Energy Trust of Oregon
Organization Redesign
Final Progress Report

May 2011

EnergyTrust of Oregon

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Executive Summary

In February 2009, Energy Trust of Oregon initiated an organization redesign effort led by a multi-disciplinary staff team and guided by senior management. The overarching purpose of the redesign was to double and then triple the amount of clean energy acquired. To achieve these aggressive goals in an accelerated timeframe, the redesign explored ways to:

- Gain deeper and more specific strategic knowledge of customers by sector, market, geography and technology to increase volume and diversify savings and generation acquisition
- Strengthen and improve customer focus and service
- Deliver "one-stop" integrated efficiency and renewable energy services
- Manage costs and gain business operation efficiencies
- Improve work flow and gain efficiencies by eliminating unnecessary steps and improving ease and speed
- Remain nimble and flexible in a changing and dynamic environment
- Achieve these results by adding only limited new staff

These and other "imperatives" provided a framework for the redesign effort. The approach, findings and recommended follow-up actions were documented in the *Energy Trust of Oregon Organization Redesign Report*, published in October 2009. Since the completion of this final redesign report, three internal staff reports documented progress and implementation of the recommendations on a quarterly basis. This is the fourth and final progress report.

Specific, detailed redesign findings and recommended follow-up actions are listed in detail under Appendix F, page 63, of the above-referenced final Redesign Report and fall into four major categories: (1) work process and productivity improvements, (2) customer focus improvements, (3) structural changes and (4) cultural changes.

Overall Accomplishments Summary
A detailed description of accomplishments and ongoing work tied to the redesign are outlined in this report. Major outcomes related to Energy Trust's recommended redesign priorities are summarized as follows:

1. **Double digit savings growth** – By the end of 2010, Energy Trust had met almost all gas and electric stretch goals. Overall, we exceeded 2009 savings by 63 percent in electric efficiency, growing from 28 aMW in 2009 to 45.6 aMW in 2010. Gas efficiency grew from 2,878,309 annual therms to 4,622,780 annual therms, a 61 percent increase. New renewable energy generation was the highest since we transitioned to supporting smaller scale systems. We accomplished this significant growth in results in a fragile economy, during a time of constrained capital and new frugality for our participants.

2. **Collaborative approach to setting resource acquisition goals and funding** -- Concurrent with our redesign, we began collaborating with each utility and the OPUC to develop an annual cycle of activity to update utility Integrated Resource Plan (IRP) targets and corresponding revenues. We now have an agreed upon schedule to update resource potential studies to acquire the maximum cost-effective energy available. This effort links us to utility IRP goals in new ways and has led to new

funding agreements, goals, and accountabilities. The Director of Operations, a new role resulting from staff reassignments of the organizational redesign, provides leadership for Energy Trust's collaboration and communication with all parties on these important subjects.

3. **Integration across programs to deliver customer focused services** – Creating a "one-stop shop" for customers was identified early on in the redesign process as a way to better enhance customer experience and to more quickly grow savings and generation results. The goal of integration drove structural changes in several areas including: reconfiguration of an existing staff position to create a Director of Energy Programs, with oversight of all efficiency and renewable programs; embedding solar and marketing managers within the Homes and Business groups; creating a contract position to focus on serving the comprehensive needs of public sector customers; and redefining coordinator roles into operations analysts to interface with IT staff and provide data and reports needed for program management. Such integration has also resulted in program enhancements while also helping facilitate shared learning across programs and between sectors.

4. **Training supports more effective customer interactions** -- CCS developed and delivered multiple customer orientation and service trainings to over 150 Energy Trust staff, Program Management Contractor staff and outreach contractors. This investment created a knowledgeable cadre of Energy Trust "ambassadors" capable of representing the full spectrum of Energy Trust services to customers. Those who received this training are more able to connect customers to those solutions most appropriate to meet their needs. Other cross-program staff and contractor sessions, including renewable energy training for industrial Program Delivery Contractors, reinforced our ability to meet customer needs independent of which program provided the first customer contact.

5. **Investment in new information technology (IT) systems supports our business needs** – Current Business Intelligence, Data Warehouse and SharePoint efforts in IT are contributing to better data management and information sharing consistent with Energy Trust redesign program and organizational needs. The Integrated Solutions Project implementation will address the ease, quality, management of and access to data necessary to better serve Energy Trust business requirements. Upon project completion, data entry, analyses and reporting will be simplified and fully integrated for customer relationship management, project tracking and financial management systems.

6. **Web services save time and improve customer service** – Over 20 forms are now accessible on the Energy Trust web site, providing customers easier access. During the fourth quarter of 2010, 54 percent of all FastTrack projects in our database were created using web forms. This approach saves roughly 4 minutes of data entry per form. To better support and simplify the customer's trade ally contractor selection process, tiered ratings and distance search were added to the web site. Communications and Customer Service (CCS), IT, and program groups continue to collaborate on web services initiatives to better serve the customer and capture more Energy Trust efficiency gains.

7. **Market research supports customer focus and identifies customer priorities** – In response to a redesign request to obtain an earlier understanding of customer

attitudes, preferences and decision-making processes, the Planning and Evaluation group implemented Fast Feedback customer surveys. A 2010 Residential Awareness survey and a Clean Energy Works Portland process evaluation further expanded our knowledge of customer needs and priorities. Results from the awareness survey indicate awareness of Energy Trust increased significantly, particularly in rural areas, stemming from additional outreach and media presences in local marketplaces.

