Energy Trust of Oregon

Revised 2008-2009 Action Plan and Budget

Board of Directors
April 9, 2008

Energy Trust of Oregon, Inc.

Introduction

- Context
  - Electric and gas spending patterns by program and sector
- 2008 Proposed Budget Revisions
  - Revenue changes
  - Projected expenditure and saving changes
  - Revised efficiency budget
- 2009 Budget Projection
  - Revenue changes
  - Anticipated changes in expenditures and savings
  - Projected revised efficiency budget

EnergyTrust of Oregon, Inc.

2008 Revised Budget Overview

- Approved 2008 total ETO budget of $93.6 million in expenditures
  - $62.7 million total for energy efficiency
  - Savings of 28.9 aMW and 2.2 million annual therms
- Revised 2008 budget of $103.1 million in expenditures
  - Adds total EE supplemental funding of $11.5 million
  - Adds $6.5 million in PacifiCorp supplemental funding
  - Assumes addition of $5 million PGE supplemental funding
  - Adjust savings to 33.2 AMW and 2.3 million annual therms
  - $72.2 million budget total for energy efficiency expenditures

EnergyTrust of Oregon, Inc.

2008 Revised Budget Summary

Proposed changes between final and revised 2008 budget:

- Total resources increased $14.8 million
- Total expenses increased $ 9.5 million
  - Electric efficiency +$ 9.3 million
  - Gas efficiency +$ .3 million
  - Renewable programs -$ .1 million
- Electric savings increase +4.3 aMW (best case)
- Annual therm savings increase 97,000 (best case)
- No change in renewable generation

EnergyTrust of Oregon, Inc.

Revised Total ETO 2008 Budget
Changes in Revenue

Revenue sources:	Dollar Value
Additional 2007 carryover, above forecast	$ 3,183,134
SB1149 updated funding forecasts	720,044
Projected PGE supplemental EE funding	5,011,745
PacifiCorp supplemental EE funding	6,449,128
Interest rate income adjustment	(530,682)
Total Resource Change from Approved Budget	$14,833,368

EnergyTrust of Oregon, Inc.

Supplemental (838) Funding Emphasis 2008-2009

- More savings from existing markets
- Greater emphasis on existing small businesses and new commercial construction
- Pursue zero net energy commercial building design
- Secure more savings from small industrial customers
- Add near low-income residential and introduce new residential technologies
- Explore time of sale upgrades
- Expand refrigerator turn-in and replacement pilots
- Expand Corvallis Community Energy Challenge activities

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Program Expenditures Over Time

	2007 Actual	2008 Approved Budget	Revised 2008 Budget	Revised 2009 Projection
Existing Homes	$ 11,300,689	**$ 14,168,610**	**$ 16,905,124**	**$ 15,711,177**
New Homes and Products	9,512,928	**11,832,526**	**14,142,089**	**17,422,157**
NEEA Residential	1,195,316	1,114,509	1,029,650	912,857
Existing Buildings	5,331,298	**10,245,111**	**11,880,168**	**15,861,076**
New Buildings	4,932,095	**9,016,425**	**9,673,071**	**11,678,729**
NEEA Commercial	1,611,702	1,713,090	1,582,620	1,393,128
Production Efficiency	11,341,284	**13,544,577**	**16,087,116**	**18,240,894**
NEEA Industrial	924,541	1,046,476	949,483	852,742
Total	**$ 46,149,853**	**$ 62,681,324**	**$ 72,249,321**	**$ 82,072,760**

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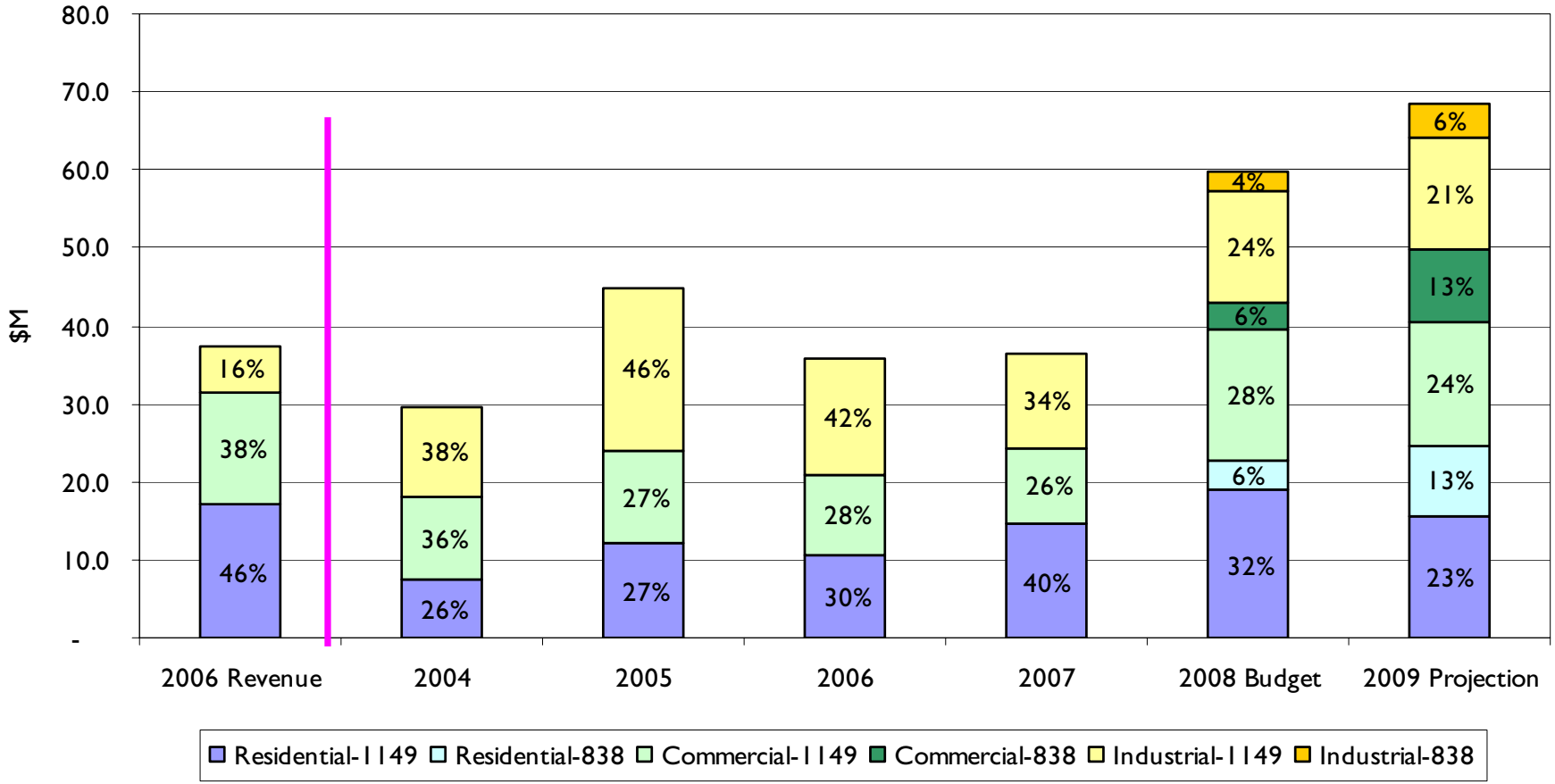
EE Electric Spending by Sector



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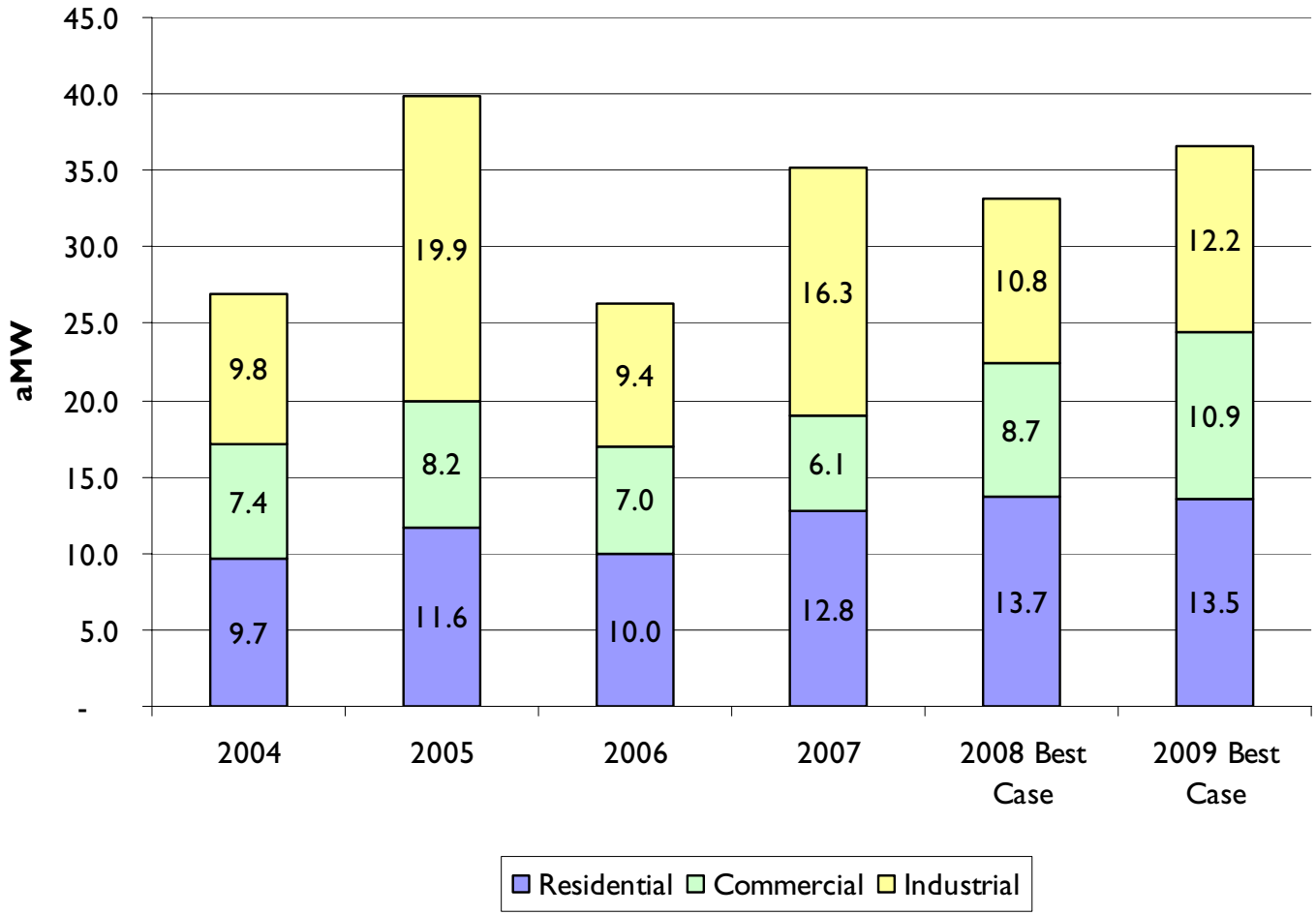
Best Case Electric Savings by Sector



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2009 Revised Budget Overview

- Approved 2009 total ETO projected budget of $77 million in expenditures
  - $60.3 million total for energy efficiency
  - Savings of 25.7 aMW and 2.5 million annual therms
- Revised 2009 projected budget of $98.7 million in planned expenditures
  - Adds total EE supplemental funding of $23.1 million
  - Adds $8.1 million in PacifiCorp supplemental funding
  - Assumes addition of $15 million PGE supplemental funding
  - Adjusts savings to 36.7 AMW and 2.7 million annual therms
  - $82.1 million total for energy efficiency

EnergyTrust of Oregon, Inc.

2009 Revised Budget Summary

Changes between final and revised 2009 projections:

- Projected resource increase $28.6 million
- Projected expense increase $21.7 million
  - Electric efficiency +$22.2 million
  - Gas efficiency -$ .4 million
  - Renewable programs -$ .1 million
- Electric savings increase +10.9 aMW (best case)
- Annual therm savings increase 201,000
- No change in generation

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Accounting and Reporting

- SB 1149 (base) and SB 838 (supplemental energy efficiency) revenues segregated by source
- Budgets allocated based upon anticipated market opportunities and savings potential
  - Targets customers based upon size, consistent with legal requirements applicable to large customers over 1aMW
  - Based upon revenue sources
- Program Management Contractors operate from a total budget for electricity and gas efficiency investments
- Electricity savings will continue to be reported in total, with attribution by funding source completed at year-end
  - Intended to estimate incremental savings derived from new revenues

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2008 Revised Budget Detail
Efficiency Expenditure and Savings Changes

2008 Budget	Expenditures			aMW-Best Case			Annual Therms-Best Case		
Energy Efficiency	Approved	Change	New	Approved	Change	New	Approved	Change	New
Residential									
Existing Homes	14.2	2.7	16.9	2.5	0.6	3.1	810,335	137,958	948,293
New Homes & Products	11.8	2.3	14.1	3.5	1.7	5.2	426,019	(40,854)	385,165
NEEA Residential	1.1	(0.1)	1.0	5.9	(0.5)	5.5			
Commercial					-				
Existing Buildings	10.3	1.6	11.9	4.5	0.8	5.3	570,757	-	570,757
New Buildings	9.0	0.7	9.7	3.1	-	3.1	369,600	-	369,600
NEEA Commercial	1.7	(0.1)	1.6	0.3	(0.0)	0.3			
Industrial					-				
Production Efficiency	13.5	2.6	16.1	7.8	1.9	9.7	38,903	-	38,903
NEEA Industrial	1.0	(0.1)	0.9	1.2	(0.1)	1.1			
Total Energy Efficiency	62.6	9.6	72.2	28.9	4.3	33.2	2,215,614	97,104	2,312,718
Renewable Energy	35.1	(0.1)	35.0	17.3	-	17.3			
Total	97.7	9.5	107.2						

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2008 Revised Efficiency Budget Detail (in Millions)

Revenues	Approved	Revised	Change
PGE	$ 26.8	$ 32.0	$ 5.2
Pacific Power	16.4	23.2	6.8
NW Natural	8.5	8.5	--
Cascade	.9	.9	--
Avista	--	--	--
Total	$ 52.6	$ 64.6	$ 12.0
Expenses	**Approved**	**Revised**	**Change**
PGE	$ 34.3	$ 38.4	$ 4.1
Pacific Power	16.1	21.3	5.2
NW Natural	11.0	11.3	.3
Cascade	1.2	1.2	--
Avista	.1	.1	--
Total	$ 62.7	$ 72.3	$ 9.6

EnergyTrust of Oregon, Inc.

Revised Total ETO 2009 Budget
Changes in Revenue

Revenue sources:	Dollar Value
Additional 2008 carryover, above forecast	$ 5,301,365
Projected SB1149 funding forecast	684,906
Anticipated PGE Supplemental EE Funding	14,999,998
PacifiCorp Supplemental EE Funding	8,070,250
Interest income adjustment	(483,317)
Total Resource Change from Approved Budget	$28,573,202

EnergyTrust of Oregon, Inc.

2009 Revised Budget Detail
Efficiency Expenditure and Savings Changes

2009 Projection	Expenditures			aMW-Best Case			Annual Therms-Best Case		
Energy Efficiency	Approved	Change	New	Approved	Change	New	Approved	Change	New
Residential									
Existing Homes	14.1	1.6	15.7	2.6	0.0	2.6	844,942	58,971	903,913
New Homes & Products	12.2	5.2	17.4	3.1	3.0	6.1	451,721	-	451,721
NEEA Residential	0.9	-	0.9	4.8	-	4.8			
Commercial					-				
Existing Buildings	7.5	8.4	15.9	2.1	4.1	6.3	487,192	262,808	750,000
New Buildings	9.8	1.9	11.7	3.9	0.6	4.4	415,800	53,307	469,107
NEEA Commercial	1.4	-	1.4	0.2	-	0.2			
Industrial					-				
Production Efficiency	13.5	4.7	18.2	8.0	3.2	11.2	251,600	(173,794)	77,806
NEEA Industrial	0.9	-	0.9	1.0	-	1.0			
Total Energy Efficiency	60.3	21.8	82.1	25.7	10.9	36.6	2,451,255	201,292	2,652,547
Renewable Energy	15.1	(0.1)	15.0	5.6	-	5.6			
Total	75.4	21.7	97.1						

EnergyTrust of Oregon, Inc.

2009 Revised Efficiency Budget Detail (in Millions)

Revenues	Approved	Revised	Change
PGE	$ 27.6	$ 42.8	$ 15.2
Pacific Power	16.9	25.4	8.5
NW Natural	8.6	8.6	--
Cascade	1.6	1.6	--
Avista	.1	--	-.1
Total	$ 54.8	$ 78.4	$ 23.6

Expenses	Approved	Revised	Change
PGE	$ 30.4	$ 43.8	$ 13.4
Pacific Power	15.9	24.6	8.7
NW Natural	12.3	12.1	-.2
Cascade	1.7	1.5	-.2
Avista	.1	.1	--
Total	$ 60.4	$ 82.1	$ 21.7

EnergyTrust of Oregon, Inc.

Thank you!

EnergyTrust of Oregon, Inc.

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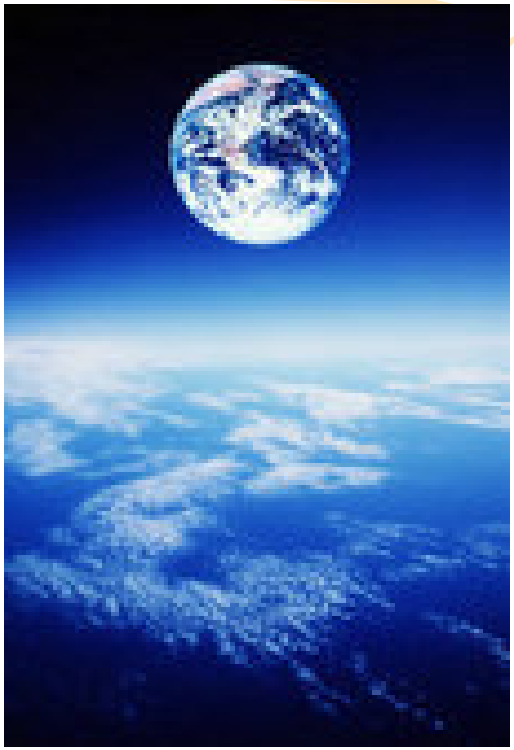

EnergyTrust of Oregon, Inc.

