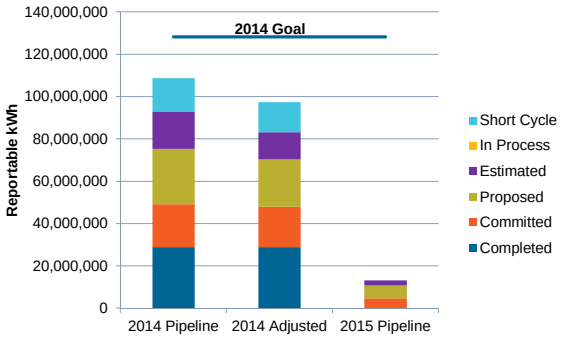
- Savings in Cascade Natural Gas territory resulted from a prescriptive space heating project.

Commercial Programs Summary* **July 1, 2014**

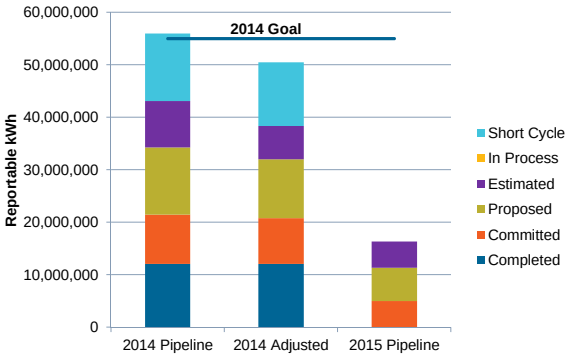
New Buildings, Existing Buildings and Existing Multifamily; not including NEEA

Commercial Sector		PGE	PAC	NWN	CNG
Achievement	2014 Achievement to Date (Rpt kWh or therm)	28,882,895	12,101,929	524,576	65,257
	To date % of goal	23%	22%	26%	22%
Context	Historical % of actual accomplishment	23%	30%	19%	23%
Budget	To Date % of Incentive Budget Spent	20%	19%	18%	19%

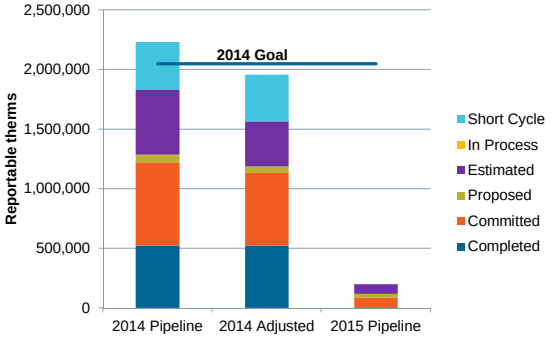
PGE Savings Pipeline 2014-2015



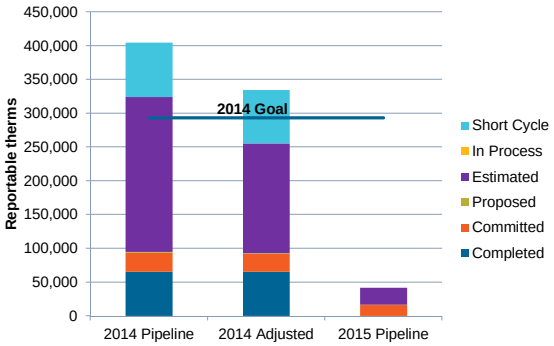
PAC Savings Pipeline 2014-2015



NWN Savings Pipeline 2014-2015



CNG Savings Pipeline 2014-2015



2014 Adjusted Pipeline percent of Goal	
PGE: 76%	**PAC:** 92%
NWN: 95%	**CNG:** 114%

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COMMERCIAL SECTOR

PROGRESS TO GOALS

Sector overall

- The commercial sector is on track to exceed goal in Cascade Natural Gas territory and approach goal in NW Natural territory. While New Buildings and the multifamily initiative exceeded historical gas accomplishments, Existing Buildings is behind historical gas accomplishments.
- Existing Buildings and the multifamily initiative are planning increase to base custom gas incentives and offer a short-term increase on the custom project incentive to drive participation and bring savings in line with 2014 goals.
- Existing Buildings and multifamily initiative launched prescriptive bonuses to help reach goals.
- Multifamily brought on additional resources to increase direct installation of light bulbs, showerheads and faucet aerators.
- New Buildings launched enrollment bonuses for multifamily projects to maximize program participation in this market sector.
-

