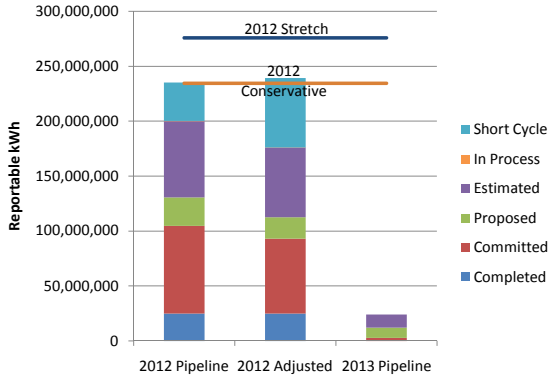
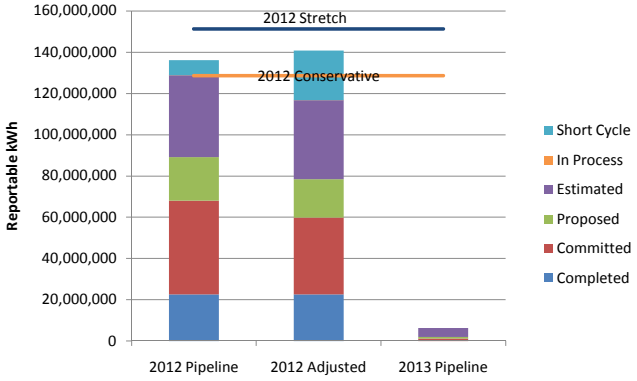
Efficiency Summary with Market Transformation **April 1, 2012**

Combined Efficiency		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	25,002,759	22,656,672	555,028	34,214
	To date % of Conservative goal	11%	18%	12%	9%
	To date % of stretch goal	9%	15%	11%	8%
Context	Historical % of actual accomplishment	10%	11%	12%	11%
Budget	To Date % of Incentive Budget Spent	10%	17%	13%	8%

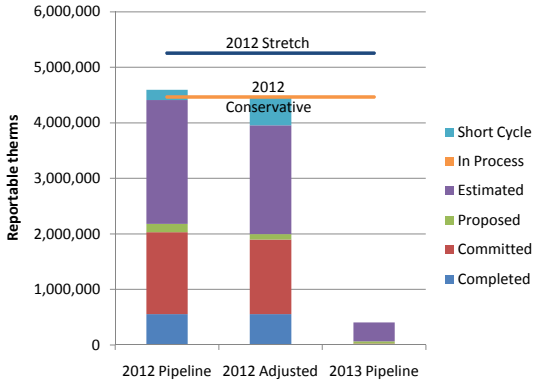
PGE Savings Pipeline 2012-2013



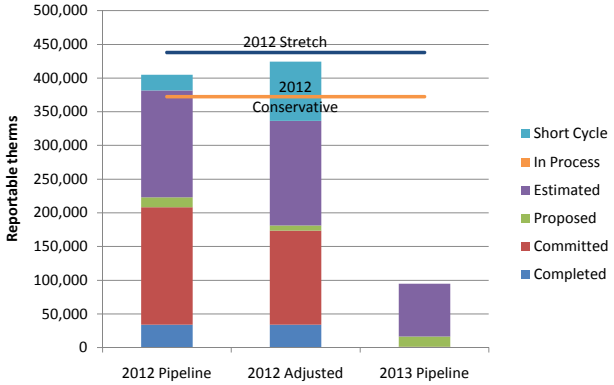
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



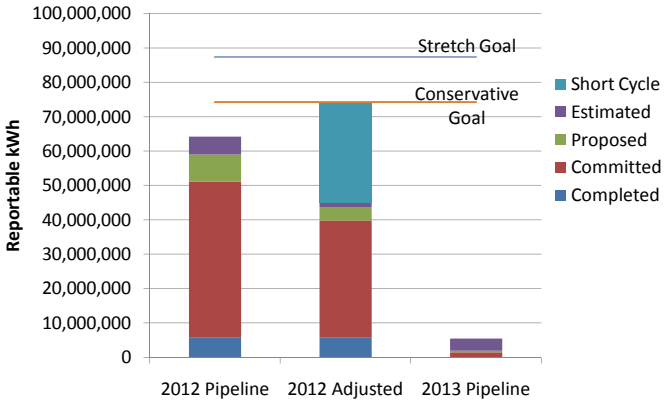
2011 Adjusted Pipeline percent of Stretch Goal	
PGE: 86.70%	**PAC:** 93.00%
NWN: 84.74%	**CNG:** 96.93%

Industry & Agriculture Summary

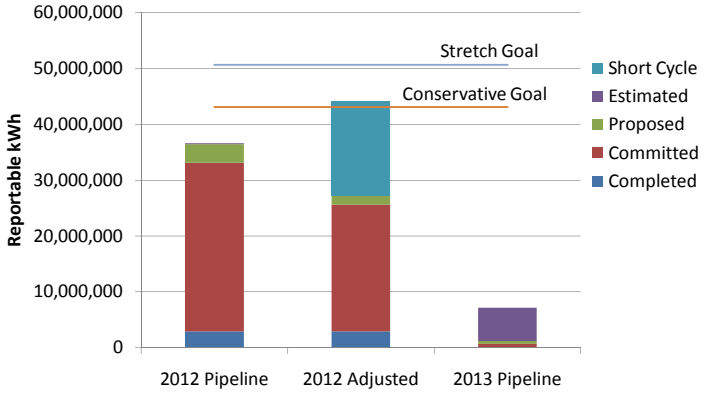
April 1, 2012

		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	5,894,018	2,910,399	62,642	-
	2012 Stretch Goal (kwh or therm)	87,391,719	50,701,285	1,031,485	126,035
	To date % of conservative goal	8%	7%	7%	0%
	To date % of stretch goal	7%	6%	6%	0%
Context	Expected % to goal	2%	2%	2%	3%
	Historical % of actual	6%	4%	5%	1%
Budget	% of incentive budget spent	11%	8%	4%	2%