The Energy Trust of Oregon, Inc
Year to Date by Program / Service Territory
For the Twelve Months Ending December 31, 2007
Audited

	ENERGY EFFICIENCY						RENEWABLE ENERGY				TOTAL
	PGE	PacifiCorp	NW Natural	Cascade	Avista	Total	PGE	PacifiCorp	Total	Other	All Programs
REVENUES											
Public Purpose Funding	$25,123,961	$15,514,799	$9,622,649	$934,266	$160,163	$51,355,838	$7,290,983	$4,681,250	$11,972,233		$63,328,071
Conservation Rate Credit	550,000					550,000					550,000
Revenue from Investments										3,197,780	3,197,780
TOTAL PROGRAM REVENUE	25,673,961	15,514,799	9,622,649	934,266	160,163	51,905,838	7,290,983	4,681,250	11,972,233	3,197,780	67,075,851
EXPENSES											
Program Management (Note 4)	1,174,114	723,356	625,810	40,494	6,942	2,570,716	442,867	222,241	665,108		3,235,824
Program Delivery	6,337,715	4,270,740	1,816,282	128,375	24,827	12,577,939	33,028	83,546	116,574		12,694,513
Incentives	11,005,944	7,374,141	4,653,307	279,543	38,045	23,350,980	7,218,303	987,392	8,205,695		31,556,675
Program Evaluation & Planning Svcs.	670,433	430,080	304,359	15,564	2,079	1,422,516	66,881	35,316	102,197		1,524,713
Program Marketing/Outreach	980,103	610,592	788,158	49,220	9,082	2,437,155	183,723	39,888	223,611		2,660,766
Program Legal Services	5,738	3,468	4,814	225	27	14,272	22,417	4,703	27,120		41,392
Program Quality Assurance	41,264	24,300	32,596	1,964	345	100,469	-	-	-		100,469
Outsourced Services	130,945	54,656	63,030	1,162	48	249,841	205,748	89,132	294,880		544,721
Trade Allies & Customer Svc. Mgmt.	115,044	64,415	131,400	4,727	317	315,903	15,544	15,282	30,826		346,729
IT Services	364,102	224,149	200,312	13,797	2,341	804,702	90,547	43,498	134,045		938,747
Other Program Expenses	110,438	97,903	72,259	17,714	304	298,618	82,811	45,657	128,468		427,086
TOTAL PROGRAM EXPENSES	20,935,839	13,877,801	8,692,329	552,784	84,357	44,143,111	8,361,869	1,566,655	9,928,524		54,071,635
ADMINISTRATIVE COSTS											
Management & General (Note 1 & 3)	652,398	432,457	270,868	17,226	2,629	1,375,577	260,571	48,820	309,390		1,684,967
Communication & Outreach (Note 2 &3)	312,192	188,658	117,010	11,361	1,948	631,167	88,657	56,923	145,581		776,748
Total Administrative Costs	964,589	621,114	387,878	28,586	4,576	2,006,744	349,228	105,743	454,971		2,461,715
TOTAL PROG & ADMIN EXP	21,900,428	14,498,915	9,080,207	581,370	88,933	46,149,855	8,711,097	1,672,398	10,383,495		56,533,350
TOTAL REVENUE LESS EXPENSES	3,773,533	1,015,884	542,442	352,896	71,230	5,755,983	(1,420,114)	3,008,852	1,588,738	3,197,780	10,542,502
Cumulative Carryover at 12/31/07 (Note 5)	11,385,547	(8,445,630)	6,870,551	93,292	117,839	10,021,599	25,517,626	9,189,002	34,706,628	4,348,508	49,076,735
Interest attributed	1,740,000	1,160,000				2,900,000		1,700,000	1,700,000	(4,600,000)	
TOTAL NET ASSETS CUMULATIVE	16,899,080	(6,269,746)	7,412,993	446,188	189,069	18,677,582	24,097,512	13,897,854	37,995,366	2,946,288	59,619,237

Note 1) Management and General (Administrative) Expenses have been allocated based on total expenses.
Note 2) General Communication and Outreach expenses (Administrative) have been allocated based on Public Purpose Revenue from each Territory.
Note 3) Administrative costs are allocated for management reporting only. GAAP for Not for Profit organizations does not allow allocation of administrative costs to program expenses.
Note 4) Program Management costs include both outsourced and internal staff.
Note 5) Cumulative carryover at 12/31/2006 has been adjusted to reflect audited results.

The Energy Trust of Oregon, Inc
Program Expenses by Service Territory (Includes Allocated Administratve Expenses)
For the Twelve Months Ending December 31, 2007
Audited

	PGE	Pacific Power	Subtotal Elec. Utilities	Northwest Natural Gas	Cascade	Avista	Subtotal Gas Providers	Total	2007 Budget	Variance
Energy Efficiency										
Residential										
Home Energy Solutions - Existing Homes	3,827,520	1,980,451	5,807,971	5,352,747	139,971		5,492,718	11,300,689	13,757,550	2,456,861
Home Energy Solutions - New Homes/Products	4,745,250	2,961,558	7,706,808	1,393,689	323,498	88,933	1,806,120	9,512,928	10,152,336	639,408
Market Transformation (NEEA)	681,699	513,617	1,195,316				-	1,195,316	1,108,543	(86,773)
Total Residential	9,254,469	5,455,626	14,710,095	6,746,436	463,469	88,933	7,298,838	22,008,933	25,018,429	3,009,496
Commercial										
Business Energy Solutions - Existing Buildings	2,073,742	1,721,794	3,795,536	1,438,059	97,703		1,535,762	5,331,298	7,984,848	2,653,550
Business Energy Solutions - New Buildings	2,836,361	1,219,131	4,055,492	856,405	20,198		876,603	4,932,095	5,564,083	631,988
Market Transformation (NEEA)	919,168	692,534	1,611,702				-	1,611,702	1,803,872	192,170
Total Commercial	5,829,271	3,633,459	9,462,730	2,294,464	117,901	-	2,412,365	11,875,095	15,352,803	3,477,708
Industrial										
Business Energy Solutions - Production Efficiency	6,289,414	5,012,563	11,301,977	39,307			39,307	11,341,284	13,947,751	2,606,467
Market Transformation (NEEA)	527,274	397,267	924,541				-	924,541	1,059,668	135,127
Total Industrial	6,816,688	5,409,830	12,226,518	39,307	-	-	39,307	12,265,825	15,007,419	2,741,594
Total Energy Efficiency Costs	21,900,428	14,498,915	36,399,343	9,080,207	581,370	88,933	9,750,510	46,149,855	55,378,651	9,228,798
Renewables										
Biopower	429,946	61,788	491,734				-	491,734	1,530,096	1,038,362
Open Solicitation	454,123	90,198	544,321				-	544,321	2,130,696	1,586,375
Solar Electric (Photovoltaic)	1,243,874	1,253,129	2,497,003				-	2,497,003	3,019,111	522,108
Utility Scale Projects	6,421,691	13,235	6,434,926				-	6,434,926	4,542,972	(1,891,954)
Wind	161,463	254,048	415,511				-	415,511	1,355,794	940,283
Total Renewables Costs	8,711,097	1,672,398	10,383,495	-	-	-	-	10,383,495	12,578,669	2,195,174
Cost Grand Total	30,611,525	16,171,313	46,782,838	9,080,207	581,370	88,933	9,750,510	56,533,350	67,957,320	11,423,972

The Energy Trust of Oregon, Inc
Statement of Functional Expenses
For the Twelve Months Ending December 31, 2007
Audited

	Energy Efficiency	Renewable Energy	Total Program Expenses	Management & General	Communication & Outreach	Total Admin Expenses	Total
Program Expenses							
Incentives/ Program Management & Delivery	39,377,824	8,322,269	47,700,093			-	47,700,093
Payroll and Related Expenses	934,794	665,108	1,599,902	1,028,865	395,255	1,424,120	3,024,022
Outsourced Services	1,744,708	567,598	2,312,306	238,238	224,199	462,437	2,774,743
Planning and Evaluation	666,563	80,209	746,772	13,829		13,829	760,601
Customer Service Management	315,903	30,826	346,729			-	346,729
Total Program Expenses	43,039,792	9,666,010	52,705,802	1,280,932	619,454	1,900,386	54,606,188
Program Support Costs							
Supplies	5,000	3,935	8,935	5,538	3,124	8,662	17,597
Postage and Shipping Expenses	40,947	1,111	42,058	3,462	1,132	4,594	46,652
Telephone	3,765	2,835	6,600	2,701	701	3,402	10,002
Printing and Publications	64,498	8,846	73,344	4,778	26,825	31,603	104,947
Occupancy Expenses	80,534	58,061	138,595	75,151	35,269	110,420	249,015
Insurance	12,834	9,253	22,087	11,976	5,620	17,596	39,683
Equipment	3,180	6,812	9,992	2,967	1,420	4,387	14,379
Travel	31,968	18,714	50,682	24,683	3,798	28,481	79,163
Meetings, Trainings & Conferences	25,620	10,979	36,599	58,533	5,515	64,048	100,647
Interest Expense and Bank Fees		250	250	88		88	338
Depreciation & Amortization	6,212	5,825	12,037	5,797	2,721	8,518	20,555
Dues, Licenses and Fees	22,848	1,608	24,456	5,701	4,077	9,778	34,234
Miscellaneous Expenses	1,211	240	1,451	1,048	251	1,299	2,750
IT Services	804,702	134,045	938,747	201,612	66,841	268,453	1,207,200
Total Program Support Costs	1,103,319	262,514	1,365,833	404,035	157,294	561,329	1,927,162
TOTAL EXPENSES	44,143,111	9,928,524	54,071,635	1,684,967	776,748	2,461,715	56,533,350

PUC Performance Measure	11.0%
Administrative plus Program Support Costs	6.0%

Exp-Acct-YTD-002

2008 Budget Recap - Revised Budget

PROGRAM	TOTAL BUDGET ($M)	ELECTRIC GOALS1				B/C RATIO		GAS GOALS				B/C RATIO		EVAL DATE(S) (I=Impact; MA=Market Assessment; P=Process	PMC CONTRACT EXPIRATION
		Con-servative (aMW)	Best Case (aMW)	($mils/ aMW)	Levelized ($/kWh)	Utility	Societal	Conservative (annual therms)	Best Case (annual therms)	($/annual therms)	Levelized ($/Therm)	Utility	Societal		
ENERGY EFFICIENCY															
Residential															
Home Energy Solutions – Existing Homes	16.9	2.31	3.08	4.37 - 3.28	0.036 - 0.027			711,220	948,293	9.59 - 7.19	0.65 - 0.48			Q1-2008 (PI)	1/1/2011
Home Energy Solutions – New Homes & Products	14.1	3.86	5.14	3.04 - 2.28	0.049 - 0.037			288,874	385,165	8.43 - 6.32	0.61 - 0.45			Q1-2009 (PI) homes; Q1-2009 (I) homes; Q3-2008 (PI) prod	12/31/2008
Mkt Transformation (Alliance)	1.0	4.11	5.47	0.25 - 0.19	0.004 - 0.003			NA						NA	12/31/2010
Total Residential	**32.1**	**10.3**	**13.7**	**2.22 - 1.67**	**0.025 - 0.019**			***1,000,094***	***1,333,458***	**9.25 - 6.94**	**0.49 - 0.37**				
Commercial															
Business Energy Solutions – Existing Buildings	11.9	3.96	5.28	2.59 - 1.94	0.032 - 0.024			428,068	570,757	3.84 - 2.88	0.37 - 0.28			Q1-2008 (PI); Q1-2009 (I)	1/1/2011
Business Energy Solutions – New Buildings	9.7	2.36	3.14	3.52 - 2.64	0.035 - 0.026			277,200	369,600	4.97 - 3.73	0.44 - 0.33			Q1-2008 (PI); Q1-2009 (I)	12/31/2008
Mkt Transformation (Alliance)	1.6	0.19	0.26	8.24 - 6.18	0.092 - 0.069			NA						NA	12/31/2010
Total Commercial	**23.1**	**6.5**	**8.7**	**3.09 - 2.32**	**0.030 - 0.022**			***705,268***	***940,357***	**4.29 - 3.22**	**0.34 - 0.26**				
Industrial															
Production Efficiency	16.1	7.29	9.72	2.17 - 1.63	0.028 - 0.021			29,177	38,903	9.19 - 6.89	1.05 - 0.79			Q2-2008 (PI)	na
Mkt Transformation (Alliance)	0.9	0.81	1.07	1.18 - 0.88	0.018 - 0.013			NA						NA	12/31/2010
Total Industrial	**17.0**	**8.1**	**10.8**	**2.07 - 1.55**	**0.024 - 0.018**			**29,177**	**38,903**	**9.19 - 6.89**	**1.05 - 0.79**				
Total Energy Efficiency	**$72.2**	**24.9**	**33.2**	**2.40 - 1.80**	**0.030 - 0.022**			***1,734,539***	***2,312,718***	**7.23 - 5.42**	**0.44 - 0.33**				
RENEWABLE RESOURCES2															
Biopower	10.9	4.00	9.31	2.71 - 1.17				NA						NA	NA
Open Solicitation	9.0	2.07	3.18	4.34 - 2.82				NA						NA	NA
Solar Electric	9.1	0.47	0.62	19.40 - 14.55				NA						NA	NA
Utility-Scale	0.2	0.00	0.00	na - na				NA						NA	NA
Wind Cluster	5.9	2.92	4.17	2.03 - 1.42				NA						Q4-2008 (P)	NA
Total Renewable Resources	**$35.0**	**9.5**	**17.3**	**3.71 - 2.03**											

1 some columns may not add due to rounding

2 Budget amounts for Renewables are activity based and include dedicated funds

The Energy Trust of Oregon, Inc
By Program / Service Territory
For the Twelve Months Ending December 31, 2008
Revised Budget 2008-B-03

	ENERGY EFFICIENCY						RENEWABLE ENERGY				TOTAL	Previous		
	PGE	PacifiCorp	NW Natural	Cascade	Avista	Total	PGE	PacifiCorp	Total	Other	All Programs	Budget	Change	Pct change
REVENUES														
Public Purpose Funding	$26,964,732	$16,770,574	$8,540,133	$905,757		$53,181,197	$8,132,221	$5,057,792	$13,190,013		$66,371,210	$65,651,166	$720,044	1.10%
Public Purpose Funding-838	5,011,745	6,449,128				11,460,873					11,460,873		11,460,873	100.00%
Revenue from Investments										1,842,528	1,842,528	2,373,210	(530,682)	-22.36%
TOTAL PROGRAM REVENUE	31,976,477	23,219,702	8,540,133	905,757		64,642,069	8,132,221	5,057,792	13,190,013	1,842,528	79,674,610	68,024,376	11,650,234	17.13%
EXPENSES														
Program Management (Note 4)	1,647,052	831,284	730,405	82,652	6,511	3,297,904	631,842	327,180	959,023		4,256,927	4,132,482	124,444	3.01%
Program Delivery	10,386,582	5,975,604	2,616,343	293,705	23,795	19,296,029	147,970	49,530	197,500		19,493,530	18,111,999	1,381,530	7.63%
Incentives	19,879,559	11,214,101	5,628,182	557,332	35,794	37,314,968	15,769,655	10,734,313	26,503,968		63,818,937	56,874,055	6,944,882	12.21%
Program Evaluation and Planning Services	1,482,210	774,463	455,336	51,162	3,297	2,766,469	282,585	132,632	415,218		3,181,687	3,151,265	30,422	0.97%
Program Marketing/Outreach	2,051,893	949,693	696,452	79,563	6,189	3,783,789	229,301	73,398	302,700		4,086,489	3,441,915	644,574	18.73%
Program Legal Services	0	0	0	0	0		75,782	25,967	101,750		101,750	101,750		0.00%
Program Quality Assurance	82,603	40,264	37,744	2,338	52	163,000	19,400	7,200	26,600		189,600	189,600		0.00%
Outsourced Services	395,260	206,732	160,043	12,777	220	775,031	624,001	214,799	838,800		1,613,831	1,408,831	205,000	14.55%
Trade Allies & Customer Service Management	355,545	141,194	246,752	16,146	613	760,249	58,476	23,908	82,384		842,634	835,695	6,938	0.83%
IT Services	691,885	322,406	285,868	30,269	2,250	1,332,678	146,870	73,138	220,007		1,552,685	1,535,202	17,483	1.14%
Other Program Expenses	240,556	123,290	74,482	7,166	434	445,929	170,011	74,015	244,026		689,955	628,746	61,208	9.73%
TOTAL PROGRAM EXPENSES	37,213,145	20,579,031	10,931,608	1,133,110	79,155	69,936,048	18,155,894	11,736,079	29,891,976		99,828,024	90,411,541	9,416,483	10.42%
ADMINISTRATIVE COSTS														
Management & General (Note 1 & 3)	839,752	464,386	246,683	25,570	1,786	1,578,177	409,706	264,836	674,542		2,252,719	2,225,452	27,267	1.23%
Communication & Outreach (Note 2 &3)	391,146	216,305	114,902	11,910	832	735,095	190,836	123,357	314,193		1,049,289	961,038	88,250	9.18%
Total Administrative Costs	1,230,898	680,692	361,584	37,480	2,618	2,313,272	600,542	388,194	988,736		3,302,008	3,186,490	115,517	3.63%
TOTAL PROGRAM & ADMIN EXPENSES	38,444,043	21,259,723	11,293,192	1,170,590	81,773	72,249,320	18,756,436	12,124,273	30,880,712		103,130,031	93,598,031	9,532,000	10.18%
TOTAL REVENUE LESS EXPENSES	(6,467,566)	1,959,979	(2,753,059)	(264,833)	(81,773)	(7,607,251)	(10,624,215)	(7,066,481)	(17,690,699)	1,842,528	(23,455,421)	(25,573,655)	2,118,234	-8.28%
Net Assets from prior years	15,159,080	(7,429,746)	7,412,993	446,188	189,069	15,777,584	24,097,512	12,197,854	36,295,366	7,546,288	59,619,238	56,436,104	3,183,134	5.64%
Interest attributed	1,740,000	1,160,000				2,900,000		1,700,000	1,700,000	(4,600,000)				100.00%
TOTAL NET ASSETS CUMULATIVE	10,431,514	(4,309,767)	4,659,934	181,355	107,296	11,070,333	13,473,297	6,831,373	20,304,667	4,788,816	36,163,817	30,862,449	5,301,368	17.18%

Note 1) Management and General (Administrative) Expenses have been allocated based on total expenses.
Note 2) General Communication and Outreach expenses (Administrative) have been allocated based on total expenses for budget purposes only, otherwsie by Public Purpose Revenue from each Territory.
Note 3) Administrative costs are allocated for management reporting only. GAAP for Not for Profit organizations does not allow allocation of administrative costs to program expenses.
Note 4) Program Management costs include both outsourced and internal staff.
Note 5) Cumulative carryover at 12/31/2007 has been adjusted to reflect audited results.

