

This Energy Trust quarterly report covers the period 7/1/2008 through 9/30/2008, the third quarter of the year (Q3). The report addresses progress toward 2008 annual and 2012 strategic plan energy saving and renewable energy generation goals. It also includes corresponding revenue and expenditure information. The number of completed projects and incentives paid during the quarter are tallied, along with other quarterly activity highlights.

## **I. QUARTERLY HIGHLIGHTS**

### **I. General**

- With electric efficiency spending remaining below budget and gas spending coming close to budget, we are expecting by the end of 2008 to achieve 95% of the best case electric efficiency annual goal and to exceed the best case gas annual goal by over 9%. We forecast 34 aMW in electric efficiency savings at the end of '08, slightly under the 35 aMW saved in 2007.\* The forecasted savings of 2.5 million annual therms in 2008 would exceed actual 2007 savings of 2.3 million, making this the highest gas savings results achieved to date.
- By year end, we expect to add 34.8 average megawatts of new renewable energy generation, a dramatic increase over prior years and well beyond the 2008 best case annual goal.
- Electric efficiency projects completed during the quarter are expected to save 4.8 average megawatts. Overall electric efficiency expenditures for the quarter were 33% under budget, continuing the trend from Q1 and Q2 and the expectation that the majority of savings will be acquired in the last quarter of the year. Electric energy savings in the quarter represent 14% of the 2008 year-end best case goal of 36 average megawatts and 18% of the conservative case goal of 27 average megawatts.
- Since March 1, 2002, these electric efficiency programs have cumulatively saved 174 average megawatts. When savings from self-directed industrial projects are added, the total represents 64% of Energy Trust's 2012 strategic goal. This is equivalent to the annual electric consumption of about 150,000 average Oregon homes.
- Gas efficiency projects completed during the quarter are expected to save 383,469 annual therms. Gas expenditures for the third quarter were 1% under budget. Gas efficiency savings in the quarter represent 22% of the conservative goal 2008 annual goal of 1.7 million annual therms and 17% of the best case goal of 2.3 million annual therms.
- Since gas programs began in 2003, cumulative savings of 8.1 million annual therms have been realized, accounting for 38% of the current 2012 goal. This is equivalent to providing gas to almost 16,000 homes.
- Renewable energy projects completed during the quarter are expected to generate 30.2 average megawatts, the vast majority of this from the GoodNoe Hills wind project for Pacific Power. The programs significantly underspent for the quarter due to cancellations of community wind projects and adjustment of project invoices for completed work.
- Since March 1, 2002, the renewable energy programs have cumulatively installed 95.3 average megawatts. This total represents 64% of Energy Trust's 2012 goal. This is equivalent to serving the annual electric needs of almost 75,000 average Oregon homes.

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\*2007 electric efficiency results include 6.5 aMW from a megaproject (SP Newsprint). There is no comparable megaproject in 2008. Projected year-end 2008 electric efficiency savings are 5 aMW greater than 2007 results minus the megaproject.

- Public purpose revenues were \$18.5 million for the quarter, \$147,557 (1%) more than budgeted. Total quarterly expenditures were \$16.0 million, 64% of budget.

## **2. Commercial efficiency programs**

- During the third quarter, energy efficiency measures were installed in 436 commercial buildings. The average incentive payment per site was \$2,955. Of the total, 293 buildings received electric efficiency measures, 136 buildings received gas efficiency measures, and 7 buildings saved both gas and electricity.
- The Existing Buildings program is on track to be under budget while meeting or exceeding savings goals for the year.
- The Existing Buildings program launched a new target initiative for congregations and will launch new target initiatives for grocery stores and municipalities in the third quarter.
- The Existing Buildings program's Business Development Manager, Lyn Schmidt, was honored with the Industry Partner of Year Award from the Oregon Lodging Association.
- A total of 23 highly efficient new commercial buildings were completed this quarter. The average incentive payment per site was \$8,808.
- The New Buildings program added field staff in central and southern Oregon, which enhanced outreach efforts and increased project enrollments.
- NEEA market specialists for hospitals and healthcare continued to work with Providence and Legacy Health Systems to staff conservation efforts.
- NEEA's refrigeration system optimization efforts are showing results at three Lamb's Thriftway stores, with up to 18% energy savings being acquired. NEEA's contractor continues to optimize refrigeration systems across the Lamb's chain of six stores.