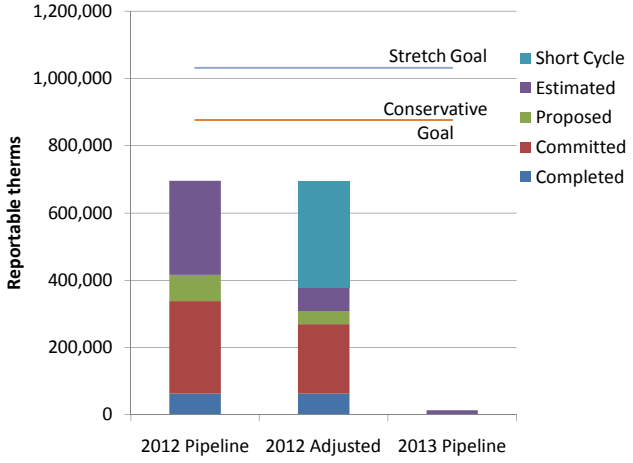
PGE Pipeline 2012 - 2013



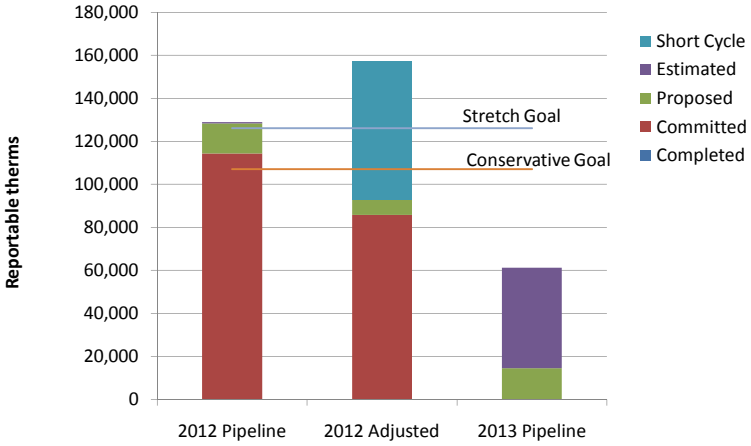
PAC Pipeline 2012 - 2013



NWN Pipeline 2012 - 2013



CNG Pipeline 2012 - 2013



2012 Adjusted Pipeline percent of Stretch Goal			
PGE:	**85%**	**NWN:**	**67%**
PAC:	**87%**	**CNG:**	**125%**

Program Activity

Activity	2012	2011
Studies Assigned	*21*	*21*
Studies Approved	*18*	*26*
Offers Signed	*80*	*66*
Offers counter-signed	*45*	*60*
Projects Completed	*303*	*132*

Special Considerations:

Overall:

The pipelines for the electric utilities are growing, with projections just over their conservative goal. The general health of these pipelines are possibly attributed to the Kick-Start bonus's effect on an uncertain market. Regarding the gas utilities, the CNG pipeline is robust, while the NWN pipeline appears to lag, though this may be due to the nature of the Small Industrial projects that contribute a high percentage of the savings in this territory. Incentives are outpacing savings at this point, but this is due to the investment of technical studies and services with the savings coming later in the year.

Program activity metrics show that nearly 150% more projects completed through Q1 than in 2011. Many of these were lighting projects, showing the lingering effects of the Fall Bonus as some of those 2011 projects were pushed to the current year.

PGE

PGE's pipeline is currently at 85% of the stretch goal, with completed projects barely outpacing historical trends. The relative health of 2012's pipeline, as opposed to last year's, could be due to the effect that the Kick-Start bonus is having in the market. While claimed savings are 7% toward the goal, 11% of the budget has been spent. The asynchronicity is part of a historical trend where studies and technical services are paid for early on in the year, and the savings from them are due to come later.

PAC

At 87%, the Pacific Power pipeline is just above conservative, with Q1 results at 6% toward the stretch goal, which is in front of historical trends for the utility. Eight percent of the budget has been spent, though this is due to the investment in technical studies and services and is not out of line with historical trends.

NWN

Northwest Natural's pipeline is at 67% toward the stretch goal. The appearance of lag is illusory due to the nature of the territory. Nearly half of the savings in this territory come from the Small Industrial Initiative and are either prescriptive or quick-to-close, thus, are more difficult to forecast. Program staff will monitor the development of this pipeline and the flow of Small Industrial projects. Completed projects through Q1 are keeping pace with historical trends with the savings tracking favorably against the incentive budget.

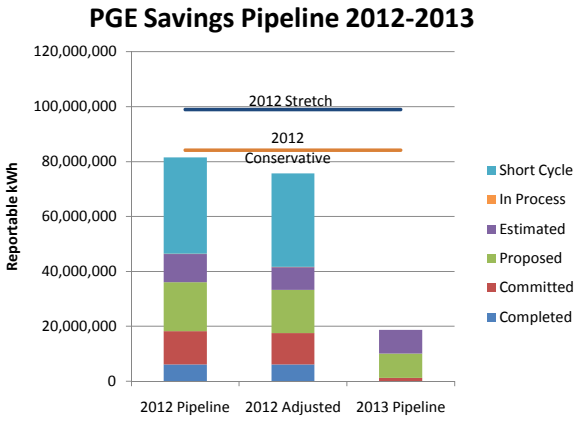
CNG

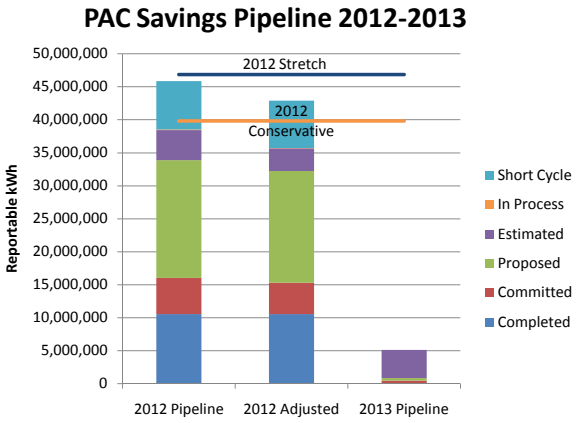
CNG's pipeline is robust, with current projections at 125% of the stretch goal. It should be noted that the short-cycle adjustment is rather generous, and it belies the volatility of the pipeline since it is composed of a handful of projects, but this merely serves to make the program staff comfortable that this territory is not burning as hot as it seems. No projects have completed in 2012 yet, though some of the budget has been spent on studies.

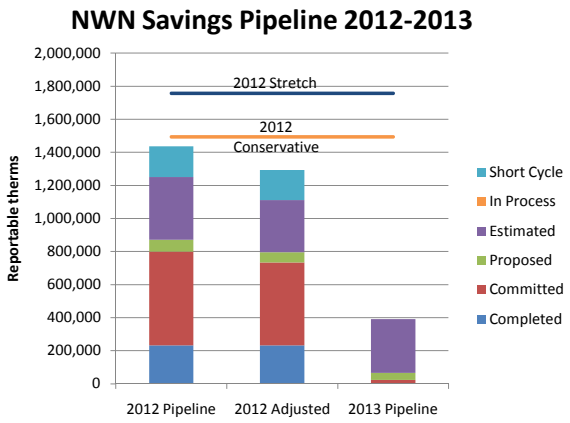
Commercial Programs Summary

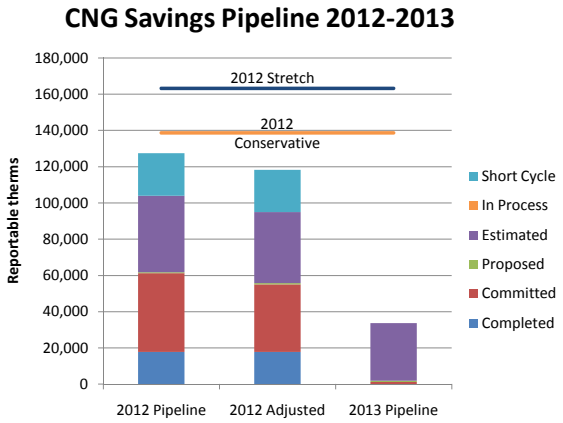
April 1, 2012

Commercial Sector		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	6,111,826	10,534,719	233,143	17,837
	To date % of Conservative goal	7%	26%	16%	13%
	To date % of stretch goal	6%	22%	13%	11%
Context	Historical % of actual accomplishment	7%	8%	9%	8%









2011 Adjusted Pipeline percent of Stretch Goal	
PGE: 76%	**PAC:** 91%
NWN: 74%	**CNG:** 73%

Special Considerations:

Overall

- The overall Commercial Sector is tracking ahead of historic accomplishments for Pacific Power, NW Natural, and Cascade Natural Gas. PGE is slightly behind pace for reaching Stretch Goal due to slower start in Existing Buildings. Existing Buildings is addressing this lag through focused outreach, leveraging the Kick-Start Bonus to enroll lighting and custom projects.