The Energy Trust of Oregon, Inc
Program Budget Expenses by Service Territory
For the Twelve Months Ending December 31, 2008
Revised Budget 2008-B-03

	PGE	Pacific Power	Subtotal Elec. Utilities	Northwest Natural Gas	Cascade	Avista	Subtotal Gas Providers	Total	2008 no 838 Round 2	Change	Pct Change
Energy Efficiency											
Residential											
Home Energy Solutions - Existing Homes	7,339,479	2,747,249	10,086,728	6,495,255	321,909	1,232	6,818,396	16,905,124	14,168,610	2,736,514	19.31%
Home Energy Solutions - New Homes/Products	7,525,308	4,181,721	11,707,029	1,740,506	614,014	80,540	2,435,060	14,142,089	11,832,525	2,309,564	19.52%
Market Transformation (NEEA)	586,900	442,750	1,029,650				0	1,029,650	1,114,510	(84,860)	-7.61%
Total Residential	15,451,687	7,371,720	22,823,407	8,235,761	935,923	81,772	9,253,456	32,076,863	27,115,645	4,961,218	18.30%
Commercial											
Business Energy Solutions - Existing Buildings	7,732,647	2,501,646	10,234,293	1,552,397	93,478		1,645,875	11,880,168	10,245,110	1,635,058	15.96%
Business Energy Solutions - New Buildings	5,709,612	2,585,398	8,295,010	1,236,870	141,191		1,378,061	9,673,071	9,016,424	656,647	7.28%
Market Transformation (NEEA)	902,093	680,527	1,582,620				0	1,582,620	1,713,090	(130,470)	-7.62%
Total Commercial	14,344,352	5,767,571	20,111,923	2,789,267	234,669		3,023,936	23,135,859	20,974,624	2,161,235	10.30%
Industrial											
Business Energy Solutions - Production Efficiency	8,106,795	7,712,156	15,818,951	268,165			268,165	16,087,116	13,544,576	2,542,540	18.77%
Market Transformation (NEEA)	541,205	408,278	949,483				0	949,483	1,046,476	(96,993)	-9.27%
Total Industrial	8,648,000	8,120,434	16,768,434	268,165			268,165	17,036,599	14,591,052	2,445,547	16.76%
Total Energy Efficiency Costs	38,444,039	21,259,725	59,703,764	11,293,193	1,170,592	81,772	12,545,557	72,249,321	62,681,321	9,568,000	15.26%
Renewables											
Biopower	1,094,275	954,717	2,048,992				0	2,048,992	2,046,485	2,507	0.12%
Open Solicitation	7,573,687	1,651,112	9,224,799				0	9,224,799	9,237,621	(12,822)	-0.14%
Solar Electric (Photovoltaic)	6,453,565	2,638,473	9,092,038				0	9,092,038	9,101,940	(9,902)	-0.11%
Utility Scale Projects	38,800	4,556,565	4,595,365				0	4,595,365	4,604,878	(9,513)	-0.21%
Wind	3,596,110	2,323,408	5,919,518				0	5,919,518	5,925,759	(6,241)	-0.11%
Total Renewables Costs	18,756,437	12,124,275	30,880,712				0	30,880,712	30,916,683	(35,971)	-0.12%
Cost Grand Total	57,200,476	33,384,000	90,584,476	11,293,193	1,170,592	81,772	12,545,557	103,130,033	93,598,004	9,532,029	10.18%

Energy Trust of Oregon
Statement of Functional Expense
For the Twelve Months Ending December 31, 2008
Revised Budget 2008-B-03

	Energy Efficiency	Renewable Energy	Total Program Expenses	Management & General	Communication & Outreach	Total Admin Expenses	Total
EXPENSES							
Program Expenses							
Incentives/ Program Management & Delivery	61,143,822	26,701,468	87,845,290			0	87,845,290
Payroll and Related Expenses	1,434,419	959,023	2,393,442	1,262,860	366,263	1,629,123	4,022,565
Outsourced Services	3,613,817	1,423,226	5,037,043	405,003	422,728	827,731	5,864,774
Planning and Evaluation	1,229,469	277,217	1,506,686	19,738	1,821	21,559	1,528,245
Customer Service Management	760,249	82,384	842,633			0	842,633
Total Program Expenses	68,181,777	29,443,319	97,625,096	1,687,601	790,812	2,478,413	100,103,509
Program Support Costs							
Supplies	8,761	5,535	14,296	12,053	3,435	15,488	29,784
Postage and Shipping Expenses	21,650	7,306	28,956	5,347	21,381	26,728	55,684
Telephone	1,668	6,538	8,206	2,047	298	2,345	10,551
Printing and Publications	108,666	34,540	143,206	4,736	50,740	55,476	198,682
Occupancy Expenses	82,860	52,352	135,212	60,088	21,137	81,225	216,437
Insurance	23,363	14,761	38,124	16,942	5,960	22,902	61,026
Equipment	4,535	2,865	7,400	16,489	2,357	18,846	26,246
Travel	56,888	60,740	117,628	45,935	7,412	53,347	170,975
Meetings, Trainings & Conferences	60,600	37,050	97,650	124,750	14,500	139,250	236,900
Depreciation & Amortization	2,069	1,307	3,376	1,500	528	2,028	5,404
Dues, Licenses and Fees	49,926	5,269	55,195	8,414	5,109	13,523	68,718
Miscellaneous Expenses	608	384	992	541	155	696	1,688
IT Services	1,332,678	220,007	1,552,685	266,276	125,464	391,740	1,944,425
Total Program Support Costs	1,754,271	448,657	2,202,928	565,118	258,477	823,595	3,026,523
TOTAL EXPENSES	69,936,048	29,891,976	99,828,024	2,252,719	1,049,289	3,302,008	103,130,032

PUC performance measure	11%
Administrative plus program support costs	7.1%

The Energy Trust of Oregon, Inc
Energy Efficiency Electric Spending by Rate Schedule - 1149 vs 838
For the Twelve Months Ending December 31, 2008
Revised Budget 2008-B-03

	PGE			PacifiCorp		
	Total	1149	838	Total	1149	838
TOTAL PROGRAM REVENUE	31,976,477	$26,964,732	5,011,745	23,219,702	16,770,574	6,449,128
EXPENSES						
Program Management (Note 4)	1,647,052	1,428,571	218,480	831,284	650,596	180,689
Program Delivery	10,386,582	9,012,691	1,373,891	5,975,604	4,655,275	1,320,329
Incentives	19,879,559	17,329,463	2,550,096	11,214,101	8,945,829	2,268,272
Program Evaluation & Planning Svcs.	1,482,210	1,287,703	194,507	774,463	608,819	165,644
Program Marketing/Outreach	2,051,893	1,774,525	277,368	949,693	728,779	220,914
Legal Services						
Program Quality Assurance	82,603	71,781	10,821	40,264	31,763	8,501
Outsourced Services	395,260	341,881	53,378	206,732	158,691	48,041
Trade Allies & Customer Svc. Mgmt.	355,545	307,276	48,268	141,194	107,907	33,287
IT Services	691,885	599,021	92,864	322,406	249,078	73,329
Other Program Expenses	240,556	208,952	31,605	123,290	96,880	26,410
TOTAL PROGRAM EXPENSES	37,213,145	32,361,865	4,851,279	20,579,031	16,233,616	4,345,415
ADMINISTRATIVE COSTS						
Management & General (Note 1 & 3)	839,752	730,278	109,474	464,386	366,327	98,059
Communication & Outreach (Note 2 &3)	391,146	340,154	50,992	216,305	170,631	45,674
Total Administrative Costs	1,230,898	1,070,432	160,466	680,692	536,958	143,733
TOTAL PROGRAM & ADMIN EXPENSES	38,444,043	33,432,298	5,011,745	21,259,723	16,770,574	4,489,148
TOTAL REVENUE LESS EXPENSES	(6,467,566)	(6,467,566)	0	1,959,979	0	1,959,980
Net Assets Carried Forward From Prior Years	15,159,080	15,159,080	0	(7,429,746)	(7,429,746)	0
Interest attributed	1,740,000	1,740,000	0	1,160,000	1,160,000	0
TOTAL NET ASSETS CUMULATIVE	10,431,514	10,431,514	0	(4,309,767)	(6,269,746)	1,959,980

Note 1) Management and General (Administrative) Expenses have been allocated based on total expenses.
Note 2) General Communication and Outreach expenses (Administrative) have been allocated based on Public Purpose Revenue from each Territory.
Note 3) Administrative costs are allocated for management reporting only. GAAP for Not for Profit organizations does not allow allocation of administrative costs to program expenses.
Note 4) Program Management costs include both outsourced and internal staff.
Note 5) Cumulative carryover at 12/31/2007 has been adjusted to reflect audited results.
Note 6) Efficiency electric funding as allocated between 1149 and 838 proprtionate to revenue, adjusted for large industrial customers and expenditure of pge 1149 carryover

The Energy Trust of Oregon, Inc
Energy Efficiency Electric Spending by Program and Rate Schedule - 1149 vs 838
For the Twelve Months Ending December 31, 2008
Revised Budget 2008-B-03

	PGE			Pacific Power		
	Total	1149	838	Total	1149	838
Energy Efficiency						
Residential						
Home Energy Solutions - Existing Homes	7,339,479	6,342,738	996,741	2,747,249	2,098,748	648,501
Home Energy Solutions - New Homes/Products	7,525,308	6,503,330	1,021,978	4,181,721	3,194,606	987,115
Market Transformation (NEEA)	586,900	507,196	79,704	442,750	338,237	104,513
Total Residential	15,451,687	13,353,264	2,098,423	7,371,720	5,631,591	1,740,129
Commercial						
Business Energy Solutions - Existing Buildings	7,732,647	6,682,511	1,050,136	2,501,646	1,911,121	590,525
Business Energy Solutions - New Buildings	5,709,612	4,934,216	775,396	2,585,398	1,975,103	610,295
Market Transformation (NEEA)	902,093	779,584	122,509	680,527	519,885	160,642
Total Commercial	14,344,352	12,396,311	1,948,041	5,767,571	4,406,109	1,361,462
Industrial						
Business Energy Solutions - Production Efficiency	8,106,795	7,215,016	891,779	7,712,156	6,420,972	1,291,184
Market Transformation (NEEA)	541,205	467,706	73,499	408,278	311,902	96,376
Total Industrial	8,648,000	7,682,723	965,277	8,120,434	6,732,874	1,387,560
Total Energy Efficiency Costs	38,444,039	33,432,298	5,011,741	21,259,725	16,770,574	4,489,151

The Energy Trust of Oregon
Capital Purchases

	2008 budget
Technology Refresh	
Server upgrade and replacement	60,000
Network Switch Replacement	10,000
Firewall Replacement	10,000
Accounting Software	200,000
CRM Software	75,000
Software enhancements	20,000
Total capital purchases	375,000

	2009 Projection
	-
2009, nature of projects to be determined in mid 2008	120,000

all hardware and software is depreciated over 3 years, straight line

Revised 2008-2009 Action Plan
Updated April 9, 2008

The 2008-2009 Action Plan has been amended primarily to reflect the addition of supplemental electric energy efficiency funding authorized by the Renewable Energy Act (SB 838).

I. INTRODUCTION

Palpable shifts are evident in the environment in which Energy Trust operates. The first is broader acceptance that climate change is real and that, as a result, carbon regulation is expected. Time previously spent debating scientific evidence about climate change is now shifting to how to reduce carbon emissions 80% between now and 2050. A second change is the exponential growth in capital investment aimed at clean technology development. Related venture capital investments have increased 800% in four years time, with solar being a top priority category. Third, renewable energy equipment production is dramatically expanding. Demand for wind turbines is outstripping supply, and costs have increased 30% - 50%. The top five world wind manufacturers, representing 65% of the market, all are working to increase their output by 2010. Global supply of solar photovoltaic (PV) panels is expected to increase four-fold by 2010.

We appear to have reached the proverbial tipping point at which energy efficiency and renewable energy emerge as positive, viable, centerpiece solutions in a world where carbon reduction is a driver. Energy efficiency is seen as the first resource choice—the most available, affordable and carbon-neutral option. Like Oregon, other states with system benefit charges are pursuing more aggressive ways to acquire *all* the cost effective energy efficiency available as soon as possible. In 2007, Oregon became the 24th state with a renewable portfolio standard, and utilities are acquiring more renewable energy projects for their portfolios at a faster rate than ever before. The work Energy Trust does buys critical time, building a bridge to a bright and innovative energy future that is greener, cleaner and more sustainable.

2007 Energy Trust accomplishments move us further in this direction. Electric savings of 35.2 aMW significantly exceeded the best case goal of 32.8 aMW. Electric efficiency spending came within 83% of the total available budget, with the result that more savings were acquired at lower cost. Natural gas savings of 2.25 million annual therms exceeded the conservative 1.8 million annual therm goal while falling short of the best case goal of 2.4 million annual. Year-end renewable energy generation totaled 46.9 aMW, short of results forecasted in the adopted budget but nevertheless a dramatic increase over prior years.

As we look forward, heightened consumer awareness and marketplace interest translates to high growth in volume and demand for Energy Trust programs and services, for both efficiency and renewable energy opportunities.

This revised Action Plan and associated budget assume additional revenues and spending derived from utility supplemental energy efficiency plans. As of this writing, Oregon Public Utility Commission (OPUC) has approved the plan submitted by Pacific Power, with the plan submitted by PGE currently under review. Combined, the two plans are expected to add $11.5 million more to the Energy Trust electric energy efficiency budget for 2008, and an anticipated total of $23.1 million in 2009. As a result, the amended 2008-2009 action plan and 2008 budget

anticipate a new savings range of 24.9-33.2 aMW (previously 21.7-28.9 aMW) in electric energy savings and between 1.7 and 2.3 million annual therm savings (previously 1.7-2.2), representing the conservative to best case scenarios for both fuels.

OPUC minimum performance measures for 2008 remain under development. The current electric performance measure requiring average program levelized cost to be 2.0 cents/kWh is expected to increase to a higher level, reflecting a desire to acquire more cost effective savings. This amended budget contemplates a range of electric levelized costs from $.022 - $.030/kWh levelized. Levelized cost per annual therm, currently at 40 cents, is also expected to increase, adjusting for an increase in the discount rate from 3% to 5.2%. New renewable energy generation commitments in 2008 are expected to range between 9.5 and 17.3 aMW in new generation.

The following sections of the 2008-2009 action plan describe our emphases and strategies (section II), followed by detailed program/department descriptions and corresponding budgets (section III). The draft 2008 budget is consistent with these themes and approaches. Lastly, a summary of 2009 actions is included (section IV).

II. 2008-2009 DRAFT ACTION PLAN HIGHLIGHTS

Growth in demand for Energy Trust services and programs challenge us to acquire more savings and generation and to deliver greater benefits over time. Building upon existing programs, the 2008-2009 action plan is characterized by innovation and diversification. The plan expands into both current and new markets, adds insights through new market research, pursues different technologies, strengthens existing partnerships while seeking collaboration with new partners, and defines different Energy Trust roles. These and other new strategies and approaches are intended to build capacity and ultimately achieve more results.

The following specific themes spotlight what to expect in the coming two years:

1. *Renewable energy program transition* - When the Oregon Renewable Energy Act took effect in January 2008, Energy Trust transitioned from programs historically emphasizing utility scale development to projects of 20 MW or less. Mature, successful and diverse renewable energy programs form a solid foundation for this transition while challenging the organization to meet growth in volume and demand across all renewable energy programs. 2008-2009 emphases include:

    - Fulfill 2007 project commitments and continue to provide diverse project opportunities across renewable technologies
    - Meet residential and commercial solar electric demand, with a special emphasis on large commercial installation opportunities in PGE service territory
    - Pursue several community scale wind projects
    - Focus on biopower/biogas projects for dairies and municipal sewage/water treatment facilities
    - Expand the open solicitation program to incorporate small-scale hydro and small geothermal projects

    In addition, greater emphasis will be placed on non-profit/public sector opportunities using the successful third-party investor financing model. To meet changing customer expectations, Energy Trust will provide more technical assistance, market validation and

neutral reviews of proposed renewable energy projects. Lastly, with an exclusive role to develop smaller projects, Energy Trust anticipates longer lead times and more intensive work with customers to secure projects and bring them on line. Energy Trust will continue to monitor available funds and, should demand exceed resources, staff will work with interested parties on project timing.

2. *Energy efficiency program emphases* - The amended 2008-2009 action plan and budget are designed to capture more savings within existing markets and pursue new initiatives to reach more challenging and historically underserved, niche markets. Consistent with the resource assessment, the commercial sector holds the greatest market potential for accelerating savings and is the first tier for program growth. Overall energy efficiency strategies designed to first invest base (SB 1149) public purpose funding will:

    - Concentrate on sub-markets for both existing and new commercial buildings, including food services, lodging, office buildings, healthcare facilities and informational technology (IT) server farms
    - Emphasize lost opportunities, including new small to medium commercial construction, focused on the design-build market and integrating renewable energy
    - Expanded service to industrial customers, with new staff managing the program in-house, resulting in more direct Energy Trust/Program Delivery Contractor communication and a new focus on small industrial manufacturing customers consuming <1aMW/year
    - Go deeper into residential markets, continuing high value heating, ventilating, and air conditioning measures, ENERGY STAR® Home Performance, further integrating solar usage through home energy reviews and assessments, and renewed concentration in the multifamily/rental market

    More research is planned to integrate new energy efficient technologies and measures. Investments and field testing will be pursued for high efficiency water heaters, advanced residential construction techniques and potentially also for select light-emitting diode (LED) applications. In addition, joint marketing of both efficiency and renewable energy opportunities is viewed as a key element of the overall strategy to successfully enter new markets.

3. *Utility Collaboration and Other Partnerships* - With the Renewable Energy Act in place, Energy Trust expects to coordinate even more closely with PGE and Pacific Power on their integrated resource plans (IRPs). This will include regularly engaging utility representatives in the design and review of updated Energy Trust resource assessments. New market opportunities and corresponding measures/technologies will also be identified and pursued. Mutual Energy Trust/utility priorities are expected to be reflected in utility IRPs, with Energy Trust acquisition targets and results included for both efficiency savings and renewable energy generation. In addition, the following important areas will be emphasized as Energy Trust further pursues cooperative relationships:

    - Interconnection - The smooth and successful integration of smaller renewable energy projects into the electric utility grid is of special importance as Energy Trust continues to acquire smaller-scale, distributed generation
    - New financial options - These include further exploration of utility bill and other

financing options and potential purchase and ownership of efficiency and/or renewable energy products where this is critical to establishing viable markets
- Economic development - As interest in sustainable and green development continues, Energy Trust will strengthen its connections with utilities, state, regional and local economic development organizations, private investors and other organizations committed to sustainability

4. *Apply a customer-driven marketing strategy* - In 2008 Energy Trust is accelerating the evolution of its communications and marketing strategy from a generalized market approach (e.g. existing commercial buildings) to a customer-centric approach that also targets more specific customer groups and vendors (e.g., dry cleaners and nurseries). Beyond the promotion of specific individual programs, this approach will provide broader and more comprehensive ways for business and residential customers to address their energy opportunities. More in-depth market research, targeted outreach, website improvements and trade ally support activities are the keystones to this plan. Specific changes will:

    - Add new research focused on market segmentation, an annual attitude and awareness survey and shared market research with utilities and other entities
    - Increase outreach, using more tailored messages for key target groups
    - Promote sector-wide marketing and communications strategies that work across both efficiency and renewable programs
    - Upgrade our website, adding more detailed energy information, interactive features and possibly videos
    - Progressively automate on-line program forms and put an easier application process in place, further simplifying participation
    - Centralize trade ally administration and support, adding capacity for more interaction and feedback, trainings, events and recognition

5. *Community energy* - Energy Trust has selected Corvallis as the community to test whether working with local leaders and organizations in a concentrated manner will result in more participation and greater savings and generation at lower cost. Corvallis presented a best-case opportunity to explore the full gamut of community-based strategies. The amended budget provides additional funding to support activities in Corvallis for a well-rounded campaign that launched March 1, 2008, and will continue through February 2009. The program entails:

    - Partnering with the local grassroots Corvallis Sustainability Coalition, comprised of and driven by energetic leaders from 85 community organizations
    - Work closely with NW Natural, Pacific Power, Consumers Power, the mayor, and city council on planning and delivery

    In addition to the Corvallis focus, Energy Trust will work to engage large employers to reach out to employees with information about Energy Trust opportunities through:

    - Continued work with Nike to communicate Energy Trust Home Energy Savings information on its intranet sustainability site and through employee email "blasts"
    - Future participation of larger employers to deliver targeted messages for both efficiency and renewables

6. *Continue process improvements* - In 2008, Energy Trust will act upon findings and recommendations from the IT Enterprise Architecture Study. Such actions will lead to a new IT strategic plan with elements that:

    - Put a new IT staffing plan in place
    - Re-assess contact management system requirements and software
    - Evaluate current versus alternative accounting and finance packages
    - Develop new system implementation plans

    These improvements are intended to further focus IT efforts on those system improvements that most benefit both internal and external customers and users. Additionally these improvements will provide Energy Trust the flexibility to more effectively address the complexities the organization encounters.

