Energy Trust of Oregon
Organization Redesign Progress Report

October 28, 2010

This is the third quarterly report summarizing progress on implementing 2009 organization redesign recommendations.

Background

In February 2009, Energy Trust of Oregon started an organization redesign effort led by a multi-disciplinary staff team and guided by senior management. The redesign process, findings and recommended follow-up actions are documented in *Energy Trust of Oregon Organization Redesign Report*, published in October 2009.

Redesign findings and recommended follow-up actions fall into four major categories and are listed in detail under Appendix F, page 63, of the Redesign Report: (1) work process and productivity improvements, (2) customer focus improvements, (3) structural changes and (4) cultural changes. Please see the second quarterly progress report, published in July 2010, for additional background.

Updates

The following activity descriptions draw from, and correspond to, areas identified in the organization redesign final report and recommendations. Additions, corrections and feedback are welcome at any time. Please provide comments to Amber Cole at amber.cole@energytrust.org.

Data: *Improve the accuracy and quality of data; improve system capacity for data collection and analysis; secure updated data sharing agreements with utilities through the Oregon Public Utility Commission.*

- **Integrated Solutions Project**
  The Integrated Solutions Project, ISP, will replace our three major IT systems — Goldmine, Fast Track and Great Plains — with a new Energy Trust specific version of the Epicor 9 product. This project will produce an integrated system designed to meet Energy Trust's specific business needs, while improving system capacity for data collection and analysis.

  Recent activities and current status:
  - Selected Epicor Consulting and Epicor 9 as our Integrated Solutions Project implementation provider, developed scope of work, and negotiated and signed contracts
  - Continuing to develop project plan; implementation is expected to complete in fall 2011
  - Drafted internal communications plan to help inform staff of ISP process and milestones
  - Assigned functional leads for each group at Energy Trust, and started to work on plans to back-fill workload
  - Drafted a survey to help assess Energy Trust staff's readiness for ISP

- **Business Intelligence**
  The Business Intelligence, BI, initiative involves developing a better understanding of key business information in an effort to generate reports that improve decision-making. The goal is to consolidate all essential business data from various sources into a central location, then transform it into useful information that is readily available via standard reports and interactive dashboards.

  Recent activities and current status:
  - A Levelized Costs Pilot was completed in mid-July. This pilot will result in reports that replace the iterative, manual effort needed to calculate levelized cost for all programs. During this process, the pilot addressed and resolved data quality issues, resulting in more accurate data for savings and incentives.
  - More than 25 BI "Power Users" were trained on how to use the new BI reporting tools to generate savings and incentive reports.
  - The Counting Project is underway and is expected to complete Q1 2011. This project will allow us to better report the volume and type of program activities to show a more accurate picture of customer services delivered. The project will ensure a standard definition and consistent count for each measure of program activity. Additional data cleansing and business rules standardization will occur during this project.
  - IT collaborated with staff to scope subsequent BI projects and the IT Steering Committee is in process of prioritizing.

- **Staffnet & SharePoint platform**
  Staffnet is Energy Trust's intranet portal delivered via the SharePoint platform. The SharePoint platform allows for streamlined reviewing and approval processes, document editing and version control, record retention and internal communications. IT is in the process of developing Staffnet via the SharePoint platform to meet the collaboration and workflow needs of the organization, and is providing support to staff and teams utilizing the platform.

  Recent activities and current status:
  - SharePoint lead, Lynn Greenough, has met with staff around the office to discuss SharePoint needs and capabilities; topics have included trade allies, forms, utility collaboration and communications.
  - Currently drafting a governance plan
  - Conducted a SharePoint training for Management Team
  - Created or defined the following "sites" on Staffnet/SharePoint:
    - Budget
    - Office Relocation
    - ACEEE Conference Materials
    - NW Natural Washington
    - Bike Commute Challenge
    - Measure Maintenance Workflow
    - Document Retention Workflow
    - Measure Maintenance
  - IT and Planning and Evaluation are collaborating to develop streamlined measure maintenance processes in SharePoint to improve data quality and customer service.