Existing Buildings

- Existing Buildings is tracking ahead for Pacific Power, NW Natural and Cascade Natural Gas and is slightly behind for PGE.
- The Kick-Start bonus is working effectively in all utilities driving lighting and custom capital enrollments. Gas savings driven by the Kick-Start Bonus are longer lead custom projects and approach to this market will require adjustment depending on uptake in Q2.
- The sector is coordinating efforts with ODOE in support of the Governor's Cool Schools Initiative, and as a result, has already enrolled many more schools than in previous years.
- In addition, Energy Trust program staff is managing Strategic Energy Management offerings which are expected to bring in substantial operations and maintenance savings in 2012 and beyond.

New Buildings

- The New Buildings pipeline is strong across all four utilities. Electric savings are forecast to exceed Stretch Goal while gas savings are expected to land between Stretch and Conservative.
- Program staff will continue to push for more gas savings, focusing on small commercial projects.
- There are several large projects in the pipeline representing up to 40% of the projected savings depending on utility. This is expected to bring down levelized cost for electric savings.
- Program staff is seeing signs of economic recovery in the number of new project enrollments for 2012 and 2013 pipeline development. Two new program offers, small commercial and data centers, should strengthen results even further.

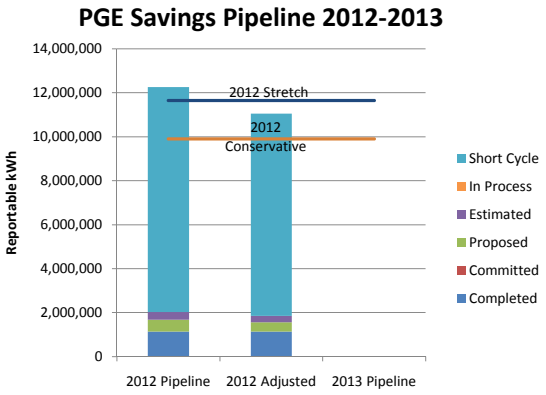
Existing Multifamily

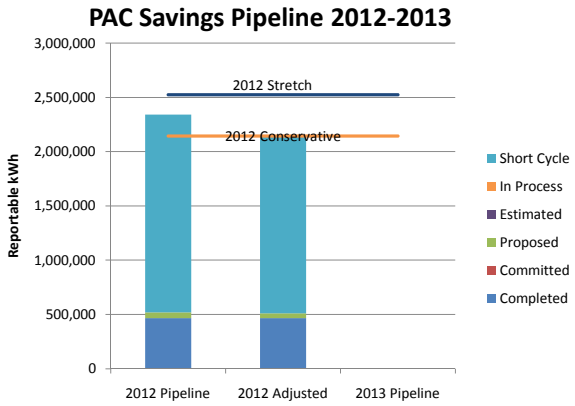
- Multifamily is tracking substantially ahead of target for PGE and Pacific Power and is slightly behind for gas savings in NW Natural territory. One large gas project expected to complete in 2012 was postponed indefinitely, but program staff expects to make up the therm savings with large custom HVAC projects during Q2 and Q3.
- Program staff is in discussion with Planning and Evaluation to add to or modify gas measures to bring in more gas efficiency projects this year and create a stronger pipeline for 2013.
- Existing Multifamily is emphasizing customer outreach to go deeper with existing customers and key decision-makers to take more properties to the next step after direct install.
- We have launched a new mid-stream buy-down promotion with a regional appliance distributor to increase sales of energy-efficient clothes washers.
- The program continues to work with local, regional and national organizations to develop and deploy an on-bill financing pilot called *MPower* Oregon.

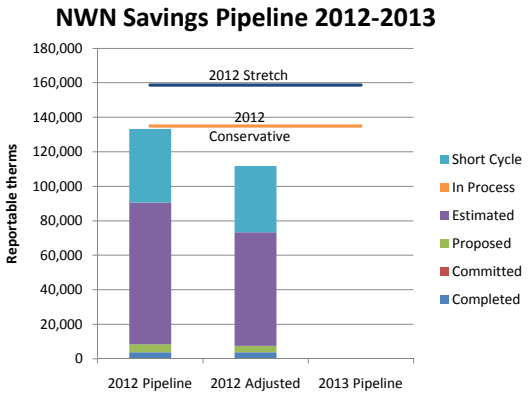
Existing Multifamily Summary

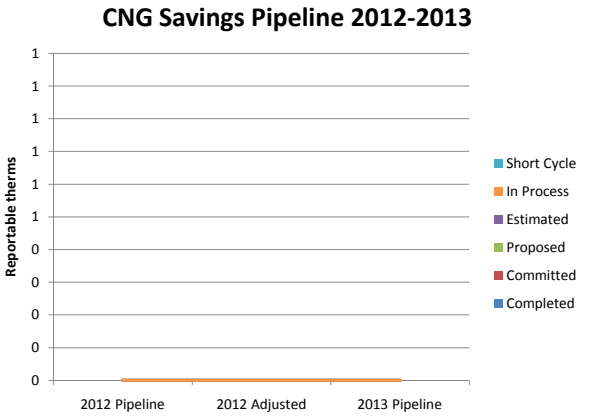
April 1, 2012

Program: Existing Multifamily		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	1,133,943	465,794	3,853	-
	To date % of Conservative goal	11%	22%	3%	0%
	To date % of stretch goal	10%	18%	2%	0%
Context	Historical % of actual accomplishment	8%	11%	3%	0%
Budget	To Date % of Incentive Budget Spent	6%	14%	5%	0%









Special Considerations:

General

- Instant Savings Measures (ISMs) and direct install continue to make up the majority of the electric savings for Existing Multifamily and are the majority of the short cycle numbers shown in the dashboard.
- Savings from custom and prescriptive measures are continuing to grow compared to previous years and are expected to contribute more robust and varied savings as the year progresses.
- Outreach efforts continue to focus on cultivating new and existing relationships with decision makers at top property management and affordable housing agencies to access the breadth of their portfolios rather than simply working on a site-by-site basis.
- During Q1 Existing Multifamily has added assisted living, memory care centers and retirement living projects into our normal program focus. These were previously served by Existing Buildings but were passed to Existing Multifamily to focus on the vast opportunities that are more residential in nature.
- In Q1 the Existing Multifamily team expanded its footprint with an additional outreach associate and a program development associate. These new team members will support the continued focus on the breadth and depth of market opportunities and are expected to help accelerate savings performance across both fuels.

Impact of the Economy

- Non-owner occupied dwellings continue to have some of the lowest vacancy rates on record, due to the continuing crunch for credit on home ownership.

Q1 Accomplishments

- A mid-stream buy-down promotion with a regional appliance distributor was launched in Q1 to influence the market to purchase energy-efficient clothes washers. While the initial number of units incented through during the first month has been small, program staff is encouraged by the amount of interest and potential for this offering.
- Continued work with local, regional and national organizations to develop and deploy an on-bill financing pilot called MPower Oregon led to the awarding of $3M in funds from HUD. MPower is focused on making light touch energy-efficient improvements in affordable housing multifamily building stock over the next 24 months, with the first projects scheduled for completion in Q3 2012.

