EnergyTrust of Oregon, Inc.

Staff Report

December 19, 2008

This report from Margie Harris is on behalf of all staff and spans the period October 27, 2008, through November 28, 2008. Items not otherwise addressed in this board packet are described here.

General

- Staff conducted outreach to utilities and Oregon Public Utility Commission, soliciting comments on our proposed 2009 budget and 2009-2010 action plan. Included public hearing hosted by the OPUC on this subject.
- Margie participated in a roundtable meeting of Northwest Energy Efficiency Alliance board members, who shared their energy efficiency and renewable energy strategies, plans, accomplishments and challenges in an open all-day meeting.
- Margie participated in the Alliance board meeting, during which the strategic plan was endorsed by the board as sufficient to guide the business plan and funding options. Several board members expressed interest in seeing all 3 documents prior to committing funding for the 2010-2015 time period.
- Fred Gordon and Margie Harris participated in an all-day meeting in San Francisco to explore ways California, Oregon and Washington might pursue new Zero Net Energy commercial buildings. The group identified opportunities for joint collaboration during the facilitated session. Next steps will include expansion of the group to include more representation and specific goal setting and strategies to be potentially undertaken on a regional basis.
- Staff participated in the Association for an Energy Efficient Economy (ACEEE) Behavior and Climate Change conference in Sacramento, a forum for behaviorists, analysts and marketers to engage in the connection between efficiency and climate change.
- Staff met with Dennis Wilde of Gerding Edlen to discuss options for the Living Building Initiative and to become more familiar with the intended approach. A Request for Qualifications will be issued by the City of Portland regarding the property known as the Jasmine Block on PSU's campus. Selection of a firm(s) will be made in early 2009 to develop the site as the City's first living building. Energy Trust is represented among the non-profit organizations interested in this site.
- Along with the Oregon Housing and Community Services Department and Department of Energy, Energy Trust staff met with representatives of the Legislative Fiscal and Legislative Budget offices to discuss the focus of our different programs, how we are distinct from one another and how we coordinate activities.

Program Planning and Evaluation

General

- Solicited review and comment from program managers, utility staff and Conservation Advisory Council on updated Resource Assessment 2008 – 2027; presenting results by utility to various IRP technical workgroups.
- Completed an extension of the Resource Assessment for the additional industrial gas customers in NW Natural's service territory; working with staff of Energy Trust and NW Natural to provide budget and goals for 2009 – 2010.
- Assisted NW Natural in developing a Resource Assessment for their Washington service territory to insure consistency with IRP and Phase I report of potential Energy Trust delivery of programs beginning Q4 2009; will establish Energy Efficiency Advisory Group to guide Phase II.
- Assisted in completion of recommendations to Northwest Energy Efficiency Team executive committee from various workgroups.

Residential

- Completed measure definition and cost effectiveness for over 33 specialty lights.
- Approved several new code lighting packages designed to acquire energy savings from non-ENERGY STAR homes in 2008 and help builders learn how to implement the new Oregon code while producing quality lighting.

Commercial and Industrial

- Approved three new measures in new, replacement, and retrofit markets for multifamily installations using centralized gas-fired boilers, tank-type and tankless water heaters; replaces existing measures using the prescriptive incentive structure of single family installations.

NW Alliance Evaluations

- Attended annual meeting of the Northwest Energy Efficiency Alliance expert committee on cost effectiveness and savings attribution methods, along with representatives of the Northwest Power and Conservation Council and other regional utility representatives.
- Participated in a number of calls with Pacific Gas & Electric and the Alliance regarding the PG&E electronics program; Alliance likely will assume responsibility for lead role in due diligence at this point, although we will review the cost and benefits with them when the information becomes available.

Efficiency Programs

Home Energy Solutions—ENERGY STAR® New Homes

- Completed focus groups for consumer feedback about the Energy Performance Score.

Home Energy Solutions—Existing Homes

- Conducted several Trade Ally orientations on the GreenStreet lending product, leading to six consumer loans and one $1.5 million multifamily loan in process.
- Placed remaining Living Wise educational kits for 2008.
- Documented 3,795 calls to the CSG call center in November, 27 of which were from Spanish speakers.