## **3. Industrial efficiency programs**

- Electric energy-saving projects were completed at 117 manufacturing firms. The average incentive payment per site was approximately \$9,277.
- The Production Efficiency program released new prescriptive measures for irrigation equipment and compressed air systems through collaborative efforts with BPA and Pacific Power.
- The Production Efficiency program also competitively bid and subsequently added two new Program Delivery Contractors, Nexant and Strategic Energy Group. Nexant will deliver program services to Deschutes, Jefferson, and Crook Counties as well as lead a high tech strategy pilot for 2009. Strategic Energy Group will deliver a 2-year pilot focusing on continuous improvement for energy management in industrial facilities.
- The program began collaboration effort with Oregon Manufacturing Extension Partnership to integrate energy efficiency with manufacturing assessments delivered through Oregon Manufacturing Extension Partnership (OMEP).
- The program contracted with Green Motors Practices Group (GMPG) through a regional collaborative effort called "Green Rewinds." The program offers high quality motor rewinds that retain the original motor efficiency.
- Working in concert with Energy Trust at Blue Heron Paper Company, NEEA funded an intern to create an energy map for the Oregon City mill. This effort enables the energy team at Blue Heron and Energy Trust to be more targeted in their efforts to identify and implement additional energy efficiency projects.
- Energy Trust and Pacific Power co-sponsored a number of technical training sessions for industrial personnel, facilitated by NEEA's industrial initiative.
- The Northwest Food Processors Association and NEEA recently agreed to collaborate on a long-term food processing industry energy roadmap, driven by the membership. Savings are

anticipated to be from a combination of capital improvements, energy management, existing technologies and emerging technologies.

#### **4. Residential efficiency programs**

- Energy Trust completed 1,479 Home Energy Reviews during the third quarter. Through Home Energy Reviews, State Home Oil Weatherization program self-audit fulfillments, retail sales, fundraiser promotions and other activities, 248,383 packages of compact fluorescent light bulbs were provided during the quarter.
- Energy-efficient measures were installed in 2,044 single-family homes, 1,549 multifamily units and 264 manufactured homes. Of these, 2,310 homes received electric efficiency measures and 1,547 received gas efficiency measures.
- Energy Trust incentives helped fund the construction of over 310 efficient new homes. Of these, 80 have electricity-saving measures, 73 have gas-saving measures and 157 have both electricity- and gas-saving measures. Incentives helped purchase 79 electrically-heated and 11 gas-heated new efficient manufactured homes.
- During the third quarter Energy Trust incentives helped fund the purchase of 7,381 energy efficient clothes washers. The washers were installed in 3,845 homes with electric hot water and 3,536 homes with gas hot water.
- Solar water heating systems were installed in 29 homes with electric hot water and 20 homes with gas hot water.
- Existing Homes savings booked in remote territories showed significant gains over the third quarter of 2007, with Pacific Power kWh increasing 59% and Cascade Natural Gas annual therms increasing 91%.
- The Existing Homes program launched three new energy-efficiency promotions, including a \$50 heat pump bonus promotion, energy saver kits for Pacific Power, NW Natural and Columbia River and Clatskanie PUD customers, and the \$100 gas bundle bonus promotion with a \$50 bonus on gas furnaces.
- At the end of Q3, the multifamily program had completed or committed 95% of the program budget with 85 projects expected to close in fourth quarter.
- The ENERGY STAR<sup>®</sup> New Homes program collaborated with the Existing Homes program to bring real estate professionals, trained by Earth Advantage, into the program as trade allies.
- The New Homes program worked with NEEA to finalize the new ENERGY STAR Builder Option Package for 2009.
- The New Homes program worked to refine the design of the Energy Performance Score (EPS) to compare a home's energy usage and carbon footprint and to integrate the tool into the overall program design.
- The Manufactured Homes program saw a small uptick in the number of gas home incentives submitted.
- NEEA delivered Northwest ENERGY STAR Homes "critical details" tools focused on lighting, ventilation, and pressure balancing. The updated tools will help builders in Energy Trust service territory adopt the new ENERGY STAR home requirements taking effect January 1, 2009.
- The third quarter marked NEEA's launch of an extensive mass media campaign educating potential home buyers on the benefits of purchasing an ENERGY STAR Home.