How we are positioning the program to achieve savings.

Overall:

- An increased focus on outreach to go deeper with existing relationships and key decision-makers to take properties to the next step after direct install.
- An RFP targeted at key regional appliance distributors to property managers has been developed for release in Q2 to influence the market to purchase energy-efficient refrigerators. This is expected to drive market uptake.
- A comprehensive lighting pilot targeted at memory care facilities is in development and is expected to bring in a minimum of three projects during 2012.

PGE

- PGE results through Q1 show completed projects at 10% of stretch goal. Historically, achievement at the end of Q1 is 8%. During the past two years Existing Multifamily has achieved its PGE stretch goal.
- When year-to-date achievement is combined with forecast and short-cycle savings the program is on track to reach and exceed its conservative goal. As custom and prescriptive savings come in program staff will actively manage the budget and direct install operations to keep within the 2012 budget and maintain savings above stretch goal.
- The run rate of incentive dollars needed to achieve each kWh of savings has been significantly less than budgeted to date, giving leverage to close out Comfort Now and Kick Start Bonus offerings without budget implications.
- Existing Multifamily has continued to take steps to conduct studies with affordable housing agencies served primarily by PGE to develop long-term strategies to achieve savings in this underserved market through *MPower Oregon* .

PAC

- Existing Multifamily achieved results through Q1 exceed 18% of stretch goal. This compares to the historic savings to goal results of 11%.
- When year-to-date achievement is combined with forecast and short-cycle savings the program is on track to reach and exceed conservative goal, with prescriptive savings expected to push it past stretch savings goals.
- The run rate of incentive dollars needed to achieve each kWh of savings has been significantly less than budgeted to date, giving leverage to close out Comfort Now and Kick Start Bonus offerings without budget implications.

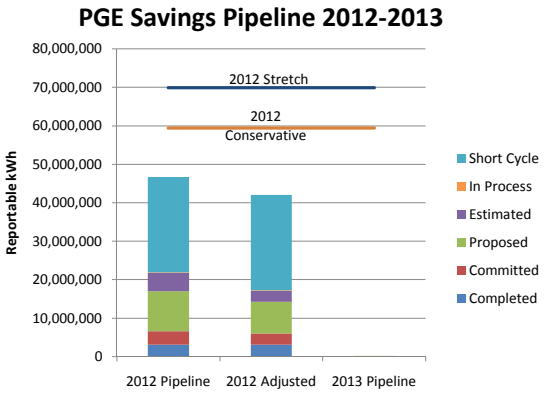
NWN

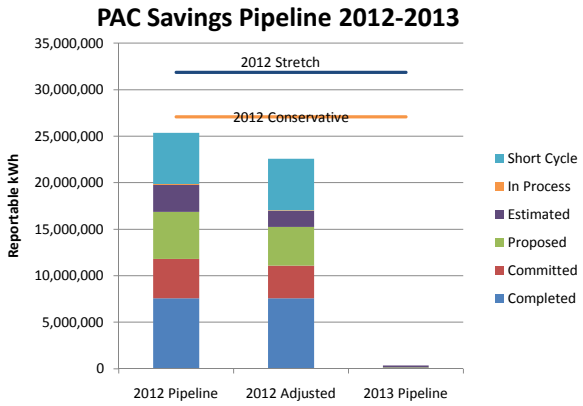
- Results through Q1 for NW Natural show completed projects at 2% of stretch goal. This compares to the historic savings to goal results of only 3%.
- Program staff expects to see a majority of therm savings occur during Q2 and Q3 which are typically the warmer quarters of the year when large custom HVAC projects are typically completed.
- When year-to-date achievement is combined with forecast and short-cycle savings the program is just short of the conservative savings goals. This is a significant achievement given that the goals were set assuming a large custom project with a key affordable housing agency. This project was postponed
- The majority of the 2012 forecast is made up of large custom projects targeting centrally heated buildings, with the short cycle savings being primarily made up of direct install of ISMs.
- Program staff is in discussion with Planning and Evaluation to add to or modify gas measures to bring in more gas efficiency projects this year and create a stronger pipeline for 2013.

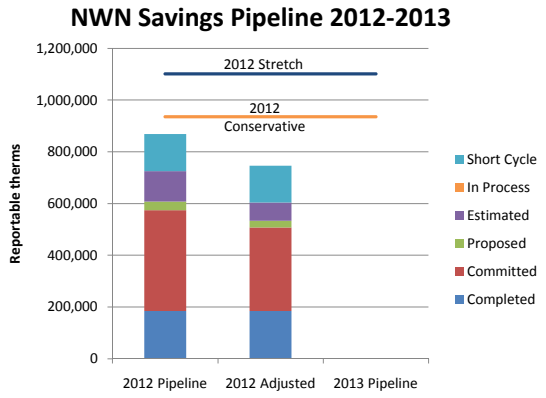
Existing Buildings Summary

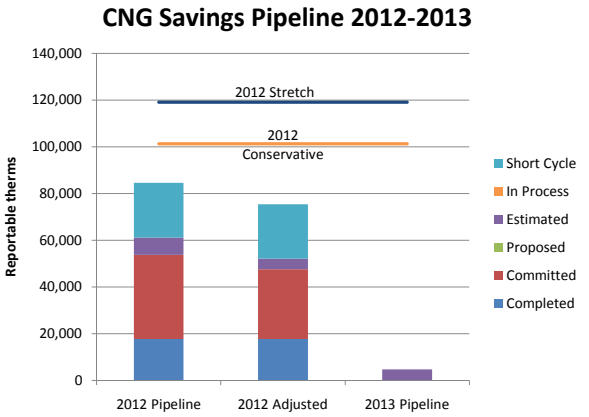
April 1, 2012

Program: Existing Buildings		PGE	PAC	NWN	CNG
Achievement	2011 Achievement to Date (Rpt kWh or therm)	3,141,655	7,584,665	184,274	17,675
	To date % of Conservative goal	5%	28%	20%	17%
	To date % of stretch goal	4%	24%	17%	15%
Context	Historical % of actual accomplishment	8%	9%	9%	7%
Budget	To Date % of Incentive Budget Spent	4%	29%	21%	14%









Special Considerations:

Overall:

- Existing Buildings began 2012 with a healthy pipeline and is on track to meet stretch goals in Pacific Power, NW Natural and Cascade Natural Gas Territories. It will be a challenge again in 2012 to meet stretch goal in PGE territory.
- The program started the year with Kick-Start Bonus incentives for qualified lighting upgrades and custom capital energy efficiency improvements. The lighting project pipeline at the beginning of 2012 has been less robust than previous years and initial lighting project activity resulting from the bonus was slower than expected. However, lighting trade allies seem to be finding a renewed rhythm selling projects with the bonus after taking a breather from the surge of projects generated from the Fall Bonus Incentive in Q4 2011.
- The program has enrolled several substantial custom capital projects contributing to the strength of the pipeline.
- The program has been collaborating closely with ODOE on the State's Cool School initiative by providing outreach and planning services to schools to help them leverage ODOE's SB 1149 schools funds. To date Existing Buildings has been in contact with 28 schools; 10 of these schools have committed to complete projects by the end of 2012.