SOURCES OF SAVINGS, TRENDS

Sector overall

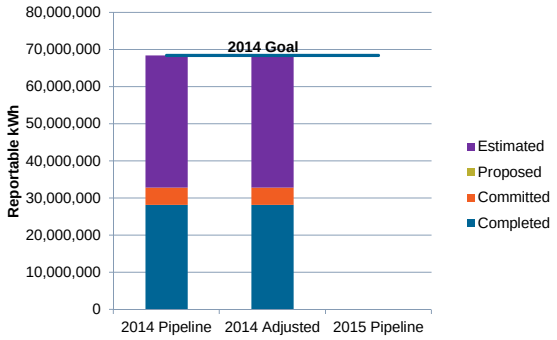
- Existing Buildings savings and pipeline are behind expectations for both electric and gas. SEM savings are lagging due to the timing of projects but are expected to significantly exceed goals by the end of the year.
- Emphasis on serving smaller customers continued in 2014 with outreach and trade ally recruitment resulting in more projects with customers in rural areas.
- New Buildings activity and interest remains at an all-time high with 152 enrollments in Q2. Enrollments were strong across all four utility territories, especially in Cascade Natural Gas territory and central Oregon.
- Direct installation of CFLs, faucet aerators and showerheads comprised the majority of gas and electric savings for the multifamily initiative.
- New data centers provide substantial electric savings yet continue to be difficult to predict. In PGE, one data center delayed its construction timeline and is now expected to close in 2016 instead of 2014, as was originally planned.
- The sector received responses to a request for proposals for a Pay for Performance pilot.
- In collaboration with Oregon Department of Energy, Energy Trust completed several energy studies for K-12 schools expected to install measures this summer. Existing Buildings refocused effort to reach out to small school.
- Existing Buildings continued to expand outreach to non-lighting trade allies including food service dealers, insulation and roofing installers and HVAC vendors.
- Existing Buildings and Multifamily launched bonus incentives for prescriptive measures including boilers, ductless heat pumps, package terminal heat pumps and select foodservice equipment and steam traps in schools.
- Multifamily launched a customer-facing Energy Savings Action Plan report that aggregates and ranks savings opportunities by return on investment, the cost of delaying upgrades and non-energy benefits .
- Multifamily streamlined mid-stream incentive promotions for refrigerators and clothes washers to encourage higher distributor participation and reduce the program staff time required to manage the promotions.
- Work continued with local, regional and national organizations to develop and deploy an on-bill repayment pilot, MPower Oregon, with two projects completed during Q2.
- During Q2, New Buildings conducted 122 outreach activities (lunch and learns, networking events and account management) in regional locations. These efforts can directly be connected to the higher enrollment numbers, especially in rural areas.
- Existing Buildings, multifamily and Production Efficiency programs continued to collaborate, with a focus on streamlining and sharing common resources and making referrals between programs.
- More than 200 participants from across the state attended an Allies for Efficiency training on net-zero energy.

Residential Programs Summary* **July 1, 2014**

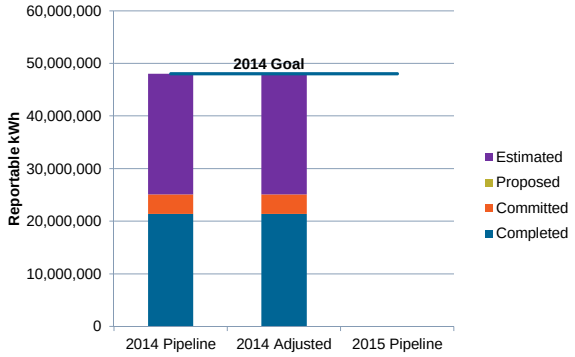
Existing Homes, and New Homes and Products; not including NEEA

Residential Sector		PGE	PAC	NWN	CNG
Achievement	2014 Achievement to Date (Rpt kWh or therm)	28,198,680	21,404,618	793,181	67,097
	To date % of goal	41%	45%	37%	51%
Context	Historical % of actual accomplishment	36%	38%	37%	40%
Budget	To Date % of Incentive Budget Spent	38%	39%	32%	30%

