EnergyTrust of Oregon, Inc.

Staff Report

May 9, 2007

This report from Margie Harris is on behalf of all staff and spans the period March 12, 2007, through April 20, 2007. Items not otherwise addressed in this board packet are described here.

General

- At the request of Cascade Natural Gas, discussed and initiated a planning contract to assess and analyze requirements associated with Energy Trust to potentially provide gas efficiency program services to Cascade's Washington customers. Results will inform a decision-making process between Cascade, the Washington Utility and Transportation Commission and Energy Trust.
- Applauded the 10 businesses honored for sustainable practices and products at the 15th annual BEST Awards, organized by the Office of Sustainable Development and sponsored by Energy Trust and others. A total of 8 of the 10 winners participated in Energy Trust programs – including 200 Market Building (lighting), Columbia Forest Products (motors), Doubletree Hotel (HVAC, pre-rinse sprayer), OSHU Center for Health & Healing (new buildings, solar electric), Rejuvenation Inc. (lighting), Scenic Fruit Company (refrigeration), Sokol Blosser Winery (solar electric) and Tualatin Valley Water District (pump upgrade).
- Informed by Pacific Power that the GoodNoe Hills West 56 MW wind project will be cancelled and that Pacific Power proposes to shift a majority of the turbines from the West project to the GoodNoe Hills East project. Initiated staff review of revised above market costs.
- Prepared and submitted 2006 annual report to the OPUC.
- Tom Foley and Margie Harris met separately with Victor Merced, Executive Director of the Oregon Department of Housing and Community Services and with Pat Egan, new Vice President of Community Relations for Pacific Power.
- Received the Blue Works award from City of Portland's Office of Sustainable Development honoring our commitment to sustainability and green practices; credit is due to our staff Walking the Talk Team (WATT) for tracking our progress and seeking this award.

Program Planning and Evaluation

General

- Finalized 2006 savings and generation numbers for the Energy Trust annual report, the biennial public purpose report to the legislature, and the Energy Trust analysis of economic impacts.
- Completed documentation for the annual true-up and summarized impacts for 2002-2007.
- Developed draft topics for the board strategic work session in June, reviewed by both the board strategic planning committee and the management team. (Topics listed under the Strategic Planning Committee in this packet.)
- Developed a strategy to accelerate gas expenditures and savings (see Energy Efficiency tab in this packet).

Residential

- Completed cost-effectiveness analyses for heat pump installation in existing single family and manufactured homes and for use of several Existing Buildings lighting measures in the multifamily portion of Home Energy Solutions–Existing Homes.
- Revised all remaining measures for the Home Energy Solutions–Existing Homes program.

Commercial and Industrial

- Completed cost-effectiveness analyses for revised restaurant convection ovens and fryers; hotel room bathroom LED/fluorescent night lights and heat pump packaged terminal air conditioners for hotel rooms.
- Completed Irrigation Program evaluation report (executive summary and staff response included in this packet).

Renewables

- Completed the residential photovoltaic impact evaluation report (executive summary and staff response included in this packet).

NW Alliance Evaluations

- BetterBricks Grocery Initiative Market Progress Evaluation Report #2 (3/20/2007).
- BetterBricks Hospitals and Healthcare Initiative Market Progress Evaluation Report #2 (3/14/2007).
- Single-Family Residential New Construction Characteristics and Practices Study (3/24/2007).

Efficiency Programs

Home Energy Solutions—ENERGY STAR® New Homes

- Began work on the supplemental program components, including solar training, technical school outreach and sustainable community development.
- To help cross-promote solar, in which there appears to be strong interest, designed a solar FAQ document for inclusion in builder kits.
- Announced cooperative marketing funds and model home incentive programs to manufactured home retailers during site visits, receiving positive initial response and uptake.