PGE

- In terms of achieved savings, Existing Buildings is tracking behind where it was after Q1 2011. Incentive expenditures are proportional to savings, which reflects lower study expenditures than we would normally see at this point in the year. Lower than expected lighting activity, fewer large custom capital projects and smaller average savings per project combine to be challenges for achieving the 2012 stretch goal. Program staff is aggressively pursuing projects in PGE territory to generate stronger results in Q2 by re-contacting customers with completed studies to alert them to the bonus opportunities in 2012.

PAC

- Existing Buildings began the year by closing a group of projects that had carried over from 2011. The projected pipeline is also very strong for Custom and Lighting Track projects. To effectively manage the 2012 program budget, program staff is strategically deploying outreach efforts.

NWN

- Existing Buildings has achieved more savings in Q1 2012 than at the same time last year due to completion a significant number of roof-top tune-up projects and some large Standard Track projects. The pipeline is robust, including a solid set of large custom capital project commitments from outreach activities with larger customers. Incentive expenditures are tracking ahead of savings reflecting the investment in studies that will result in project savings later in the year. Staff is closely monitoring project activity in order to manage within the budget.

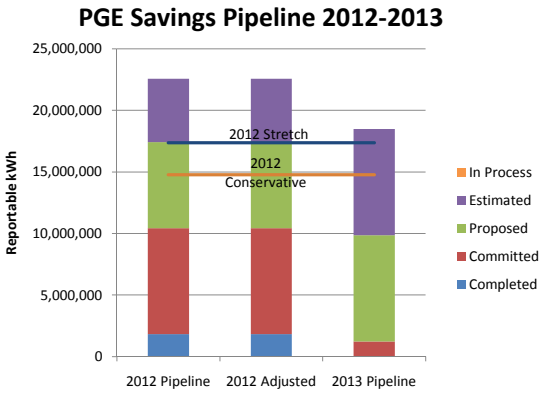
CNG

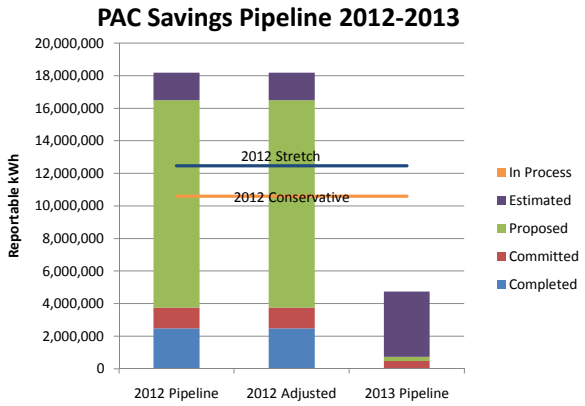
- Existing Buildings has already achieved more savings in Q1 2012 than at the same time last year due to a significant number of roof-top tune-up projects and some Building Performance Tracking and Control System pilot projects coming to fruition. The pipeline is healthy including a solid set of commitments in the Custom Track . Incentive expenditures are proportional to savings due to the fact that the program has yet to initiate many new studies in the Custom Track this year. Rooftop tune-ups continue to will be a successful operations & maintenance solution and are expected to pick up even more in the spring. This should start to further reinforce the pipeline in Q2.

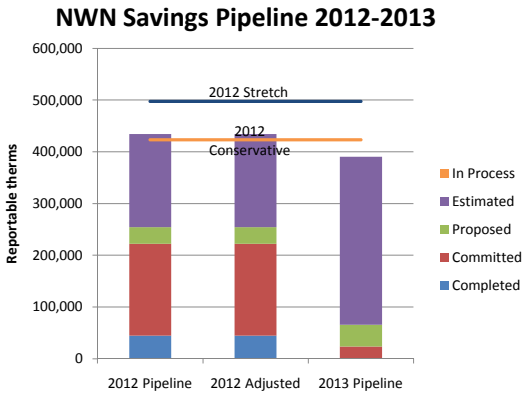
New Buildings Summary

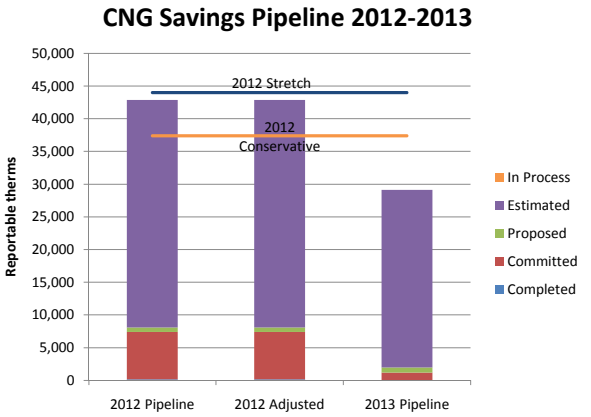
April 1, 2012

Program: New Buildings		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	1,836,228	2,484,260	45,016	162
	To date % of Conservative goal	12%	23%	11%	0%
	To date % of stretch goal	11%	20%	9%	0%
Context	Historical % of actual accomplishment	2%	6%	10%	11%
Budget	To Date % of Incentive Budget Spent	8%	15%	8%	3%









Special Considerations:

Overall

- The New Buildings pipeline is strong across all four utilities. Large projects are again bringing in more electric savings this year. Gas savings are ahead compared to this time last year. We did not apply an adjustment factor this quarter because we have high confidence in the savings wrapped up in the larger projects. Program staff is seeing signs of economic recovery in the number of new project enrollments for 2012 and 2013 pipeline development.

Two new program offers, small commercial and data centers, are expected to strengthen enrollments and penetration even further

Small Commercial Offer

- Based on the successful results of the 2009-2011 Small Commercial Efficiency Pilot, a mainstream small commercial offering will be rolled out in 2012 to more comprehensively serve the needs of the small commercial market. The Small Commercial Offer will be a phased rollout with the first phase launching in May, targeting office, retail and restaurant buildings less than 50,000 square feet. The second phase may include grocery, schools and multifamily buildings, expected to launch in July. The new offers are comprehensive packages of measures with modeled savings meeting three main objectives: provide simple, achievable bundles of measures that encourage incrementally higher savings; allow flexibility for buildings that have a variety of operating characteristics or want to make measure substitutions or select additional elective measures; and incentivize more efficient HVAC design choices. This builds from current prescriptive measures, where historically, small buildings install two to three measures. By driving more high efficiency HVAC and lighting at the core and offering 11 elective measures, program staff can help customers do more and estimate savings of 12 – 20% for retail and 4 – 8% for office, (restaurants are being analyzed). Incentives will be paid on a per square foot basis, savings graduate depending on the customer's appetite.

- The expected near term impact will be in the number of enrollments in 2012, increased savings results are expected in 2013 and 2014 as projects close. For perspective on the market, the program closed 270 projects last year that were less than 50,000 square feet, office and retail are some of the major building types program staff can influence.

Data Center Offer

- Oregon has seen unprecedented growth in data centers over the past few years, a trend we see continuing. While this affords the New Buildings program with the opportunity to capture large savings through custom analysis, the full savings potential may be missed without a specific program offer that scales with the market potential. The new offer, launching in July, is a series of incremental changes that will streamline the process, is scaled to meet the needs of large enterprise, mid-tier, localized and small that range in size anywhere from >10MW load data server "farm" to an office building with a <10kW load. The new offer will emphasize early involvement through design assistance, focus heavily on IT design, and introduce new measures like power supply and power distribution. In cases where early design assistance is not warranted due to the limited scope of a project, such as with an office data closet or room, straightforward standard measures will be available. The expected near term impact will be building awareness with many market actors, working with project teams to set high goals, and begin design and engineering processes where professional design incentives will be leveraged to maximize savings results. In 2013, results are expected to be significant and drive down program levelized cost with a few completed projects.