#### **5. Renewable energy programs**

- The Biopower program received the final report on opportunities for Oregon wastewater treatment plants to become energy independent by optimizing energy efficiency and developing on-site renewables; results of the study will be presented to policy makers and treatment plant operators over the next six months.

- The Biopower program completed feasibility studies for an anaerobic digester at a proposed rendering plant and another for a biodiesel-fired cogeneration plant.
- The Biopower program co-funded two feasibility studies. One will evaluate expanded methane production for electricity generation at a wastewater treatment plant, and the other will evaluate anaerobic digestion with electricity generation as a wastewater treatment option for an agricultural processor.
- The Biopower program concluded the analysis on an application for funding a 1.6 MW co-generation facility utilizing on-site farm waste and initiated efforts to evaluate expanded co-generation opportunities at a pulp and paper plant.
- The Open Solicitation program initiated an assessment of the non-stream hydropower resources available in PGE and Pacific Power service territories to better define market potential.
- The Open Solicitation program provided funding for a feasibility study examining a geothermal electric project at the Klamath Falls campus of Oregon Institute of Technology and three hydropower feasibility studies at Eastern Oregon ranches.
- The Open Solicitation program helped coordinate a media event celebrating the construction of the 1.1 MW PGE/ProLogis solar project.
- The Solar program installed 22 commercial solar electric systems in the third quarter. In addition, solar electric systems were installed on 44 homes during the quarter.
- The Solar program participated in the Governor's Renewable Energy Working Group and its development of a legislative concept for new solar electric systems funding through payment of production-based incentives.
- The Solar program recommended that the Oregon Plumbing Board adopt a national standard for residential solar water heaters to allow higher efficiency systems in Oregon; the proposal received unanimous support.
- The Solar program made progress toward the launch of GreenStreet Lending, an alliance with Umpqua Bank to offer and co-promote loans available to Energy Trust residential and small business participants who want to finance energy efficiency and solar energy system improvements.
- The Solar program reviewed above market costs of several projects proposed to PGE through its new renewable generation RFP.
- The Wind program paid incentives for 3 small wind systems; an additional 3 small wind system applications were approved during the quarter.
- The Wind program held a small wind seminar in Hood River, attracting 30 attendees, and participated in NW SEED's one-day wind workshop in Hood River.
- The 84 MW GoodNoe Hills wind farm came on line for Pacific Power with the capability to generate 30.1 annual megawatts.

## **6. Revenues and expenditures**

- \$18.5 million in public purpose funds were received during the quarter, with expenditures at \$16.0 million.
- A total of \$7.3 million in incentives was paid.

## **7. OPUC performance measures**

- Following are the new 2008-2009 performance measures adopted by the Oregon Public Utility Commission for Energy Trust.

Category	Measures
Energy Efficiency	<ul style="list-style-type: none"> <li>Obtain at least 31 aMW computed on three-year rolling average</li> <li>Levelized cost not to exceed 3.5 cents/kWh</li> </ul>
Natural Gas	<ul style="list-style-type: none"> <li>Obtain at least 1.8 million annual therms computed on a three-year rolling average</li> <li>Levelized cost not to exceed 60 cents/therm</li> </ul>
Renewable Energy	<ul style="list-style-type: none"> <li>Achieve at least 9 aMW in new utility-scale generation, and at least 3 aMW from small-scale projects, computed on a three-year rolling average</li> </ul>
Financial Integrity	<ul style="list-style-type: none"> <li>Receive an unqualified financial opinion from independent auditor on annual financial statements</li> </ul>
Administrative/Program Support Costs	<ul style="list-style-type: none"> <li>Keep below 11% of annual revenue</li> </ul>
Customer Satisfaction	<ul style="list-style-type: none"> <li>Achieve reasonable rates</li> </ul>
Benefit/Cost Ratios	<ul style="list-style-type: none"> <li>Report both utility system and societal perspective on an annual basis</li> </ul>
Incremental Electric Efficiency Funding	<ul style="list-style-type: none"> <li>Report annually energy savings achieved as a result of SB 838</li> </ul>