Home Energy Solutions—ENERGY STAR® Products

- Since the beginning of the year, answered inquiries about the CFL fundraiser from more than 20 schools, congregations and other organizations, with participants earning $2,708.
- Exceeded forecasted sales of premium efficiency clothes washers, with support from all participating appliance retailers in Energy Trust territory.

Home Energy Solutions—Existing Homes

- As a training exercise to further market solar thermal measures, held a site visit for Home Energy Reviewers to see a functioning residential solar electric and solar water heating system.
- Trained eight new Home Performance contractors to earn Building Performance Institute (BPI) certification.

- Coordinated with NW Natural and Ecos Consulting on an 18-month contract for weatherization energy services to customers with households in the 60-80% median income range.

Business Energy Solutions—New Buildings

- Scheduled a series of statewide community involvement seminars, targeting architects and engineers, project developers, utility account representatives, local government officials and others.
- Hired a new marketing/communications person and a new engineer to help recruit and process projects.
- Made a presentation on New Buildings incentives, including solar options, to a commercial building audience at Lane Powell Green Building Seminar March 27.

Business Energy Solutions—Existing Buildings

- Staffed a booth at the NW Foodservice Show April 1 and 2.
- Launched a new lodging initiative April 1.
- Coordinated with BPA and the Regional Technical Forum on the lodging initiative.
- Worked closely with ODOE on school projects.

Business Energy Solutions—Production Efficiency

- Began offering services to gas industrial customers who pay the public purpose charge using our Small Industrial Initiative.
- Nominated Buzz Thielemann, program delivery contractor with RHT Energy, for a Daily Journal of Commerce Rainmaker of the Year award; as a finalist, Buzz received a special award as Innovator of the Year award.

Renewable Energy

Open Solicitation

- Served on planning committee for a May 16 Bend workshop on small hydropower for municipalities, irrigation districts, and private property owners; Energy Trust staff presented information on available incentives.
- Worked with solar staff to develop a matrix of options for third-party financing of municipal solar projects.
- Visited two private properties in PGE service territory where owners are interested in micro-hydropower.
- Made site visits to assess solar potential in Cornelius and at Clean Water Services.

Utility Scale

- Continued to resolve contract issues with PGE for the Biglow Canyon 125.4 MW wind project.

Wind

- Sponsored a wind turbine purchase seminar with attendees from Stoel Rives, Oregon Department of Energy, Community Renewable Energy Association, US Department of Agriculture and Energy Trust staff to discuss turbine supply agreement options for community wind projects.

- Successfully submitted a statement of qualifications with a team comprised of ODOE, CREA and Tri-Axis Engineering to Bonneville Power Administration for the development of a monitoring and communications system for distributed energy resources.

Biopower

- Incorporated the 15.8 MW Warm Springs Biomass project within the PGE Master Agreement.
- Presented biopower opportunities for wastewater treatment plants at Clackamas Community College's annual Water Environment School.
- Completed a biomass cogeneration feasibility study at West Linn Paper.
- Executed contract with Clackamas County for feasibility study at wastewater treatment plant.
- Received proposal for feasibility study co-funding from City of Woodburn.
- Joined steering committee for Harvesting Clean Energy Conference.