8. **Contracts reinforce customer focus and process improvement priorities** – To provide clearer direction to program management contractors (PMCs) about customer focus, integration across programs and process improvements, contract measurements were enhanced consistent with redesign suggestions. In addition to the existing service metrics for each program's customer service team, requirements now align with Energy Trust's customer service values, process improvement work, feedback and efficiency metrics reporting, and assistance with customer complaints. In addition, all PMC contracts include expectations and incentives to cross-reference and promote other Energy Trust programs.

9. **Pilot process supports success in testing and innovation** -- As a result of redesign process improvement work, Energy Trust developed a pilot process to help manage big, complex projects, test new measures and innovative service strategies and analyze marketplace impacts. The new process improves internal coordination and communication among staff, leads to a more intentional approach to pilot project design, and strengthens our understanding of and return from innovative approaches we test.

10. **Process mapping reinforces a culture of ongoing improvement** – Energy Trust conducted training and facilitation in workflow process mapping, a technique learned during the redesign effort. Analysis of 12 work processes involved more than 80 Energy Trust and PMC staff in 2010. Nearly 40 process improvements and solutions were subsequently implemented, resulting in saving staff time, simplifying customer experiences and more cross-program awareness and collaboration. Twenty-three Energy Trust staff also learned to facilitate future process mapping sessions, with work on 13 additional process maps conducted during these trainings. A series of project management, work process, skills and cultural improvement trainings were also conducted through twenty-one professional development employee trainings in 2010, compared to four trainings and six webinars in 2009.

11. **New organizational structure supports resource acquisition, flexibility, strategic planning, innovation and customer focus** – To realize the full potential of the redesign imperatives – be fully flexible and nimble in our changing environment, shift our focus to the customer needs and wants, improve work flow, and integrate across programs – Energy Trust reassigned existing staff resources and added some additional resources in a few targeted areas. Staff resources were aligned to support savings acquisition growth, strategic planning, measure evaluation, innovation through managed pilots, data analysis and customer service. Here are some highlights:
    a. The Executive Director shifted her focus to leveraging external relationships to build increased awareness, reach customers through new working relationships, and help position Energy Trust to achieve our accelerated goals.

b. Two existing staff positions were reconfigured, creating an Energy Programs Director and an Operations Director. These new roles help Energy Trust think strategically about both efficiency and renewables programs, to negotiate utility funding and collaboration agreements, and to provide leadership for our multiple-year Integrated Solutions Project and other program support systems.
c. A group of existing staff were identified as Operations Analysts, with an eye toward improving program operations, data integrity and management reporting.
d. Other existing positions were reconfigured to allow for the integration of solar and marketing managers into the homes and business groups, a greater focus on customer service management and trade ally strategic direction, and additional support for general outreach and communications.
e. New positions were identified for critical needs, including: sector leads to provide strategic direction and management for the homes group and the business group; a development engineer in planning and evaluation to support programs through faster measure analysis, development and approval; a full-time manager dedicated solely to customer service (previously just a partial FTE); and a production efficiency coordinator to support the growing volume of industrial sector activity. These positions were approved by the Energy Trust Board of Directors and filled.

With the completion of this fourth progress report, Energy Trust has incorporated the majority of redesign recommendations into our way of working. As we move forward, redesign will represent how we do our business in new ways. We remain open to future changes, including those that build upon the redesign as well as any new and different ways to further strengthen our organization and our collective ability to reach our goals.

Introduction

In February 2009, Energy Trust of Oregon initiated 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 the *Energy Trust of Oregon Organization Redesign Report*, published in October 2009. Since the original report, three progress reports documented progress and implementation of the redesign recommendations on a quarterly basis. This fourth and final progress report summarizes accomplishments from all four quarters.

Redesign findings and recommended follow-up actions are listed in detail under Appendix F, page 63, of the Redesign Report and fall into four major categories: (1) work process and productivity improvements, (2) customer focus improvements, (3) structural changes and (4) cultural changes.

After completion and distribution of the redesign report in October 2009, the organization transitioned to implementation. Work process improvements, customer focus improvements, and training to support cultural changes were incorporated into staff work plans. Structural changes were made through staff reassignments, and development, approval and recruitment of new positions as part of the budget process.

Also in the fall of 2009, Coraggio Group was retained to work with the executive director and Management Team to identify, sequence and monitor priority tasks to be undertaken in 2010 and to develop simple management and communications systems to track and share progress throughout the organization. Coraggio Group was also tasked with guiding sector level strategic planning sessions with the Business and Homes sector groups. Lastly, Research Into Action was retained to help evaluate progress and measure outcomes from the redesign over time.

By the end of February 2010, Energy Trust had reorganized into four energy program groups reflecting targeted customer types, namely Homes, Commercial Business, Industry and Agriculture, and Renewable Energy. Five support groups - Finance, Legal, Planning and Evaluation, Communications and Customer Service (CCS) and Information Technology (IT) – assumed some new and clarified functions more connected to program results. Staff work plans prepared in February 2010 helped further clarify new roles, responsibilities, decision-making and accountabilities consistent with redesign objectives.