Business Energy Solutions—New Buildings

- Attended trade ally roundtables in Portland, Grants Pass, Pendleton and Bend to discuss the transition from SAIC to PECI and address related concerns.
- Presented Pencil-It-Out at a Portland General Electric training, Energy Efficiency and Renewables —a CFO Perspective, which drew over 100 participants, including CEOs and CFOs from a number of prominent Oregon companies.

Business Energy Solutions—Existing Buildings

- Launched municipality target initiative with a Courthouse Challenge in which counties will compete against each other based on the ENERGY STAR benchmark score of their courthouse; 21 out of Oregon's 36 counties participating thus far.
- Begun work on seamlessly integrating renewables, specifically solar electric and solar thermal, into the program.
- Planning marketing and outreach efforts for 2009 in cooperation with utility partners.

Business Energy Solutions—Production Efficiency

- Began transition of pulp and paper, food processing, high tech, and the Bend region territories to new Program Delivery Contractors for 2009.
- Kicked off two pilot initiatives – Industrial Energy Improvement (IEI), a two-year pilot focused on energy management, and a focus on the high tech industry.
- Continued collaboration with the Oregon Manufacturing Extension Partnership by working to integrate energy efficiency into Environmental Protection Agency's Green Supplier Network Assessments at two sites in the Salem area.

Renewable Energy

Open Solicitation

- Worked with efficiency staff to organize a one-day workshop for governments on solar and efficiency for new and existing buildings, attracting more than 175 people representing 70 different municipalities, special districts, and government agencies.
- Attended an event commemorating completion of the Portland Habilitation Center's 859 kW solar project.
- Served as a member of the review team for the state's Renewable Energy Feasibility Fund applications.
- Completed solar site assessments for the city of Molalla and the Mittleman Jewish Community Center as part of outreach initiative to municipalities and nonprofits.
- Evaluated a combined energy efficiency and renewable energy generation project for Farmers' Irrigation District in Hood River County.

Utility Scale

- Provided regular, scheduled payments for the GoodNoe Hills wind project for Pacific Power.

Wind

- Evaluated an application and reviewed above market cost for an 800 kW community wind project near Hermiston.
- Held a trade ally training session for approximately 30 contractors.

Biopower

- Approved co-funding of a six-dairy feasibility study with Northwest Dairy Association to evaluate the technical, operational and economic components of generating renewable energy from methane produced from anaerobic digestion of dairy waste and other co-digestion substrates.
- Formed an Energy Issues Working Group, with representatives of the Association of Clean Water Agencies (ACWA), US Department of Agriculture, and the Oregon departments of energy, environmental quality and economic development, to promote energy conservation and renewable power production at wastewater treatment plants.
- Attended the Renewable Energy Finance Forum in Seattle, WA.
- Attended the Environmental Protection Agency AgSTAR-sponsored Northwest Dairy Digester Workshop focusing on the status of anaerobic digestion at dairies in northwest states.
- Continued to analyze a revised proposal for a 1 MW landfill gas project in Douglas County

Solar

- Met with new executive director of Oregon Solar Energy Industries Association; presented Energy Trust program update at OSEIA board retreat.