7. *Incremental energy efficiency funding* - This revised action plan, revised budget and corresponding updated electric energy savings targets assume incremental funding authorized by the Renewable Energy Act (SB 838) from Pacific Power and PGE. The OPUC has approved Pacific Power's request to acquire more cost-effective savings with funding above the 3% public purpose rate, and these funds began flowing to Energy Trust in February, 2008. PGE has filed for OPUC approval of supplemental funding. For the purposes of this revised budget, Energy Trust assumes PGE supplemental funds will become available starting in August, 2008. Incorporating incremental funds assumes a period of ramp-up and diversification, reaching steady state by 2010. In addition to gleaning more savings from existing programs and approaches, the following investments are planned:

    - With the coordinated participation of utility representatives, accelerate efforts to target key sub-sectors of the existing commercial buildings market
    - Expand efforts in small to medium new commercial construction
    - Explore opportunities for zero net energy residential and commercial building design
    - Expand market penetration to serve more customers across all sectors
    - Add services for near low-income residential customers (60-80% of federal median income levels), expanding multifamily lighting emphasis and investigating the addition of new high efficiency technologies such as ductless mini-split heat pump units for heating
    - Investigate capturing new energy improvement upgrades and financing opportunities at the time when existing residential and commercial buildings are sold or leased
    - Expand funding and activity for measures such as lighting, compressed air and motor upgrades in specific small industrial segments, such as metal fabrication, horticulture and nurseries
    - Add new pilots in the residential sector including refrigerator recycling and home energy monitors

III. 2008-2009 PROGRAM/DEPARTMENT SUMMARIES AND CORRESPONDING BUDGET DETAIL

The following section includes 1-page, 2-sided descriptions for every program and major department, including 2008 revised budget details. This information provides a short descriptive statement of purpose, a list of top strategies and actions anticipated, the revised 2008 budget, and—where applicable—projected savings/generation.

IV. 2009 PROJECTED HIGHLIGHTS

Energy Efficiency

- Develop new initiatives to fully utilize any additional revenues made available by utilities through the Renewable Energy Act
- Continue concerted natural gas efficiency marketing, investments and savings acquisition
- Promote viable new residential technologies such as non-condensing gas water heaters as equipment becomes available
- Begin promotion of the most advantageous niche applications of LED lighting and next generation compact fluorescent lighting (CFL) technologies, assuming new products are tested and proven reliable
- Continue to develop the capacity of architects, engineers and developers to integrate energy efficient practices into new commercial construction
- In collaboration with the Northwest Energy Efficiency Alliance (NEEA), implement a new ENERGY STAR home specification that will be 15% above the 2008 Oregon residential code
- Explore strategies to achieve low- to zero net energy homes and green communities
- Collaborate with Avista to expand Home Performance with ENERGY STAR in southern Oregon
- Continue to seek opportunities with electric utilities to develop transmission and distribution deferral projects
- By supporting NEEA programs, attract more companies to permanently incorporate energy management practices and actions
- Continue to work with the Consortium for Energy Efficiency and manufacturers to encourage the development of new gas appliances to fill market gaps (e.g., condensing heat for rooftop commercial space conditioning systems)
- Accelerate efforts to identify and quantify when we are transforming markets and how much we are consequently saving

Renewable Energy

- Accelerate pursuit of projects of 20 MW or less
- Monitor utility scale project operation and fulfill ongoing reporting responsibilities
- Expand the opportunities for more community wind developments
- Grow the small-scale on-site wind generation initiative
- Continue to support commercial biomass operations at Warm Springs to come on-line in 2009
- Focus on dairy, wood and innovative waste management biomass projects
- Support wave power projects if research and development efforts prove out
- Support more hydro electric developments and expand to small-scale geothermal
- Examine whether to create a separate hydropower program offering
- Adjust solar incentives and activities to respond to changes in federal tax credits after 12/31/08
- Quantify and demonstrate the value solar energy systems add to Oregon homes

Other

- Continue evolving effective communications and marketing strategies that are customer centric and go beyond promotion of individual programs
- Monitor results of the Corvallis community energy pilot and, if successful, replicate the approach in one or more other Oregon communities[1]
- Focus research and planning on market acceleration and more hard-to-reach markets
- Begin implementation of financial and contact management systems changes selected in 2008
- Begin full implementation of the remainder of the IT strategic plan
- Update the five-year strategic plan
- Complete the five-year management audit

[1] The Corvallis pilot will continue into 2009 and final evaluation will not be possible until then.

Appendix 1

Energy Trust of Oregon
Mission Statement and Strategic Plan Goals

Mission statement:

To change how Oregonians produce and use energy by investing in efficient technologies and renewable resources that save dollars and protect the environment.

Strategic Plan Goals:

Goal 1: By 2012, deliver programs to help consumers save 300 average megawatts (2.6 million annual megawatt hours) of electricity and 21 million annual therms of natural gas from long-lasting energy efficiency measures. Targets are for a weighted average measure life of 14 years for electric savings and 20 years for gas savings.

Goal 2: Provide 10% of Oregon's electric energy from renewable resources by 2012, (approximately 450 average megawatts for Pacific Power and PGE if Energy Trust programs are complemented by state, federal and other policies and programs, or 150 average megawatts by Energy Trust effort alone.) [2]

Goal 3: Extend energy efficiency and on-site renewable energy programs and benefits to underserved consumers.

Goal 4: Contribute to the creation of a stable environment in which businesses that promote energy efficiency and renewable energy have the opportunity to succeed and thrive.

Goal 5: Encourage and support Oregonians to integrate energy efficiency and renewable resources into their daily lives.

[2] Goal 2 was adopted before passage of the Oregon Renewable Energy Act, which takes effect in January 2008. In the course of updating the strategic plan during this same year, Energy Trust will revise this goal to reflect our new and exclusive focus on renewable energy projects of 20MW or less.

Appendix 2

2008 Anticipated OPUC Energy Trust of Oregon Performance Measures*

Category	**Measures**	**2008 Revised Budget**
Energy Efficiency	Obtain at least 20 aMW computed on three year rolling average Levelized cost not to exceed $0.02/KWh	24.9- 33.2 aMW $0.022 - $.030/kwh
Natural Gas	Obtain at least 700,000 annual therms Levelized cost not to exceed $0.40/therm	1.7-2.3 million annual therms $0.33 - $0.44/therm
Renewable Resource Generation	Secure at least 3 aMW computed on a three year rolling average from small scale projects	9.5 – 17.3 aMW
Financial Integrity	Receive an unqualified financial opinion from independent auditor on annual financial statements	Accounting conforms with Generally Accepted Accounting Principles (GAAP)
Administrative and Program Support Costs	Keep below 11% of annual revenue	7.1%
Customer Satisfaction	Achieve reasonable rates	Includes customer satisfaction research
Benefit/Cost Ratios	Report both utility system and societal perspective on an annual basis and report significant changes, if any, on quarterly statements	

*In light of increased Renewable Energy Act (SB 838) electric efficiency revenues, discussions are in progress with OPUC staff regarding increases in electric and gas levelized cost performance measures.

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

PROGRAM: **BUSINESS ENERGY SOLUTIONS- PRODUCTION EFFICIENCY** **SECTOR:** **INDUSTRIAL**

PURPOSE: Acquire cost-effective electric savings through technical assistance and financial incentives for high-efficiency design and equipment in existing and new industrial processes and facilities. Although mostly funded through electric public purpose funding, small industrial gas customers on specific tariffs are eligible for gas program services and incentives. Contributes to Strategic Plan goals 1, 3, 4, 5.

PROGRAM STRATEGY:

In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.

Base:

1. Strengthen direct communications with Program Delivery Contractors (PDCs) and service to program participants through in-house staffing of the Production Efficiency program.
2. Deliver program to owners, plant engineers and design process engineers through Program Delivery Contractors (PDCs) assigned to key sectors and geographic territories.
3. Promote program participation through developing a broad offering of services that include detailed technical analysis studies, project management assistance, prescriptive premium lighting and high efficiency motor incentives, and custom project incentives.
4. Develop with board approval, large-scale projects those being mega-projects, that exceed program incentive caps, or combined heat and power projects (CHP) to achieve program value through large-scale savings.
5. Target key decision makers of existing industrial process projects, including owners and Chief Financial Officers
6. Promote regional collaboration by working with neighboring utilities and complementary organizations to leverage our collective resources for energy efficiency in industry
7. Leverage Northwest Energy Efficiency Alliance industrial sector activities to develop projects in targeted industries.

Incremental:

8. Target measure offerings to small/medium industrial market through use of trade ally network and semi-prescriptive technology specific, incentive calculation tools.

2008 ACTIONS:

Base:

1. Promote service delivery and market penetration for small to medium sized industrial customers, focusing on irrigation, dairy, nursery, and manufacturing markets.
2. Expand project commitment pipeline through concentrated PDC outreach efforts
3. Explore new strategies targeting O&M opportunities, specifically in compressed air and refrigeration systems.
4. Develop strategies to integrate continuous energy improvement into program offerings
5. Monitor project commitment level expenditures relative to utility funding territory and adjust PDC marketing to balance revenue project funding.
6. Influence growth in technical analysis skills by expanding the ATAC pool of engineering consultants adept at energy savings analysis calculations in the production environment.
7. Work with NEEA industrial staff to provide a coordinated marketing approach to food processors and pulp and paper companies.

Incremental

8. Expand marketing and trade ally support for small to medium sized industrial initiative.
9. Expand training opportunities for participants through collaboration with regional organizations
10. Develop additional semi-prescriptive incentive calculation tools for compressed air, boilers, refrigeration, and hydraulic systems to support the small industrial initiative.

2009 PLANNED ACTIVITIES:

1. Expand services that will be coordinating efforts with the potential Community Energy and T&D deferral projects.
2. Focus on delivering lower cost savings opportunities to achieve program delivery goals.
3. Implement strategies to reduce program management and delivery costs by optimizing PDC deployment.

TARGETS:

April

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

Year	Annual Electric & Gas Expense $M	Electric aMW	Electric MWh	Electric $M/aMW	Electric Levelized Cost ($/kWh)
2007 Full-Year Forecast	$ 11.3	14.97	131,178	$0.75	$0.011
2008 Proposed Budget	$ 16.1	7.29 - 9.72	63,880 - 85,174	$ 2.17 - $ 1.63	$ 0.028 - $ 0.021
2009 Projection	$ 18.2	8.44 - 11.26	73,977 - 98,636	$ 2.11 - $ 1.59	$ 0.028 - $ 0.021

	Gas Therms	Gas $/Therm	Gas Levelized Cost ($/therm)
2007 Full-Year Forecast	3,102	-	-
2008 Proposed Budget	29,177 - 38,903	$ 9.19 - $ 6.89	$ 1.05 - $ 0.79
2009 Projection	58,354 - 77,806	$ 6.72 - $ 5.04	$ 0.77 - $ 0.57

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Production Efficiency

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	$59,499		
Delivery	2,524,341	2,885,811	3,084,244
Performance Comp	132,615	58,570	68,567
Incentives	7,351,440	11,420,536	13,309,851
Total PMC Costs	**10,067,895**	**14,364,917**	**16,462,662**
Staffing	**221,556**	**373,543**	**395,955**
Marketing	**31,768**	**95,600**	**67,568**
Other Services			
Evaluation and Planning Services	369,765	517,028	469,224
QA-Subcontracted	6,031	30,000	30,900
Customer Service & Trade Ally Support	739	1,285	1,045
Legal Services	1,440		
Other Professional Services	325	24,692	25,433
Total Other Services	**378,299**	**573,004**	**526,603**
General			
General Program Support Costs	22,927	42,240	43,507
Shared	24,172	38,249	30,222
IT Services	101,240	84,487	82,784
Total General	**148,338**	**164,976**	**156,513**
PROGRAM DIRECT COSTS	**10,847,857**	**15,572,040**	**17,609,301**
Allocated mgmt & general marketing	493,427	515,076	631,593
TOTAL EXPENSE, FULLY ALLOCATED	**11,341,284**	**16,087,116**	**18,240,894**

April 2008

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: **MARKET TRANSFORMATION NORTHWEST ENERGY EFFICIENCY ALLIANCE (NEEA)** **SECTOR:** **COMMERCIAL**

PURPOSE: NEEA funds regional market transformation initiatives in the Northwest region across commercial, industrial and residential sectors working in coordination with Energy Trust programs. This budget contemplates leveraging NEEA regional market transformation initiatives in the commercial market sector to acquire cost-effective savings while creating sustainable and efficient purchasing patterns among commercial consumers. Contributes to Strategic Plan goals 1, 4, 5

PROGRAM STRATEGY:

1. Create and refine business cases for investment in energy efficiency as a profit center for vertically integrated real estate firms, hospitals, and grocery chains. Market to executive management through peer consultants.
2. Support with technical initiatives to enhance new building construction and operations and maintenance services.
3. Train vendors to provide efficient services and equipment, focusing on the targeted markets described above.
4. Support code enhancements based on these successes.
5. Coordinate marketing efforts with NEEA for energy efficiency opportunities that are currently a focus of Energy Trust programs (e.g. high efficiency computer power supplies).
6. Establish the viability of high efficiency building design, operations and maintenance services, and sales of efficient equipment as profitable businesses for vendors through intensive "firm focused" technical support.

2008 ACTIONS:

1. Continue progress in changing energy related business practices in large hospitals systems and community based hospitals by assisting with strategic energy management planning, providing education and training and technical assistance.
2. Follow through with regional grocery store chains on energy management action plans, expand to other regional grocers and initiate activities with national grocers when productive.
3. Initiate energy related business practice change within office real estate by building a strong relationship with the Building Owners and Managers Association (BOMA), providing education and training, and assisting select firms with energy management planning activities.
4. Advance integrated energy design practices with architects and design engineering firms through three or more firm focus relationships, technical assistance on 10 or more projects, and broad based education and training.
5. Promote better building operating performance with building operators and building service providers through three or more firm focus relationships, technical assistance on 10 or more projects, and education and training activities.
6. Continue to promote high efficiency computer power supplies and , consider other opportunities to improve plug load efficiencies and data centers.

2009 PLANNED ACTIVITIES:

- The NEEA commercial initiative is a multiyear venture. Over time we can expect more firms to participate and the participants to evolve from study, to test cases, to incorporating new practices and actions into their organizational structure and directives.

TARGETS:

Year	Annual Electric Expense $M	Electric			
		aMW	MWh	$M/aMW	Levelized Cost ($/kWh)
2007 Full-Year Forecast	$ 1.6	0.30	2,643	$5.34	$0.060
2008 Proposed Budget	$ 1.6	0.19 - 0.26	1,682 - 2,242	$ 8.24 - $ 6.18	$ 0.092 - $ 0.069
2009 Projection	$ 1.4	0.17 - 0.22	1,473 - 1,964	$ 8.28 - $ 6.21	$ 0.092 - $ 0.069

(see budget details on reverse)

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Market Transformation (NEEA) - Commercial

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Delivery	$1,519,264	$1,505,797	$1,318,863
Total PMC Costs	**1,519,264**	**1,505,797**	**1,318,863**
Staffing	**14,007**	**4,409**	**4,673**
Other Services			
Evaluation and Planning Services	6,915	19,814	19,506
Total Other Services	**6,915**	**19,814**	**19,506**
General			
General Program Support Costs		933	933
Shared	1,366	311	246
IT Services		684	670
Total General	**1,366**	**1,928**	**1,849**
PROGRAM DIRECT COSTS	**1,541,551**	**1,531,948**	**1,344,891**
Allocated mgmt & general marketing	70,151	50,672	48,237
TOTAL EXPENSE, FULLY ALLOCATED	**1,611,702**	**1,582,620**	**1,393,128**

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: **BUSINESS ENERGY SOLUTIONS- NEW BUILDINGS** **SECTOR:** **COMMERCIAL**

PURPOSE: Acquire cost-effective electric and natural gas savings by providing technical assistance and financial incentives for high-efficiency design and equipment in commercial and industrial new construction and major renovation projects. Contributes to Strategic Plan Goals 1, 3, 4, 5

PROGRAM STRATEGY:

In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.

Base:

1. Bolster pipeline for projects to be completed in 2009 and 2010.
2. Target decision makers in commercial and industrial new construction projects and major renovations of existing buildings.
3. Ensure program captures the majority of large projects.
4. Target architects and engineers by providing tools and resources to assist them in selling their clients on high efficiency design and equipment.
5. Enroll more projects that follow a "design-build" model.
6. Deliver program directly to owners and developers by utilizing Program Management Contractor (PMC) and a statewide comprehensive network of trade allies, leveraging existing market relationships and professional service channels.
7. Incorporate solar water heating and photovoltaic measures leveraging outreach and management resources. Rely on delivery support from Energy Trust solar program staff.
8. Coordinate with ODOE to package program offerings with Business Energy Tax Credits (BETC).
9. Leverage Northwest Energy Efficiency Alliance commercial sector activities to develop projects in targeted markets.
10. Encourage projects that will enroll in program to install more efficiency measures.

Incremental:

11. Achieve deeper penetration in the market for small and medium-sized construction and major renovation projects.
12. Create enhanced outreach program utilizing direct calls and emails, referrals, mass emails, cold calls, news releases, direct mailings, case studies, advertisements in trade publications, program seminars, sponsorships of events and organizations, web site, articles, bill inserts and partnerships with related organizations.