The redesign has resulted in numerous and varied accomplishments, as documented in regular quarterly reports and in this final progress report. Overall, Energy Trust staff has integrated changes introduced by the redesign, embracing the opportunity to strengthen and improve work processes, improve data quality and business applications, define and emphasize efficiencies and improved customer service approaches and function optimally across all parts of the organization.

These and other changes positioned the organization to achieve dramatic increases in results in 2010 compared to prior years. Energy Trust had met almost every one of our 2010 gas and electric program stretch goals. Overall, we exceeded 2009 savings by 63 percent in electric efficiency, which grew from 28 aMW in 2009 to 45.6 aMW in 2010. Gas efficiency grew from 2,878,309 annual therms to 4,622,780 annual therms, a 61 percent increase. New renewable energy generation acquired in 2010 is the highest since we transitioned to smaller scale projects. Energy Trust accomplished these savings and generation in a fragile economy, during a time of constrained capital and new frugality for our participants.

As the experience, learning and insights gathered through the redesign are fully integrated into Energy Trust culture, our ability to align, predict and shift efforts to assure we meet our goals will only strengthen and continue.

Late 2009 and 2010 Activity: Accomplishments and Ongoing Work

The following activity descriptions correspond to areas and recommendations identified in the Organization Redesign Report.

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, FastTrack 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 business needs, while improving system capacity for data collection and analysis.

  Accomplishments:
  - Selected Epicor Consulting and Epicor 9 as our ISP implementation provider, developed scope of work, negotiated and signed contracts and developed a project plan.
  - Outcomes from the redesign findings helped inform the contractor's scope of work and priorities for project.
  - Administered a survey to help assess Energy Trust staff's readiness for ISP.
  - Drafted and started executing an internal communications plan to help inform staff of ISP process and milestones.
  - Assigned functional leads from each group at Energy Trust, developed plans to back-fill functional lead workload.

  Ongoing work:
  - Project implementation commenced; expected to complete in late 2011 or early 2012.
  - Began educating functional leads on the new solution with ongoing engagement on system design and testing planned through summer, 2010.
  - Started process modeling to determine gaps that will be filled with software customizations.

- **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.

  Accomplishments:
  - A Levelized Costs Pilot was completed in mid-July 2010. This pilot developed reports that replaced the iterative, manual effort needed to calculate levelized

- More than 25 BI “Power Users” were trained on how to use the new BI reporting tools to generate savings and incentive reports.
- Reports were migrated from the old Crystal platform to the new BI platform allowing users to access all crystal reports and newly created BI reports in one location.

Ongoing work:

- The Counting Project is underway and phase one, Measure Counting metrics, was completed in December 2010. Phases two and three are expected to complete Q1, 2011. Site data was cleansed in preparation for phases two and three, ensuring improved site data accuracy. This project will allow us to better report the volume and type of program activities to show a more accurate picture of customer services and where services were 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 prioritized the list. As a result, the Quarterly Report Project was given a high priority and commenced in Q1, 2011. The goal is to generate the Q1, 2011 quarterly report from the BI platform, accomplishing significant efficiencies in the data delivery and quality control review process for the quarterly reports.

- **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 and collaboration systems. IT is 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.

  Accomplishments:

  - SharePoint lead has met with staff to discuss SharePoint needs and capabilities.
  - Completed development of a governance plan.
  - Conducted SharePoint training for Management Team and Energy Trust staff.
  - Formed a governance team with both program and program support staff.
  - Created or defined the following “sites” on SharePoint:
    - Budget
    - Office Relocation
    - ACEEE Conference Materials
    - NW Natural Washington
    - Bike Commute Challenge
    - Integrated Solutions Project
    - Records Center for Administrative Records
    - True-up
    - Employee Resources
    - Business Sector
    - Customer Experience Portal
    - Trade Ally Coordination
    - Utility Collaboration

        - Legislative Tracking
        - Forms
        - Happy Customer Form

Ongoing work:

- IT and Planning and Evaluation are collaborating to develop streamlined measure maintenance processes in SharePoint to improve data quality and customer service.
- IT is working with operations analysts to deliver a faster, more efficient way to handle Reversal Requests using SharePoint lists and workflows.
- IT has worked with the Homes and Business teams to plan and configure their sites for improved collaboration and content management. Planning and Evaluation and Industry and Agriculture team sites are in the works.
- IT is working with the office manager to develop an employee resources section.
- IT is working with CCS to plan and implement an improved Staffnet Home Page featuring internal communications content and quick links for staff

- **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.

  Accomplishments:

  - The majority of FastTrack projects are now delivered via online web forms transmitted via web services, saving thousands of data entry hours and associated costs.
  - Improved cross-program visibility in FastTrack, so customers aren't transferred when inquiring about an incentive check.
  - There is now an automated upload of high volume State Home Oil Weatherization program, SHOW, and Energy Saver Kit entries.
  - The administration and maintenance of FastTrack measures has been moved to the Planning and Evaluation group.

  Ongoing work:

  - IT and Operations Analyst teams continue 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 participate with Energy Trust programs. 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.