**8. Electric benefit-cost ratios for 2007 (year-end data)**

Program	Utility system benefit-cost ratio	Societal benefit-cost ratio
1. Existing Homes	2.7	1.5
2. New Homes and Products	2.8	2.6
3. Existing Buildings	4.3	1.4
4. New Buildings	6.4	2.8
5. Production Efficiency	7.7	3.0
6. NW Energy Efficiency Alliance	12.0	4.0

**II. TABLES**

**I. Revenues**

Source	Actual revenues received Q3	Budgeted revenues Q3
Portland General Electric	\$10,580,568	\$9,946,624
Pacific Power	\$6,827,905	\$7,410,585
NW Natural	\$966,861	\$872,811
Cascade Natural Gas	\$86,574	\$84,330
Avista	\$0	\$0
Total	\$18,461,907	\$18,314,350

## 2. Expenditures

Type	Actual Expenditures Q3	Budgeted Expenditures Q3
Energy Efficiency programs	\$12,822,566	\$18,078,839
Renewable Energy programs	\$2,542,231	\$6,165,911
Administration	\$651,035	\$836,412
Total	\$16,015,832	\$25,081,162

## 3. Incentives Paid

Quarter	Energy Efficiency				Renewable Energy		Total	
	PGE	Pacific Power	NW Natural	Cascade Natural Gas	Avista	PGE		Pacific Power
Q1	\$1,451,477	\$1,024,918	\$1,190,165	\$52,291	\$7,253	\$177,071	\$150,094	\$4,053,269
Q2	\$2,646,972	\$1,544,148	\$1,430,709	\$69,591	\$12,407	\$267,066	\$495,270	\$6,466,163
Q3	\$2,562,453	\$1,505,228	\$1,240,533	\$72,927	\$12,821	\$804,736	\$1,111,258	\$7,309,956
Q4	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$6,660,902	\$4,074,294	\$3,861,407	\$194,809	\$32,481	\$1,248,873	\$1,756,622	\$17,829,388

## 4. Savings and Generation

**Electric efficiency savings.** In the third quarter of 2008, energy efficiency programs saved 4.8 average megawatts, representing 14% of the 2008 year-end best case goal of 36 average megawatts and 18% of the conservative case goal of 27 average megawatts. Since March 1, 2002, these programs have cumulatively saved 174 average megawatts. When savings from self-directed industrial projects are added, the total represents 64% of Energy Trust's 2012 goal.

Electric Efficiency Savings Q3 2008	PGE aMW	Pacific Power aMW	Total Savings aMW	Expenses	mil \$ / aMW	Levelized Cost/kWh
Commercial	0.88	0.47	1.35	\$3,535,299	\$2.6	3.3 ¢
Industrial	0.50	0.54	1.04	\$2,291,473	\$2.2	2.7 ¢
Residential	1.46	0.95	2.41	\$4,699,556	\$2.0	2.7 ¢
Total Energy Efficiency programs	2.84	1.96	4.80	\$10,526,328	\$2.2	2.9 ¢

**Gas efficiency savings.** In the third quarter of 2008, efficiency programs saved 383,469 annual therms of natural gas, representing 22% of the conservative goal 2008 goal of 1.7 million annual therms and 17% of the best case goal of 2.3 million annual therms. Since gas programs began in 2003, cumulative savings of 8.1 million annual therms have been realized, accounting for 38% of the current 2012 goal.

