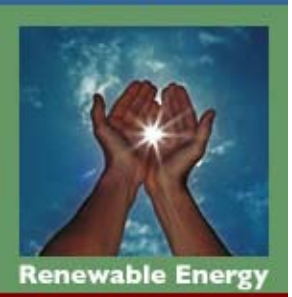

Energy Trust of Oregon

Information Technology Operations Work Plan Accomplishments

May 9, 2007

Energy Trust of Oregon, Inc.

Background

- Operational improvements identified as highest priorities, taking precedence over 2006 strategic issues
- July 2006 IT "Redoux" meeting identified 4 critical focus areas:
  - Ease of use for FastTrack and Goldmine
  - Data integrity
  - Reporting consistency and reliability
  - Long-term direction and evolution of systems
- Significant progress made in these important areas

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Ease of Use

- Single login provides access to files, reporting, and FastTrack
- FastTrack response times greatly improved
- Major FastTrack data entry screens enhanced based on user suggestions
- Goldmine data entry screens simplified
- Automatic transfer of site details from Goldmine to FastTrack to minimize duplicate data entry

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Data Integrity

- Screens highlight critically required items
- Color coding of Goldmine contacts added
- Additional error reporting capability available
- Site attribute list standardized
- Measure attributes greatly simplified
- Data structures improved
  - Program and measure hierarchies
  - Program consistency between FastTrack and Great Plains
  - Program data added re: sector and goals

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Reporting

- Simplified FastTrack data entry and validation for project reports
- Eliminated redundant Excel system to track New Homes program
- Added new reporting capability for PMCs
- "Automated" support materials for quarterly reports
- Improved feedback loop for PMC report review and input
- Developed efficiency programs progress report

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Benefits

- Improved Communication
- Reduced data entry time
- Fewer errors
- Duplicate Excel systems eliminated
- More accurate and useable reports
  - " I want to take this opportunity to thank you for the focused support you provided our program in the conversion of management controls to FastTrack and GoldMine. I have never worked with an IT group as responsive as the Trust's" – Earl Johnson, formely SAIC
  - At last year's strategic planning session, data and reporting issues were a major topic. This year they are no longer a problem. –Steve Cowell, Conservation Services Group (paraphrased)

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Contributors

- Critical issues identified and solutions suggested: ETO Sector/Program Managers and PMC representatives
- More powerful and reliable reports created: Vanessa Amundson
- Enhanced FastTrack application: Asher Atkinson, CSG
- Goldmine screens/fields redesignd: Claudia Blanton
- FastTrack data configuration: Aaron Zahler; Serene Ezell (intern); Santina Brohen
- Standardized data collection for evaluations: Phil Degens

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Final piece: Enterprise Architecture Study

- Purpose: Assess IT requirements and system design options, including staffing and structural considerations, and recommend improvements
- Moss Adams selected via competitive bid (Jan-Feb)
- Contract kick-off meeting (March)
- Staff and PMC interview underway (April)
- Preliminary consultant report (June)
- Findings review (July)
- Response plan prepared (August-September)
- Begin plan implementation (October)

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Reporting Example

Report: R1101-06e
Print Date: 4/17/2007
Print Time: 12:24 pm

2007 Energy Efficiency Programs Progress Report
Earned Activity to Date
Estimated Energy Savings
Unless otherwise noted, all numbers are in annual kWh or annual therms

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	2007 Conservative kWh Energy Savings Goal		2007 Best Case kWh Energy Savings Goal	
	kWh	aMW	kWh	aMW
Annual Goal	215,311,000	24.58	287,081,000	32.77
To Date Savings	10,455,562	1.19	10,455,562	1.19
To Date % of Goal	5%	5%	4%	4%

	2007 Conservative Therms Energy Savings Goal	2007 Best Case Therms Energy Savings Goal
Annual Goal	1,814,591	2,419,454
To Date Savings	210,065	210,065
To Date % of Goal	12%	9%

Month	Business Energy Solutions - Existing Buildings		Business Energy Solutions - New Buildings		Business Energy Solutions - Production Efficiency	Home Energy Solutions - Existing Homes		Home Energy Solutions - New Homes and Products		NEEA	Total of Programs by Month	
	kWh	Therms	kWh	Therms	kWh	kWh	Therms	kWh	Therms	kWh	kWh	Therms
January	529,482	9,246	0	0	398,450	830,422	17,409	379,944	5,608	0	2,138,298	32,262
February	373,534	25,474	697,091	0	438,188	564,074	35,803	675,213	20,428		2,748,100	81,706
March	969,066	31,952	86,303	2,243	3,301,181	759,160	41,990	453,454	19,912	69,453,840	75,023,004	96,097
Total Savings	1,872,082	66,672	783,394	2,243	4,137,819	2,153,656	95,202	1,508,611	45,948	69,453,840	79,909,402	210,065
2007 Conservative Goal	23,483,000	518,893	14,932,000	209,684	89,165,000	17,250,000	559,198	21,863,000	526,816	48,618,000	215,311,000	1,814,591
2007 % of Conservative Goal	8%	13%	5%	1%	5%	12%	17%	7%	9%	143%	5%	12%
2007 Best Case Goal	31,311,000	691,857	19,909,000	279,579	118,887,000	22,999,000	745,597	29,151,000	702,421	64,824,000	287,081,000	2,419,454
2007 % of Best Case Goal	6%	10%	4%	1%	3%	9%	13%	5%	7%	107%	4%	9%

Notes: T&D Savings represent 10% of residential and commercial installed savings, 6% of industrial installed savings

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Report Revision Date: 4/6/2007 1:37:41PM

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