Accomplishments:

- OPUC-led stakeholder input process has developed general agreement among stakeholders.

Ongoing work:

- Updated utility data sharing rules are being developed in response to the Energy Trust proposal.
- 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 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. Program groups and PMCs will be engaged in the development and implementation of these procedures when the data-sharing rules are finalized.
- 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 and maintenance of more than 300 forms designed to collect customer data for accurate processing of projects and incentives. CCS is developing new procedures and clarifying work flow for forms development and revision to ensure forms are optimized for users and internal needs.

  Accomplishments:

  - Conducted a 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
        - Wind—reduced the number of forms to reduce confusion for customers, inspectors and trade allies
    - Existing Buildings and Solar programs developed a process to integrate solar analysis into Allied Technical Assistance Contractor (ATAC) studies.
    - Engaged stakeholders and changed the "How did you hear about" section of the forms and database collection system (GoldMine) to simplify for customers and processors.

    Ongoing work:
    - Completing a process to integrate New Buildings and solar water heating that includes:
        - Streamlining qualifications for incentive reservation
        - Broadening our market approach from only solar installers or trade allies who can serve customers requesting solar to now include professional design firms enrolled as New Buildings
        - Drafting addenda to forms that will allow this solar option and is expected to enhance the value to New Buildings Allies that would like to directly work with Energy Trust on solar
    - Renewable Energy program managers are undertaking review and improvement of application forms for projects requiring in-depth financial review for determining project incentives. This is an effort to clarify for the applicant what Energy Trust needs to evaluate a project. Prior to this review, all elements were gathered over time through negotiations in a less transparent manner.
    - The Wind program is revising its incentive application form to support more accurate customer expectations for their systems' electricity generation.

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

  Accomplishments:
    - 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 easier for processing teams to track.
    - Streamlined the Trade Ally Enrollment form by lessening the number of fields, clarifying the language around problem areas, and giving clear steps about how to complete the enrollment process.

  Ongoing work:
    - Continuing to update trade ally enrollment program addendums that accompany the initial enrollment form.
    - Implementing priority forms improvement projects in 2011 according to the plan.

- **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 delivery 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, complement or streamline various Energy Trust forms and processes where significant efficiency and customer service gains can be made.

  Accomplishments:
  - To help curb the amount of staff time used to enter data, improve data quality and simplify the application process for customers, IT and CCS collaborated to develop numerous web forms programs in 2010.
  - In the fourth quarter alone, 54 percent of all FastTrack projects were created using web forms (using an average of four minutes data processing time for each project submitted). The high-volume online forms are:
    - Home Showerhead Kit request
    - Home Energy Saver Kit request
    - Products application form
    - Residential HVAC form
    - “What is the status of my incentive application” form
    - Home Energy Review request form
    - Find a contractor search tool
    - Powerclerk – An existing solar project incentive request form that we integrated with our systems
  - The online Home Energy Review request form is now sending scheduling information to the Existing Homes PMC, in addition to the project information that is being sent to Energy Trust. This allows quicker turnaround time by the PMC and better service to customers.
  - The “Find a Contractor” search tool provides enhanced customer service by allowing for distance search information and trade ally contractor rating
  - The 2011 Products web form now includes a better tool to upload images of receipts, which has reduced the abandonment rate (customers stopping the submission of their request) to near zero. Customers who use this products online form now get checks up to two weeks earlier than those who submit a paper form.

  Ongoing work:
  - The Existing Buildings web form is being created to support the standard equipment incentive and information request. Form functionality includes the ability to:
    - Upload multiple supporting document types
    - Attach multiple players to a project with different roles
    - Queue new projects under different phases to represent appropriate steps in the business process
  - A new web form is in development to support the New Manufactured Homes program in submitting incentive requests for either a salesperson or retailer.
  - Improved “what’s the status of my incentive application” site, which will make it easier for customers to see the status of their incentive check

- 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, works with program and PMC call takers to ensure consistency and accuracy in call handling, 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.

  Accomplishments:
  - CCS defined customer experience and developed key metrics of Energy Trust customer service core values.
  - CCS developed and delivered multiple customer experience trainings to over 150 Energy Trust staff, PMC staff and outreach contractors, which helped improve representatives' ability to speak with customers about Energy Trust and connect them to appropriate services and solutions.
  - CCS and programs collaborated on multiple occasions to implement process improvements based on customer feedback, complaints and process improvement exercises, which resulted in an updated Interactive Voice Response, IVR, system, FastTrack visibility, more robust training for call takers and enhanced internal communication mechanisms—all simplifying the experience for customers and staff.
  - CCS held a staff focus group to help inform IVR options, and implemented changes to the system that have resulted in a lower percentage of customers opting out of the IVR 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 for shared visibility of customer service resources, 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
    - OPOWER
    - EPS for existing homes