Gas Efficiency Savings Q3 2008	NWN Therms	Cascade Natural Gas	Avista	Total Savings Therms	Expenses	\$ / Therm	Levelized Cost/
Commercial	126,926	10,831	0	137,757	\$691,432	\$5.0	44 ¢
Industrial	8,732	0	0	8,732	\$37,054	\$4.2	31 ¢
Residential	222,270	12,155	2,555	236,980	\$2,102,860	\$8.9	61 ¢
Total Energy Efficiency Programs	357,928	22,986	2,555	383,469	\$2,831,346	\$7.4	55 ¢

**Renewable energy generation.** Renewable energy projects completed during the quarter are expected to generate 30.2 average megawatts, the vast majority of this from the GoodNoe Hills wind project for Pacific Power. The programs significantly underspent for the quarter due to cancellations of community wind projects and delays in project completions and corresponding billings.

Renewable Energy Generation Q3 2008	PGE aMW	Pacific Power aMW	Total Generation aMW	Q3 2008 Expenses	mil \$ / aMW	Levelized Cost/kWh
Biopower	0.00	0.00	0.00	\$216,180	n/a	n/a
Open Solicitation	0.00	0.00	0.00	\$174,391	n/a	n/a
Solar Electric Program	0.05	0.05	0.10	\$1,594,198	\$15.9	27 ¢
Utility Scale	0.00	30.10	30.10	\$490,772	\$0.02	0.02 ¢
Wind Program	0.002	0.002	0.004	\$182,617	\$50.0	121 ¢
Total Renewable Programs	0.05	30.15	30.20	\$2,658,158	\$0.09	0.11 ¢

**5. Projects completed this quarter**

	Total	Electric-only	Gas-only	Both
<b>ENERGY EFFICIENCY</b>				
<b>Commercial projects</b>				
Existing buildings retrofitted	436	293	136	7
Efficient new buildings constructed	23	18	2	3
Solar water heating commercial installations	9	3	6	0
Subtotal Commercial	468	314	144	10
<b>Industrial projects</b>				
Subtotal Industrial	117	114	1	2
<b>Residential projects</b>				
ENERGY STAR new homes constructed	310	80	73	157
ENERGY STAR new homes enhanced	81	4	62	15
Efficient new manufactured homes purchased	90	79	2	9
Home energy reviews conducted	1,479	289	55	1,135
Single family homes retrofitted	2,044	701	1,343	0
Manufactured homes retrofitted	264	257	7	0
Multifamily units retrofitted	1,387	1,190	197	0
New multifamily units enhanced	162	162	0	0
Residential solar water heating installations	49	29	20	0
ENERGY STAR clothes washer rebates	7,381	3,845	350	3,186
CFL packages sold/provided	248,383	248,383	0	0
Subtotal Residential	261,630	255,019	2,109	4,502
<b>TOTAL EFFICIENCY</b>	<b>262,215</b>	<b>255,447</b>	<b>2,254</b>	<b>4,514</b>
<b>RENEWABLE ENERGY INSTALLATIONS</b>				
Biopower project installations	0	0	0	0
Open solicitation project installations	0	0	0	0
Solar electric residential installations	44	44	0	0
Solar electric commercial installations	22	22	0	0
Utility scale project installations	1	1	0	0
Wind project installations	0	0	0	0
<b>TOTAL RENEWABLES</b>	<b>67</b>	<b>67</b>	<b>0</b>	<b>0</b>

Table 5 and corresponding information in the narrative refer to numbers of efficiency and renewable energy projects. We define “projects” to be completed installations or services at one location with certain exceptions:

- A Home Energy Review, with CFL installation, counts as one project. If that home subsequently installs one or more measures, this installation counts as a separate project.
- Each apartment unit treated counts as one project.
- Each manufactured home counts as one project.
- Measures installed in separate facilities within a large industrial complex count as separate projects.

