EnergyTrust of Oregon, Inc.

Staff Report

November 12, 2008

This report from Margie Harris is on behalf of all staff and spans the period August 11, 2008, through October 24, 2008. Items not otherwise addressed in this board packet are described here.

General

- Margie arranged meetings for Board president John Reynolds to meet Dave Van't Hof of Governor Kulongoski's office; Claire Fulenwider of the NW Energy Efficiency Alliance and Pat Egan of Pacific Power.
- Margie participated and spoke at the Governor's Energy Summit on August 27th.
- Energy Efficiency staff and Margie attended and in many cases, presented, at the American Council for an Energy Efficient Economy (ACEEE) summer study conference, bringing new learning back to Energy Trust.
- The strategic planning committee of the NW Energy Efficiency Alliance completed its outreach on the final draft strategic plan and brought it forward for Board consideration in late October. The board acted by indicating that the plan was sufficient to set direction for the organization and continued its work on both the business plan and funding options for 2010.
- Along with other energy representatives from throughout the state, Margie participated in a meeting with members of a Thailand delegation visiting Oregon to learn about our history, policies, programs and accomplishments.
- Participated in PGE's Business Appreciation luncheon, recognizing small companies who made a pledge to reduce their energy use.
- Energy Trust will begin providing energy efficiency services to NW Natural commercial and industrial customers on Schedules 3, 31, and 32, representing firm and interruptible customers. Under a stipulated agreement with NW Natural, OPUC, and the Northwest Industrial Gas Users; details of the funding mechanism, budget and goals are being worked out at this time
- The interim, 18-month Public Purpose Funding report to the Oregon Legislature is in final draft form for staff review; the report is being compiled by EcoNorthwest, the same firm selected for the prior bi-annual report.
- Phase I of the Energy Trust "Solutions" advertising campaign was launched in September and runs through mid-November. The media buy includes print, radio, and online ads, and an update to Energy Trust's OPB sponsorship (radio/TV). Where appropriate, ads are cobranded with our utility partners.
- Energy Trust is well represented on the Northwest Energy Efficiency Task Force, aimed at ramping up efficiency's share of the power supply. Margie serves on the executive committee and numerous Energy Trust staff are participating in working groups and subcommittees.

Program Planning and Evaluation

General

- Completed documentation and reporting for the 2008 true-up of prior years' savings and generation based on evaluations and other new information. The summary report enclosed in this packet shows that changes to savings and generation were small.

- Completed the study of the economic impacts of Energy Trust's 2007 programs, enclosed in this packet.
- OPUC performance measures for 2008 and 2009 were approved and are included as an attachment to the Action Plan in the budget binder.
- Cost effectiveness analyses were completed for turndown of residential water heaters. Home reviewers who have performed turndowns will now claim savings.

Commercial and Industrial

- In cooperation with NEEA, started an analysis of how Northwest buildings perform using the ENERGY STAR portfolio manager benchmarking tool. One Legislative concept from the Governor's Energy Efficiency working group would require "benchmarking" or disclosure of energy usage at the time a building is sold.
- Initiated design of a three-state coordinated initiative to accelerate achievement of zero net energy new commercial buildings in Oregon, Washington, and California. Utility regulators, program providers, engineers, architects and others from all three states will meet on November 3 to identify key areas of coordination and organize toward a January meeting to charter the group.
- Cost effectiveness analyses were completed for:
    - Various grocer measures including anti-sweat (condensation) for coolers, heater controls, night covers, and evaporator fan motor controls
    - Commercial clothes washer incentives and savings for multi-family and laundromats
    - Green motor rewind measures
    - Sprinkler irrigation measures
    - Revised ice machine measures, adding a tiered incentive structure to stay ahead of forthcoming code change

NW Alliance Evaluations

- Market progress evaluation reports were completed for the following programs in the last 3 months and are available on the NW Alliance website (www.nwalliance.org):
    - Long term monitoring and tracking report on 2007 activities
    - ENERGY STAR Homes Northwest Program Evaluation Report #5
    - Baseline characteristics of the 2002-2004 nonresidential sector: Idaho, Montana, Oregon, and Washington

Efficiency Programs

Home Energy Solutions—ENERGY STAR® New Homes

- Developing Trade Ally category and training for architects and designers.
- Strengthening the Energy Performance Score process for late fall implementation.
- Increasing rate of manufactured home incentives claimed – up 25% from 2007.