        - Utility coordination
    - Marketing and outreach efforts and materials have been adjusted to target customers based on their needs. The success of which is seen by the consumer action and program savings realized from the residential Free Your Home campaign—a cross-program/PMC effort (with significant collaboration with IT and CCS) that utilized a single message.
    - Examined key customer participation processes, such as Home Energy Reviews and web forms, from a customer experience perspective.
    - Industry and Agriculture created new Program Delivery Contractor action plans to chart a facilitative sales approach to deeper engagement with customers.
    - Enhanced customer engagement opportunities around the state. This has become an organization-wide priority for Energy Trust, and staff created tools and trainings to help support this, such as:
        - Business sector-organized Energy Trust trainings for PMC outreach managers and team members on the value of energy efficiency, strategic objectives and the vision of Energy Trust in the coming years.
        - Continued general outreach support for southern Oregon and eastern Oregon through contractors to ensure customers in outlying areas have a local resource for engagement with Energy Trust. Existing Homes hired regional representatives to provide field resources in southern Oregon and eastern Oregon.
        - CCS worked with programs and utilities to coordinate general outreach efforts with program outreach efforts and 838-funded outreach efforts to minimize confusion and duplication of efforts; established a protocol for sorting leads and moving customers to the program when they are ready to take action. Evaluation and evolution of this coordination continues.
        - Extended the Savings Within Reach initiative to better serve moderate-income gas and electric customers.
        - Supported Clean Energy Works Portland and Clean Energy Works Oregon.
        - Supported the Energy Efficiency and Sustainable Technology Act, HB 2626 (EEAST), rural pilot.
        - Gathered information from program and PMCs to create a landscape of outreach plans to identify what is currently happening across the state and where gaps exist.
        - Created a system of tracking and sharing events to support coordination and reduce duplication.
        - Extended call center SharePoint tools to outreach staff and provided customer experience training.

- **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 participate and to realize greater savings. For example, the following tools and products have been designed in recent months to make customer participation easier:

  Accomplishments:
    - Combined our Home Energy Reviews and Solar Energy Reviews resulting in 253 homes receiving both types of site assessments in 2010 compared to 40 sites receiving both in 2009.

- Re-defined Home Energy Review materials, processes and customer support.
- The Homes group developed a customer-friendly, online Home Energy Profile tool to walk customers through simple, visual online evaluations of their home without the need for technical information or bill data.
- Small Industrial Initiative reached out to rural farmers and their vendors with irrigation incentives.
- Industry and Agriculture's central Oregon PDC sited staff in Bend to increase penetration in this territory.
- The Industry and Agriculture group and the Renewable Energy group collaborated to provide technical training for PDCs in industrial solar electric and solar water heating, biogas and biomass applications.
    - Cross-program collaboration between Industry and Agriculture and Renewable Energy helped initiate eight projects in 2010 that incorporate both efficiency and renewable measures.
- Renewable Energy group expanded project development services for custom renewable energy projects, including cost sharing of grant application assistance, feasibility studies, interconnection technical assistance, and permitting and construction management. All of these services are now under one contracting process, as opposed to the process which was before -- separate contracts for each service. This saves the customer (renewable project manager) and us time and resource.
- Renewable Energy group supported Wallowa Resources to co-fund a project coordinator to identify all resources available to renewable energy projects including federal, state and local incentives and grants.
- CCS created a web resource dedicated to helping customers find state and federal tax credit information for energy efficiency and renewable projects and products. By providing a visible link to this resource on the home page during tax season, we anticipate fewer inquiries from customers who often confuse Energy Trust incentives with state and federal tax credits.
- The Business group offered greater industry assistance during the new construction code change, and re-tooled New Buildings incentives to meet customer needs by providing tiered incentives. This approach rewards increased savings with increased incentives.
- The Business group designed an HVAC calculator and enhanced the lighting calculator for 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.
- 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 Business group has taken steps to expand the base of representatives delivering services to distinct customer types. Actions include:
    - Adding a government account representative contractor to deliver account management services in the public sector
    - Releasing an RFQ for a pool of Commercial Technical Service providers
- Existing Buildings program restructured to dedicate specific team members to support target markets and develop market expertise.
- The Industry and Agriculture group rolled out the Energy Project Portfolio, a customer-facing tool for PDCs to deploy with large industrial customers who may consider or seek internal support for multiple projects.

- 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
- The Renewable Energy group and CCS developed the *Wind Permitting Considerations* publication to provide counties and customers information about permitting standards and definitions that affect wind development.
- The Renewable Energy group worked closely with the Renewable Energy Advisory Council to refine program objectives in light of industry challenges, one result being to focus more strongly on early stage project and market development across all technologies.

Ongoing work:

- Existing Multifamily in initial stages of process mapping the complete customer experience.
- A session to map out the program processes in Existing Buildings is pending with the intention of making the process more efficient and customer friendly.
- Existing Homes is working to fully implement a Customer Engagement model, whereby the program follows up with customers that complete the online profile and talk through the recommendations and next steps.

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 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.
  Accomplishments:
  - Instituted fast feedback survey mechanism, totaling 1,734 surveys of Q2 and Q3 participants in 2010. Based on initial results, surveys were adapted to gather better customer feedback:
    - Added a question to surveys of New Buildings participants to explore what challenges the new energy code poses for them
    - Added a question to surveys of residential refrigerator participants to determine how many refrigerators they have on average and how they disposed of old units
    - Added a question to surveys of residential clothes washer participants to determine what percent of their laundry loads are cold water only, to inform cold water detergent plans
    - Added questions to surveys of all commercial participants to determine how many are taking advantage of state tax credits, to inform program scenarios without the Oregon Department of Energy Business Energy Tax Credit
    - Added numerous questions to the trade ally survey (i.e. questions on EBIX the insurance verifier, NW Natural in Washington, GreenStreet Lending)

- Evaluation and CCS worked together to collect and track anecdotal customer feedback provided via customer service channels, evaluations, and proactive communications to staff and PMCs; utilized this feedback, along with evaluation data and awareness study, to understand customer motivations and suggest program enhancements.