PGE

- Larger projects are leading the savings results this year, including three hospitals and a number of small commercial projects. We expect to close a few large projects by Q3, which are currently in the 'proposed' category (engineering review) and expected to represent 40% of program savings for the year. Program staff have high confidence in the savings currently under review.

PAC

- A large project currently under engineering review is expected to bring in a majority of New Buildings savings in Q2. Additional savings will come through small commercial projects. PAC savings are likely to exceed stretch goals under current budget level, due to large project capping out at the standard maximum incentive allowed.

NWN

- Program staff expects to land between conservative and stretch this year. New Buildings is in a good position at this point in the year to drive more quick-turn opportunity with measures that are simple and cost-effective for customers to install. This year's results are similar to last year's for NWN, although large electric savings are magnified with datacenter projects hitting the incentive cap. Over the next two quarters program staff will drive results by focusing on solar thermal applications and quick-serve restaurants that could bring the program to meet stretch goal.

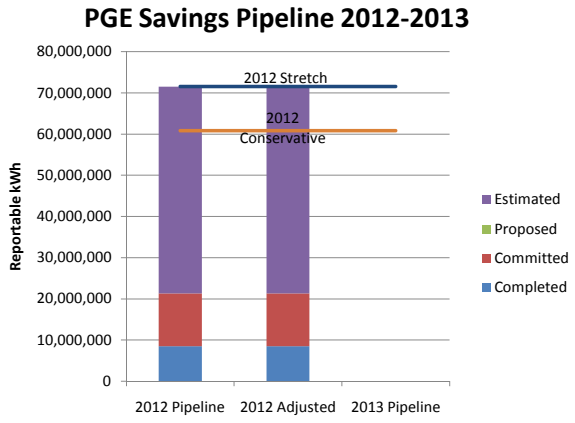
CNG

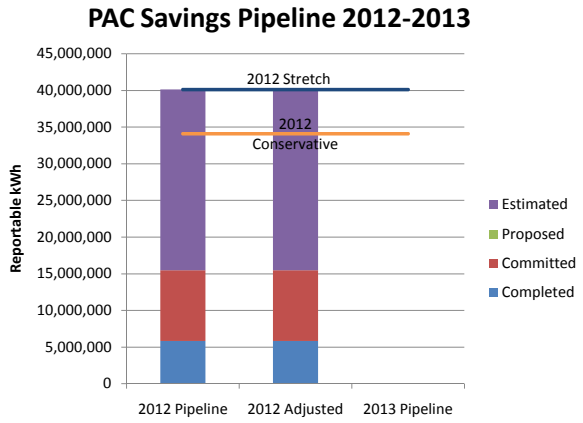
- New Buildings was forecast to exceed stretch goal. Recently a project decided to use propane which reduced the forecast by about 20,000 therms to the revised estimate of 45,000 therms. But overall the program remains on track to exceed the conservative goal. The program will push for more savings by focusing on small commercial projects to reach the stretch goal.

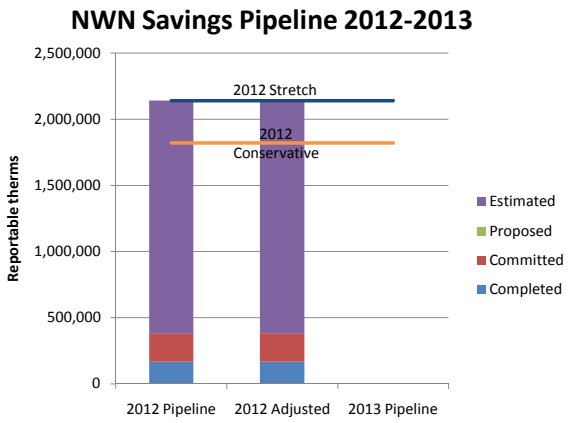
Residential Programs Summary

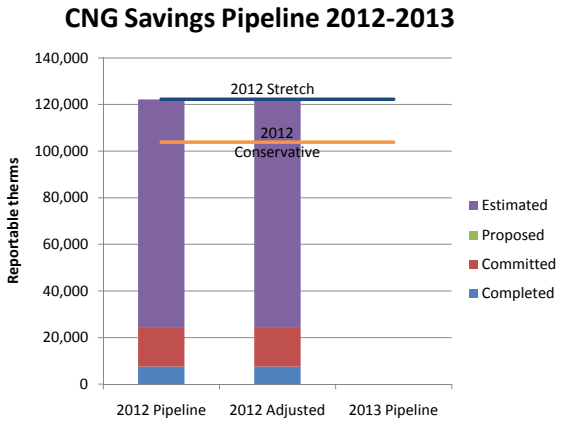
April 1, 2012

Residential Sector		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	8,493,659	5,814,362	168,112	7,544
	To date % of Conservative goal	14%	17%	9%	7%
	To date % of stretch goal	12%	14%	8%	6%
Context	Historical % of actual accomplishment	11%	15%	13%	13%









2011 Adjusted Pipeline percent of Stretch Goal	
PGE: 100%	**PAC:** 100%
NWN: 100%	**CNG:** 100%

Special Considerations:

Overall

- Weatherization saw a 50 percent decrease in savings compared to 2011 Q1. This trend is similar across Clean Energy Works, Home Performance, and Single-family program tracks. Savings Within Reach however, has seen a 491 percent increase in weatherization savings compared to last year. This decline may be attributed to the relatively mild winter.
- An instant incentive at time of sale for refrigerators launched with Sears at 3 stores in the Portland Metro area.
- Electric savings are trending well with historic savings and are on target.
- The appliance program launched a high output FastTrack form resulting in significant reductions application processing time.
- Gas savings are lower than historic trends and this is in part due to adjustments to the gas water heater measure that delayed processing of gas water heaters.

PGE

- The program has seen a 30 percent increase in CFLs installed, however, due to changes in savings levels savings from lighting has decreased 50 percent compared to 2011.
- Worked with PGE staff and 6 different Community Action Agencies to identify opportunities to distribute energy saver kits.
- 9,720,000 kWh are identified as committed for the OPOWER Pilot.

PAC

- CFL installation quantities for 2012 are up 40 percent compared to 2011. However, savings per CFL has decreased from an average 78 kWh to 34 kWh or 56 percent, which has led to a net decline of 183,000 kWh (39 percent) compared to 2011 as demonstrated in the comparison t historical % of actual accomplishment.

NWN

- Delays in recognition of ENERGY STAR (0.67) water heaters, due to delayed measure updates caused lower gas savings. In addition weatherization activity is lower than last years installations.
- 420,000 therms are identified as committed for the OPOWER Pilot.

CNG

- Weatherization measures decreased 73 percent compared to same period in 2011. The decrease can be associated to the discontinuation of prescriptive duct sealing pilot program that was underway during Q1 2011.
- Mobile homes were the largest contribution to savings.