Home Energy Solutions—ENERGY STAR® Products

- Processing record numbers of clothes washer applications.
- Uptake on the refrigerator recycling initiative slower than hoped.
- Working with IT to roll out web-based form for clothes washers and refrigerators.

Home Energy Solutions—Existing Homes

- Launched gas promotion September 1, bundling measures and providing an additional $100 for every weatherization measure over the first plus an additional $50 on furnaces.

- Logged 3,353 inbound calls in September 2008 compared to 2,000 calls in September 2007.
- Committed 95% of multifamily program budget for 2008 projects.

Business Energy Solutions—New Buildings

- Transitioning program delivery from SAIC to PECI. Effective November 1, 2008, PECI will assume responsibilities for all outreach and recruiting activities, while SAIC will focus on closing out 2008 projects.

Business Energy Solutions—Existing Buildings

- Launched a grocery initiative targeting small and large grocery stores.
- Recognized Lyn Schmidt, who was named Oregon Lodging Association Industry Partner of the Year.
- Collaborating closely with PGE on their "Make a Pledge" campaign for commercial customers.
- Will launch municipality target initiative in October and November.

Business Energy Solutions—Production Efficiency

- Released new prescriptive measures for irrigation equipment and compressed air systems.
- Added two new Program Delivery Contractors: Nexant and Strategic Energy Group. Nexant will deliver program services to Deschutes, Jefferson, and Crook counties as well as head a High Tech Strategy pilot in 2009. Strategic Energy Group will deliver a 2-year pilot focusing on continuous improvement for energy management.
- Began collaboration effort with Oregon Manufacturing Extension Partnership to integrate energy efficiency with lean manufacturing assessments delivered through Oregon Manufacturing Extension Partnership (OMEP).

Renewable Energy

Open Solicitation

- Provided funding for a feasibility study examining a geothermal electric project on the Klamath Falls campus of Oregon Institute of Technology and three hydro feasibility studies on ranches in Eastern Oregon.
- Began an assessment of the non-stream hydropower resources available in the PGE and Pacific Power service territories.
- Helped coordinate a media event celebrating the construction of the 1.1 MW PGE/ProLogis solar project.
- Made presentations at the Northwest Hydropower Association workshop on small hydro and a tribal energy conference in Eugene.
- Attended international conference of the Geothermal Resources Council.

Wind

- Paid an incentive for a 1.8 kW demonstration small wind system at Hood River Valley High School.
- Paid an incentive for a 5 kW residential small wind system in Independence.
- Signed a contract for a 7.2 kW building integrated wind turbine project in Portland.
- Received application for 800 kW community wind project near Hermiston.
- Installed a tall tower anemometer in Sherman County.
- Completed wind resource reports for the tall tower in Sherman County and the short tower anemometers in Sherman and Clatsop counties.

- Held a small wind seminar in Hood River (35 attendees).
- Presented at full-day wind workshops given by NW SEED in Hood River, Moro, Pendleton, and Baker City.

Biopower

- Approved co-funding of feasibility studies for City of Salem and Medford Wastewater Treatment plants to evaluate opportunities to increase generation capacity and evaluate alternative generation technologies.
- Approved co-funding for a feasibility study with Lane County to evaluate opportunities to add economic value to rye grass straw through renewable energy or fuel production. ETO funding will focus on anaerobic digestion as the energy conversion process.
- Received a final application for incentive funding of a landfill gas-to-energy project at the Douglas County Landfill.
- Toured the cogeneration facility at Rough & Ready Lumber mill in Cave Junction and met with mill owners. Plant staff is integrating the new power production process into the mill operation and expects to be at full production by the end of the year.
- Attended the annual Biocycle Conference in Madison, Wisconsin focused on anaerobic digestion of organic waste streams.