**Incremental Utility SB838 Expenditures**

	Quarter Expenditures	YTD Expenditures	YTD \$M /Amw*	YTD Levelized Cost*
PGE	\$102,034	\$102,034	\$0.01	0.02 ¢
PacifiCorp	\$196,232	\$236,024	\$0.04	0.05 ¢
Total	\$298,266	\$39,792	\$0.04	0.03 ¢

\* Reflects incremental increase in costs derived from expenditures incurred by Portland General Electric and Pacific Power under terms of the agreement described in SB 838.

**See appendix I for report on PGE and Pacific Power SB 838 activities**



## **Appendix I – SB 838 Report for Q3 2008**

Following are quarterly reports for the period of July 1 through September 30, 2008, submitted by Pacific Power and Portland General Electric to provide information on activities supported by funds collected and retained for the period,.

### **Pacific Power**

#### **SB 838 General**

During this period, Kari Greer, the Pacific Power Energy Trust liaison, performed the following activities.

- Participated in the Northwest Energy Efficiency Taskforce workgroup documentation effort for Building the Energy Efficiency Workforce of the Future.
- Coordinated review and comments on proposed changes to the data transfer agreement.
- Hosted a meeting that included the Energy Trust and Pacific Power call center staff to exchange information about Pacific Power customer satisfaction results for residential, small to mid-size business, and industrial sectors. Pacific Power information on customer demographics was also exchanged.
- Began planning an internal energy efficiency employee awareness campaign to focus on available programs from the Energy Trust and education on no cost/low cost options for customers. Targeted launch for the campaign is early 2009.

In July, a planning meeting was held with Kari and Verlea Briggs, Portland General Electric Energy Liaison to the Energy Trust, to develop jointly coordinated utility marketing approaches for all eligible customer sectors that could be supported with the retained funds.

#### **SB 838 Residential efficiency programs**

- Pacific Power's Customer & Community Communications multi-media advertising campaign, The "Feel Good" TV, radio and print effort that began in early June, continued through mid-July in Southern Oregon.
- A Low-Income Energy Efficiency webinar at Pacific Power's Portland call center was delivered on August 20 and focused on understanding how to:
  - Motivate low-income customers to be excited about energy efficiency
  - Manage the growing number of low-income households
  - Address the low-income household's particular susceptibility to high and fluctuating energy costs; and,
  - Address the tendency for low-income housing to be less energy efficient.
- On August 12, Kari participated in the Residential Sector Forum focused on:
  - Moving the residential sector forward to incorporate sustainable building practices;
  - Motivating various organizations involved to work together to; create a common, reinforcing message; and,
  - Streamlining the amount of information available and how it is delivered to builders and consumers.
- Kari participated in the August 14 monthly utility/Energy Trust residential and commercial review meeting.
- Nearly 80,000 Oregon residential customers received an offer for a free Energy Saver Kit with compact fluorescent light bulbs, water-saving showerhead, water-saving faucet aerators and a home energy checklist. The offers were mailed in September in cooperation with Energy Trust.

- A press release was written and distributed to local media on September 15 that outlined the expected savings and additional steps customers could take once they received their Pacific Power/Energy Trust energy saver kits.
- September 3, Kari toured the JACO Environmental recycling facility with Energy Trust program support and communications employees to learn about the refrigerator recycling process and support ENERGY STAR Products refrigerator and freezer recycling initiative, which launched in June 2008.
- On September 11, Kari participated in the Portland residential Energy Trust trade ally roundtable.