- IT and Communications and Customer Service (CCS) collaborated to create a "Happy Customer" form to enable staff to capture customers' positive feedback and document consent for marketing purposes.
- IT is supporting CCS in the development of a "Utility Collaboration" site to support the organization in utility relations and collaboration.
- IT and CCS are collaborating on improvements to the Staffnet/SharePoint landing page.

- **FastTrack and Data quality improvements**

  FastTrack is Energy Trust's program tracking system. The system is designed to manage renewable energy and energy efficiency projects, inventory site data, process incentive payments and track and maintain savings and generation data. IT continues to support and will incrementally improve FastTrack until it is determined that such improvements are no longer of value given the parallel development of the replacement ISP (see above). IT collaborates with program operations analysts and others to identify opportunities to improve the quality of data flowing into FastTrack.

  Recent activities and current status:
  - Improved cross program visibility in FastTrack, so customers aren't transferred when inquiring about an incentive check.
  - Automated upload of high volume State Home Oil Weatherization program, SHOW, and Energy Saver Kit entries.
  - IT and Operations Analyst teams continued to meet and collaborate on various initiatives to improve data quality, improve turnaround time and streamline business processes.
  - The Operations Analyst team has been working to identify the fields in FastTrack that are continually left blank or filled out incorrectly, information which will help inform the forms improvement project.

- **Customer data**

  Under current information sharing rules, Energy Trust has limited access to utility customer information. Utilities must provide Energy Trust with information about large customers only if the customer "opts-in" to data sharing. For smaller users, utilities are supposed to provide information if the customer does not opt-out of data sharing and there are limits on how Energy Trust can use the data. In practice, the opt-in and opt-out processes have proved to be complex — each utility interprets the rules differently, and the limitations make it difficult to give customers valuable, tailored information about how to save energy. Energy Trust customer service, program planning and evaluation are hobbled. Energy Trust has proposed to the OPUC and utilities that the data sharing rules be updated to address these issues while protecting customer privacy.

  Recent activities and current status:
  - Updated utility data sharing rules are being developed in response to the Energy Trust proposal
  - OPUC-led stakeholder input process has developed general agreement among stakeholders
  - OPUC public process and rules expected in 2011; to be followed by utility agreements on data format and customer service procedures
  - Legal, IT and CCS groups are collaborating to identify and implement necessary processes and procedures to uphold customer privacy, support customer opt-

outs and ensure alignment with utilities on customer data and communications under the proposed data sharing rules
  - IT is currently redesigning the single data structure that tracks customer energy usage when provided in various formats by the utilities. This improves our ability to understand our customers and improves our analysis capabilities.

Forms: *Simplify the customer experience by creating shorter forms and "user-friendly" procedures; improve the accuracy and quality of data; apply program-specific data in decision-making.*

- **Process streamlining and best practices**
  The CCS group is collaborating with programs and support teams in the development of more than 300 forms designed to collect customer data. CCS is developing new procedures and clarifying work flow for forms development and revision to ensure forms are optimized for users and internal needs.

  Recent activities and current status:
  - Conducted process mapping session on form request process and implemented the following solutions to resolve key variances:
    - Rolled out new procedures, including a formal form request process
    - Streamlined work flow for forms development and revision
    - Clarified roles and responsibilities
  - Created a top 10 list of best practices for creating simpler and more reliable forms, which are now applied to all incoming forms
  - The following paper forms have been revised since implementing best practices:
    - Multifamily — reduced 14 forms to six
    - Commercial — forms changed to distinguish them by measure, creating less confusion for the people filling out the forms, and less follow-up from programs
    - New Buildings — forms were revised to reduce the number of iterations from project enrollment to completion by allowing email confirmation by a project team member; and as measures are identified, addenda will be added as the project scope and requested measures are added or changed

- **Forms improvements**
  CCS is working on a subset of forms that have been prioritized by a broader cross-group team as in need of improvement. These forms rose to the top based on customer complaints, processing time, volume and savings potential.