- **Other intelligence**

  Accomplishments:
  - Energy Trust continues to collect market intelligence through evaluations and customer awareness surveys, trade ally surveys and a wide variety of other data sources. 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.

  Ongoing work:
  - Renewable Energy programs plan to fine tune early development assist offerings to best meet the needs of various markets and technology segments. For example, some technologies may benefit most from permitting cost assistance while others may need more assistance in measuring resource potential.
  - In preparation for a potential new OPUC performance target metric for Renewable Energy programs related to market progress, programs are working on building quantifiable measures that tie to baseline data pulled from current market characterizations.
  - Staff proposed several new members for the RAC who will improve our understanding of customers' needs across technologies.

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.

  Accomplishments:
  - Existing Homes implemented a rating strategy for all program trade allies. This strategy rates trade allies for customers based on their installation and quality control records, customer service records and training participation. A list of defined criteria provides guidelines for new and established trade allies to align their businesses with Energy Trust goals. Ratings for Existing Homes trade allies are one to three stars based on quality control, pass rate, customer feedback and number of projects submitted for incentives. Increasing program expectations for trade allies will bring additional value to the term "trade ally".

- Improved the rating system for Home Performance trade allies, implemented new measures-per-project methodology to help low-volume, high-quality Home Performance contractors.
- Implemented gas furnace data collection form to satisfy HVAC contractor and NW Natural preferences following termination of single-family home gas furnace incentives. Utilizing data to help assess market activity.
- Implemented contractor search by distance on website.

Ongoing work:

- CCS and Existing Homes continue to monitor and solicit feedback from customers, stakeholders and trade allies on the rating system.
- CCS met with the Solar team to discuss applying a rating system to solar trade allies.

- **Energy Trust allies**
  Energy Trust allies, also known internally 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 ally management, develop new ally guidelines to support program strategies, and to support customer-friendly communications about them.

  Accomplishments:

  - Created guidelines and a request form for adding new program ally groups.
  - Created a new logo, language and guidelines for logo use.
  - Enrolled six program allies as New Building allies.
  - Existing Buildings continues to maintain a broad network of qualified lighting contractors. A new focus on developing and nurturing relationships with non-lighting contractors is expected to lead to higher penetration of prescriptive non-lighting measures.
  - Existing Multifamily initiated a re-enrollment period for allies to capture the allies who have experience and the market capabilities to successfully work in the Multifamily sector.

  Ongoing work:

  - A focus group will be held with the first 10 newly enrolled New Building allies to determine how the program ally approach is working and the value that Energy Trust is bringing.
  - Finalizing agreements with a new Energy Trust ally group of lenders to provide better financing options for customers.

- **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.

Ongoing work:

- CCS is in final development stages of a presentation and materials on customer service, Energy Trust programs, and online resources. Existing Homes' training team is developing sales training based on earlier Home Performance sales training.

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

- **Staff trainings**

  Accomplishments:

  - Project management training series for staff
    - Offered the third project management certification course
    - Piloted the MS Project tool with IT, CCS and program; results showed that for more complex projects this tool helped project managers develop and manage their plans; for less complex projects simpler tools such spreadsheets or task lists were a better fit
    - Ongoing, organization-wide project management collaboration meetings continue the awareness and adoption of project management methodologies
  - People management training series for staff
    - Offered the Manager 101 and 201 courses
  - Process mapping training
    - Twenty-three Energy Trust staff are trained to facilitate process mapping sessions and during these trainings, we began work on 13 other process maps.
  - Group informational trainings
    - Each of Energy Trust's groups—energy sectors, CCS, Planning and Evaluation, IT, Finance—gave an overview of the purpose and goals of their groups over brown bag sessions for staff
  - Customer Experience training for staff and contractors
    - CCS 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
    - CCS developed and distributed 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
    - Included an "elevator speech" segment in the Customer Experience training (see above) to provide representatives with a simple outline describing Energy Trust, what we offer, and how to take a first step.
  - Business program training for utility outreach representatives
    - Program and CCS staff met with Portland General Electric and Pacific Power to coordinate SB 838 outreach and train utility representatives conducting outreach in protocols for tracking and handing off warm leads to programs

- Cross-departmental training
    - Finance established a cross-training culture within its group, which helps enhance teamwork, allows for cross-pollination of ideas and ensures back-up while staff members are away for various reasons

- **Work flow process improvements**
  Work flow process mapping was introduced to Energy Trust as a tool and channel for staff to analyze and streamline current every day work flow processes, as well as examine our processes from the customer perspective to identify gaps, barriers, and other opportunities to simplify and speed participation.