### **SB838 Commercial efficiency programs**

- In July, Kari reviewed the fall marketing campaign for commercial customers with the Energy Trust Sr. Business Sector Manager and Marketing Manager.
- In July, Kari arranged for the Pacific Power call centers to provide additional support to do outbound calling/communications to commercial customers about future energy efficiency customer forums including the multi-family breakfasts scheduled for Bend and Medford, October 21 and 28.
- In July, Kari communicated with Pacific Power regional community managers about the Living Wise kits for Oregon sixth grade students. As a result, the regional community managers made several supportive calls to school administrators in their respective areas as well as helped promote the Change a Light, Change the World fundraising opportunity. A follow up Pacific Power letter was also sent in late August to each school highlighting the benefits of the Living Wise kit and fundraiser.
- In July, Kari met with BEST Business Center stakeholders to receive an update and review statistics about the program since the launch on February 1 of this year.
- On July 24, Pat Egan, vice president of customer and community affairs at Pacific Power, and Kari met with the Oregon Restaurant Association president and vice president of government affairs to encourage Pacific Power energy efficiency opportunities for Oregon restaurants.
- In July and early August, Kari and the Pacific Power corporate account manager facilitated resolution of energy efficiency issues raised by a key Portland customer. The concern was resolved by the Energy Trust Senior Business Sector Manager.
- In July, Pacific Power economic development manager, Erik Andersson, and Kari coordinated a meeting with Energy Trust representatives to meet with Kathy LaPlante of the National Trust Main Street Center. During her visit to Oregon, she met with some Main Street communities and heard and shared ideas on what other states might be doing to incorporate energy efficiency and sustainability into their Main Street programs. At the meeting we also reviewed Oregon Main Street Program's three tiered approach, the Corvallis Energy Challenge, and discussed ways we might be able to leverage such community activities into Oregon Main Street outreach.
- In August, Kari and the Pacific Power regional community manager facilitated resolution of energy efficiency issues raised by a city manager. The city manager's concern was resolved by the Energy Trust Senior Business Sector Manager.
- In August, Kari identified potential Pacific Power and Energy Trust visibility opportunities to Pacific Power's media managers regarding the Living Wise kits to schools, Energy Saver kits to the coast, Pendleton and southern Oregon, and the refrigerator recycling program.
- In August, Kari facilitated scheduling two customer forums proposed by Conservation Services Group to focus on multi-family energy efficiency services and incentives provided by Energy Trust programs. The forums are scheduled for October 21 and 28 in Bend and Medford, Oregon.
- In September, Kari and Verlea Briggs met to identify utility roles in supporting customer energy efficiency training and education opportunities that might be eligible for support with retained funds.
- In September, Kari participated in the Medford and Bend Energy Trust trade ally roundtables.
- Throughout September, Pacific Power hosted regional customer conferences for key customers and community leaders in Albany, Portland and Roseburg highlighting how the company is preparing for

Oregon's energy future which includes the need for customers to become increasingly energy efficient. Several customers that have participated in Energy Trust programs were featured speakers at each conference and Energy Trust program information was provided to each attendee in their information packet.

### **Ongoing Residential efficiency communications**

- During the third quarter, approximately 8,000 Oregon new residential customer Welcome Aboard kits were delivered which contain information on utility services and Energy Trust programs.
- The Energy Trust' Home Performance with ENERGY STAR program was featured in the July *Voices* newsletter distributed to approximately 420,000 residential customers in their monthly bills.
- In August, the annual notice was sent to approximately 520,000 Oregon customers notifying them of their options to share e their billing information with Energy Trust.
- A description and contact information for the Energy Trust's refrigerator recycling program was included in the September *Voices* newsletter for residential customers.
- An Energy Trust heat pump insert was included in residential bills in September. In addition, a targeted group of about 40,000 residential customers received a letter with additional information on heat pump incentives.
- Energy Trust's free home energy reviews were mentioned in the fall *Forecast*, Pacific Power's newsletter targeted for Blue Sky renewable energy participants. This communication reaches approximately 25,000 customers.
- Pacific Power promoted the Online Home Energy Analysis to Oregon customers on its Web home page for most of the third quarter.