Solar

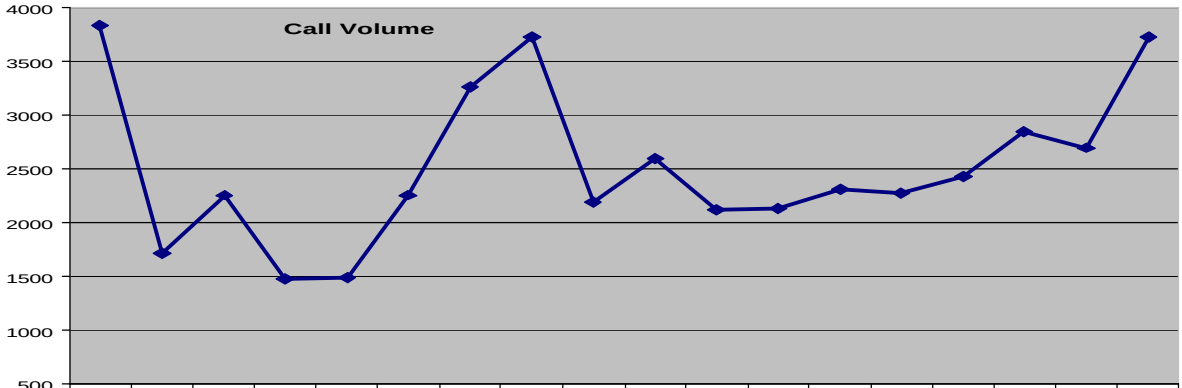
- Oversaw progress toward launch of Green Street Lending, an alliance between Energy Trust and Umpqua Bank to co-promote loans for energy efficiency and solar energy systems available to Energy Trust residential homeowners and small business participants.
- Participated in the Renewable Energy Working Group to develop a legislative concept for new funding for solar electric systems paid as a production-based incentive.
- Attended Solar Power 2008 photovoltaic conference in San Diego and presented Energy Trust's solar program to the Interstate Renewable Energy Council.
- Recommended that the Oregon Plumbing Board adopt a national standard for residential solar water heaters to allow higher efficiency systems in Oregon; received unanimous support.
- Reviewed above market cost of several projects proposed to PGE through its RFP for new renewable generation.

Communication, Marketing and Outreach

Call Center/Customer Service

- Held fall marketing plan training for both CSG and Energy Trust call centers.
- Provided Umpqua Bank information and training for both call centers.
- Trained Umpqua Bank business relationship managers on Energy Trust programs.