2008 ACTIONS:

Base:

1. Release a targeted small and medium sized project development initiative with focused marketing approach.
2. Work with design community to showcase/incorporate better analytical tools for building design (e.g. continue to host energy modeling meetings, update energy modeling tools with Oregon energy code data, develop and incorporate analytical lighting tools for new building design).
3. Continue to develop materials for architects and engineers to promote the program to their clients.
4. Continue to align with ODOE programs to minimize differences in program requirements (e.g. BETC, SEED, High-Performance Schools).
5. Provide outreach to encourage contractors that use a design-build approach to leverage program opportunities.
6. Continue to integrate Green Investment Fund projects with program activities.
7. Unspent incentive dollars budgeted for 2007 are moved into 2008 in anticipation of the program expanding into markets for small and medium sized new construction projects and starting to close more of these projects in 2008
8. Leverage NEEA Better Bricks program for program training and market actor education.
9. Increase PMC staff for marketing, outreach and technical support.
10. Offer tiered incentives for custom track and consider methods to encourage cooperation between lighting and mechanical contractors.

Incremental:

11. Further increase PMC staff for marketing, outreach and technical support.
12. Add more equipment to the Standard Track incentive list as new measures become available.
13. Expand ENERGY STAR® program track.

2009 PLANNED ACTIVITIES:

1. Continue to be aggressive at recruiting small and medium size projects.
2. Continue to successfully recruit large projects into the program.
3. Educate and enable service providers to deliver energy efficient practices in commercial new construction market.

TARGETS:

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

Year	Annual Electric & Gas Expense $M	Electric aMW	Electric MWh	Electric $M/aMW	Electric Levelized Cost ($/kWh)
2007 Full-Year Forecast	$ 4.9	2.59	22,656	$1.57	$0.015
2008 Proposed Budget	$ 9.7	2.36 - 3.14	20,641 - 27,521	$ 3.52 - $ 2.64	$ 0.035 - $ 0.026
2009 Projection	$ 11.7	3.32 - 4.43	29,102 - 38,803	$ 3.08 - $ 2.31	$ 0.031 - $ 0.023

	Gas Therms	Gas $/Therm	Gas Levelized Cost ($/therm)
2007 Full-Year Forecast	538,120	$1.63	$0.14
2008 Proposed Budget	277,200 - 369,600	$ 4.97 - $ 3.73	$ 0.44 - $ 0.33
2009 Projection	351,830 - 469,107	$ 4.16 - $ 3.12	$ 0.37 - $ 0.28

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
New Buildings

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	$32,963	$73,365	$77,033
Delivery	933,134	2,953,135	3,095,589
Marketing-PMC	66,828	89,140	
Performance Comp	109,140	100,000	100,000
Incentives	2,707,226	4,563,750	6,462,552
Total PMC Costs	**3,849,291**	**7,779,390**	**9,735,175**
Staffing	**132,570**	**208,284**	**220,781**
Marketing	**80,246**	**237,870**	**246,264**
Other Services			
Evaluation and Planning Services	293,705	518,533	479,810
QA-Subcontracted		15,000	15,750
Customer Service & Trade Ally Support	5,366	9,957	9,409
Legal Services	320		
Other Professional Services	221,560	352,588	331,217
Total Other Services	**520,951**	**896,078**	**836,186**
General			
General Program Support Costs	13,013	51,100	53,655
Shared	16,764	23,738	18,756
IT Services	104,529	166,898	163,534
Total General	**134,307**	**241,736**	**235,945**
PROGRAM DIRECT COSTS	**4,717,365**	**9,363,359**	**11,274,351**
Allocated mgmt & general marketing	214,730	309,712	404,378
TOTAL EXPENSE, FULLY ALLOCATED	**4,932,095**	**9,673,071**	**11,678,729**

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: **BUSINESS ENERGY SOLUTIONS- EXISTING BUILDINGS** **SECTOR:** **COMMERCIAL**

PURPOSE: Acquire cost-effective electric and natural gas savings by providing technical assistance and financial incentives for high-efficiency equipment and energy efficient operating practices in existing commercial facilities. Contributes to Strategic Plan goals 1, 3, 4, 5.

PROGRAM STRATEGY:

In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.

Base:

1. Target decision makers of existing commercial renovation projects including owners and installation contractors.
2. Deliver program to commercial entities by utilizing Program Management Contractor (PMC) and a statewide comprehensive network of trade allies, leveraging existing market relationships and professional service channels.
3. Maintain and expand successful state-wide Trade Ally Network of installation and technical assistance contractors to further deliver program services to the public.
4. Maintain focus on current target markets- foodservice, lodging, office, healthcare and natural gas equipment.
5. Incorporate operation and maintenance services and incentives formerly offered by Building Tune-Up and Operations pilot program.
6. Coordinate with ODOE and renewable energy programs to package program offerings.
7. Leverage Northwest Energy Efficiency Alliance commercial sector activities.
8. PMC will add marketing and technical resources to increase program participation and project throughput.
9. Expand program offerings geographically by engaging subcontractors in central and southern Oregon.

Incremental:

10. Expand target markets and target technologies.
11. Create enhanced outreach and educational program utilizing direct calls and emails, referrals, mass emails, cold calls, news releases, direct mailings, case studies, advertisements in trade publications, program seminars, sponsorships of events and organizations, web site, articles, bill inserts and partnerships with related organizations.

2008 ACTIONS:

Base:

1. Add new equipment incentives and develop new outreach strategies for current target markets- foodservice, lodging, office, healthcare and natural gas equipment.
2. Smoothly transition trade ally and allied technical analysis contractors to a more direct relationship with Energy Trust.
3. Continue to align with ODOE programs to minimize differences in program requirements (e.g. BETC, SEED, High-Performance Schools).
4. Integrate ODOE Business Energy Tax Credits (BETC) forms in incentive offerings to facilitate and streamline application process.
5. Continue to improve and streamline program rules, forms and participation steps for Trade Allies and participants.
6. Develop targeted incentives and marketing materials for new markets like commercial laundries, groceries and convenience stores, data centers and services and retro-commissioning.
7. Hire PMC marketing manager to coordinate all marketing and outreach activities.

Incremental:

1. Pilot tablet-PCs for low-level energy audits
2. Hire additional PMC technical resources to facilitate and review projects to optimize throughput.
3. Offer expanded technical and educational resources to trade allies and participants.

2009 PLANNED ACTIVITIES:

1. Lower acquisition cost of energy savings by streamlining program operations.
2. Expand into new target markets and target technologies.

TARGETS:

April 2008

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

Year	Annual Electric & Gas Expense $M	Electric aMW	Electric MWh	Electric $M/aMW	Electric Levelized Cost ($/kWh)
2007 Full-Year Forecast	$ 5.3	3.26	28,530	$1.16	$0.017
2008 Proposed Budget	$ 11.9	3.96 - 5.28	34,670 - 46,226	$ 2.59 - $ 1.94	$ 0.032 - $ 0.024
2009 Projection	$ 15.9	4.71 - 6.28	41,250 - 55,000	$ 2.88 - $ 2.16	$ 0.035 - $ 0.026

	Gas Therms	Gas $/Therm	Gas Levelized Cost ($/therm)
2007 Full-Year Forecast	598,831	$2.56	$0.28
2008 Proposed Budget	428,068 - 570,757	$ 3.84 - $ 2.88	$ 0.37 - $ 0.28
2009 Projection	562,500 - 750,000	$ 4.06 - $ 3.04	$ 0.39 - $ 0.30

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Existing Buildings

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	$111,106	$235,316	$383,837
Delivery	742,580	1,696,001	2,428,956
Marketing-PMC	446,492	859,063	1,039,407
Performance Comp	(14,098)	100,000	100,000
Incentives	3,202,498	7,016,280	9,949,599
Total PMC Costs	**4,488,578**	**9,906,660**	**13,901,799**
Staffing	**175,993**	**273,391**	**289,795**
Marketing	**61,362**	**199,120**	**110,750**
Other Services			
Evaluation and Planning Services	206,270	533,904	500,097
QA-Subcontracted		30,000	30,000
Customer Service & Trade Ally Support	25,884	69,698	64,818
Legal Services	1,088		
Other Professional Services		187,588	130,693
Total Other Services	**233,242**	**821,189**	**725,608**
General			
General Program Support Costs	24,484	64,600	59,600
Shared	20,862	30,373	23,998
IT Services	95,448	204,456	200,335
Total General	**140,794**	**299,428**	**283,933**
PROGRAM DIRECT COSTS	**5,099,969**	**11,499,789**	**15,311,885**
Allocated mgmt & general marketing	231,329	380,379	549,191
TOTAL EXPENSE, FULLY ALLOCATED	**5,331,298**	**11,880,168**	**15,861,076**

April 2008

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: **MARKET TRANSFORMATION NORTHWEST ENERGY EFFICIENCY ALLIANCE (NEEA)** **SECTOR:** **RESIDENTIAL**

PURPOSE: NEEA funds regional market transformation initiatives in the Northwest region across commercial, industrial and residential sectors working in coordination with Energy Trust programs. This budget contemplates leveraging NEEA regional market transformation initiatives in the residential market sector to acquire cost-effective savings while creating sustainable and efficient purchasing patterns among consumers**.** Contribute to Strategic Plan goals 1, 4, 5.

PROGRAM STRATEGY:

1. Leverage Energy Trust and NEEA programs to increase delivery support and program incentive offerings.
2. Coordinate marketing efforts in areas where there are complimentary NEEA and Energy Trust initiatives, in particular, ENERGY STAR New Homes.
3. Work with residential program staff to develop new residential initiatives that provide cost effective market transformation results.
4. Continue the expansion of the market share of ENERGY STAR Northwest Homes, while exploring possibilities for more advanced efficient homes.

2008 ACTIONS:

1. Run regional promotions of ENERGY STAR New Homes in coordination with utility and public purpose provider (including Energy Trust) rebates.
2. Complete demonstrations for advanced technologies in new homes and expand the number of high performance homes being built in Oregon in conjunction with Oregon Department of Energy (ODOE), Portland Office of Sustainability (OSD) and U.S. Department of Energy (DOE).
3. Initiate an impact evaluation that will provide an analysis of actual realized savings per ENERGY STAR new home, based on homes constructed in 2006-2007. It is assumed that residential new construction building characteristics study will serve as a baseline for this impact evaluation. (Energy Trust will leverage their evaluation on this effort.)
4. Work with residential program staff to identify new opportunities in residential market transformation efforts.
5. Coordinate Energy Trust program operations with NEEA regional initiatives to maximize overall program effectiveness.

2009 PLANNED ACTIVITIES:

- Continue efforts to drive regional progress toward adoption of homes certified to the Northwest ENERGY STAR standards. 2009 activities will likely involve raising the Energy Star spec to 15% above the proposed 2008 Oregon code and continuing high performance homes efforts.
- Continued invest in the new residential market transformation opportunities identified in late 2007/early 2008.

TARGETS:

Year	Annual Electric Expense $M	Electric			
		aMW	MWh	$M/aMW	Levelized Cost ($/kWh)
2007 Full-Year Forecast	$ 1.2	6.03	52,785	$0.20	$0.004
2008 Proposed Budget	$ 1.0	4.11 - 5.47	35,965 - 47,953	$ 0.25 - $ 0.19	$ 0.004 - $ 0.003
2009 Projection	$ 0.9	3.61 - 4.81	31,590 - 42,120	$ 0.25 - $ 0.19	$ 0.005 - $ 0.003

(see budget details on reverse)

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Market Transformation (NEEA) - Residential

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Delivery	$1,130,030	$948,711	$833,320
Total PMC Costs	**1,130,030**	**948,711**	**833,320**
Staffing	**3,278**	**11,677**	**12,378**
Other Services			
Evaluation and Planning Services	9,680	32,376	31,872
Total Other Services	**9,680**	**32,376**	**31,872**
General			
General Program Support Costs		933	933
Shared	300	933	737
IT Services		2,052	2,011
Total General	**300**	**3,918**	**3,681**
PROGRAM DIRECT COSTS	**1,143,287**	**996,683**	**881,251**
Allocated mgmt & general marketing	52,029	32,967	31,606
TOTAL EXPENSE, FULLY ALLOCATED	**1,195,316**	**1,029,650**	**912,857**

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

PROGRAM:	HOME ENERGY SOLUTIONS- NEW HOMES/PRODUCTS	SECTOR:	RESIDENTIAL

PURPOSE: Program targets lost energy efficiency opportunities in the residential sector. Provide the residential new home market with services and incentives with focus on EPA ENERGY STAR® regional specifications, reaching home buyers, builders, multifamily developers, and manufacturers of pre-fabricated homes. Overcome market barriers to the purchase of energy efficient products through product incentives, consumer awareness and education, focusing on ENERGY STAR label and corresponding benefits of products and services that display it. Contributes to Strategic Plan goals 1, 3, 4, 5.

PROGRAM STRATEGY:

In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.

Base:

1. Deliver program to customers and builders by utilizing Program Management Contractor (PMC) and a statewide comprehensive network of trade allies, leveraging existing market relationships and professional service channels.
2. Provide market support (e.g., building diagnostics and equipment installation support, market-based verifier oversight, training, co-op marketing funds, retailer training, lighting support, and outreach to industry organizations).
3. Develop and implement elements to overcome barriers (e.g., education, lighting, HVAC, solar).
4. Provide incentives (e.g., homes, stand-alone measures, clothes washers, light bulbs, duct sealing, commissioning (Cx)).
5. Conduct marketing to create consumer demand (e.g., ads, website, education, trade shows, and school outreach).
6. Move the market preparedness for the next generation of high performance homes.
7. Leverage Northwest Energy Efficiency Alliance (NEEA) residential sector activities.
8. Leverage other related programs and organizations (e.g., Earth Advantage, NEEM, home builder associations).

Incremental:

9. Provide incentives to further promote energy efficient lighting.
10. Collaborate with regional and national market actors to introduce and incent new energy efficient products.

2008 ACTIONS:

Base:

1. Increase market share and long-term viability of ENERGY STAR homes in the new construction market place, ENERGY STAR refrigerators and 2.0 MEF clothes washers in the appliance marketplace, and energy efficient lighting (specialty CFLs, LED can lights, and appropriate application of CFLs in new construction lighting packages).
2. Provide incentives for ENERGY STAR single and multi-family homes, gas furnaces, zonal electric homes, heat pumps, commissioning and/or duct sealing for heat pumps, manufactured homes, tankless hot water heaters, refrigerators, and clothes washer incentives on ultra-high efficiency models (2.0+ MEF).
3. Recruit new builders and help them prepare for the code change to take place in 2008.
4. Provide technical guidance, training, incentives, and promotions to support high performance homes (e.g., HPH "challenge", design training and assistance, solar integration, community specs).
5. Provide performance testing and duct sealing training to HVAC installers.
6. Promote energy efficient lighting through the spring and fall BPA specialty bulb buy down, the school fundraiser, and the on-line home energy analyzer.
7. Continue technical school outreach initiative.
8. Provide training to PV and solar water system installers through a partnership with Solar Oregon and OSEIA.

Incremental:

9. Implement specialty CFL buy downs, LED can lights for kitchens with dimmers, and fixture and CFL packages for new homes.

2009 PLANNED ACTIVITIES:

1. Maintain new home market transformation efforts while increasing focus on alternative strategies toward achieving low-energy homes and green communities.
2. Increase installations of solar thermal systems and provide support for direct application renewable strategies.
3. Begin promoting LED lighting options and next generation CFL technologies.
4. Promote new viable technologies (e.g., heat pump water heaters, non-condensing gas water heaters).

TARGETS:

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

Year	Annual Electric & Gas Expense $M	Electric aMW	Electric MWh	Electric $M/aMW	Electric Levelized Cost ($/kWh)
2007 Full-Year Forecast	$ 9.5	4.59	40,171	$1.68	$0.028
2008 Proposed Budget	$ 14.1	3.86 - 5.14	33,772 - 45,030	$ 3.04 - $ 2.28	$ 0.049 - $ 0.037
2009 Projection	$ 17.4	4.55 - 6.06	39,830 - 53,107	$ 3.30 - $ 2.48	$ 0.053 - $ 0.040

	Gas Therms	Gas $/Therm	Gas Levelized Cost ($/therm)
2007 Full-Year Forecast	336,588	$5.37	$0.40
2008 Proposed Budget	288,874 - 385,165	$ 8.43 - $ 6.32	$ 0.61 - $ 0.45
2009 Projection	338,791 - 451,721	$ 7.11 - $ 5.33	$ 0.51 - $ 0.38

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
New Homes & Products

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	$400,316	$562,630	$583,530
Delivery	2,657,480	4,633,291	6,134,174
Marketing-PMC	908,608	865,167	949,254
Performance Comp	214,609	100,000	75,000
Incentives	4,105,888	6,006,763	7,555,409
Total PMC Costs	**8,286,900**	**12,167,851**	**15,297,368**
Staffing	**145,480**	**259,770**	**275,357**
Marketing	**63,962**	**151,620**	**155,308**
Other Services			
Evaluation and Planning Services	227,454	460,588	473,188
QA-Subcontracted	37,230	8,000	20,000
Customer Service & Trade Ally Support	34,176	99,407	146,364
Legal Services	2,912		
Other Professional Services	16,222	76,995	15,495
Total Other Services	**317,993**	**644,991**	**655,046**
General			
General Program Support Costs	9,954	49,750	34,500
Shared	20,371	29,542	23,342
IT Services	252,378	385,766	377,991
Total General	**282,704**	**465,058**	**435,833**
PROGRAM DIRECT COSTS	**9,097,040**	**13,689,289**	**16,818,911**
Allocated mgmt & general marketing	415,888	452,800	603,246
TOTAL EXPENSE, FULLY ALLOCATED	**9,512,928**	**14,142,089**	**17,422,157**

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

PROGRAM:	HOME ENERGY SOLUTIONS- EXISTING HOMES	SECTOR:	RESIDENTIAL

PURPOSE: Acquire cost-effective electric and gas savings by providing energy efficiency services and incentives for existing single-family, multifamily and manufactured homes. Contributes to Strategic Plan goals 1, 3, 4, 5.

PROGRAM STRATEGY:

In consideration of incremental funding stemming from the passage of the Renewable Energy Act and subsequent electric utility rate filing approvals, the following strategies are contemplated in this program for 2008 and 2009.

Base:

1. Offer incentives for a wide variety of efficiency measures for single-family, multifamily, and manufactured homes.
2. Offer an online home energy analyzer to Energy Trust public purpose funding contributors.
3. Provide home energy reviews to customers in areas served by the Energy Trust of Oregon.
4. Work with utility funders to create promotions targeted to their customers.
5. Leverage manufacturer and community based partnerships in delivering energy efficiency.
6. Fully integrate the assessment and processing of Solar Hot Water applications.
7. Coordinate with ODOE to reward participants in the State Home Weatherization Program (SHOW) from Energy Trust service territories with compact fluorescent light bulbs.
8. Establish realtors as a new trade ally for the program.
9. Continue growth of Home Performance with ENERGY STAR®, a comprehensive, whole-house approach to single family residential energy efficiency that utilizes diagnostic equipment and generates a home analysis assessment.

Incremental:

10. Offer lower interest financing/increased incentive structure as an option for median income customers thru Assisted Home Performance program.
11. Add more services and/or device installations to home energy reviews with goal to move customers to measure installation, resulting in greater savings.