  Accomplishments:
  - CCS engaged a contract resource to provide process mapping facilitation, training, tracking and communication of mapping results and learnings
  - Training in process mapping facilitation provided to 20 staff members who will now serve as a pool of facilitators for mapping projects in 2011
  - Process mapping results were captured in a summary report and presented to Management Team for consideration in development of 2011 workplans. Highlights:
    - Twelve process maps were completed, seven of which have become full projects with follow-up implementation plans
    - Nearly 40 process improvements or solutions to current work flow issues were implemented, saving staff time, simplifying experiences for customers and creating more cross-program collaboration
    - Over 80 Energy Trust and PMC staff have participated in a mapping session, sharing insights and expanding participants' understanding of our business processes and necessary controls

  Ongoing work:
  - Process mapping will be leveraged during development of the Integrated Solutions systems to provide greater clarity around key processes
  - A plan was devised for 2011 to continue process mapping work throughout the organization, focusing resources on priority cross-departmental maps, as well as the ability to support specific process improvement projects as they arise.

  Note: Of the 12 process maps that were completed in 2010, some solutions are referenced below and some are included in different sections throughout the report under the various programs or groups affected.

- **Pilot process improvements**
  In early 2010, the Planning and Evaluation group defined and implemented a new, more formalized approach to evaluate new initiatives and presented it to staff.

  Accomplishments:
  - The pilot process was applied to several new initiatives over the course of 2010, including the test of the Energy Performance Score for existing homes, a project to develop lighting specifications for assisted care facilities and a lab test of new gas water heaters. The process establishes clear roles for coordination, and a step is to develop a business brief early in the design process to help gather all appropriate input and support before beginning the project.
  - Review procedures have been streamlined to ensure the appropriate level of engagement by members of Management Team.

- Energy Trust has shared the policy with other program delivery entities who are dealing with similar decision-making and management issues.
- As a result of this process, we are selecting, designing and managing pilots in a more deliberate coordinated fashion. In summer 2011, a review of our experience will be developed, and as needed revisions to the policy will be recommended.

- **New or Changed Incentive process improvements**
  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.

  Accomplishments:
  - Planning and Evaluation and Existing Homes worked together to define a more formalized approach to evaluate and implement new initiatives. This included:
    - Template for timelines, work flow, initiative plan and measure requests
    - An updated blessing memo and clear understanding of purpose
    - Glossary of definitions
    - Clarified process roles and responsibilities

- **Finance process improvements**

  Accomplishments:
  - Finance, IT and CCS reviewed their individual purchase order practices and revealed several inconsistencies across the organization, with current policies and potential inefficiencies. All agreed to process map the purchase order process in January 2011 to establish best practices and recommendations for the ISP Implementation by end of Q1 2011.
  - Finance adapted how incentive checks are issued. Checks are batched more consistently by PMC, and we now are able to issue the checks within each batch alphabetically. The Products program reports that the alphabetizing of the checks will save them as much as five hours a week they previously spent re-sorting the checks.
  - Language barriers were discovered in relation to W9s. Finance worked with the a lighting contractor to have the W9 form translated into Korean in hope this will help participants comply and cut down on administrative work for the contractor.
  - Three Finance team members are trained in process mapping. Finance intends to use this tool extensively in the next year to map procedures against how these functions should work in Epicor.
  - Due to a process mapping session analyzing the current project-based forecasting process, Finance created a project planning tool that PDCs use to facilitate and record discussions with participants about a realistic timeline for project implementation. We now have more information available, a better understanding of their scope and timeline, a clear understanding of who the lead is at the site, and can quantify the impact of delays caused during project implementation. This results in a more accurate forecast.

- **Industry and Agriculture process improvements**
  Mapped regular Industry and Agriculture process to transition the Industrial Energy Improvement and Kaizen Blitz pilots into standard program offerings.

Accomplishments:

- Two pilots were worked into the work flow process of the program. A result of this is that an RFQ was issued, and eight contractors were selected to provide 14 discrete scopes of enhanced technical services that will be deployed in 2011.

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*

- **Staffing**

Accomplishments:

- Created sector lead positions to plan across sectors from a strategic level.
  - Responsibilities that were formally handled by program managers were delegated in order to allow the sector leads time to focus on high-level strategic thinking and management. 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.
  - 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 and meetings with sector leads, directors and PMC trade ally staff.
- Embedded program support staff for marketing and solar to provide more direct lines of communication, improve customer-focused design of program services, and optimize program-based marketing functions delivered by PMCs.
  - Sector marketing managers are engaged with program managers at the start of new program initiative development, bringing the customer perspective to the full range of customer interactions—from forms to marketing collateral and web content.
  - Annual and quarterly planning processes have been established to align PMC marketing/outreach work and Energy Trust direction; four quarterly planning meetings have been established for the PMC teams to present out plans for the quarter and facilitate cross-program collaboration to reach customers.
  - Sector marketing managers meet with CCS monthly to review creative services, media planning, and production support needs and to share information about program developments. Fine tuning of roles and responsibilities and information-sharing needs continues.
  - Sector marketing managers collaborate to identify cross-program marketing opportunities, such as providing residential energy efficiency information to employees of companies who participate in Energy Trust business and industrial programs.
  - The Industrial Team shared the Industrial Energy Improvement project plan with the other business programs.