  Recent activities and current status:
  - Compiled a landscape of all Energy Trust forms showing associated data such as complaints, processing time and energy savings tied to the form
  - Used this landscape document to identify and prioritize forms in need of improvement
  - Developed a plan to address priority forms to make them easier for the customer and trade ally to fill out, and processing teams to track

- **Online forms**
  Online forms are electronic versions of application forms or user tools delivered via the Energy Trust website or other electronic means. These forms result in direct input to or exchange of data with Energy Trust data systems via web services or other secure means. Electronic forms and web services eliminate data entry and improve the speed of information and incentives to customers. IT, with input from an Online Forms steering committee, is prioritizing and developing electronic applications to take the place of, supplement or streamline various Energy Trust forms and processes where significant efficiency and customer service gains can be made.

  Recent activities and current status:
  - IT collaborated with programs and CCS to develop the following online forms in 2010:
    - Home Showerhead Kit request
    - Home Energy Saver Kit request
    - Home Energy Review request
    - Residential HVAC form upgrade
    - Appliance incentive application form
    - "What is the status of my incentive application" form
    - Customer search improvements for the "find a contractor" directory, including online distance search and trade ally contractor rating
  - The Forms team and Online Forms steering committee continue to collaborate on process and prioritization of forms.

Customer Focus: *Re-orient Energy Trust products and services from a focus on individual program offerings to a focus on customers.*

- **Customer service**
  To ensure a high level of customer service, CCS manages an external call center, coordinates with utility call center managers, trains Energy Trust representatives, responds to customer comments and questions via the call center and info@energytrust.org, and resolves customer complaints. Ensuring a positive customer experience is the mission of the customer service team.

  Recent activities and current status:
  - CCS developed and began delivering customer experience training for Energy Trust staff, Program Management Contractor, PMC, staff and outreach contractors to develop representatives' ability to speak with customers about Energy Trust and connect them to appropriate services and solutions.
  - CCS and programs routinely collaborate to implement process improvements based on customer feedback and complaints; responsibility for process improvement follow-up is now documented during the complaint resolution process.
  - CCS held a staff focus group to help inform Interactive Voice Response, IVR, options, and implemented changes to the system.
  - CCS, program and PMC staff participated in a process mapping session — customer experience by phone — and implemented the following solutions to resolve key variances:
    - More robust solar training for the Energy Trust call center

        - New way of handling calls from business customers, which pinpoints where they are in the decision-making process and targets their options accordingly
        - Cross-program visibility in FastTrack
        - Created a SharePoint site, which is accessible to PMC staff, Energy Trust staff and outreach representatives with contact lists, a discussion board, current marketing campaign materials and an interactive FAQ database
    - CCS organized call center trainings that focused on:
        - Clean Energy Works Portland, Clean Energy Works Oregon
        - Prescriptive duct sealing
        - Savings Within Reach initiative
        - Existing Homes ongoing program enhancements
        - Routing Existing Buildings customers

- **Tools and program enhancements**
  As programs develop tools and offerings, we strive to approach this work from the customer's perspective, asking ourselves what will facilitate new and repeat customer action and what barriers exist that we need to remove for customers to realize greater savings. For example, the following tools and products have been designed in recent months to make participating with Energy Trust easier for the customer:
    - The Business Group re-tooled New Buildings program incentives to meet customer needs in a very aggressive code environment. Tiered incentives now kick-in when customers reach 15 percent beyond the 2010 Oregon Energy Efficiency Code, resulting in a clear incentive structure that rewards increased savings with increased incentives.
    - The Homes Group developed a customer-friendly, online Home Energy Profile tool for the Energy Trust website to walk residential customers through simple, visual online evaluations of their home without the need for technical information or bill data. The Home Energy Profile provides customers with a general idea of how their homes compare to others and recommends a first step to take.
    - The Industry and Agriculture Group recently rolled out the Energy Project Portfolio, a customer-facing tool for PDCs to use in working with large industrial customers. Using the portfolio, a PDC will document what has been done at the site, current projects underway, and future project opportunities. The portfolio shows how projects relate to longer-term savings goals, provides financial and energy-savings data, and demonstrates the combined cash flow impact of the full portfolio of energy-savings projects. It also provides visual representations of the data for industrial energy managers to use in conversations with executive leadership to gain support for future projects.
    - The Business Group designed and enhanced two tools for use by New Buildings program outreach managers, program allies, trade allies and others working with a project design team to streamline the calculations associated with the energy-efficiency features of a new building:
        - Updated the lighting calculator, including exterior and interior lighting and lighting controls