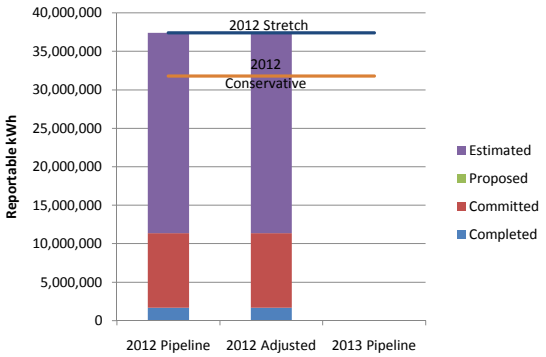
Existing Homes Summary

April 1, 2012

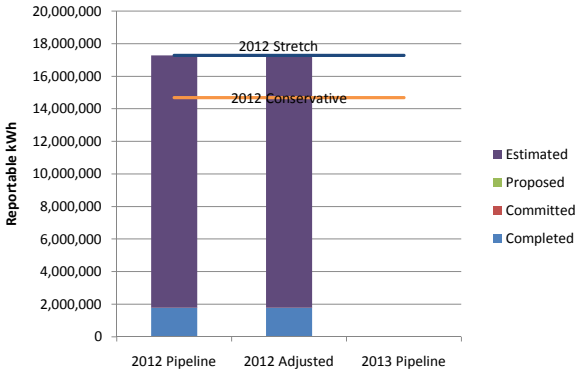
Program: Existing Homes		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	1,658,199	1,795,643	103,380	4,014
	To date % of Conservative goal	5%	12%	8%	5%
	To date % of stretch goal	4% *	10%	6% *	5%
Context	Historical % of actual accomplishment	6%	11%	12%	11%
Budget	To Date % of Incentive Budget Spent	10%	16%	10%	5%

* OPOWER Pilot Savings achievement is committed and not yet recognized.

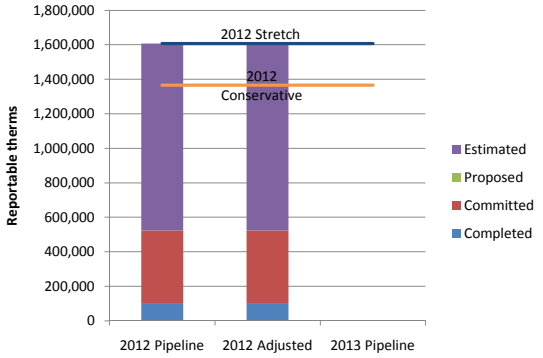
PGE Savings Pipeline 2012-2013



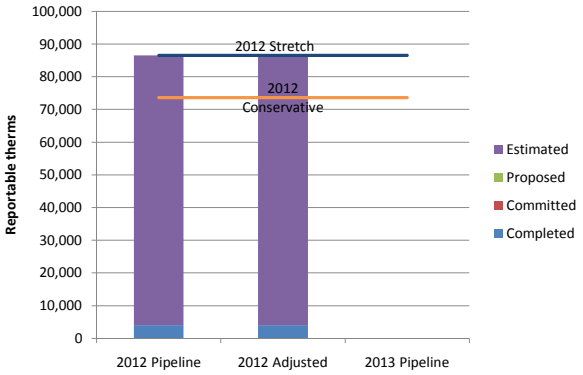
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



Special Considerations:

Overall:

- Database updates to key measures late in the quarter have led to delayed processing and recognition of savings for key measures such as ENERGY STAR Gas (0.67 EF) water heaters and ductless heat pumps.
- Weatherization measures, especially insulation are down across all utilities and tracks (with the exception of Savings Within Reach). This is likely driven by the mild winter Oregon experienced this year.

PGE

- Savings are in-line with historical percent of actual accomplishment through Q1 (6 percent).
- The program has seen a 30 percent increase in CFLs installed, however, due to changes in savings levels savings from lighting has decreased 50 percent compared to 2011.
- Hot Water measures have increased 16 percent compared to 2011 and are being driven through direct installs in Small Multifamily.
- 9,720,000 kWh are identified as committed for the OPOWER Pilot.

PAC

- Through Q1 Existing Homes is trailing historical percent of actual accomplishment by 0.6 percent or the equivalent of 105,000 kWh.
- CFL installation quantities for 2012 are up 40 percent compared to 2011. However, savings per CFL has decreased from an average 78 kWh to 34 kWh or 56 percent, which has led to a net decline of 183,000 kWh (39 percent) compared to 2011 as demonstrated in the comparison t historical % of actual accomplishment.
- HVAC savings is currently 31 percent behind 2011 same period savings. The variance can be primarily attributed to measure updates that did not occur until the middle of April for Ductless Heat Pumps. As a result the program currently has a backlog of incentive applications to process and will see increased quantities and savings in HVAC products over the coming months.

NWN

- Existing Homes has achieved 9 percent of the 2012 stretch savings target through Q1. This is 3 percent under historical performance and equates to 39k therms.
- Hot Water measures are down 22 percent compared to this period last year. This decrease can be contributed to a larger volume of tankless water heaters recognized in Q1 2011. Delays in recognition of ENERGY STAR (0.67) water heaters, due to delayed measure updates nearly offset the decline in tankless activity. The program is currently working through a backlog of 0.67 water heater incentive applications.
- Weatherization saw a 50 percent decrease in savings compared to 2011 Q1. This trend is similar across Clean Energy Works, Home Performance, and Single-family program tracks. Savings Within Reach however, has seen a 491 percent increase in weatherization savings compared to last year.
- 420,000 therms are identified as committed for the OPOWER Pilot.

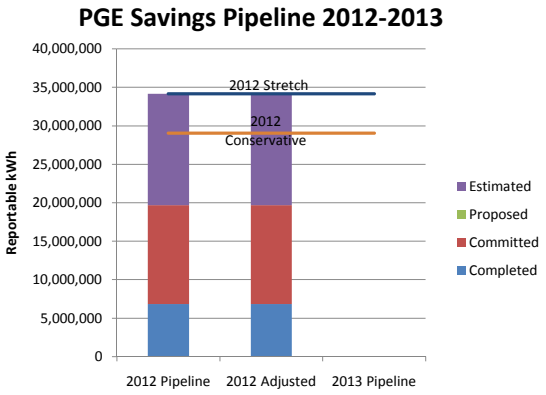
CNG

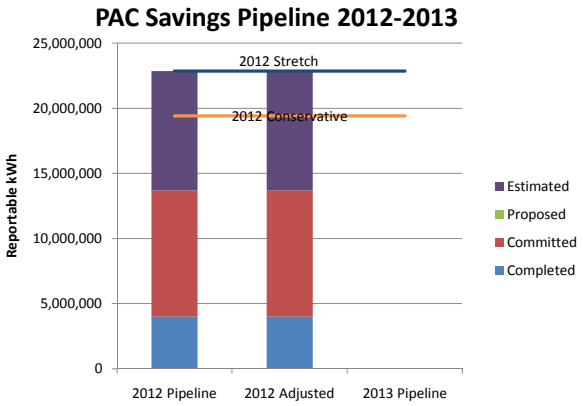
- Cascade has the largest variance to historical performance at 6 percent, which equates to 5,500 therms.
- Weatherization measures decreased 73 percent compared to same period in 2011. The decrease can be associated to the discontinuation of a pilot program that was underway during Q1 2011.
- Hot Water measure also saw a decrease of 16 percent. This was driven by a decrease in Tankless water heaters from 11 units in Q1 2011 to 3 units in 2012. The decrease would have been offset by savings from ENERGY STAR (0.67) water heater savings, however, measure updates to the database did not take effect till late in the quarter preventing the program from being able to process new incentive applications.