Solar

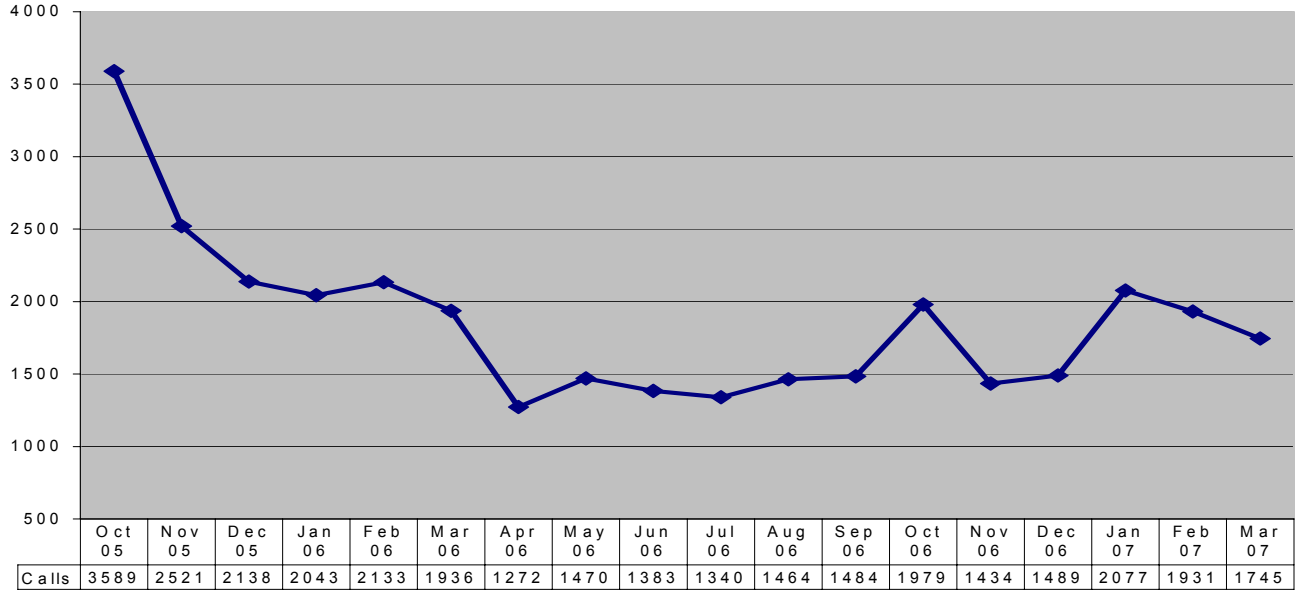
- Enhanced and added content on Energy Trust's solar web pages.
- Presented considerations for nonprofit PV incentive to RAC for feedback.
- Sponsored Solar Oregon's basic and in-depth PV workshops, which attracted full-house audiences totaling 160 in March.
- At the Governor's request, joined his new Solar Energy Working Group to address four areas: workforce development, business development, market development and policy.
- With PGE, met with Clark Public Utilities to learn from their experience financing customer solar energy systems on utility bills.

Communication, Marketing and Outreach

Call Center/Customer Service

- Provided support and training for Home Energy Solutions call center during staff transitions.
- Coordinated additional representatives to help Home Energy Solutions process incentive applications with missing information.
- Provided Energy Trust program training for NW Natural call center.
- Scheduled program training for PGE call center.
- Provided updated program information for Pacific Power call center staff.
- Updated call center representatives on new Home Energy Solutions incentives and requirements.
- Completed draft report on cost of providing call center services in house.