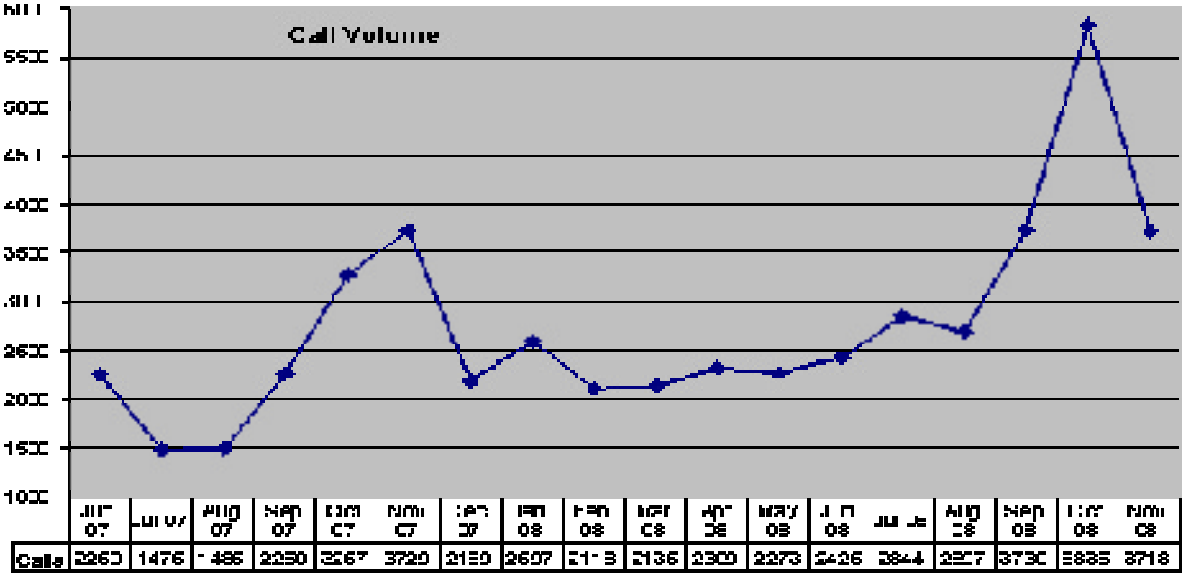
- Conducted break-out discussions with solar trade allies at trade ally roundtable events in Portland and Bend.
- Oversaw successful launch of GreenStreet Lending November 12.
- Agreed with Existing Buildings to include solar site assessments in energy efficiency studies and cost-share between programs.
- Analyzed an innovative PV-thermal solar system for Nike.

Communication, Marketing and Outreach

Call Center/Customer Service

- Added one representative at the main call center.
- Held outreach event in Pendleton to bring trade allies and participants together.
- Trained Umpqua Bank business relationship managers on Energy Trust programs.
- Investigated home energy review signup process and worked with CSG on improvements.