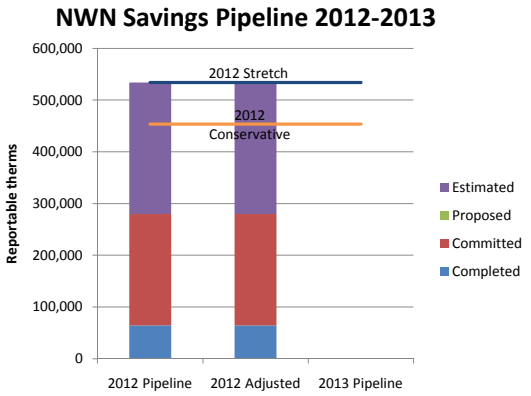
New Homes And Products Summary

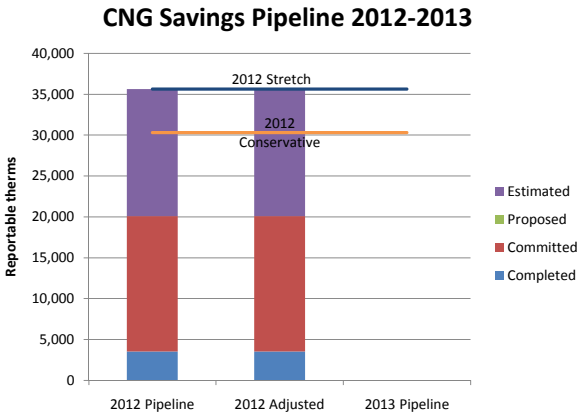
April 1, 2012

Program: New Homes & Products		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	6,835,460	4,018,719	64,732	3,530
	To date % of Conservative goal	24%	21%	14%	12%
	To date % of stretch goal	20%	18%	12%	10%
Context	Historical % of actual accomplishment	16%	19%	17%	17%
Budget	To Date % of Incentive Budget Spent	21%	17%	25%	8%









Special Considerations:

Overall:

- At this early time of the year the program expects to be on track to achieve stretch case savings for all utilities.
- New homes Air Sealing Pilot project developed targeting non program builders and homes.
- Path to Goal Net Zero project designed in response to demand from builders.
- Finalized new EPS look and feel.
- The HOFF (High Output FastTrack Form) was launched reducing application processing time.
- Developed Phase 2 of the Smart Home Buyer Campaign.

PGE

- Launched instant incentive at Sears in 3 Portland metro locations.
- PGE Community Office giveaways developed and organized for the remainder of the year.
- Worked with PGE staff and 6 different Community Action Agencies to identify opportunities to distribute energy saver kits.

PAC

- Worked with Pacific Power staff to identify new avenues to distribute energy saver kits to low income populations.
- Lighting story in the May Voices newsletter to Pacific Power customers.

NWN

- Coordinating with the Portland Water Bureau to distribute showerheads and to market Energy Trust during their Smart Drips Campaign.

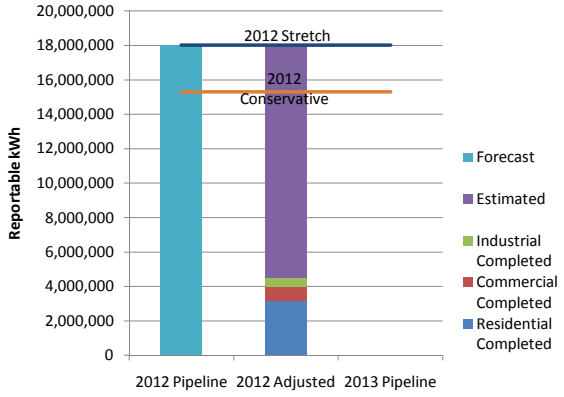
CNG

- Coordinated with City of Redmond to distribute showerheads at events.
- Coordinating Earth Day event in Bend to distribute showerheads and as cross promotional opportunity with Existing Homes program.

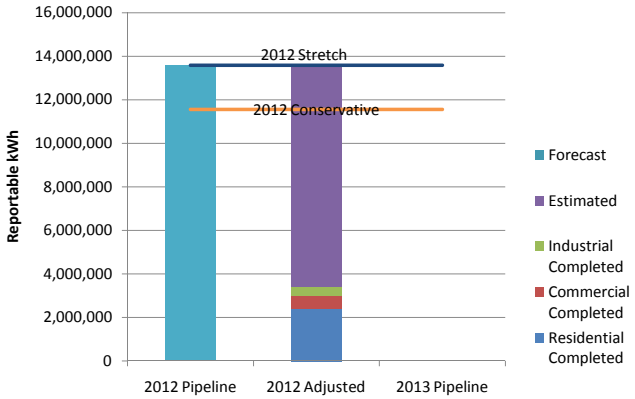
Market Transformation Summary **April 1, 2012**

Program: Market Transformation		PGE	PAC	NWN	CNG
Achievement	2012 Achievement to Date (Rpt kWh or therm)	4,503,256	3,397,192	91,131	8,833
	To date % of Conservative goal	29%	29%	33%	39%
	To date % of stretch goal	25%	25%	28%	33%
Context	Historical % of actual accomplishment	29%	29%	38%	50%
Budget	To Date % of Incentive Budget Spent	N/A	N/A	N/A	N/A

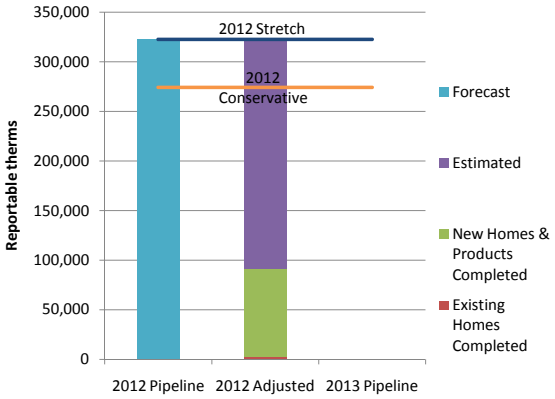
PGE Savings Pipeline 2012-2013



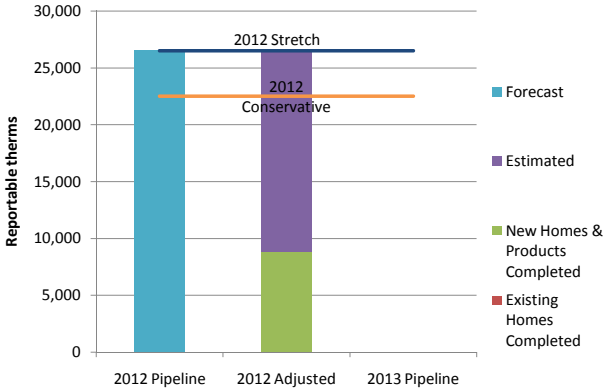
PAC Savings Pipeline 2012-2013



NWN Savings Pipeline 2012-2013



CNG Savings Pipeline 2012-2013



NEEA

- Pending information to be released in Q3, 25% of expected savings have been claimed in Q1.