Call Volume through March 2007

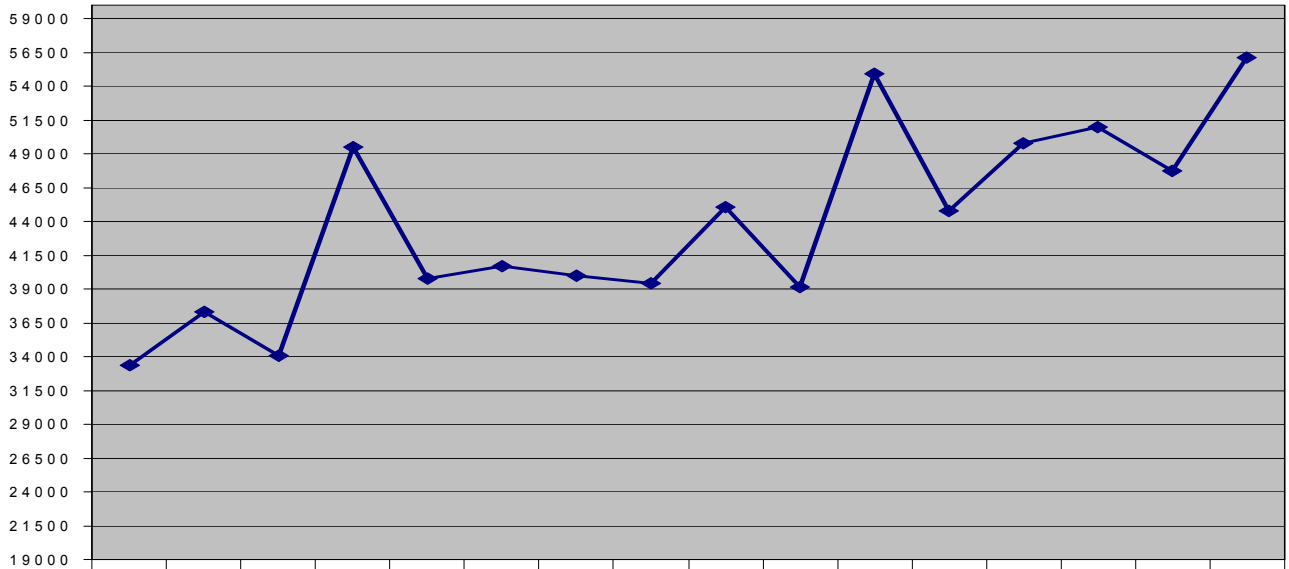


	Oct 05	Nov 05	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06	May 06	Jun 06	Jul 06	Aug 06	Sep 06	Oct 06	Nov 06	Dec 06	Jan 07	Feb 07	Mar 07
Calls	3589	2521	2138	2043	2133	1936	1272	1470	1383	1340	1464	1484	1979	1434	1489	2077	1931	1745

Website

- Logged record number of website visits - 56,098.
- Updated Home Energy Solutions single family and multifamily pages with new incentive amounts and new copy.
- Posted new copy for New Buildings' ENERGY STAR Track.
- Took interactive solar program announcements database live.
- Updated copy and forms on Irrigation Initiative website.
- Fixed links to past issues of Synergy.
- Added short introductory sentences for each program index page calling out the benefits of program participation.

Website Visits through March 2007



	Dec 05	Jan 06	Feb 06	Mar 06	Apr 06	May 06	Jun 06	Jul 06	Aug 06	Sep 06	Oct 06	Nov 06	Dec 06	Jan 07	Feb 07	Mar 07
Visits	33345	37283	34072	49474	39804	40703	39979	39460	45084	39126	54912	44813	49794	50995	47761	56098

Trade Ally Outreach

- Fielded annual trade ally survey.
- Held trade ally round table meetings for both residential and commercial groups.
- Scheduled training for Cascade Natural Gas Contractors in central Oregon.
- Coordinated trade ally messaging and communicated description of NW Natural's new program low-income program with Ecos Consulting.

Events, Speaking Engagements and Sponsorships

- Participated in 14 energy/conservation-related events during the period.
- Sponsored two more Rethink classes organized by the Office of Sustainable Development.
- Staffed booths at the Spring Northwest Home Show and at the Northwest Foodservice Show.
- Presented at the Pacific Northwest Clean Water Association's Water Environment School.
- Hosted a Clean Energy Fair in Pioneer Square to celebrate Energy Trust of Oregon's 5th anniversary.

Creative Products

- Created 10 new and resized advertisements: 4 commercial, 5 residential and 1 general.
- Updated Multifamily Home Energy Solutions brochure.
- Produced ENERGY STAR® New Homes virtual tour for builders.
- Created new materials for Change a Light, Change the World (formally Lights for Learning).
- Produced an energy tips fact sheet: "10 ways to curb global warming."
- Designed updated Business Energy Solutions brochure and New Buildings piece.

- Produced and released three newsletters: Synergy (general, monthly), Insider (for trade allies, bimonthly) and Pit Stop (internal, monthly).