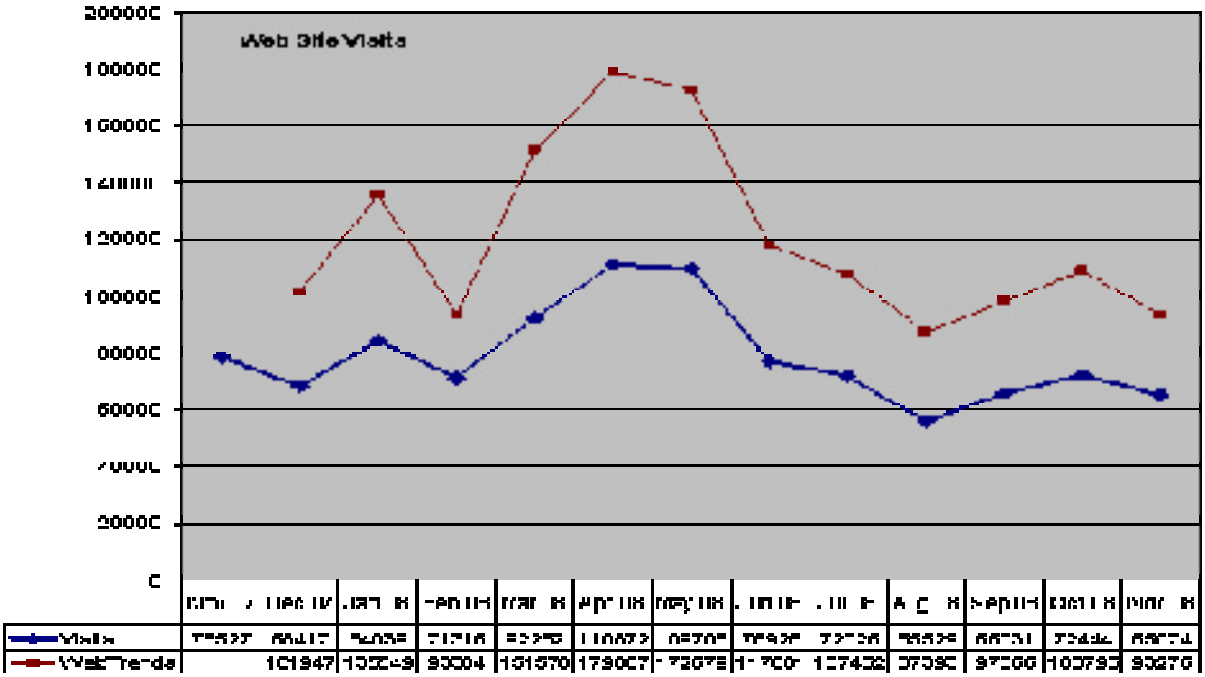
Call Volumes through 11/2008



Website

- Posted new Biopower and Wind Web pages including new, improved content and photos.
- Worked with Umpqua Bank in launching the new GreenStreet Lending Web site; placed touts (special notices) and links on our site to the GreenStreet site.
- Launched a new Program Delivery Contractor (PDC) look-up tool.
- Created a tool for the Solar team to send bulk e-mails to solar trade allies.
- Improved visibility of eligibility information on Home Energy Solutions pages for homeowners not using electricity or natural gas as the primary heat source.
- Issued RFP for web development services.

Web Visits through 11/2008



Trade Ally Management

- Completed renewal for New Homes trade allies.
- Held fourth quarter roundtable meetings – best attended to date.
- Held trade ally networking mixers with Umpqua Bank staff.
- Reviewed issues with Oregon Green Solutions, prompting updated procedures for probationary status.

Creative Products

- Created 43 new and resized advertisements: 8 commercial, 21 residential, 2 renewables and 12 general.
- Produced brochures representing the Existing Buildings program and Irrigation Initiative.
- Produced a case study representing the Production Efficiency program.
- Produced mailers for six trade allies representing Production Efficiency program.
- Produced a low cost tips sheet for homeowners with oil heated homes.
- Submitted two New Homes articles to HBA's monthly newsletter.
- Worked with Umpqua Bank to produce a GreenStreet Lending Web site and brochures to inform trade allies and consumers about the new financing offers.
- Produced a fact sheet on new mini-split heat pump pilot.
- Created a fact sheet on the existing homes Energy Performance Score (EPS) pilot.
- Designed bill inserts with Pacific Power, NW Natural and Cascade Natural gas for their December mailings.

News Releases and Media Events

- Collaborated with OSD on release to announce Green Investment Fund scholarship.
- Distributed press release on date for four free information sessions about Energy Trust's grant writing workshop for potential applicants to the USDA's Rural Energy for America grant program.

- Prepared press release announcing APEM Energy Manager of the Year, Earl Johnson, for establishing the Building Simulations Users Group (BSUG) through New Buildings.
- Distributed press releases on house as a system workshop in Bend (11/3), GreenStreet lending launch (joint release with Umpqua Bank), get your home fit for the holidays (11/24).
- Worked with reporters/producers for stories on KATU TV, KPAM radio, KEX radio, Oregonian Homes a+ Gardens Northwest, CNBC.

Operations, Contracts, Human Resources, Finance and Information Technology

Finance

- Completed interim audit field work for the 2008 financial statement audit.
- Received benefits renewal information from broker for 2009 benefits rates; recommended and implemented changes.
- Participated in Living Building Initiative work as well as viewing additional space in Pacific Center Building.
- With consultant assistance, refining compensation study analysis and aligning job descriptions.
- Continuing preparations for year end processing—incentives processing, Form 1099 processing, payroll, etc.
- Implemented outsourced insurance tracking solution; went live on 11/26.
- Completed the first review of the final 2009/2010 budget.
- Completed an update to the Q4 2008 forecast.
- Assisted with Bonneville Power Administration with pricing analysis