Call Volumes through 09/2008

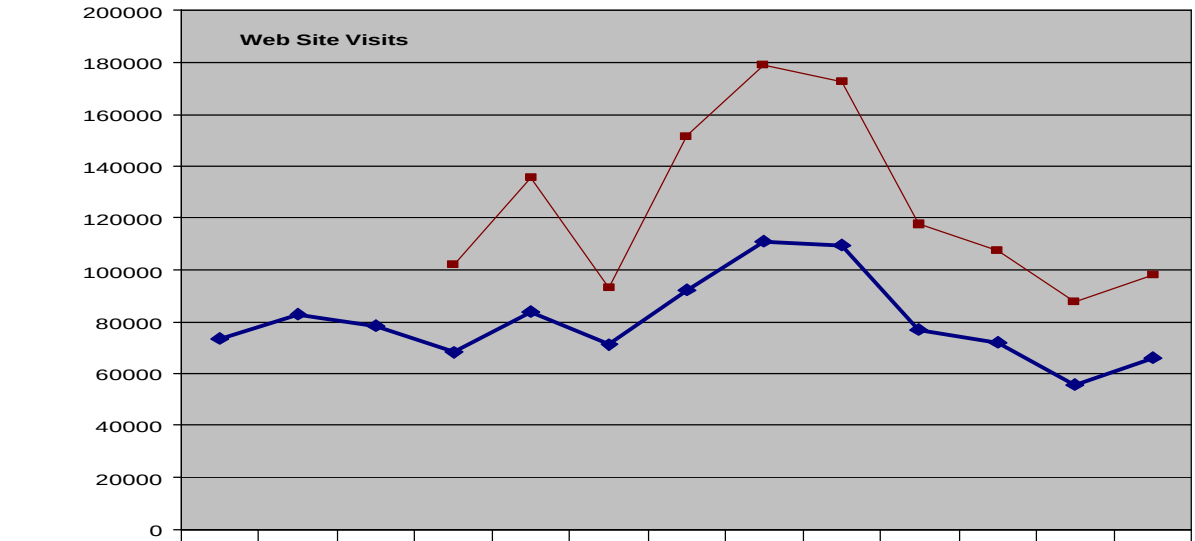


	Apr 07	May 07	Jun 07	Jul 07	Aug 07	Sep 07	Oct 07	Nov 07	Dec 07	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08
Calls	3839	1718	2259	1476	1485	2260	3267	3729	2189	2597	2118	2136	2309	2273	2426	2844	2697	3730

Website

- Posted three new Web pages for the fall campaign: see www.energytrust.org/solutions, www.energytrust.org/commercial, and www.energytrust.org/solutions/for_homes.php
- Replaced Open Solicitation with three new sections: Hydroelectricity, Geothermal and Grants & Proposals, go to the Renewables landing page to see the new photo boxes that will take you to each of these sections.
- Posted our first video, on Home Performance with ENERGY STAR Educational Video on our HPwES Web page in the Home Energy Solutions section of the Web site.
- Posted a page for renters with low-cost tips for increasing the energy efficiency of their homes and a link to a flyer to download and give to their landlord; see www.energytrust.org/renters.
- Posted a new tool for Business Energy Solutions customers to help them weigh the costs and benefits of proposed energy efficiency measures; try it out!

Web Visits through 09/2008



	Sep 07	Oct 07	Nov 07	Dec 07	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08
Visits	73259	82837	78527	68417	84039	71316	92252	110872	109708	76926	72026	55529	66031
WebTrends				101947	135549	93384	151570	179007	172679	117601	107462	87393	97866

Trade Ally Initiative

- Completed renewal for Existing Buildings trade allies.
- Met with possible vendor for online training services for trade allies.
- Coordinated attendance at trade ally meetings to learn about new Umpqua Bank loan products.
- Provided training materials for Umpqua Bank staff to use at trade ally meetings.
- Met with Blue Mountain Homebuilders' Association in Baker City to discuss cooperation on training and outreach to potential trade allies.
- Updated trade ally roundtable meetings based on trade ally requests for breakout sessions and new format.

Community Energy

- Met monthly with Corvallis Energy Challenge steering committee.
- Hosted three three-hour workshops by Solar Oregon—one each on solar electric, solar thermal and passive solar design—that drew 103, 85 and 45 attendees, the largest ever turnouts for these workshops (Sept. 8, Oct. 4, Oct. 18).
- Hosted a talk by Dick Wanderscheid, City of Ashland utility director, on community energy independence (Oct. 6).
- Staffed exhibit at third Corvallis Sustainability Action Plan Town Hall (Oct. 7).
- Hosted two workshops by Dave Hutchins, manager of Energy Trust/CSG's Home Performance with ENERGY STAR, on winterizing your home (Oct. 24, 25).
- Since March 1, 678 home energy reviews have been completed, compared to 134 in the same period in 2007; 44 business walkthroughs have been completed (not offered in 2007).

Events, Speaking Engagements and Sponsorships

- Spoke at Douglas County Tour of Solar Homes, League of Oregon Cities conference, and Douglas County Alternative Energy Forum.

Creative Products

- Created 83 new and resized advertisements: 18 commercial, 35 residential, 7 renewables and 23 general.
- Produced Spanish versions of fact sheets representing Existing Buildings and Home Energy Solutions programs.
- Produced brochures representing municipalities for Renewable Energy and Energy Efficiency programs and Commercial Solar Now.
- Produced fact sheets representing Open Solicitation, Existing Buildings and Small Wind programs.
- Produced case studies representing New Buildings, Production Efficiency and Small Wind programs.
- Produced and released 2 newsletters: Synergy (general, monthly) and Pit Stop (internal, monthly).
- Oversaw development of two Energy Saver Kits—one directed to Pacific Power customers, mailed to over 8,000 people throughout the state and one directed to schools as an exercise for sixth graders to be mailed to 10,000 schools throughout the state.