News Releases and Media Events

- Distributed six press releases: Energy Trust's 5th anniversary, USDA-VAPG Grant Assistance, Savings with a Spin promotion, Troutdale Airport lighting upgrade, ENERGY STAR award for food service program, commercial solar incentives.
- Coordinated with outside organizations on other releases, including Sokol Blosser Winery's solar array, Green Investment Fund awards, Pacific Power/Bornstein's Seafood/Port of Astoria and Portland General Electric heat pumps.
- Continued to build a pipeline of stories and press releases for 2007.
- Continued to garner news coverage about Energy Trust programs in local newspapers around the state.

Utility Co-promotions

- Pacific Power (residential)—Voices newsletter article on ENERGY STAR washers and Energy Trust incentive; mention of Energy Trust programs in annual power options direct mail.
- Pacific Power (commercial)—article on Energy Trust Existing Buildings program and Burgerville sprayer installations in April issue of the Energy Connections small business newsletter; article on Energy Trust Biopower program and the Rough and Ready project in the April issue of the Energy Insights large business newsletter.
- NWN—co-branded TV spot continued airing through April 22.
- PGE—co-branded CheckMe! Heat pump tune-up offer letter mailed to 21,000 residential customers.
- Cascade Natural Gas—bill insert on Savings with a Spin ENERGY STAR clothes washer offer.

Operations, Contracts, Human Resources, Finance and Information Technology

Finance

- Finalized the budget documents to reflect amended 2006 carryover, addition of CRC revenue and new incentive timing curves.
- Completed review and updating of 2006 audit report.
- Developed responses and timelines to address financial audit management letter comments.
- Completed and reviewed documents for the preparation of the 2005-2006 legislative report on public purpose expenditures.
- Helped update PMC check pick-up process, with necessary controls.
- Assessed solar contractors and removed 3 from program due to non-compliance with requirements.
- Determined ongoing renewable energy generation tracking as reasonable and consistent.
- Worked with renewable energy staff to determine contract-required Non-Energy Attribute Attestations are being collected and filed.
- Implemented improved measure addition and change process; new forms posted.
- Audited all irrigation forms received for payment this year.
- Finalized update of Financial Principles.

- Produced over 500 incentive checks weekly.
- Worked with IT and PMC to identify and address potential data import problems.
- Discussed and described weekly import/integration process with Moss Adams as part of Enterprise Architecture study.
- Identified and investigated potential incentive import errors.
- Prepared financial statements for January, February and March.
- Completed 2nd quarter 2007 forecast.
- Evaluated and implemented process improvements for quarterly report processing, W-9 and Form 1099 compliance.
- Initiated planning for potential business development including CRC reporting, lodging initiative with PUD planning and centralized reporting of Green Tags.

Human Resources

- Secured partnering arrangement with NEEA for salary survey of energy-specific positions with similar companies.
- Hired Danielle Gidding as the new planning intern; Danielle is currently attending Portland State completing her masters degree in economics.
- Hired Santina Brohen as program tracking administrative coordinator; Santina was a project coordinator at PECI, received her degree from University of Vermont and spent six months teaching English in Taiwan.
- Accepted resignation from Jimmy Douglas, network administrator, who is leaving to begin his own company; replacement of this position will be considered as part of the recommendations from the Enterprise Architecture study.
- Accepted resignation from Dixon Martin from his position assisting in the forms process; Dixon accepted a permanent position with the Schools Uniting Neighborhoods program at Multnomah County.
- Hired Lars Stewart to assume forms responsibilities; Lars is most recently from Seattle, where among her other experiences and skills, she performed with the Seattle Opera.

Information Technology

- Contracted with Nancy Mounir as the SQL database administrator and Delphi developer; her first assignment is optimization of the utility billing database and associated data load procedures to provide more effective access to that data for evaluation.
- Completed interviews with staff and PMC representatives as part of the Enterprise Architecture study.