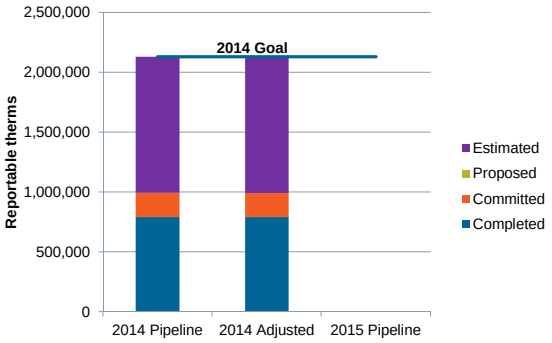
PGE Savings Pipeline 2014-2015



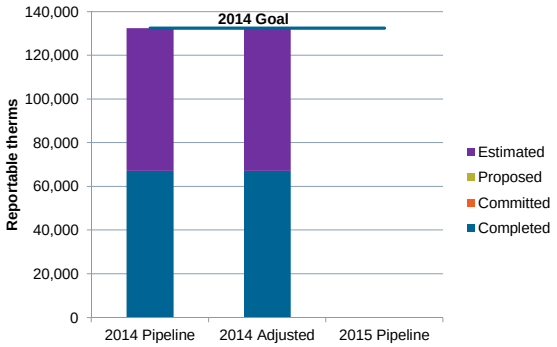
PAC Savings Pipeline 2014-2015



NWN Savings Pipeline 2014-2015



CNG Savings Pipeline 2014-2015



2014 Adjusted Pipeline percent of Stretch Goal	
PGE: 100%	**PAC:** 100%
NWN: 100%	**CNG:** 100%

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RESIDENTIAL SECTOR

PROGRESS TO GOALS

Sector overall

- The residential sector is on track to meet electric and gas goals for 2014.
- A Savings Action Plan, implemented in Q1, bolstered savings in the first half of the year. The action plan included spring weatherization bonuses for customers of all utilities, spring fireplaces bonuses in for Cascade Natural Gas customers, promotions of LivingWise Kits in schools and Energy Saver Kit promotions.
- The spring Energy Saver Kit campaign and reintroduction of LivingWise kits contributed the majority of electric and gas savings in Q2. Direct installations of light bulbs, faucet aerators and showerheads comprised 80 percent of electric savings, with 12 percent of savings from HVAC, 5 percent from weatherization and 3 percent from water heating measures. Direct installations of light bulbs, faucet aerators and showerheads comprised 64 percent of gas savings, with 15 percent of savings from HVAC, 19 percent from weatherization and 2 percent from water heating measures.
- Clean Energy Works and home performance measures contributed fewer-than-expected savings than expected. Many projects are in process and strong savings are anticipated in Q3 and Q4.

SOURCES OF SAVINGS, TRENDS

Sector overall

- A Western Regional Utility Network promotion with Sears-Kenmore refrigerators launched on May 30 and ran through June 29. The promotion resulted in 33 refrigerators purchased, and retailers provided positive feedback on the effort.
- Spa covers, windows, heat pump water heaters and heat pumps are performing above 2013 levels and driving core measure electric savings.
- Through the SmartDrips campaign, the City of Portland Bureau of Transportation and Portland Water Bureau began distributing efficient showerheads on March 1. Energy Trust delivered 400 showerheads to Portland Water Bureau for distribution through their online and phone ordering systems.
- LEDs already achieved 123 percent of annual savings goal through Q2.
- The Existing Homes program launched and began promotion of a new $350 incentive for high-efficiency pool pumps in Q2.
- Existing Homes insulation and gas hearth measures performed below Q2 2013 levels. As a result, Energy Trust increased outreach at health and retail vendors.
- The volume of Clean Energy Works projects are below 2013 levels for Q2 for both gas and electric.
- To drive ductless heat pump savings in electric territories, Existing Homes planned for a summer ductless heat pump bonus, expanded eligibility requirements and developed of a fixed-price offering for manufactured homes.

PGE

- There were 47 electrically heated homes built and third-party verified in Portland General Electric territory.
- A total of 8,500 compact fluorescent light bulb A-lamp, globes, reflectors and twists were distributed through PGE community offices.
- During Q2, 1,700 Carry Home Savings kits were delivered and 1,800 kits were processed.
- A total of 2,293 refrigerators were collected for recycling in PGE territory.

Pacific Power

- There were 35 electrically heated homes built and third-party verified in Pacific Power territory.
- A total of 1,096 refrigerators were collected for recycling in Pacific Power territory.

NW Natural

- Gas savings were lower-than-expected in Q2, following higher-than-expected gas savings in Q1. Gas savings are anticipated to increase in the remainder of 2014.
- There were 440 gas-heated homes built and third-party verified in NW Natural territory.
- In Q2, 209 gas-heated new homes received air sealing measures in NW Natural territory.
- The 2014 Ultimate Open House featured 25 homes rated with EPS. The tour reached 22 unique builders and provided information regarding EPS opportunities.

Cascade Natural Gas

- The sector implemented a showerhead direct installation initiative in the Bend area, which contributed 4.5 percent of savings goal for Cascade Natural Gas territory.
- There were 45 gas-heated homes built and third-party verified in Cascade Natural Gas territory.