Public Relations, News Releases and Media Events

- Finalized PR plan for fall/winter "Solutions" campaign and residential programs.
- Distributed a release to announce Energy Trust's new fall incentives to media statewide (9/18).
- Distributed release to announce first Green Building Fund scholarship award winner (9/29).

- Distributed a release with tips to save energy this fall; sent in two parts to avoid news traffic around economy and VP debate (10/2 and 10/6).
- Joined with Pacific Power on a release to offer free Energy Saver Kits to coastal residents. (9/12).
- Joined with NW Natural on a release to provide tips to save as energy costs rise and promote media opportunity to see a Home Energy Review and talk with an expert. (9/29).
- Joined with Umpqua Bank on a release to announce GreenStreet Lending (10/7).
- Developed and sent a letter about refrigerator recycling to *Oregon Home* magazine in response to editor's column about her old refrigerator.
- Identified expert media contacts (both general and technical) from Energy Trust and CSG; conducted a half day media training with opportunities for practice interviews.
- Pitched media to secure contributing expert opportunities.
- Coordinated interviews with four Clear Channel radio stations of Energy Trust expert Shawn O'Neill (CSG-Home Energy Reviewer) as part of the fall ad buy. Interviews took place with KEX, K103, KPOJ and KQOL (aired week of 9/22).
- Coordinated KGW TV news story of Energy Trust expert, Shawn O'Neill, conducting a Home Energy Review and provided weatherization tips at a staff member's house; reporter went live outside home and story aired at both 5:00 and 6:00 evening news hours for a total coverage value of $5,457 based on ad value, or $16,371 publicity value.
- Wrote and submitted "energy corner" articles for the Main Ingredient, the Oregon Restaurant Association's monthly magazine.
- Wrote and submitted energy story to Oregon Lodging Association newsletter.

Operations, Contracts, Human Resources, Finance and Information Technology

Finance

- Prepared the 18-month public purpose charge financial report for the legislature.
- Completed the draft budget and projection for 2009/2010.
- Completed the forecast through year-end 2008.
- Participated in internal control interviews and validated internal control documentation.
- Developed plan and began implementing internal control improvements recommended in the review.
- Selected an outsource solution for tracking contractor insurance certificates.
- Developed business requirements for 1099 reporting in the new data mart.
- Developed business requirements for streamlined corrections to incentive payments.
- Developed requirements and reviewed solutions for new payroll and timekeeping service providers.
- Developed new financial report formats for program managers.
- Began planning for the 2008 external financial audit.