        - Launched an HVAC calculator, including air-to-air heat pumps, air conditioning, demand control ventilation, economizers, variable frequency drives and fan energy optimization
    - The Business Group developed outreach and account management tools to build high quality strategic long-term customer relationships with the largest multifamily property management firms in Oregon.
    - The Renewable Energy group developed a pilot that will provide incentive dollars earlier in the project development process, when they are most needed to support project completion.
    - The Renewable Energy group developed the *Interconnection Guidebook* to help projects through the complex process of connecting to the utility, and the *Wind Permitting Considerations* publication to provide counties and customers information about permitting standards and definitions that affect wind development.
    - The Industry and Agriculture Group collaborated with the Renewable Energy Group to provide technical training for Program Delivery Contractors in industrial solar PV and solar thermal, biogas and biomass applications. This enables PDCs working with customers on production efficiency and other projects to identify renewable opportunities for the customer, and provide referrals for those potential projects.

Market Research: *Identify market research needs and prioritize; coordinate market research efforts so all programs benefit from intelligence gained.*

- **Fast Feedback**
  Fast Feedback is an ongoing evaluation program launched in 2010 whereby short phone surveys of a sample of recent participants gauge satisfaction and free ridership, as well as identify possible program improvements. Fast Feedback delivers this information to programs and support groups on a quarterly basis so improvements can be made without waiting for the more extensive, less-frequent evaluations to uncover opportunities for improvement.

  Recent activities and current status:
    - Reported on Q2 fast feedback findings, which generally found customer satisfaction to be high and free ridership at sustainable levels. Results led to revised market effects forecasts for three measures and supported plans to revise these measures.
    - Fast feedback sample expanded to include residential solar electric and small wind (both residential and commercial).
    - The Energy Trust call center now conducts Fast Feedback survey calls. This allows our customer service representatives to respond to customers who have questions or ask about additional program offerings during the phone call.

- **Other intelligence**
  The following recent evaluation activities broaden Energy Trust's understanding of the market and customers:

- Gained considerable insight into customer attitudes, preferences and decision making through the 2010 Residential Awareness survey and Clean Energy Works Portland process evaluation; awareness of Energy Trust is up, particularly in rural areas, and increasingly comes from mass media.
- Used the awareness survey to explore market position of cold water detergent; now considering program activities to promote its use.

Trade Ally Network: *Seek new ways to balance trade ally interests while also serving customer needs.*

- **Trade ally rating system**
  As of July 2010, Existing Home trade allies are rated from one to three stars based on their quality control, QC, pass rate, customer feedback and number of projects submitted for incentives.

  Recent activities and current status:
  - CCS and the Existing Homes program continued to solicit feedback from customers, stakeholders and trade allies on the Existing Homes trade ally rating system. Trade allies had few complaints.
  - CCS met with the Solar team to discuss applying a rating system to solar trade allies.

- **Energy Trust allies**
  Energy Trust allies, also known as "program allies," are the professionals, retailers, distributors and other organizations who are educated about Energy Trust programs, but are not categorized as "trade allies" because they are not members of the skilled trades. CCS is collaborating with programs to streamline and centralize processes around program-related allies management, and to support customer-friendly communications about them.

  Recent activities/current status:
  - Created guidelines and a request form for adding new program-related ally groups
  - Created a new logo, language and guidelines for logo use

- **Trade ally development training**
  As part of the new trade ally rating system, trade allies in the top tier will be required to complete Energy Trust's Enhanced Trade Ally Development course including customer service best practices, sales techniques, Energy Trust messaging, and customer assistance with forms and resources.