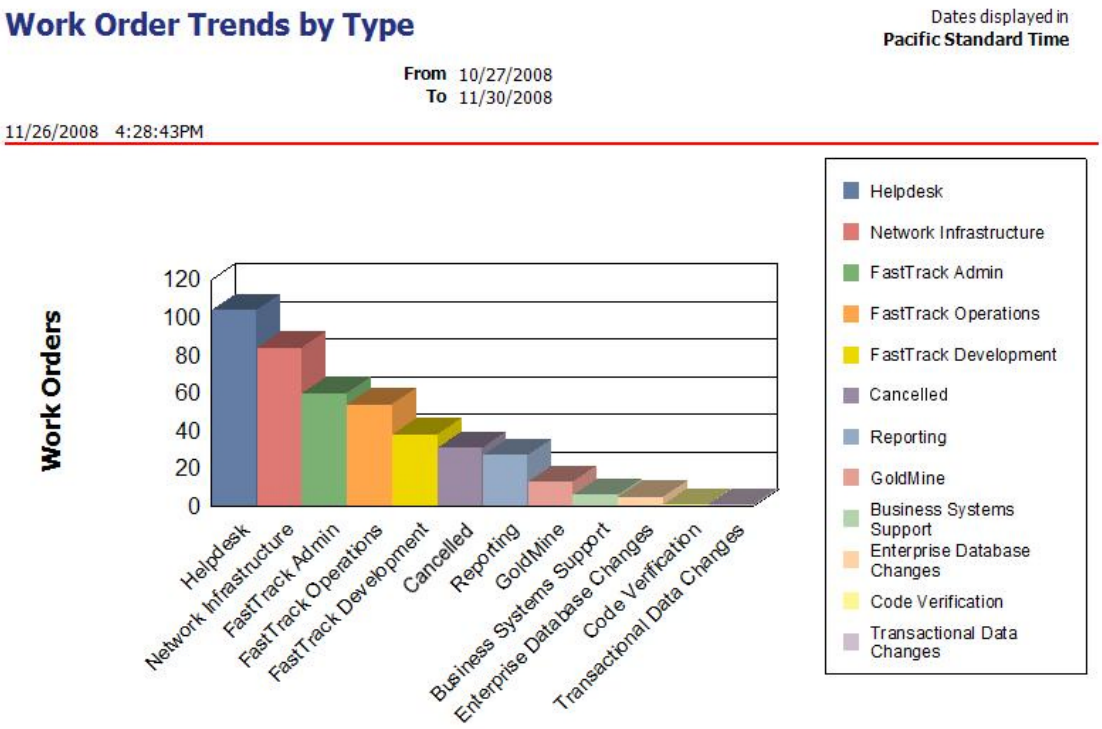
Human Resources

- Held annual performance review training for the 2008 performance review process.
- Held new employee orientation for new staff.
- Hired Brian Sinclair as senior technical business systems analyst; previously director of learning technologies at Olive Wyman Delta, Brian attended University of British Columbia and has a masters degree in education.
- Hired Matthew Taylor as an intern in planning and evaluation; Matthew has an economic degree from the University of Nevada and will be attending a graduate program at Portland State University.
- Hired Amanda Helstrom as a short term contractor in IT; Amanda will be assisting in report writing.
- Hired Elaine Prause as renewable business program manager.
- Recruiting for Elaine's replacement as senior industrial sector manager in the energy efficiency department.

Legal and Contracts

- Met with utilities and interest groups on proposal to streamline process of obtaining, using and protecting utility customer data, made presentation and received comment from the Conservation Advisory Council, and developing template agreements and contract provisions to ensure data protection.
- Spoke to Oregon State Bar Government and Municipal Law Section and Building Owners and Managers' Association on energy and climate change regulation.

Information Technology

- Completed IT portion of 2008 financial statement interim audit.
- Completed 19 forms in November; 270 total for January – November 2008.

- Hired one staff and one contractor (see Human Resources bullets) and an IT policy writer to ensure IT policies in place.
- Streamlined the process for normalizing addresses, making it 40% faster and improving user response time and data base processing time.
- Improved the integration between Great Plains and FastTrack, resulting in savings of 45 minutes to an hour per week by the accounting team.
- Enabled uploading of incentive applications, receipts and other document images.
- Improved clothes washer/refrigerator web form with validations and integration.
- Completed the quarterly report and utility outreach fact sheets for three utilities.
- Developed 4 reports for the 1099 project.