        - The business programs work together to train architect and engineer-type trade allies to integrate solar into their offerings.
    - Implemented staffing changes in what was formerly the Marketing & Communications Department to create a Communications and Customer Service Group (CCS) with greater focus on enhanced customer service initiatives and general communications, and reduced focus on program marketing.
        - Added one staff position to allow for creation of a Customer Relations Manager and a Trade Ally Manager, functions that had previously been combined in one staff position. This afforded staff the time to develop and deliver the customer experience core values and training, trade ally ratings, and other customer service enhancements and process improvements described in this report.
        - Shifted existing Senior Communications Manager position to enhance CCS focus and leadership on improvements in customer service, forms streamlining, trade ally network development, outreach management, events/sponsorships, media relations and general communications.
        - Clarified role and responsibility of corporate communications and customer service function in relation to the program marketing function by completing transition of marketing manager roles to Homes and Business Groups; developed job descriptions, work plans, and work scopes with sector leads.
        - Eliminated CCS review of many program marketing communications, instead providing periodic review and feedback to sector marketing managers regarding alignment with brand and organizational standards; maintained tracking and archiving of all marketing communications for customer service and outreach coordination purposes.
        - Minimized duplication and maintained consistency and quality by serving common needs through shared program marketing support services, including coordinated media planning and buying, creative services, public relations, and web development and coordination.
        - Transitioned forms administration from IT to CCS and embarked on forms streamlining initiative, work flow improvements, and efforts to align and leverage paper and web forms development to improve the customer experience, minimize barriers to participation, maximize efficiencies and minimize key variances in data quality.
        - Expanded support for legislative and general external communications by evolving existing staff position from program marketing review/editing toward communications project management, by enhancing staff reporting skills through participation in Business Intelligence Power User training, and by maintaining contract support for general communications and reporting project management.
        - Managed a contract resource to supported redesign implementation, including process mapping facilitation and training, and ongoing redesign communications.
    - Hired a planning data analyst to support measure tracking, entry and year-end processing.
        - By placing this position closer to the planners who develop measures, there is closer alignment between IT systems, planning and evaluations.
        - The planning data analyst supports Planning in data selection and analysis for *ad hoc* reporting and establishing quality control procedures for the

measure management process end-to-end. These procedures further automate/streamline the True-up process.

- As a result of establishing a new planning engineer position in Planning and Evaluation to support program development, measure development backlog was reduced significantly and the planning department was able to approve 407 new measures and revise 133 measures in 2010.
- Operations Analyst positions were created in each of the sectors. This allowed for cross-communication about data issues and a more streamlined approach to working with Finance and IT on ongoing issues.
- Created a government account manager role to offer public sector customers the hand-holding they need.
  - Since coming on board in August, the government account manager has represented Energy Trust at seven conferences and initiated conversations with 25 government agencies to determine how Energy Trust can better serve them. The representative has identified and is tracking more than 100 project opportunities.

- **Cross-group and cross-program collaboration**
  As a result of structural shifts at Energy Trust, as well as a desire to work more effectively across programs to design, bundle, and market offerings to reach the customer, many cross-group, cross-program collaborations occurred.

  Accomplishments and ongoing work:
  - In mid 2010, the Renewable Energy team developed a Team Charter to provide clear definition of roles for the team and for other groups interacting with the team. It aligns the group around common objectives and improves its operational efficiency by creating functional and adaptable relationships to take advantage of opportunities and learn from mistakes. This charter is a living document which will be updated by midyear 2011.
  - Finance is working more fluidly with programs by participating in energy group meetings on a regular basis.
  - The customer relations manager created a Customer Service team, including all of the customer service leads from each of the various programs and PMCs. The team meets regularly to ensure consistent training, share experiences and information, solve problems, and identify best practices.
  - The forms administrator created a cross-program forms group to help develop and carry out a more consistent process and share best practices and lessons learned.
  - The trade ally manager created a cross-program Trade Ally team to work together on planning trade ally roundtables, identify and resolve trade ally issues and strategize around program needs, challenges, and opportunities.
  - To ensure information sharing and alignment between program-based marketing functions and organizational communications and customer service, marketing managers and CCS staff meet monthly to review and discuss program and marketing developments, utility communications and coordination, customer service trends and developments, strategies and messaging, public context/concerns, resource needs, and relevant brand and style questions or updates. Roles and responsibilities clarification is ongoing.

Planning: *Implement continuous process planning improvements.*

- **Integration**

  Accomplishments:
  - Updated and expanded the capabilities of the lighting tool, which is used for scoping and analyzing cost-effectiveness of lighting projects.
  - Improved and expanded the cost effectiveness calculator.
  - Developed models to assess the impacts of potential policy changes in funding and tax incentives.
  - Established new metrics in PMC contracts for delivery, auditing, forecasting and savings. Adapted contracts to include language requiring cross-program promotion and to include milestones for performance compensation that incent accurate costing and data entry.
  - Expanded savings goals and action planning in PDC contracts
  - Renewable Energy worked with the government accounts manager to provide outreach training on all technologies and to further develop our messaging to cities and governments focused around practical applications and opportunities for renewable installations.
  - 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.
  - Re-examined the issue of free ridership from a comprehensive perspective, accounting for spillover and other market effects; explored options that minimize free ridership in program design and allow tracking where warranted with a goal to reduce costs.