2008 ACTIONS:

Base:

1. Expand the number of trade allies participating in the Home Performance program in southern and eastern Oregon.
2. Effectively leverage utility and manufacturer promotional activities.
3. Engage in promotional activities with gas utilities to promote efficient gas furnaces and other efficient gas applications.
4. Conduct solar potential studies on residential homes and process solar hot water applications, with a goal to increase the number of solar thermal installations.
5. Sponsor events with Oregon Remodeling Association, Affordable Comfort, Building Performance Institute, the Remodelers Council and other organizations that support activities of trade allies.
6. Provide full program services to Cascade service territory including Home Performance with ENERGY STAR.
7. Provide approximately 12,000 CFLs to State Home Oil Weatherization (SHOW) customers.
8. Pursue more opportunities for gas efficiency measures.
9. Conduct a Blue Line behavioral monitor pilot.
10. Evolve multifamily program services to focus on high value measures such as common area lighting, appliances and HVAC.
11. Develop and conduct a pilot with the City of Portland that focuses on messaging energy efficiency and greenhouse gas mitigation through EPC and carbon labels that communicate how a homeowner can improve energy efficiency and reduce the home's carbon foot print.
12. Work with OR Housing & Community Services to pilot solar hot water systems installations to low income homes
13. Develop near-low income (60-80% median) outreach strategy and implement in last quarter of 2008.

Incremental:

14. Expand refrigerator replacement pilot efforts to other areas with incremental funds including Roseburg and Corvallis.
15. Assess effectiveness of heat pump commissioning for a programmatic offering.
16. Investigate large scale early refrigerator retirement effort for entire region not limited by income.
17. Fund educational "living wise" materials for student initiated residential direct installs in elementary / Jr. High curricula.

2009 PLANNED ACTIVITIES:

1. Continued focus on multifamily lighting and appliances related projects.
2. Continue delivery activities commensurate with incremental funding levels employing flexible initiatives established to spend funding as needed.
3. Continue collaboration efforts with Avista to expand Home Performance with ENERGY STAR in southern Oregon.

April 2008

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

TARGETS:

Year	Annual Electric & Gas Expense $M	Electric aMW	Electric MWh	Electric $M/aMW	Electric Levelized Cost ($/kWh)
2007 Full-Year Forecast	$ 11.3	2.20	19,246	$2.64	$0.023
2008 Proposed Budget	$ 16.9	2.31 - 3.08	20,227 - 26,970	$ 4.37 - $ 3.28	$ 0.036 - $ 0.027
2009 Projection	$ 15.7	1.97 - 2.63	17,249 - 22,998	$ 4.38 - $ 3.28	$ 0.035 - $ 0.026

	Gas Therms	Gas $/Therm	Gas Levelized Cost ($/therm)
2007 Full-Year Forecast	771,587	$7.12	$0.48
2008 Proposed Budget	711,220 - 948,293	$ 9.59 - $ 7.19	$ 0.65 - $ 0.48
2009 Projection	677,934 - 903,913	$ 10.47 - $ 7.85	$ 0.69 - $ 0.52

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Existing Homes

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Program Management	$417,530	$533,603	$574,267
Delivery	2,199,633	3,778,547	3,637,557
Marketing-PMC	391,055	855,969	964,955
Performance Comp	172,246	100,000	75,000
Incentives	5,983,927	8,307,639	7,425,576
Total PMC Costs	**9,164,390**	**13,575,759**	**12,677,356**
Staffing	**239,012**	**298,935**	**316,871**
Marketing	**386,510**	**303,240**	**257,615**
Other Services			
Evaluation and Planning Services	299,047	666,217	603,901
QA-Subcontracted	57,208	80,000	85,000
Customer Service & Trade Ally Support	249,738	579,903	567,682
Legal Services	8,512		
Other Professional Services	12,059	260,168	76,575
Total Other Services	**626,564**	**1,586,288**	**1,333,158**
General			
General Program Support Costs	111,895	77,775	77,325
Shared	32,267	34,208	27,028
IT Services	251,107	487,651	477,823
Total General	**395,268**	**599,634**	**582,176**
PROGRAM DIRECT COSTS	**10,811,744**	**16,363,857**	**15,167,176**
Allocated mgmt & general marketing	488,945	541,267	544,001
TOTAL EXPENSE, FULLY ALLOCATED	**11,300,689**	**16,905,124**	**15,711,177**

April 2008

ENERGY EFFICIENCY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: **MARKET TRANSFORMATION NORTHWEST ENERGY EFFICIENCY ALLIANCE (NEEA)** **SECTOR:** **INDUSTRIAL**

PURPOSE: NEEA funds regional market transformation initiatives in the Northwest region across commercial, industrial and residential sectors working in coordination with Energy Trust programs. This budget contemplates leveraging the NEEA regional market transformation initiatives in the industrial market sector through the Industrial Efficiency Alliance program (IEA) to acquire cost-effective savings while creating sustainable and efficient purchasing patterns among industrial consumers. Contribute to Strategic Plan goals 1, 4, 5

PROGRAM STRATEGY:

1. Focus efforts in the pulp and paper and food processing "vertical" markets.
2. Offer Continuous Energy Improvement (CEI) as the business practice change initiative that leads to energy efficient actions.
3. Facilitate the companies engaged in the CEI process through support in energy related organizational structure development, technical support, employee development and energy indicators.
4. Market program efforts through peer organizations and their readily available publications, trade shows, executive-level meetings and committees.
5. Leverage Energy Trust and utility resources to increase delivery outreach, support and program incentive offerings.

2008 ACTIONS:

1. Capitalize on NEEA's partnership with the Northwest Food Processors Association to gain access to targeted, strategic food processing firms and to provide executive level support for setting an industry-wide energy efficiency goal.
2. Move companies engaged with the Industrial Efficiency Alliance through the CEI process in a manner that allows them to reach their energy efficiency goals.
3. Enhance the process for facility level measurement and reporting of energy key performance indicators (KPI's).
4. Coordinate NEEA's offerings and staff with Energy Trust outreach, technical studies and incentives, to help tie sound energy management to resource acquisition.

2009 PLANNED ACTIVITIES:

- The NEEA industrial initiative is a multi-year venture. Over time we can expect more firms to participate and the participants to permanently incorporate energy management practices and actions into their organizational structure and directives.

TARGETS:

Year	Annual Electric Expense $M	Electric			
		aMW	MWh	$M/aMW	Levelized Cost ($/kWh)
2007 Full-Year Forecast	$ 0.9	1.30	11,432	$0.71	$0.011
2008 Proposed Budget	$ 0.9	0.81 - 1.07	7,054 - 9,405	$ 1.18 - $ 0.88	$ 0.018 - $ 0.013
2009 Projection	$ 0.9	0.72 - 0.96	6,299 - 8,399	$ 1.19 - $ 0.89	$ 0.018 - $ 0.013

(see budget details on reverse)

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Market Transformation (NEEA) - Industrial

	2007 Actual	2008 Budget	2009 Projection
PMC Costs			
Delivery	$871,477	$894,737	$798,965
Total PMC Costs	**871,477**	**894,737**	**798,965**
Staffing	**2,898**	**4,409**	**4,673**
Other Services			
Evaluation and Planning Services	9,680	18,009	17,728
Total Other Services	**9,680**	**18,009**	**17,728**
General			
General Program Support Costs		933	933
Shared	243	311	246
IT Services		684	670
Total General	**243**	**1,928**	**1,849**
PROGRAM DIRECT COSTS	**884,299**	**919,083**	**823,216**
Allocated mgmt & general marketing	40,242	30,400	29,526
TOTAL EXPENSE, FULLY ALLOCATED	**924,541**	**949,483**	**852,742**

April 2008

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: **BIOPOWER**

PURPOSE: Acquisition of significant amounts of renewable energy from wood-fired and other biomass generation; and development of markets for less mature energy resources such as dairy manure and forest biomass.

PROGRAM STRATEGY:

1. Perform targeted market analyses where necessary to fill in knowledge gaps.
2. Focus on sawmills and facilities using other sources of wood waste to acquire significant quantities of renewable energy.
3. Target upgrades at existing wastewater treatment plants to build capacity in PGE territory, and explore opportunities at such facilities in Pacific Power territory. Work with Energy Trust's energy efficiency programs and create strategic partnerships with local and regional trade associations.
4. In partnership with Oregon Dairy Farmers Association and OSU Dairy Extension Office, assist dairy community in exploring project opportunities and initiating project development. Coordinate offerings with Energy Trust efficiency programs.
5. Seek opportunities to position biogas projects as innovative waste management solutions receiving mixed waste streams including food processing waste, animal byproducts, human wastewater, manure and other organic material.
6. Offer cost-shared support for feasibility analyses to help potential applicants identify opportunities, where possible by leveraging other sources of funding (e.g., U.S. Department of Agriculture, Western Governors' Association and the Oregon Economic and Community Development Department).
7. Where appropriate, provide facilities that lack technical resources with assistance in applying for Energy Trust or other funding.
8. Remain engaged in forest biomass, participating in state initiatives while continuing to engage the Lake County Initiative and Warm Springs Biomass efforts.

2008 ACTIONS:

1. Begin commercial operation at Rough & Ready and Columbia Blvd. projects.
2. Roll out Dairy Initiative, including standard financial incentive offer.
3. Develop strategic partnership with wastewater sector, and explore potential for an "Energy Independence" campaign for wastewater treatment plants based on best efficiency practices and onsite generation.
4. Commit funding for 8 projects, totaling 4.00 – 9.31 aMW, and 12 feasibility studies.

2009 ACTIONS:

1. Begin commercial operation at Warm Springs Biomass.
2. Scale down standard WWTP. Focus on dairy, wood and innovative waste management projects (which could include WWTPs).

TARGETS:

Year	Annual Electric Activity $M	Energy Generation		
		aMW	MWh	$M/aMW
2007 Full-Year Forecast	$0.5	-	-	
2008 Proposed Budget	$10.9	4.00 - 9.31	35,068 - 81,553	$ 2.71 - $ 1.17
2009 Projection	$3.3	0.55 - 1.62	4,817 - 14,186	$ 5.96 - $ 2.02

(see budget details on reverse)

Note: Budget figures include dedicated funds

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Biopower

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Incentives	$177,996	$1,132,815	$3,687,500
Total Program Management Costs	**177,996**	**1,132,815**	**3,687,500**
Staffing	**146,069**	**263,174**	**278,964**
Marketing	**24,114**	**34,650**	**29,150**
Other Services			
Evaluation and Planning Services	19,730	116,005	100,884
QA-Subcontracted		6,600	19,500
Legal Services	11,278	26,250	17,500
Other Professional Services	38,058	299,400	208,100
Total Other Services	**69,066**	**448,255**	**345,984**
General			
General Program Support Costs	8,671	28,000	13,750
Shared	15,793	23,841	18,837
IT Services	28,880	52,653	51,592
Total General	**53,344**	**104,494**	**84,179**
PROGRAM DIRECT COSTS	**470,589**	**1,983,388**	**4,425,777**
Allocated mgmt & general marketing	21,145	65,604	158,739
TOTAL EXPENSE, Accounting Perspective	**491,734**	**2,048,992**	**4,584,516**
Plus/minus Dedicated Funds committed for future years	-	8,802,185	(1,307,500)
TOTAL EXPENSE, Action Plan Perspective	**491,734**	**10,851,177**	**3,277,016**

April 2008

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: OPEN SOLICITATION

PURPOSE: Develop a portfolio of market-defining installations, each element of which demonstrates a new application, technology or business model not otherwise covered by Energy Trust programs, provides insight on whether and how to launch new, technology-specific Energy Trust programs, and/or secures a low-cost renewable energy resource. Contributes to Energy Trust strategic goals 2, 3 and 5.

PROGRAM STRATEGY:

1. Offer a program to help ensure that eligible good ideas do not "fall through the cracks."
2. Focus on outreach and lead generation, particularly for hydro and geothermal projects.
3. Make funds available for feasibility studies. When possible, work in concert with the Oregon Economic and Community Development Department's Renewable Energy Feasibility Fund (REFF).
4. Conduct specific outreach to municipalities in the PGE service territory to develop municipal hydro projects.
5. Assist selected applicants in further developing proposals.

2008 ACTIONS:

1. Complete approved projects.
2. Complete evaluations of existing applications for a geothermal project, hydro project, and other applications that arrive late in 2007.
3. Conduct an RFP for feasibility studies for municipal hydro projects.
4. Provide assistance to enable more municipalities in the PGE service territory to apply for funding from REFF and to help municipalities in PAC territory file more successful applications.
5. Continue outreach and communication work to municipalities to build the pipeline and to make sure we are aware of projects that may be coming in.
6. Determine what role, if any, Energy Trust will play in development of wave power projects.

2009 PLANNED ACTIVITIES:

1. Fund projects that result from feasibility studies conducted in 2007 and 2008.
2. Support wave power project(s) based on information gathered in 2008.
3. Examine possibilities for "spinning off" hydropower into its own program.

TARGETS:

Year	Annual Electric	Energy Generation		
		aMW	MWh	$M/aMW
2007 Full-Year Forecast	$0.5	0.01	50	54.43
2008 Proposed Budget	$9.0	2.07 - 3.18	18,097 - 27,842	$ 4.34 - $ 2.82
2009 Projection	$2.8	0.57 - 0.88	5,012 - 7,711	$ 4.91 - $ 3.19

(see budget details on reverse)

Note: Budget figures include dedicated funds

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Open Solicitation

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Delivery		$60,000	
Incentives	238,590	8,188,635	2,338,627
Total Program Management Costs	**238,590**	**8,248,635**	**2,338,627**
Staffing	**110,245**	**220,603**	**233,839**
Marketing	**4,596**	**22,500**	**48,300**
Other Services			
Evaluation and Planning Services	10,320	80,829	93,819
QA-Subcontracted		20,000	20,000
Legal Services	2,912	30,000	
Other Professional Services	114,652	203,500	200,150
Total Other Services	**127,884**	**334,329**	**313,969**
General			
General Program Support Costs	2,516	29,200	33,600
Shared	13,695	23,116	18,265
IT Services	22,886	51,057	50,028
Total General	**39,097**	**103,373**	**101,893**
PROGRAM DIRECT COSTS	**520,412**	**8,929,440**	**3,036,628**
Allocated mgmt & general marketing	23,909	295,359	108,915
TOTAL EXPENSE, Accounting Perspective	**544,321**	**9,224,799**	**3,145,543**
Plus/minus Dedicated Funds committed for future years	-	(264,500)	(338,626)
TOTAL EXPENSE, Action Plan Perspective	**544,321**	**8,960,299**	**2,806,917**

April 2008

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: SOLAR ELECTRIC (PHOTOVOLTAIC)

PURPOSE: Transform the solar electric market for all sectors in Oregon by expanding participation, providing quality standards and ensuring there is a strong qualified installer base for consumers. Contributes to Energy Trust goals 2, 3 and 5.

PROGRAM STRATEGY:

1. Leverage increased state and strong federal tax benefits for businesses to expand the commercial sector.
2. Support 3rd party ownership model to expand into high visibility nonprofit/government sector.
3. Provide quality standards for consumers to rely on.
4. Foster growth in the installer base to maintain balance between local supply and demand.
5. Expand market opportunities to include homebuilders and commercial architects/engineers.
6. Leverage City of Portland Solar Now! campaign to increase participation in PGE territory.

2008 ACTIONS:

1. Expand market opportunities:
   a) Offer project support for governments and nonprofits seeking 3rd party investors.
   b) Establish guidelines for Energy Trust participation in large (1-2+ MW) solar projects.
   c) Offer intensive support for selected home builders. Promote successful solar home developments.
   d) Cross promote solar with all energy efficiency programs, coordinate targeted customer sector outreach.
2. Maintain high level of publicity for solar. Continue targeted outreach to PGE customers:
   a) Continue effective solar workshops (outsourced to Solar Oregon), primarily in PGE territory.
   b) Develop new messages based on 2007 focus group results.
   c) Work with Solar Now! to promote commercial solar through established business groups/networks.
   d) Continue support for solar home tours, Green + Solar magazine and NW Solar Expo.
   e) Continue coop ad incentives for trade allies.
3. Expand the installer base:
   a) Increase installer training available locally (outsourced to OSEIA); continue to promote best installation practices.
   b) Build relationships with large national integrators, including 3rd party owners, moving into Oregon.
   c) Encourage growth in residential installer base by sponsoring expansion of LRT apprenticeship program.

2009 PLANNED ACTIVITIES:

1. Adjust incentives and activities to respond to changes in federal tax credits after 12/31/08.
2. Manage incentive levels to provide predictable and stable market with equity between sectors.
3. Strive to quantify and demonstrate the value that solar energy systems add to a home in Oregon's market.

TARGETS:

Year	Annual Electric	Energy Generation		
		aMW	MWh	$M/aMW
2007 Full-Year Forecast	$2.5	0.15	1,289	16.65
2008 Proposed Budget	$9.1	0.47 - 0.62	4,106 - 5,475	$ 19.40 - $ 14.55
2009 Projection	$5.5	0.35 - 0.47	3,090 - 4,120	$ 15.47 - $ 11.60

(see budget details on reverse)

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Solar Electric (Photovaltaic)

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Delivery	$63,309	$39,500	$40,685
Incentives	1,749,537	7,782,118	4,257,500
Total Program Management Costs	**1,812,846**	**7,821,618**	**4,298,185**
Staffing	**169,574**	**251,442**	**266,529**
Marketing	**191,694**	**209,600**	**192,157**
Other Services			
Evaluation and Planning Services	16,343	109,375	106,171
Customer Service & Trade Ally Support	30,826	82,384	72,136
Legal Services	1,760		
Other Professional Services	59,823	173,300	182,104
Total Other Services	**108,752**	**365,059**	**360,411**
General			
General Program Support Costs	18,543	55,750	60,641
Shared	26,534	30,373	23,998
IT Services	39,959	67,088	65,736
Total General	**85,036**	**153,211**	**150,375**
PROGRAM DIRECT COSTS	**2,367,902**	**8,800,930**	**5,267,657**
Allocated mgmt & general marketing	129,101	291,108	188,934
TOTAL EXPENSE, Accounting Perspective	**2,497,003**	**9,092,038**	**5,456,591**
Plus/minus Dedicated Funds committed for future years	-	-	-
TOTAL EXPENSE, Action Plan Perspective	**2,497,003**	**9,092,038**	**5,456,591**

April 2008

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: **UTILITY-SCALE PROJECTS**

PURPOSE: **Large-scale acquisition**

PROGRAM STRATEGY:

1. Phase out the program per SB 838 and focus on projects of 20 MW and less.

2008 ACTIONS:

1. Finish out current funding contracts for Biglow Canyon and GoodNoe Hills wind projects including reporting, review and inspection obligations.
2. Monitor projects over time.
3. Fulfill ongoing reporting responsibilities.