  Recent activities/current status:
  - CCS started developing trade ally training and plans to rolled out in Q1 2011; topics include sales, customer service and general Energy Trust information

Energy Trust Culture: *Develop project management skills among staff; define a pilot process; implement ongoing process improvements; support general improvements.*

Recent trainings offered to Energy Trust staff and others include:

- **Project management training series for staff**
    - Offered the third project management certification course
    - Piloted the MS Project tool with the IT, CCS and Program teams; training has been scheduled; data gathering continuing

- **People management training series for staff**
    - Offered the Manager 201 course

- **Customer Experience training for staff and contractors**
    - Delivered the first round of Energy Trust Customer Experience training to ensure staff and contractors can deliver on our core values and have more tools to cross-promote programs; more trainings are planned for staff and contractors who regularly interact with customers

- **Representing Energy Trust (elevator speech) training for staff**
    - Developed a wallet-sized *Customer Conversation Guide* providing staff and representatives with a short list of key points about Energy Trust and what we offer for different types of customers
    - Including an "elevator speech" segment in the Customer Experience training (see above) and distributing the *Customer Conversation Guide*

- **Business program training for utility outreach representatives**
    - Program and CCS staff met with Portland General Electric and Pacific Power to coordinate 838 outreach and train utility representatives conducting the outreach.

To support a culture of ongoing process improvement, the CCS group provides training and facilitation for work process mapping. Programs and support groups request this support to examine specific processes that cause customer confusion or create inefficiencies.

- **Work process mapping**
    - Mapped various processes at Energy Trust, including incentive changes, new measures, forms development and revision, and call traffic.
    - Documented opportunities for improvement and provided follow-up support for implementation of improved processes.
    - The results from these mapping sessions are referenced in various sections of this report.

Internal Structural Development: *Create a structure in support of what customers need and want; enhance programs to support accelerated acquisition of savings and generation; revise and adjust position descriptions in support of optimal structure and enhanced programs*

- **Sector strategic plans**
  In late 2009, multidisciplinary groups focused on four specific customer types and sectors were formed—Homes, Business, Industry and Agriculture, and Renewable Energy. In 2010, each production group developed a strategic plan to outline their short and long-term goals.

  Recent activities and current status:

- All production groups have completed a sector strategic plan, and all have been presented to the board of directors and staff.
- The sector plans were referenced while developing 2011-2012 budget and action plans.
- CCS developed a draft trade ally strategic plan out of conversations from sector strategic planning sessions.

- **Pilot process**
  Earlier this year, the Planning & Evaluation Group defined and implemented a new, more formalized approach to evaluate new initiatives and presented it to staff.

  Recent activities and current status:
  - Programs developed business briefs for two pilots and revisions are underway.
  - Staff and contractors are learning that the brief is most valuable in assuring a quality pilot before a program offering is fully developed and scheduled.

- **Incentive change process**
  Early in the redesign process, staff identified a need to analyze, streamline and formalize the cross-organization process that occurs when an incentive needs to be changed.

  Recent activities and current status:
  - Staff and PMCs participated in a process mapping session on the Existing Homes incentive change process. The following solutions to resolve key variances were implemented:
    - Enhanced the incentive change process and created a timeline, work flow, initiative plan, measure request form and glossary
    - Reiterated the blessing memo purpose and created a process flow to understand the role of the blessing memo
    - Clarified process roles and responsibilities

Planning: *Implement continuous process planning improvements.*

- **Staffing**

  Recent activities and current status:
  - Reconfigured and augmented Planning and Evaluation staff to support development function.
  - Transferred 0.5 FTE of contract position from IT to Planning for incorporation of efficiency and renewable measures into FastTrack data system. By placing this position closer to the planners who develop measures, IT systems and planning and evaluations will be closer aligned.

- **Integration**

  Recent activities and current status:
  - Planning and Evaluation staff have worked closely to develop realization rates for savings from the most recent evaluations for use in developing the 2011-12 budget and savings forecast. This follows a new schedule that is synchronized with the needs of the budget process.

- Evaluation and CCS staff have worked together to implement Fast Feedback surveys, to implement a plan to collect and track happy customer information, and to collect other data and results to understand customer motivations and suggest program enhancements.
- Planning and Evaluation staff have worked closely with Existing Homes to clarify the purpose and value of the blessing memo through the incentive change process enhancements project.