### **On-going Commercial efficiency communications**

- In July and August, Pacific Power worked with Energy Trust to mail letters about programs and incentives to different sectors of business customers, including foodservice, congregations, auto, lodging and offices, coordinating direct mail information from internal sources and using the Pacific Power brand.
- During the third quarter, approximately 1,500 new Oregon business customer Welcome Aboard kits were delivered highlighting available services and options, including information on energy efficiency and directed customers to Energy Trust call center and web site.
- The summer Energy Insights newsletter, delivered to 700 Oregon community leaders and managed commercial/industrial accounts, featured an eastern Oregon hospital that installed an innovative, high-efficiency heating, cooling and ventilation system with the help of Energy Trust incentives. The case study included information about participation in Energy Trust programs and highlighted energy savings achieved. Customers were directed to Energy Trust call center and website for further information.
- The summer Energy Connections newsletter, delivered to 6,000 Oregon mid-size business and government customers, featured an article on a mid-Willamette valley grocery co-op that included information on reducing carbon footprint through energy efficiency, lowering energy bills through efficient equipment upgrades through Energy Trust programs and participation in Pacific Power's Blue Sky renewable energy business partner program. Customers interested in improving their bottom line are encouraged to call Energy Trust directly or visit the Energy Trust website.
- In September, Pacific Power began the procurement process to bring in an online energy efficiency support system for small to mid-size business customers. The new service will provide advice for customers who are looking for no cost/low cost opportunities to save energy.

**PGE****SB 838 General**

- Participated in the Governor Kulongoski's Energy Efficiency Working Group, Northwest Energy Efficiency Taskforce (NEET) convened by Bonneville Power Administration (including all subgroups) and offered input to NEEA strategic plan.
- Attended CAC meeting and Energy Trust communications meeting in July.
- Attended BEST Business Center partner meeting.
- Attended Energy Trust /Earth Advantage Energy Performance Certificate "Proof of Concept" meeting.
- Attended Earth Advantage "Sustainable Communities" breakfast launch.
- Coordinated with Energy Trust on fall joint advertising campaign.

**SB838 Commercial efficiency programs**

- Added more case studies to business energy efficiency pages on PGE web site, including incentives received and links to Energy Trust web site.
- PGE business newsletter Energize in August featured green theme including information on Energy Trust incentives, energy classes and preview of the "Save More, Matter More™" campaign.
- Launched "Save More, Matter More™" business energy efficiency campaign September 1. n campaign, business customers are encouraged to make a pledge to save energy. Prior to launch, held 3 breakfasts with companies to "pre-enroll" pledges. Energy Trust representatives were present at each breakfast. Promotion included bill insert in September (additional inserts planned for October and November), plus a direct mail piece to all business customers inviting them to join the campaign. Web banner and print ads also support the campaign. All companies pledging receive follow up phone call from PGE, and, as appropriate, walk-throughs and referral to Energy Trust. At September 30 meeting, 140 companies had made pledges ranging from small behavioral changes to large investments.
- PGE fall advertising campaign focuses on energy efficiency for businesses with 3 ads, highlighting lighting, HVAC, and computers.

**SB 838 Industrial efficiency programs**

- Added manufacturing case study to business energy efficiency pages, including incentives received and links to Energy Trust Web site.
- "Save More, Matter More™" campaign, described above, also targeted to small industrial customers.

**SB 838 Residential efficiency programs**

- PGE named top 10 utility nationwide for awareness of residential customers of energy efficiency by J.D.Powers for 2008.
- PGE fall energy efficiency advertising to residential customers features tips on programmable thermostats, turning off electronics, CFLs, and low-flow showerheads. Fall TV campaign "energy efficiency icons" began airing in late September.
- PGE began reviewing/revising its energy efficiency web pages to make them more user-friendly and complete and more links to Energy Trust programs. Estimated completion and launch of new pages is year end.
- Energy Trust programs received top billing in PGE's residential newsletter *Update* in June for Home Performance with ENERGY STAR, July with information on green homes, including ENERGY STAR New Homes, and August promotion for Owens Corning insulation with mention of Energy Trust

Home Energy Reviews. September *Update* featured CFL fixtures and an offer for special pricing from Rejuvenation Houseparts, along with front page article on energy tips online.

- Launched Apogee's Home Energy Analyzer on PGE's Web site with billing download in June. Promoted the analyzer to PGE employees in August and September. PGE representative attended Apogee User Group meeting in late September.
- Pledged to sponsor City of Portland/Homebuilders Association pilot of efficient and affordable new homes.
- Partnered with Energy Trust New Homes program to sponsor efficient building techniques education for homebuilders.