2009 PLANNED ACTIVITIES:

1. Monitor projects over time.
2. Fulfill ongoing reporting responsibilities.

TARGETS:

Year	Annual Electric	Energy Generation		
		aMW	MWh	$M/aMW
2007 Full-Year Forecast	$6.4	46.77	409,742	0.14
2008 Proposed Budget	$0.2	0.00 - 0.00	- - -	- - -
2009 Projection	$0.0	0.00 - 0.00	- - -	- - -

(see budget details on reverse)

Note: Budget figures include dedicated funds

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Utility Scale

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Incentives	$6,000,000	$4,373,000	
Total Program Management Costs	**6,000,000**	**4,373,000**	**0**
Staffing	**70,516**	**7,112**	**7,539**
Marketing		**6,400**	
Other Services			
Evaluation and Planning Services	15,212		
Legal Services	9,879		
Other Professional Services	54,714	50,500	27,200
Total Other Services	**79,805**	**50,500**	**27,200**
General			
General Program Support Costs	4,242	9,560	5,600
Shared	6,823	518	410
IT Services	15,257	1,140	1,117
Total General	**26,322**	**11,218**	**7,127**
PROGRAM DIRECT COSTS	**6,176,643**	**4,448,230**	**41,866**
Allocated mgmt & general marketing	258,283	147,135	1,502
TOTAL EXPENSE, Accounting Perspective	**6,434,926**	**4,595,365**	**43,368**
Plus/minus Dedicated Funds committed for future years	-	(4,373,000)	-
TOTAL EXPENSE, Action Plan Perspective	**6,434,926**	**222,365**	**43,368**

April 2008

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

PROGRAM: WIND

PURPOSE: Expansion of the opportunities for wind from the current market models, transforming markets to bring development and construction of distributed generation and projects of varying, smaller sizes and alternative ownership models. Contributes to Strategic Plan goals 3, 4, 5 & 6.

PROGRAM STRATEGY:

1. Confirm sufficient wind resources through anemometer loans and support for Oregon State University's wind monitoring lab.
2. Provide simplified wind resource tool for small wind.
3. Develop financial and business models to help rural Oregon communities and landowners become project sponsors.
4. Define a standard incentive offer or open solicitation to seed market development.
5. Build the pipeline of future projects, partnering with USDA on feasibility grants and analyses.
6. Break down knowledge barriers by providing consolidated, Oregon-specific information for project sponsors.

2008 ACTIONS:

1. Bring to fruition 1-2 community wind projects.
2. Identify 2-3 PGE 10 MW projects for 2009.
3. Continue the expanded anemometer loan program to support community wind with data analysis and taller anemometers for the tier-two projects from the 2006 RFP.
4. Provide support for additional feasibility studies to continue building the pipeline of potential Community Wind projects.
5. Distribute the second edition of the Community Wind Guidebook.
6. Continue to partner with ODOE to gain federal co-funding of projects and studies.
7. Partner with Oregon farm groups and state agencies to co-promote the program.
8. Conduct one in-depth case study with financial fact sheet.
9. Address transmission and distribution barriers to bring BPA and Co-op wind resources to PGE.
10. Continue providing the industry with support to address interconnection issues.
11. Provide incentives for 7-10 small wind projects.
12. Evaluate the effectiveness of using wind map data for evaluating wind resources for small wind.
13. Expand the number of small wind contractors participating in the Small Wind Trade Ally network.
14. Hold 2-3 Small Wind Trade Ally training sessions.
15. Hold 2-3 Small Wind Workshops to give information for interested participants.

2009 PLANNED ACTIVITIES:

1. Have a fully operational program for community wind development with standard incentive or open solicitation.
2. Implement program revisions based on 2007/2008 experience.
3. Bring projects to fruition that were proposals in 2006 and 2007.
4. Grow the small-scale on-site generation program.

TARGETS:

Year	Annual Electric	Energy Generation		
		aMW	MWh	$M/aMW
2007 Full-Year Forecast	$0.4	0.00	-	
2008 Proposed Budget	$5.9	2.92 - 4.17	25,558 - 36,512	$ 2.03 - $ 1.42
2009 Projection	$3.4	1.87 - 2.67	16,349 - 23,356	$ 1.81 - $ 1.26

(see budget details on reverse)

RENEWABLE ENERGY 2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

The Energy Trust of Oregon, Inc
Statement of Functional Expense
2008 Budget
Wind

	2007 Actual	2008 Budget	2009 Projection
Program Management Costs			
Delivery	$53,265	$98,000	$95,000
Incentives	39,571	5,027,400	2,553,000
Total Program Management Costs	**92,836**	**5,125,400**	**2,648,000**
Staffing	**168,704**	**216,691**	**229,693**
Marketing	**3,207**	**18,550**	**54,150**
Other Services			
Evaluation and Planning Services	40,591	109,008	92,027
Legal Services	1,291	45,500	
Other Professional Services	27,633	123,100	131,500
Total Other Services	**69,515**	**277,608**	**223,527**
General			
General Program Support Costs	10,617	21,900	33,950
Shared	21,033	21,768	17,199
IT Services	27,063	48,070	47,101
Total General	**58,713**	**91,738**	**98,250**
PROGRAM DIRECT COSTS	**392,975**	**5,729,987**	**3,253,620**
Allocated mgmt & general marketing	22,536	189,531	116,698
TOTAL EXPENSE, Accounting Perspective	**415,511**	**5,919,518**	**3,370,318**
Plus/minus Dedicated Funds committed for future years	-	-	-
TOTAL EXPENSE, Action Plan Perspective	**415,511**	**5,919,518**	**3,370,318**

2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

DEPARTMENT: **PLANNING AND EVALUATION** **ALL PROGRAMS**

PURPOSE: To provide strategic and quantitative planning, reporting, and evaluation for Energy Efficiency and Renewable Resources. Contributes to all Energy Trust Strategy goals.

STRATEGY:

1. Assess and prioritize new ideas and directions for meeting the evolving efficiency and renewable energy missions.
2. Increase program success by developing and coordinating enhanced market research capabilities.
3. Provide program design staff with expert feedback to enhance programs from evaluations and market studies.
4. Expand the list of qualifying prescriptive measures, including an increasing number of technology field tests.
5. Work with utilities to plan for additional efficiency funding and coordinate renewable energy activities through the integrated resource planning processes.
6. With utilities, explore and coordinate community-based efficiency opportunities and EE/RE options to defer transmission and distribution investments.

2008 ACTIONS:

1. Work with utilities to streamline access to customer information.
2. Develop market intelligence data set
3. Develop demographic data sets for market research focused on customer targeting.
4. Support and coordinate program-initiated market research focused on refining customer offerings and messaging.
5. Continue to use evaluations as pivotal market intelligence assets and to report accomplishments and refine programs.
6. Work regionally and nationally to harmonize approaches to markets and bring important new technologies forward.
7. Work with NW Natural to assess the hedge value of gas efficiency against volatility and high prices.
8. Complete market transformation analyses for additional markets to assess the relationship between Energy Trust goals and market transformation.

2009 PLANNED ACTIVITIES:

- Focus on market acceleration and more hard-to-reach markets.

TARGETS:

Year	Annual Expense $M
2007 Full-Year Forecast	$ 1.5
2008 Proposed Budget	$ 3.2
2009 Projection	$ 3.0

(see budget on reverse side of page)

2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

The Energy Trust of Oregon, Inc
Planning & Evaluation
2008 Budget

	2007 Actual	2008 Budget	2009 Projection
Department P&E			
Evaluation Services	652,412	1,425,000	1,170,000
Planning Services	125,529	250,000	335,000
Total P&E Department, non-general (nc	**777,941**	**1,675,000**	**1,505,000**
General P&E			
Evaluation Services	48,284	231,000	172,000
Planning Services	14,102	133,000	142,000
Staffing	512,369	844,723	895,406
Other Services	5,096		
General	19,283	34,000	32,000
Allocations	161,468	287,343	264,836
Total General Planning & Eval Services	**760,602**	**1,530,066**	**1,506,242**
GRAND TOTAL	**1,538,542**	**3,205,066**	**3,011,242**

April 2008

2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

DEPARTMENT: INFORMATION TECHNOLOGY ALL PROGRAMS

PURPOSE: To provide reliable and efficient technical infrastructure in support of Energy Efficiency, Renewable Resources, and Energy Trust management, helping strengthen program management through effective project, budget, data collection and reporting tools. Contributes to all strategic goals.

STRATEGY:

1. Strengthen the IT governance processes and align IT with ETO strategies, goals and objectives.
2. Partner with management, staff and PMCs to continually evolve systems to meet changing business requirements.
3. Establish and maintain highly flexible systems in support of distributed program delivery, performance analysis and stakeholder reporting.
4. Apply appropriate technology to streamline data intake processes, simplify participation and maximize data quality and consistency.
5. Improve customer service.
6. Maintain secure systems to protect confidential information.
7. Provide reliable communication systems and IT infrastructure.
8. Maintain technology refresh cycles to assure efficient and reliable operation of equipment and software.
9. Establish reasonable benchmarks for IT disaster recovery.

2008 ACTIONS:

1. Develop an IT strategic plan for long-term information systems enhancement.
2. Collaborate with Finance to investigate alternatives to the current financial, budgeting and contract management systems and to select and begin implementation of software enhancements or replacement applications.
3. Investigate alternatives to the Goldmine contact management system to provide a more integrated and efficient means of tracking participant contact information.
4. Establish an IT Governance Committee and process to assist in aligning IT resources with business strategies and objectives.
5. Facilitate IT Advisory Committee meetings as a user forum to foster innovative ideas and strategic direction.
6. Strengthen the IT organizational structure through re-alignment of positions, conversion of temporary and contract positions to staff positions and by investing in existing staff leadership, training and technical skills.
7. Simplify ETO participant forms and to extent possible, integrate with ODOE and federal tax credit participant application forms.
8. Develop capability to accept incentive applications via Web interface and leverage that technology to simplify the application process for ETO, ODOE, and federal incentives and tax credits.
9. Continue FastTrack enhancements to improve efficiency, automate data capture and evolve platforms.
10. Strengthen administration tools to improve customer service, support audit requirements, and enhance efficiency.
11. Implement a new Helpdesk tracking system and assure prompt and appropriate response to user assistance needs.
12. Evaluate a web based front end to FastTrack.
13. Develop an IT disaster recovery plan.
14. Develop IT operational and performance metrics.
15. Implement a customer survey process to measure satisfaction with current IT systems and processes.

2009 PLANNED ACTIVITIES:

1. *Complete implementation of financial and contact management systems changes selected in 2008*
2. *Evaluate conversion of FastTrack code base from Delphi to newer software technology and begin conversion process.*

TARGETS:

Year	Annual Expense $M
2007 Full-Year Forecast	$ 1.3
2008 Proposed Budget	$ 2.3
2009 Projection	$ 2.2

(see budget on reverse side of page)

2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

Energy Trust of Oregon, Inc.
2008 Budget
Information Technology

	2007 Actual	2008 Budget	2009 Projection
Staffing	**$569,919**	**$1,041,329**	**$1,103,809**
Services			
Other Professional Services	406,629	715,800	594,300
Total Services	**406,629**	**715,800**	**594,300**
General			
General Program Support Costs	267,238	400,896	439,628
Shared	83,290	122,317	96,646
Total General	**350,528**	**523,213**	**536,274**
TOTAL EXPENSE (Note 1)	**1,327,076**	**2,280,342**	**2,234,383**

Note 1 - 100% of these costs are allocated to programs and other support functions.

2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

DEPARTMENT: **COMMUNICATIONS & OUTREACH**

PURPOSE: Outreach and communications activities support all programs and general Energy Trust visibility needs. The 2008 budget provides for staff, services and materials necessary to achieve this purpose. Contributes to all strategic goals.

STRATEGY:

1. Expand utility collaboration to reach their customers with Energy Trust program messages.
2. Leverage resources and impacts by sponsoring outreach events in cooperation with peer and stakeholder organizations.
3. Position Energy Trust as an energy resource through story placements and limited advertising in Oregon media outlets.
4. Leverage relationships with associations representing niche market groups to reach prospective customers.
5. Accelerate communication support to meet growing demands with new contractors.
6. Improve website design, content and usability to serve a growing audience of participants, potential participants, trade allies and stakeholders.
7. Control website and publication costs by supplementing staff resources with free-lance contractors.
8. Facilitate development of comprehensive program communication plans to ensure integrated outreach.
9. Offer excellent customer service through call centers and email.
10. Develop Energy Trust trade ally network and improve both efficiency and service.
11. Build community relationships by developing community energy project(s) with utilities, cities and other stakeholders.
12. Use market research tools to refine strategies for program outreach to prospective participants.

2008 ACTIONS:

1. Design, review, approve and track Energy Trust communication and marketing activities across all programs.
2. Manage Energy Trust media relations on behalf of all programs; produce or support media events.
3. Develop limited general advertising, general information and educational pieces.
4. Provide non-PMC programs (renewables and production efficiency) with all marketing and communication services.
5. Manage content and look, and ensure accuracy and improve usability of, www.energytrust.org.
6. Build and maintain image library of representative Energy Trust projects.
7. Produce and disseminate public annual report; help prepare quarterly reports and other special reports.
8. Produce participant mailings and acknowledgements.
9. Publish monthly e-newsletter SYNERGY (general audience) and bimonthly INSIDER (trade allies).
10. Support annual publications Green + Solar Building Oregon and Green Living.
11. Develop and maintain cooperative relationships with utilities, Oregon Department of Energy and other stakeholder and peer groups, coordinating development of co-branded materials and joint outreach/communications initiatives.
12. Participate in community activities and organizations.
13. Manage Energy Trust participation in the Corvallis community energy pilot.
14. Coordinate stakeholder and special group outreach by all programs and PMCs.
15. Manage services provided by contracted creative and public relations professionals to programs.
16. Update marketing and communications guidelines to ensure consistent look and feel in all Energy Trust material.
17. Support trade allies through training and coordination with PMC trade ally managers; conduct annual trade ally survey.
18. Provide customer support through oversight of call center operations; work with utilities on service enhancements.
19. Team with evaluation group to conduct market research and focus groups to refine market segmentation and messaging for solar, residential efficiency and commercial efficiency programs.

2009 PLANNED ACTIVITIES:

- No major changes planned for 2009

April 2008

2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

TARGETS:

Year	Annual Expense $M
2007 Full-Year Forecast	$ 0.8
2008 Proposed Budget	$ 1.0
2009 Projection	$ 1.1

Energy Trust of Oregon, Inc.
Communications & Outreach
Budget 2008

	2007 Actual	2008 Budget	2009 Projection
Staffing	**$395,253**	**$366,263**	**$388,239**
Marketing			
Public Rel/Creative	22,546	31,350	34,485
Creative Services	18,050	43,000	38,500
Media Advertising	25,845	79,500	84,700
Events Co-Sponsor	23,880	30,000	27,500
Mktg Dev/Research	950		
Total Marketing	**91,271**	**183,850**	**185,185**
Services			
Evaluation and Planning Services		1,821	1,792
Legal Services		7,500	
Website Design & Maintenance	108,149	161,920	200,000
Other Professional Services	24,780	63,250	40,700
Total Other Services	**132,929**	**234,491**	**242,492**
General			
General Program Support Costs	39,503	99,000	99,330
Shared	50,952	40,220	31,779
IT Services	66,841	125,464	122,936
Total General	**157,296**	**264,684**	**254,045**
TOTAL EXPENSE (Note 1)	**776,749**	**1,049,288**	**1,069,961**

Note 1 - 100% of these expenses are allocated to programs, located at the bottom of each report on the line "Allocated mgmt & general marketing."

2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

DEPARTMENT: MANAGEMENT AND GENERAL ALL PROGRAMS

PURPOSE: To provide overall management, direction and resources in support of ETO strategies and operations. Contributes to all strategic goals.

STRATEGY:

1. Create and maintain a highly efficient internal organization that provides excellent guidance, resources and operational processes for the Energy Trust board, staff and stakeholders.
2. Enhance internal and external reporting processes to provide all stakeholders with timely and transparent information relating to Energy Trust activities.
3. Ensure that all financial data and operational systems are operating effectively and securely and are producing highly reliable and timely information.
4. Ensure that all contracts, employee relations and general operations are conducted in compliance with all applicable laws and regulations.
5. Ensure Energy Trust staff receives training and resources to foster continued maximum performance and career development goals.
6. Provide infrastructure to allow for adaptive management at all levels.

2008 ACTIONS:

1. Achieve unqualified audit opinion for 2007 from independent CPA firm
2. Continue to enhance systems via process improvements, designed with flexibility and transparency in mind
    - Re-evaluate potential "fixes" for Great Plains accounting software
    - Evaluate alternative accounting packages, if needed
    - Evaluate alternative budgeting/forecasting tools
    - Evaluate alternative contract management systems
    - Develop and initiate implementation plans for changes to systems
3. Improve internal financial systems by investing in software development to improve reporting and monitoring capabilities, especially for external financial reporting and internal contract tracking.
4. Implement new staffing plan and incorporate corresponding regulation changes
5. Assess and analyze all the internal control processes of the Energy Trust and its data integration points with contractors.
6. Invest in employee leadership and management training, reinforcing behaviors consistent with ETO values, improving communication and maintaining desirable culture and positive morale.
7. Enhance the performance review and work plan process for 2007 to reward individual performance and encourage teamwork.
8. Develop training plan based on needs and career goals identified during performance review process.
9. Achieve both PUC and JLAC/PUC performance measures for Administrative plus Program Support Costs.

2009 PLANNED ACTIVITIES:

- *Manage growth in demand with leveling of resources*
- *Facilitate completion of the five-year Management Audit*

TARGETS:

Year	Annual Expense $M
2007 Full-Year Forecast	$ 1.7
2008 Proposed Budget	$ 2.3
2009 Projection	$ 2.3

(see budget on reverse side of page)

2008 REVISED ACTION PLAN/BUDGET

EnergyTrust of Oregon, Inc.

Energy Trust of Oregon, Inc.
2008 Budget
Management and General

	2007 Actual	2008 Budget	2009 Projection
Staffing	**$1,028,866**	**$1,262,860**	**$1,340,780**
Services			
Evaluation and Planning Services	13,829	19,738	19,431
Legal Services	29,734	40,500	40,500
Accounting Services	109,220	111,000	122,500
Other Professional Services	99,284	235,855	265,969
Total Services	**252,067**	**407,093**	**448,400**
General			
General Program Support Costs	93,854	202,155	206,171
Shared	108,568	114,335	90,339
IT Services	201,612	266,276	260,909
Total General	**404,034**	**582,766**	**557,419**
TOTAL EXPENSE (Note 1)	**1,684,967**	**2,252,719**	**2,346,599**

Note 1 - 100% of these expenses are allocated to programs, located at the bottom of each report on the line "Allocated mgmt & general marketing."