Human Resources and Office Management

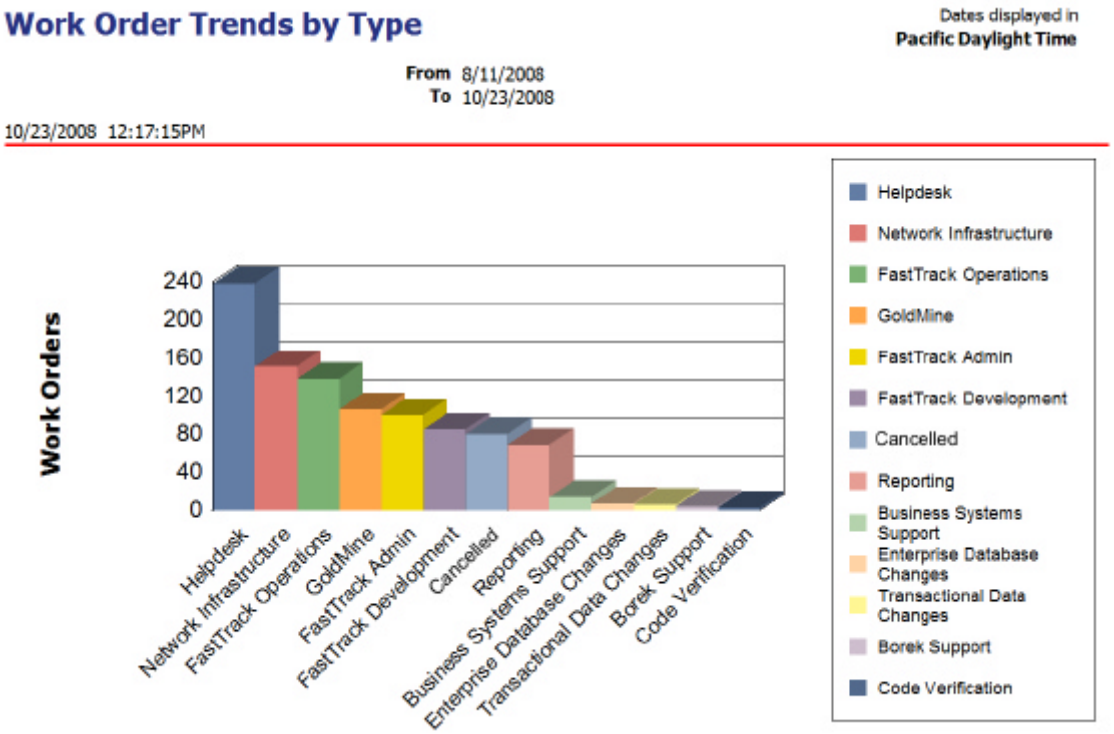
- Participated in Living Building Initiative steering committee, a consortium of non-profit organizations considering shared office space and interested in advancing the zero net energy buildings.
- The Tompkins Group completed a comprehensive salary and benefits survey for current Energy Trust staff positions.

- Accepted the resignation of Teresa Scott, Lead Business Systems Analyst; Teresa accepted a position working for a software company in Beaverton.
- Hired Max Mizejewski as an intern in the legal department; Max has a law degree from University of California Berkeley and most recently worked for HDR Engineering.
- Provided facilitation and meeting management staff training as a follow up request from the employee survey.
- Provided a brown-bag training through our Employee Assistance Program provider on managing stress.
- Recruited for a renewable energy business program manager.
- Recruited for senior technical business systems analyst.

Legal and Contracts

- Drafted transition contracts for the New Buildings program management contractor.
- Presented at Oregon State Bar Municipal Sustainability Projects continuing legal education conference.

Information Technology

- Submitted the 2009 and 2010 budgets and resource needs.
- Developed the 2008 4th quarter forecast.
- Developed a plan for accomplishing the 18 IT-focused recommendations from the Rasmussen assessment over the next 10 months.
- Engaged a contractor to organize and develop necessary IT policies over the next 6 to 9 months.
- Revised the senior business analysis lead position to an analyst position, a change that will delay the schedule for the data warehouse initiatives by two to three months; the IT manager will assume the team management responsibilities formerly assigned to this position.
- Delayed the initiation of the IT enterprise resource plan to 2009 because of staff transitions and subsequent workload increases for existing staff.
- Fast track team:
    - Fielded two FastTrack builds with user interface improvements and bug fixes
    - Developed integration for the green motor rewind program
    - Designed an import template for home energy saver kits
    - Worked with the Energy Efficiency group on an approach to provide consolidated data from all utilities to the Apogee tool
- Web forms project:
    - Posted the refrigerator and clothes washer form and received 100 applications via the web
    - Developing an electronic method of capturing receipt images, to be deployed within the next 2 months
- Business systems team:
    - Completed a total of 183 help desk tickets, including 27 data imports and 54 report requests
    - Transitioned the quarterly report process to the business systems team
- Data warehouse project:
    - Completed the design of the 1099 data mart; determined that a data mart structure may not support immediate turnaround of data corrections and therefore reverted to modifying last year's reports to meet a short-term request
    - Completed document retention business requirements and report design
- Infrastructure team:

- Installed a new server to host the Stata software for planning and evaluation group; server will be virtualized to support other applications
- Worked with our support vendor to move the Great Plains accounting and associated systems to a new server
- Setup a feedback mechanism from the Track IT work order system