2009 Budget Recap - Revised Budget

PROGRAM	TOTAL BUDGET ($M)	ELECTRIC GOALS1		ELECTRIC COST		B/C RATIO		GAS GOALS		GAS COST		B/C RATIO		EVAL DATE(S) (I=Impact; MA=Market Assessment; P=Process	PMC CONTRACT EXPIRATION
		Con-servative (aMW)	Best Case (aMW)	($mils/ aMW)	Levelized ($/kWh)	Utility	Societal	Conservative (annual therms)	Best Case (annual therms)	($/annual therms)	Levelized ($/Therm)	Utility	Societal		
ENERGY EFFICIENCY															
Residential															
Home Energy Solutions – Existing Homes	15.7	1.97	2.63	4.38 - 3.28	0.035 - 0.026			677,934	903,913	10.47 - 7.85	0.69 - 0.52			Q1-2008 (PI)	1/1/2011
Home Energy Solutions – New Homes & Products	17.4	4.55	6.06	3.30 - 2.48	0.053 - 0.040			338,791	451,721	7.11 - 5.33	0.51 - 0.38			Q1-2009 (PI) homes; Q1-2009 (I) homes; Q3-2008 (PI) prod	12/31/2008
Mkt Transformation (Alliance)	0.9	3.61	4.81	0.25 - 0.19	0.005 - 0.003			NA						NA	12/31/2010
Total Residential	**34.0**	**10.1**	**13.5**	**2.42 - 1.82**	**0.028 - 0.021**			***1,016,725***	***1,355,634***	**9.35 - 7.01**	**0.49 - 0.37**				
Commercial															
Business Energy Solutions – Existing Buildings	15.9	4.71	6.28	2.88 - 2.16	0.035 - 0.026			562,500	750,000	4.06 - 3.04	0.39 - 0.30			Q1-2008 (PI); Q1-2009 (I)	1/1/2011
Business Energy Solutions – New Buildings	11.7	3.32	4.43	3.08 - 2.31	0.031 - 0.023			351,830	469,107	4.16 - 3.12	0.37 - 0.28			Q1-2008 (PI); Q1-2009 (I)	12/31/2008
Mkt Transformation (Alliance)	1.4	0.17	0.22	8.28 - 6.21	0.092 - 0.069			NA						NA	12/31/2010
Total Commercial	**28.9**	**8.2**	**10.9**	**3.07 - 2.30**	**0.029 - 0.022**			***914,330***	***1,219,107***	**4.10 - 3.07**	**0.33 - 0.24**				
Industrial															
Production Efficiency	18.2	8.44	11.26	2.11 - 1.59	0.028 - 0.021			58,354	77,806	6.72 - 5.04	0.77 - 0.57			Q2-2008 (PI)	na
Mkt Transformation (Alliance)	0.9	0.72	0.96	1.19 - 0.89	0.018 - 0.013			NA						NA	12/31/2010
Total Industrial	**19.1**	**9.2**	**12.2**	**2.04 - 1.53**	**0.024 - 0.018**			**58,354**	**77,806**	**6.72 - 5.04**	**0.77 - 0.57**				
Total Energy Efficiency	**$82.1**	**27.5**	**36.6**	**2.49 - 1.87**	**0.030 - 0.022**			***1,989,410***	***2,652,546***	**6.86 - 5.14**	**0.42 - 0.32**				
RENEWABLE RESOURCES2															
Biopower	3.3	0.55	1.62	5.96 - 2.02				NA						NA	NA
Open Solicitation	2.8	0.57	0.88	4.91 - 3.19				NA						NA	NA
Solar Electric	5.5	0.35	0.47	15.47 - 11.60				NA						NA	NA
Utility-Scale	0.0	0.00	0.00	na - na				NA						NA	NA
Wind Cluster	3.4	1.87	2.67	1.81 - 1.26				NA						Q4-2008 (P)	NA
Total Renewable Resources	**$15.0**	**3.3**	**5.6**	**4.48 - 2.65**											

1 some columns may not add due to rounding

2 Budget amounts for Renewables are activity based and include dedicated funds

The Energy Trust of Oregon, Inc
By Program / Service Territory
For the Twelve Months Ending December 31, 2009
Revised Projection 2009-P-03

	ENERGY EFFICIENCY						RENEWABLE ENERGY				TOTAL	2009		
	PGE	PacifiCorp	NW Natural	Cascade	Avista	Total	PGE	PacifiCorp	Total	Other	All Programs	previous version	Change	Pct Chg
REVENUES														
Public Purpose Funding	$27,773,674	$17,273,692	$8,625,534	$1,638,985		$55,311,885	$8,376,187	$5,209,526	$13,585,713		$68,897,599	$68,212,693	$684,906	1.00%
Public Purpose Funding-838	14,999,998	8,070,250				23,070,248					23,070,248		23,070,248	100.00%
Revenue from Investments										1,681,189	1,681,189	2,164,506	(483,317)	-22.33%
TOTAL PROGRAM REVENUE	42,773,672	25,343,942	8,625,534	1,638,985		78,382,133	8,376,187	5,209,526	13,585,713	1,681,189	93,649,036	70,377,199	23,271,837	33.07%
EXPENSES														
Program Management (Note 4)	1,831,594	958,539	681,427	84,131	2,029	3,557,718	503,704	512,860	1,016,564		4,574,282	4,313,820	260,462	6.04%
Program Delivery	11,404,187	6,792,133	2,743,418	380,366	11,563	21,331,668	86,570	49,115	135,685		21,467,353	17,827,429	3,639,924	20.42%
Incentives	24,121,098	13,462,153	6,324,365	779,329	16,040	44,702,988	6,566,270	6,270,357	12,836,627		57,539,615	40,657,944	16,881,671	41.52%
Program Evaluation and Planning Services	1,375,709	750,791	418,648	49,242	936	2,595,326	196,121	196,780	392,901		2,988,227	2,988,227		0.00%
Program Marketing/Outreach	2,029,018	979,847	769,820	95,701	2,348	3,876,731	173,494	160,578	334,072		4,210,803	3,341,253	869,550	26.02%
Program Legal Services	0	0	0	0	0		8,750	8,750	17,500		17,500	17,500		0.00%
Program Quality Assurance	88,271	44,976	44,242	4,120	41	181,650	16,700	22,800	39,500		221,150	221,150		0.00%
Outsourced Services	276,310	143,865	66,239	7,360	29	493,803	383,730	355,009	738,739		1,232,542	1,232,542		0.00%
Trade Allies & Customer Service Management	339,756	160,524	263,555	25,185	298	789,318	41,248	30,888	72,136		861,454	861,454		0.00%
IT Services	645,602	339,407	285,263	34,777	769	1,305,818	106,450	109,124	215,573		1,521,391	1,521,391		0.00%
Other Program Expenses	207,803	111,280	69,237	7,523	118	395,961	114,919	111,332	226,250		622,211	622,211		0.00%
TOTAL PROGRAM EXPENSES	42,319,349	23,743,515	11,666,215	1,467,735	34,169	79,230,982	8,197,955	7,827,594	16,025,548		95,256,530	73,604,922	21,651,608	29.42%
ADMINISTRATIVE COSTS														
Management & General (Note 1 & 3)	1,042,517	584,910	287,392	36,157	842	1,951,817	201,953	192,829	394,782		2,346,599	2,346,599		0.00%
Communication & Outreach (Note 2 &3)	475,349	266,697	131,040	16,486	384	889,956	92,083	87,923	180,006		1,069,961	1,069,961		0.00%
Total Administrative Costs	1,517,866	851,607	418,431	52,643	1,226	2,841,773	294,036	280,752	574,787		3,416,560	3,416,560		0.00%
TOTAL PROGRAM & ADMIN EXPENSES	43,837,215	24,595,122	12,084,646	1,520,378	35,395	82,072,755	8,491,991	8,108,346	16,600,336		98,673,090	77,021,482	21,651,608	28.11%
TOTAL REVENUE LESS EXPENSES	(1,063,543)	748,820	(3,459,112)	118,607	(35,395)	(3,690,621)	(115,804)	(2,898,820)	(3,014,622)	1,681,189	(5,024,054)	(6,644,284)	1,620,230	-24.39%
Net Assets from prior years	8,691,518	(5,469,769)	4,659,933	181,354	107,296	8,170,332	13,473,296	5,131,371	18,604,667	9,388,816	36,163,815	30,862,450	5,301,365	17.18%
Interest attributed	1,740,000	1,160,000				2,900,000		1,700,000	1,700,000	(4,600,000)				0.00%
TOTAL NET ASSETS CUMULATIVE	9,367,975	(3,560,949)	1,200,821	299,961	71,901	7,379,711	13,357,492	3,932,551	17,290,045	6,470,005	31,139,761	24,218,167	6,921,594	28.58%

Note 1) Management and General (Administrative) Expenses have been allocated based on total expenses.
Note 2) General Communication and Outreach expenses (Administrative) have been allocated based on total expenses for budget purposes only, otherwsie by Public Purpose Revenue from each Territory.
Note 3) Administrative costs are allocated for management reporting only. GAAP for Not for Profit organizations does not allow allocation of administrative costs to program expenses.
Note 4) Program Management costs include both outsourced and internal staff.
Note 5) Cumulative carryover at 12/31/2006 has been adjusted to reflect audited results.

The Energy Trust of Oregon, Inc
Program Budget Expenses by Service Territory
For the Twelve Months Ending December 31, 2009
Revised Projection 2009-P-03

	PGE	Pacific Power	Subtotal Elec. Utilities	Northwest Natural Gas	Cascade	Avista	Subtotal Gas Providers	Total	Previous Budget	Change	Pct Change
Energy Efficiency											
Residential											
Home Energy Solutions - Existing Homes	6,037,032	2,577,852	8,614,884	6,581,553	514,740		7,096,293	15,711,177	14,125,894	1,585,283	11.22%
Home Energy Solutions - New Homes/Products	9,027,773	5,986,569	15,014,342	1,703,637	668,782	35,396	2,407,815	17,422,157	12,163,471	5,258,686	43.23%
Market Transformation (NEEA)	520,329	392,528	912,857				0	912,857	922,157	(9,300)	-1.01%
Total Residential	15,585,134	8,956,949	24,542,083	8,285,190	1,183,522	35,396	9,504,108	34,046,191	27,211,522	6,834,669	25.12%
Commercial											
Business Energy Solutions - Existing Buildings	10,103,668	3,475,719	13,579,387	2,111,837	169,852		2,281,689	15,861,076	7,524,715	8,336,361	110.79%
Business Energy Solutions - New Buildings	6,467,937	3,748,126	10,216,063	1,295,660	167,006		1,462,666	11,678,729	9,790,916	1,887,813	19.28%
Market Transformation (NEEA)	794,083	599,045	1,393,128				0	1,393,128	1,407,318	(14,190)	-1.01%
Total Commercial	17,365,688	7,822,890	25,188,578	3,407,497	336,858		3,744,355	28,932,933	18,722,949	10,209,984	54.53%
Industrial											
Business Energy Solutions - Production Efficiency	10,400,330	7,448,605	17,848,935	391,959			391,959	18,240,894	13,456,195	4,784,699	35.56%
Market Transformation (NEEA)	486,063	366,679	852,742				0	852,742	861,428	(8,686)	-1.01%
Total Industrial	10,886,393	7,815,284	18,701,677	391,959			391,959	19,093,636	14,317,623	4,776,013	33.36%
Total Energy Efficiency Costs	43,837,215	24,595,123	68,432,338	12,084,646	1,520,380	35,396	13,640,422	82,072,760	60,252,094	21,820,666	36.22%
Renewables											
Biopower	2,762,184	1,822,332	4,584,516				0	4,584,516	4,631,213	(46,697)	-1.01%
Open Solicitation	570,825	2,574,718	3,145,543				0	3,145,543	3,177,582	(32,039)	-1.01%
Solar Electric (Photovoltaic)	3,120,099	2,336,492	5,456,591				0	5,456,591	5,512,171	(55,580)	-1.01%
Utility Scale Projects	17,382	25,986	43,368				0	43,368	43,809	(441)	-1.01%
Wind	2,021,502	1,348,816	3,370,318				0	3,370,318	3,404,647	(34,329)	-1.01%
Total Renewables Costs	8,491,992	8,108,344	16,600,336				0	16,600,336	16,769,422	(169,086)	-1.01%
Cost Grand Total	52,329,207	32,703,467	85,032,674	12,084,646	1,520,380	35,396	13,640,422	98,673,096	77,021,516	21,651,580	28.11%

Energy Trust of Oregon
Statement of Functional Expense
For the Twelve Months Ending December 31, 2009
Revised Projection 2009-P-03

	Energy Efficiency	Renewable Energy	Total Program Expenses	Management & General	Communication & Outreach	Total Admin Expenses	Total
EXPENSES							
Program Expenses							
Incentives/ Program Management & Delivery	71,025,507	12,972,312	83,997,819			0	83,997,819
Payroll and Related Expenses	1,520,484	1,016,564	2,537,048	1,340,780	388,239	1,729,019	4,266,067
Outsourced Services	2,983,568	1,249,811	4,233,379	428,969	425,885	854,854	5,088,233
Planning and Evaluation	1,210,326	272,901	1,483,227	19,431	1,792	21,223	1,504,450
Customer Service Management	789,318	72,136	861,454			0	861,454
Total Program Expenses	77,529,203	15,583,724	93,112,927	1,789,180	815,917	2,605,097	95,718,024
Program Support Costs							
Supplies	9,248	5,843	15,091	12,436	3,679	16,115	31,206
Postage and Shipping Expenses	21,520	8,433	29,953	5,958	22,292	28,250	58,203
Telephone	506	5,978	6,484	1,240	1	1,241	7,725
Printing and Publications	95,702	42,432	138,134	4,751	50,165	54,916	193,050
Occupancy Expenses	82,508	52,130	134,638	59,833	21,048	80,881	215,519
Insurance	15,818	9,994	25,812	11,471	4,035	15,506	41,318
Equipment	3,683	2,327	6,010	15,871	2,260	18,131	24,141
Travel	55,796	61,980	117,776	46,835	7,602	54,437	172,213
Meetings, Trainings & Conferences	61,088	33,262	94,350	127,635	13,750	141,385	235,735
Depreciation & Amortization	2,069	1,307	3,376	1,500	528	2,028	5,404
Dues, Licenses and Fees	47,415	2,181	49,596	8,436	5,593	14,029	63,625
Miscellaneous Expenses	608	384	992	544	155	699	1,691
IT Services	1,305,818	215,573	1,521,391	260,909	122,936	383,845	1,905,236
Total Program Support Costs	1,701,779	441,824	2,143,603	557,419	254,044	811,463	2,955,066
TOTAL EXPENSES	79,230,982	16,025,548	95,256,530	2,346,599	1,069,961	3,416,560	98,673,090

PUC performance measure	11%
Administrative plus program support costs	6.0%

The Energy Trust of Oregon, Inc
Energy Efficiency Electric Spending by Rate Schedule - 1149 vs 838
For the Twelve Months Ending December 31, 2009
Revised Projection 2009-P-03

	PGE			PacifiCorp		
	Total	1149	838	Total	1149	838
TOTAL PROGRAM REVENUE	42,773,672	$27,773,674	14,999,998	25,343,942	17,273,692	8,070,250
EXPENSES						
Program Management (Note 4)	1,831,594	1,179,251	652,343	958,539	659,609	298,931
Program Delivery	11,404,187	7,358,185	4,046,002	6,792,133	4,653,983	2,138,150
Incentives	24,121,098	16,148,258	7,972,839	13,462,153	9,645,831	3,816,322
Program Evaluation & Planning Svcs.	1,375,709	896,595	479,114	750,791	522,774	228,017
Program Marketing/Outreach	2,029,018	1,268,803	760,215	979,847	652,295	327,552
Program Legal	0			0		
Program Quality Assurance	88,271	57,570	30,701	44,976	31,453	13,523
Outsourced Services	276,310	173,966	102,344	143,865	96,490	47,375
Trade Allies & Customer Svc. Mgmt.	339,756	211,556	128,200	160,524	106,297	54,227
IT Services	645,602	408,872	236,730	339,407	229,148	110,258
Other Program Expenses	207,803	135,669	72,134	111,280	77,710	33,571
TOTAL PROGRAM EXPENSES	42,319,349	27,838,726	14,480,622	23,743,515	16,675,590	7,067,925
ADMINISTRATIVE COSTS						
Management & General (Note 1 & 3)	1,042,517	685,794	356,723	584,910	410,795	174,115
Communication & Outreach (Note 2 &3)	475,349	312,696	162,653	266,697	187,307	79,390
Total Administrative Costs	1,517,866	998,490	519,376	851,607	598,102	253,505
TOTAL PROGRAM & ADMIN EXPENSES	43,837,215	28,837,217	14,999,998	24,595,122	17,273,692	7,321,430
TOTAL REVENUE LESS EXPENSES	(1,063,543)	(1,063,543)	0	748,820	0	748,820
Net Assets Carried Forward From Prior Years	8,691,518	8,691,518	0	(5,469,769)	(7,429,749)	1,959,980
Interest attributed	1,740,000	1,740,000	0	1,160,000	1,160,000	0
TOTAL NET ASSETS CUMULATIVE	9,367,975	9,367,975	0	(3,560,949)	(6,269,749)	2,708,800

Note 1) Management and General (Administrative) Expenses have been allocated based on total expenses.
Note 2) General Communication and Outreach expenses (Administrative) have been allocated based on Public Purpose Revenue from each Territory.
Note 3) Administrative costs are allocated for management reporting only. GAAP for Not for Profit organizations does not allow allocation of administrative costs to program expenses.
Note 4) Program Management costs include both outsourced and internal staff.
Note 5) Cumulative carryover at 12/31/2007 has been adjusted to reflect audited results.
Note 6) Efficiency electric funding as allocated between 1149 and 838 proprtionate to revenue, adjusted for large industrial customers and expenditure of pge 1149 carryover

The Energy Trust of Oregon, Inc
Energy Efficiency Electric Spending by Program and Rate Schedule - 1149 vs 838
For the Twelve Months Ending December 31, 2009
Revised Projection 2009-P-03

	PGE			Pacific Power		
	Total	1149	838	Total	1149	838
Energy Efficiency						
Residential						
Home Energy Solutions - Existing Homes	6,037,032	3,757,500	2,279,532	2,577,852	1,706,107	871,745
Home Energy Solutions - New Homes/Products	9,027,773	5,618,963	3,408,810	5,986,569	3,962,108	2,024,461
Market Transformation (NEEA)	520,329	323,857	196,472	392,528	259,788	132,740
Total Residential	15,585,134	9,700,320	5,884,814	8,956,949	5,928,004	3,028,945
Commercial						
Business Energy Solutions - Existing Buildings	10,103,668	6,288,609	3,815,059	3,475,719	2,300,345	1,175,374
Business Energy Solutions - New Buildings	6,467,937	4,025,699	2,442,238	3,748,126	2,480,633	1,267,493
Market Transformation (NEEA)	794,083	494,244	299,839	599,045	396,468	202,577
Total Commercial	17,365,688	10,808,552	6,557,136	7,822,890	5,177,446	2,645,444
Industrial						
Business Energy Solutions - Production Efficiency	10,400,330	8,025,814	2,374,516	7,448,605	5,925,562	1,523,043
Market Transformation (NEEA)	486,063	302,530	183,533	366,679	242,680	123,999
Total Industrial	10,886,393	8,328,344	2,558,049	7,815,284	6,168,242	1,647,042
Total Energy Efficiency Costs	43,837,215	28,837,217	14,999,998	24,595,123	17,273,692	7,321,431